

Issuing a Refund Through Square

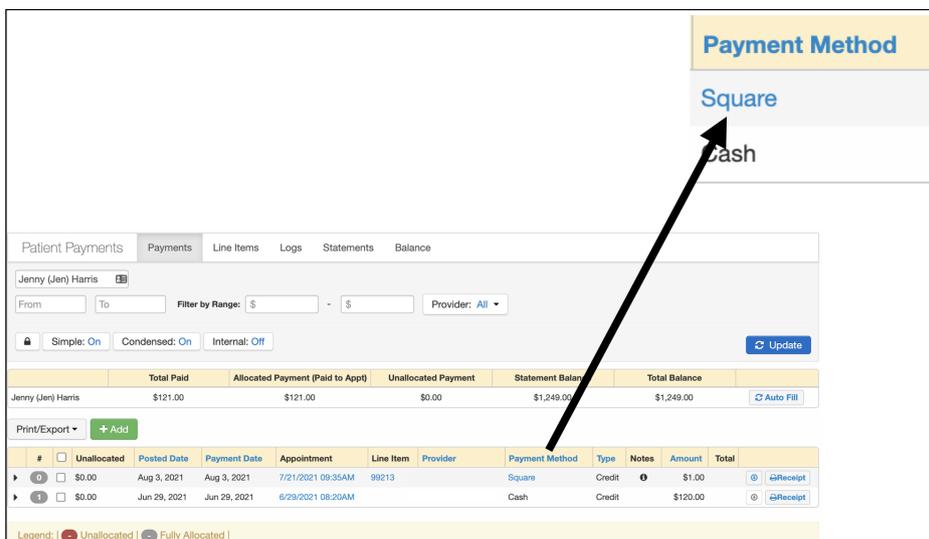
Last modified on 03/10/2025 11:27 am EDT

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

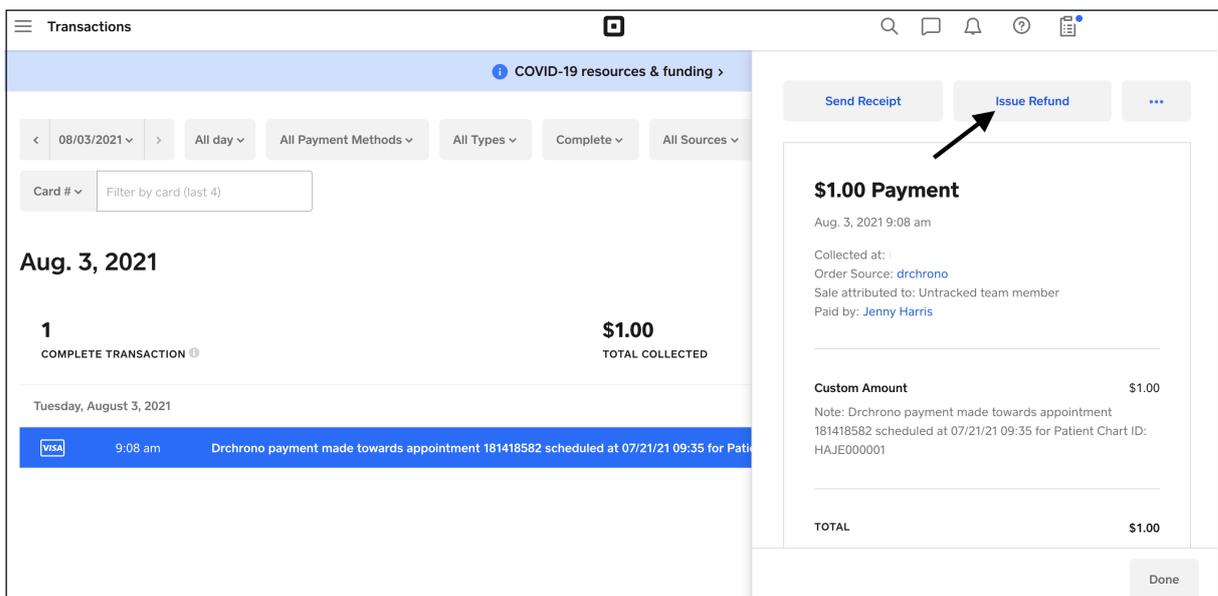
For more information on processing refunds in Square, see Square's resources [here](#).

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.

Issue Refund

Refund Items | Refund Amount

Select Items to Refund
Item amount includes taxes and discounts, if applicable.

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

Refund Items

Issue Refund

Refund Items | Refund Amount

Select Items to Refund
Item amount includes taxes and discounts, if applicable.

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

Refund Items

4. To **Refund Amount**, enter an amount and select a reason. Press **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

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

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

Transactions 🔍 🗨️ 🔔 ? 📅

COVID-19 resources & funding ✕

< 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 ⓘ
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Tuesday, August 3, 2021 \$0.00

	9:22 am	PENDING REFUND Refund for #Pfyz	(\$1.00)
	9:08 am	DrChrono payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001 B...	\$1.00

6. You will receive an email about the refund.

Square has refunded your customer

Hello

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

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

Print/Export Add Auto Fill

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