

Issuing a Refund Through Square

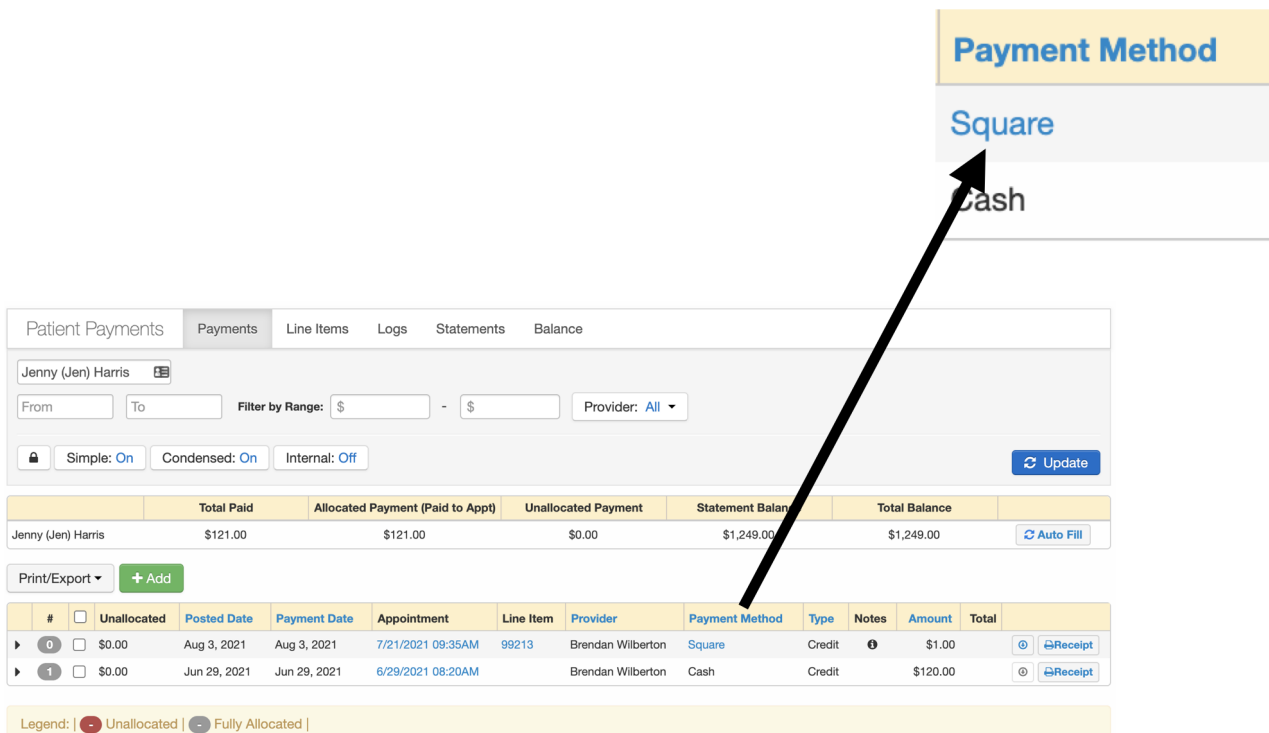
07/08/2024 7:52 pm EDT

Square refunds are started in DrChrono but need to be processed through the Square dashboard.

For more information on processing refunds in Square, see Square's resources [here](#).

To issue a refund through Square, navigate to the **Patient Payments** section and select the patient to issue the refund.

1. Once the patient is selected, click on the **Square** hyperlink to be taken to your Square dashboard.



The screenshot shows the 'Patient Payments' section for 'Jenny (Jen) Harris'. A dropdown menu for 'Payment Method' is open, with 'Square' selected and highlighted. A black arrow points from the 'Square' option in the dropdown to the 'Square' link in the 'Payment Method' column of the payment table below.

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance	
Jenny (Jen) Harris	\$121.00	\$121.00	\$0.00	\$1,249.00	\$1,249.00	Auto Fill

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total		
0	<input type="checkbox"/>	\$0.00	Aug 3, 2021	Aug 3, 2021	7/21/2021 09:35AM	99213	Brendan Wilberton	Square	Credit		\$1.00		Receipt
1	<input type="checkbox"/>	\$0.00	Jun 29, 2021	Jun 29, 2021	6/29/2021 08:20AM		Brendan Wilberton	Cash	Credit		\$120.00		Receipt

Legend: ● Unallocated | ● Fully Allocated |

2. After you log in, select **Issue Refund**.

Transactions Brendan's DrChrono

COVID-19 resources & funding >

08/03/2021 | All day | All Payment Methods | All Types | Complete | All Sources

Card # | Filter by card (last 4)

Aug. 3, 2021

1 **\$1.00**
 COMPLETE TRANSACTION | TOTAL COLLECTED

Tuesday, August 3, 2021

1 **\$1.00**
 COMPLETE TRANSACTION | TOTAL COLLECTED

9:08 am | Drchronon payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001

\$1.00 Payment

Aug. 3, 2021 9:08 am

Collected at: Brendan's DrChrono
 Order Source: [drchronon](#)
 Sale attributed to: Untracked team member
 Paid by: [Jenny Harris](#)

Custom Amount **\$1.00**

Note: Drchronon payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001

TOTAL **\$1.00**

Done

3. You will have the option to **Refund Items** or **Refund Amount**.

To **Refund Items** check the box(es) to select the items. Click **Refund Items** to issue the refund.

Issue Refund

Refund Items Refund Amount

Select Items to Refund

Item amount includes taxes and discounts, if applicable.

	Amount
<input type="checkbox"/> Items	
<input type="checkbox"/> Custom Amount Drchronon payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001	\$1.00

Issue Refund

Refund Items Refund Amount

Select Items to Refund

Item amount includes taxes and discounts, if applicable.

	Amount
<input checked="" type="checkbox"/> Items	
<input checked="" type="checkbox"/> Custom Amount Drchronon payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001	\$1.00

To **Refund Amount**, enter an amount and select a reason. Click **Refund Amount** to issue the refund.

×

Issue Refund

Refund Items

Refund Amount

Select Refund Amount

Refunding an amount (and not a specific item) may cause a discrepancy in your inventory, item sales reports, and gift card balances.

Refund to	Visa
Amount	\$1.00 \$1.00 Maximum

Reason for refund

- ✓ Select a reason
- Returned goods
- Accidental charge
- Canceled order
- Fraudulent Charge
- Other

×

Issue Refund

Refund Items

Refund Amount

Select Refund Amount

Refunding an amount (and not a specific item) may cause a discrepancy in your inventory, item sales reports, and gift card balances.

Refund to	Visa
Amount	\$1.00 \$1.00 Maximum

Reason for refund	Other
	Testing

Issue Refund

4. You will see information in your Square dashboard about the refund.

☰ Transactions
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Brendan's DrChrono

COVID-19 resources & funding >

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08/03/2021

>

All day

All Payment Methods

All Types

All Statuses

All Sources

All Risk Levels

Export

Card #

Aug. 3, 2021

	2 COMPLETE TRANSACTIONS	\$0.00 TOTAL COLLECTED	\$1.00 NET SALES
Tuesday, August 3, 2021 \$0.00			
	<div style="display: flex; align-items: center; gap: 5px;"> <div style="background-color: #007bff; color: white; padding: 2px 5px; font-size: 8px;">PENDING REFUND</div> <div style="font-size: 10px;">Refund for #Pfyz Brendan's DrChrono</div> </div>		(\$1.00)
	<div style="font-size: 10px;">Drchronon payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001 B...</div>		\$1.00

You will receive an email about the refund.



Square has refunded your customer

Hello Brendan's DrChrono,

The \$1.00 refund you requested has been processed and should be reflected on your customer's statement in **two to seven business days**. Please note that business days do not include weekends or bank holidays.

If you sent a receipt to your customer, you can send them a refund receipt at any time from your in-app transactions or Square Dashboard:

From in-app Transactions:

1. Tap **Transactions**.
2. Locate and tap the payment > **New Receipt**.

From Square Dashboard:

1. Visit [Transactions](#).
2. Use the date selector tool to locate a specific payment.
3. Click on the payment > **Send Receipt**.

[VIEW THE REFUND](#)

Thanks,

The Square Team

5. After the refund has been processed, it will appear in your DrChrono account.

Payment Method	Type	Notes	Amount
Square	Credit		-\$1.00

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Jenny (Jen) Harris

From To Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off Update

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance	
Jenny (Jen) Harris	\$1.00	\$2.00	-\$1.00	\$1,323.00	\$1,499.00	Auto Fill

Print/Export

#	<input type="checkbox"/> Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▶ 0	<input type="checkbox"/>	-\$1.00	Sep 4, 2020	Sep 4, 2020	9/03/2020 08:27AM	Brendan Wilberton	Square	Credit		-\$1.00		Receipt
▶ 0	<input type="checkbox"/>	-\$1.00	Sep 4, 2020	Sep 4, 2020		Brendan Wilberton	Square	Credit		-\$1.00		Receipt
▶ 0	<input type="checkbox"/>	\$1.00	Sep 4, 2020	Sep 4, 2020		Brendan Wilberton	Square	Credit		\$1.00		Receipt
▶ 1	<input type="checkbox"/>	\$0.00	Sep 3, 2020	Sep 3, 2020	9/03/2020 08:27AM	Brendan Wilberton	Square	Credit		\$1.00		Receipt
▶ 1	<input type="checkbox"/>	\$0.00	Aug 20, 2020	Aug 20, 2020	8/20/2020 10:40AM	Brendan Wilberton	Square	Credit		\$1.00		Receipt