Processing Square Payments through DrChrono EHR

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Patient credit card payments can be processed through DrChrono's Square integration on the web platform. You can easily enter card information to take payments and save a card on file for later use.

Entering Payment Information

1. Open an appointment and go to the **Billing** tab

2. The payment window will open. Enter an **Amount** and then select the **Payment Method**.

3. Select **Square** as the payment method.

4. Fill out the card information. If you would like to save the card, check the **Save Card Information** box. When you are ready to process the payment, press **Pay with Card**.

New Cash

Code	Applied	Balance	Payment Type	
99213	$	$174.00	P	Credit ∨

◻ Square

Location	∨
Card Number	0000 0000 0000 0000
CVV	123
Expiration Date	12/24
Postal Code	12345

◻ Save card information

Customer Notes ⓘ

Pay with card

Cancel

5. The payment will be processed and a receipt will be generated in the **Billing** tab.

Schedule Appointment

Appointment	**Billing**	Eligibility	Vitals	Grow

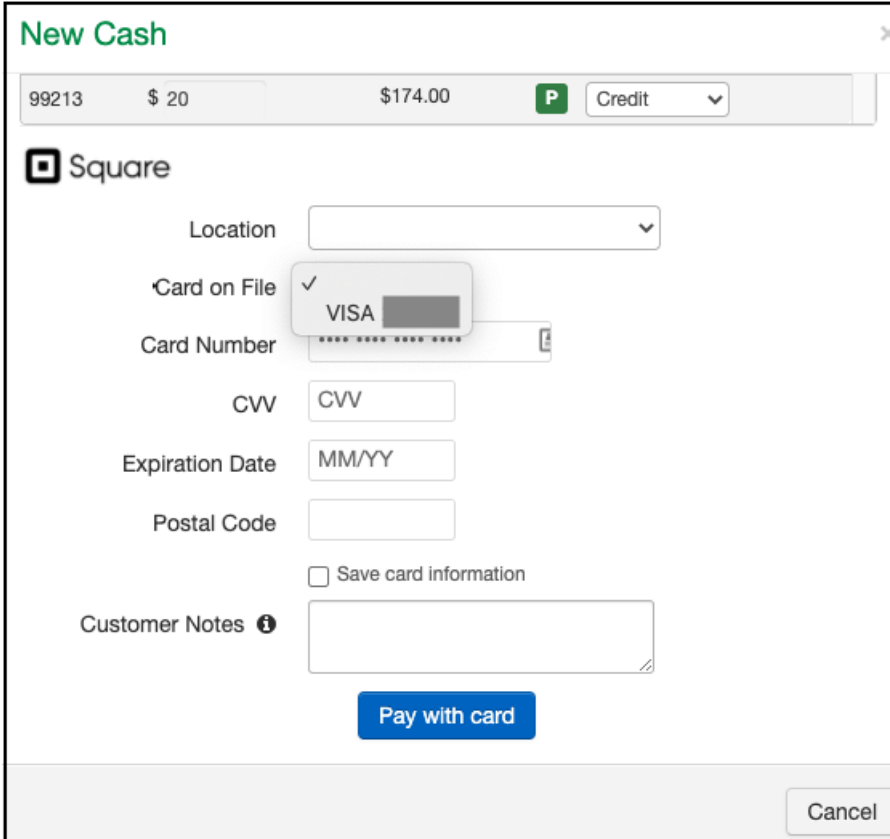|	
❷ Billing Status	Balance Due ∨
ICD Version	ICD-10 ∨
Patient Payment	$ 1.00 Copay: $20 +
↱	**Receipt ▾**
Pre Authorization Approval	$1.00 [08/20/2020]
Referral #	
Payment Profile	∨
Billing Profile	∨ +
Billing Pick List	Choose Codes from Pick List
Diagnosis Pick List	Choose Codes from Pt Problems

Processing a Payment with a Saved Card

Following the same steps above, once you have saved a card for a patient, you will be able to process payments with the card on file.

1. Select **Card on File**.

2. After selecting the card, press **Pay with Card**.

New Cash

Type	Credit
Notes	
Amount	$ 20

Code	Applied	Balance	Payment Type
99213	$ 20	$174.00 **P**	Credit

◼ Square

Location	
Card on File	VISA ▮
Customer Notes ⓘ	

Pay with card

Cancel