

Processing Square Payments through DrChrono EHR

07/08/2024 7:46 pm EDT

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 and click the (



) icon.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status [dropdown] **HCFA Box 10 - Is patient's condition related to:**

ICD Version: ICD-10

Patient Payment: \$ 0 Copay: \$20 **+** (arrow points to this icon)

Pre Authorization Approval [input]

Referral # [input]

Payment Profile: Cash

Billing Profile [dropdown] **+**

Billing Pick List: Choose Codes from Pick List

Diagnosis Pick List: Choose Codes from Pt Problems

Credit Card Payment: **Process Credit Card**

Employment: No

Auto Accident: No

Other Accident: No

Onset Date Type: Onset of Current Symptoms

Onset Date: [input]

Other Date Type: - Other Date Type -

Other Date: [input]

Claim Billed: \$175.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

| # | Code | Description | |
|---|-------|---|---|
| 1 | A06.5 | Amebic lung abscess | ✗ |
| 2 | A15.0 | Tuberculosis of lung | ✗ |
| 3 | C39.0 | Malignant neoplasm of upper respiratory tract, part unspecified | ✗ |
| 4 | M54.5 | Low back pain | ✗ |

CPT Codes Find CPT Procedure codes

| Code | Description | Price (\$) | |
|---------|-----------------------------|------------|---|
| 1 99213 | OFFICE/OUTPATIENT VISIT EST | 175.00 | ✗ |

Modifiers: [dropdown] [dropdown] [dropdown] [dropdown]

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0

2. The payment window will open. Please be sure you have an **Amount**. Then click **Payment Method**.

New Cash ×

Payment Date: 08/21/2020

Appointment: 8/21/2020 07:40AM (\$175.00) ▾

Line Item: -Auto Allocate- ▾

Provider: Brendan Wilberton ▾

Payment Method: Cash ▾

Type: Credit ▾

Notes:

Amount: \$ 20 ←

| Code | Applied | Balance | | Payment Type |
|-------|---------|----------|----------|--------------|
| 99213 | \$ 20 | \$175.00 | P | Credit ▾ |

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

New Cash ×

Payment Date: 08/21/2020

Appointment: 8/21/2020 07:40AM (\$175.00) ▾

Line Item: -Auto Allocate- ▾

Provider: Brendan Wilberton ▾

Payment Method: Cash
 Check
 Debit
 Credit Card
 American Express
 Visa
 Mastercard
 Discover
 Square (Legacy)
 Patient Payments
 onpatient
 Other

Type: Debit
 Credit

Notes:

Amount:

| Code | Applied | | Payment Type |
|-------|---------|--|--------------|
| 99213 | \$ 20 | | Credit ▾ |

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, click **Pay with Card**.

New Cash ✕

| Code | Applied | Balance | Payment Type |
|-------|---------|----------|---|
| 99213 | \$ | \$174.00 | P Credit ▼ |

■ **Square**

Location ▼
 Brendan's DrChrono

Card Number E
 0000 0000 0000 0000

CVV E
 123

Expiration Date E
 12/24

Postal Code E
 12345

Save card information

Customer Notes i E

Pay with card

Cancel

5. The payment will process and a receipt will generate in the **Billing** tab.

Schedule Appointment

Appointment
Billing
Eligibility
Vitals
Growt

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
Cash ▼

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.

New Cash ×

| | | | | |
|-------|-------|----------|----------|--------|
| 99213 | \$ 20 | \$174.00 | P | Credit |
|-------|-------|----------|----------|--------|

☐ Square

Location:

Card on File: VISA [REDACTED]

Card Number:

CW:

Expiration Date:

Postal Code:

Save card information

Customer Notes **?**

Pay with card

Cancel

2. After selecting the card, click Pay with Card.

New Cash ×

Type:

Notes:

Amount:

| Code | Applied | Balance | | Payment Type |
|-------|---------|----------|----------|--------------|
| 99213 | \$ 20 | \$174.00 | P | Credit |

☐ Square

Location:

Card on File: VISA [REDACTED]

Customer Notes **?**

Pay with card

Cancel

