Issuing a Refund Through Square

Last modified on 03/10/2025 11:27 am 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, select the **Square** hyperlink to be taken to your Square dashboard.
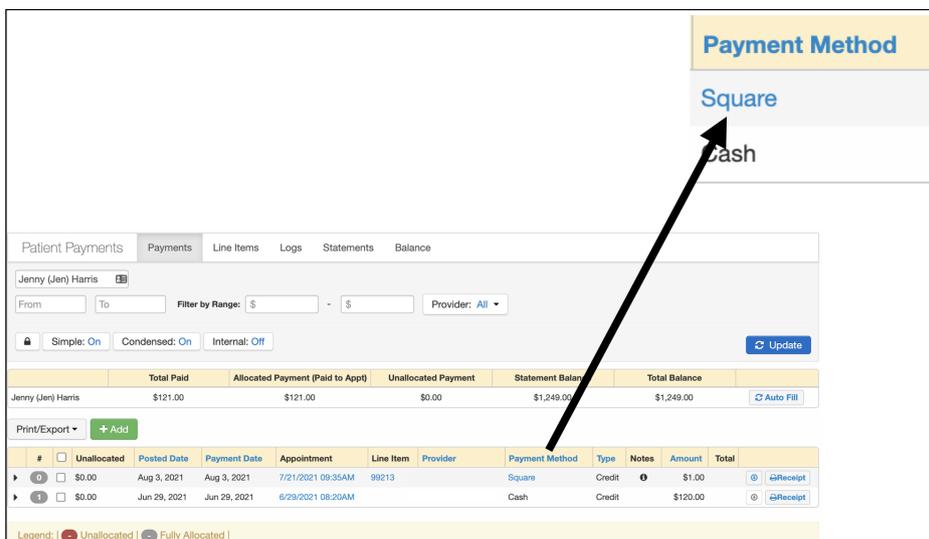
2. After you log in, select **Issue Refund**.
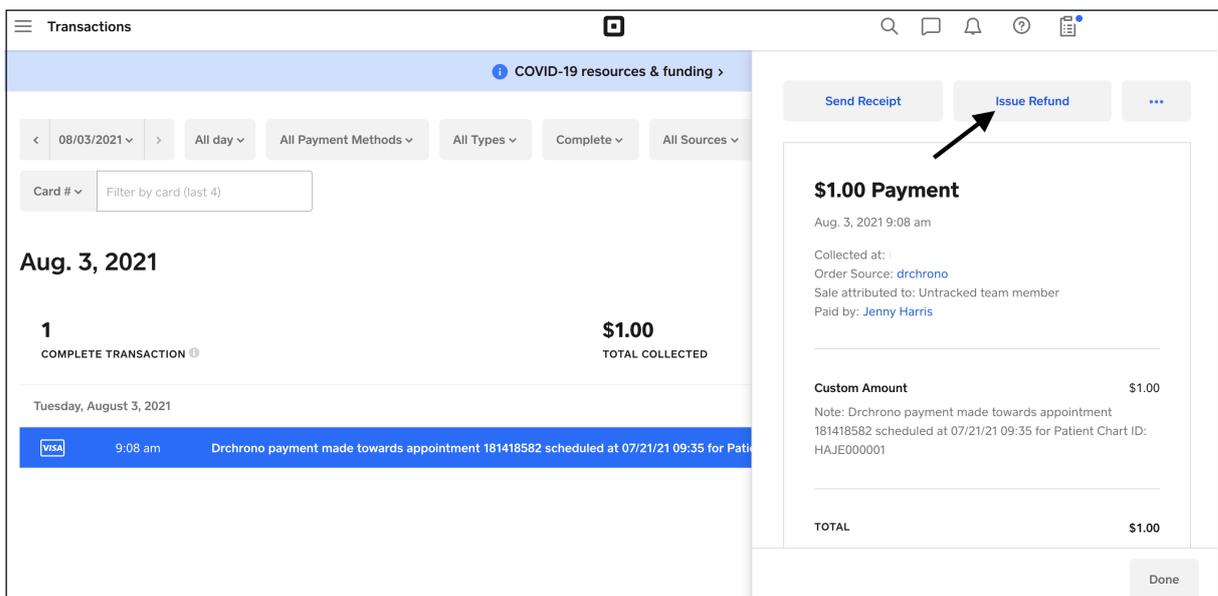
3. You will have the option to **Refund Items** or **Refund Amount**. To **Refund Items** check the box(es) to select the items. Press **Refund Items** to issue the refund.

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

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

6. You will receive an email about the refund.

7. 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 ▾ | ➕ Add

#		Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total		
▶	0 ☐	-$1.00	Sep 4, 2020	Sep 4, 2020	9/03/2020 08:27AM		Brendan Wilberton	Square	Credit	ⓘ	-$1.00		⊕	🖨Receipt
▶	0 ☐	-$1.00	Sep 4, 2020	Sep 4, 2020			Brendan Wilberton	Square	Credit	ⓘ	-$1.00		⊕	🖨Receipt
▶	0 ☐	$1.00	Sep 4, 2020	Sep 4, 2020			Brendan Wilberton	Square	Credit		$1.00		⊕	🖨Receipt
▶	1 ☐	$0.00	Sep 3, 2020	Sep 3, 2020	9/03/2020 08:27AM		Brendan Wilberton	Square	Credit		$1.00		⊕	🖨Receipt
▶	1 ☐	$0.00	Aug 20, 2020	Aug 20, 2020	8/20/2020 10:40AM		Brendan Wilberton	Square	Credit	ⓘ	$1.00		⊕	🖨Receipt