

# Processing Payments through Square on the iPad EHR App

07/08/2024 7:51 pm EDT

You can easily process credit card payments through DrChrono's integration with Square. Payments can be processed via the DrChrono EHR app or the Check-In App.

**Note:** You need to have already set up your Square account and connected it to your DrChrono account.

To create a Square account, please sign up [here](#).

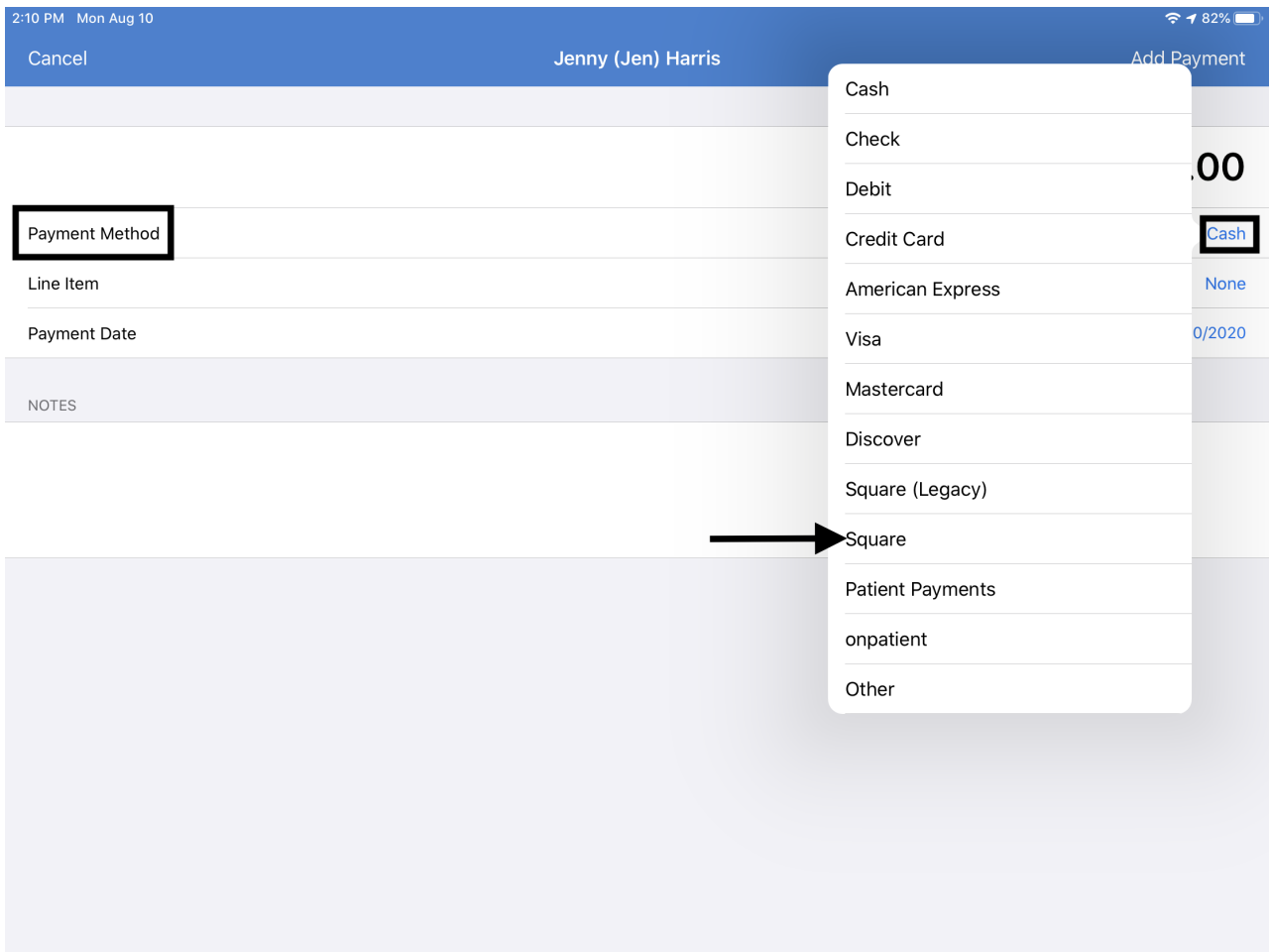
For information on connecting Square to your DrChrono account, click [here](#).

## Payments on the EHR App

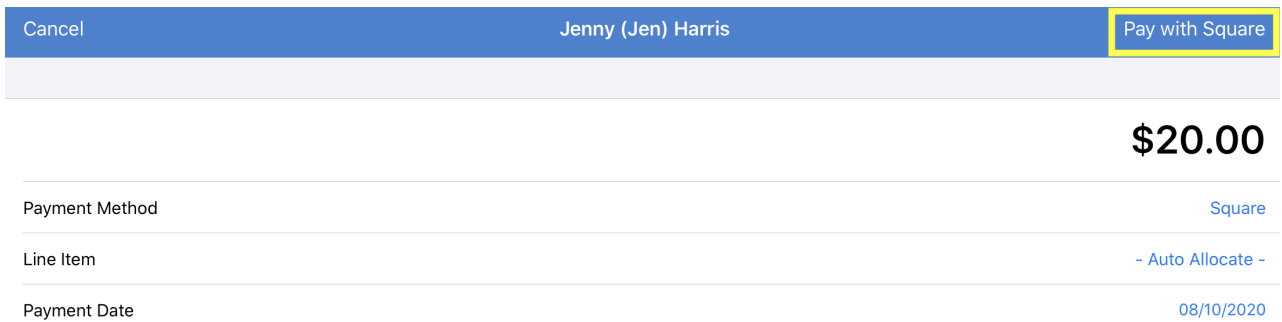
1. Please access a patient appointment and go to the **Billing Details** section. Tap **Add** next to **Total Payment**.

The screenshot displays the DrChrono iPad EHR app interface. At the top, the status bar shows the time as 2:10 PM on Monday, August 10, with 82% battery. The app header includes 'Filters (1)', 'Today', a refresh icon, a search icon, and a plus icon. Below the header, there is a search bar for appointments and a patient selection card for 'Jenny (Jen) Harris' on 08/10/2020 Mon at 09:30 AM. The patient's name and date are highlighted in a grey box. To the right of the patient card, there is a camera icon, the patient's name 'Jenny (Jen) Harris (Female | 40 | 02/11/1980)', a dropdown arrow, and an information icon. A yellow warning banner states 'This is a sample patient. To turn off sample patients, go to the Account tab.' Below this are links for 'Appointment Options', 'Super Bill', and 'Vitals', and a 'Start Visit' button. The main content area is divided into sections: 'Appointment Notes' with a 'Tap here to add a note' prompt; 'Appointment Details' showing appointment profile (None Selected), office (Primary Office), provider (Nick Riviera), and billing (None); and 'Billing Details' showing payment profile (Cash), co-pay (\$20.00), and billing status (Balance Due). The 'Total Payment' row shows '\$0.00' with 'Add' and 'History' links. A black box highlights the 'Add' link with an arrow pointing to it. At the bottom, there is a 'Patient Flags' section showing 'No Flags' and a 'View All' link. The DrChrono logo is in the bottom left corner. The bottom navigation bar includes icons for Dashboard, EHR, Messages (with a red notification badge), Tasks (with a red notification badge), and Account.

2. Tap on **Cash** in the **Payment Method** row and select **Square** from the menu.



3. Enter the payment amount and tap **Pay with Square**.



4. Select the location, if needed, and click **Swipe Card** or utilize a saved card on file.

Cancel

Jenny (Jen) Harris

Confirm

LOCATION

Location

Office 1 >

PAYMENT METHOD

Swipe Card

No saved card

>

Connect a card reader

5. A window will open up prompting you to swipe or enter a card.

# \$20.00

## Swipe to Pay

---

**Manual Credit Card Entry**



Once the payment is complete, you will be directed back to DrChrono.

Note: If processing a payment on the Check-In app, tap on **Add Payment** to start the payment process and follow steps 2-5.

Filters

Today



Patient Notes

CDS Matches (1)

No Flags



Search Appointment



Jenny (Jen) Harris

08/10 09:30AM

Exam 1



+ PHOTO

Jenny (Jen) Harris ( Female | 40 | 02/11/1980 )

Phone (650) 215-6343

Chart ID HAJE000001

New Appointment

Eligibility

This is a Sample Patient

In the Main Menu, you can Add Patients, Customize Workflow and turn off Sample Data in Settings.

Start Onboarding

No Appointment Profile

Appointment Status

08/10 09:30AM

Exam 1

Nick Riviera

Payment

20.00

Co-Pay

20

Add Payment

Billing Status

Balance Due

Appointment Notes

Tap here to create notes