

DrChrono Payments: Setting up M2 card reader

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One of the readers that can be used to process patient payments is the Stripe M2 Reader.



M2 Reader Out of the Box

1. Ensure that the M2 device is fully charged.
2. Ensure that the iPad/iPhone with which it will be paired is also charged.
3. Ensure that your DrChrono EHR App and iOS Software are both up to date.

Processing a Payment for the first time

1. Once the reader is attached to the iPad/iPhone, you may need to press on the gear setting on the payment pop-up screen and make sure it is set to automatic pairing. The DrChrono system should find the M2 reader quickly. It may ask to enable GPS and to allow Bluetooth; both will need to be set to yes. There could be a short Initializing period that could take 5-10 minutes. After initializing, the reader connected to iPad/iPhone will show you the battery life of M2; DrChrono will then tell you to press A: "card on file" or B: "credit card."
 - a. Option A – Will show you any saved payment methods saved by the patient. This option will allow you to process a payment without needing the physical M2 reader.
 - b. Option B – Will allow you to manually type credit card details to process the payment.
2. Under the M2 battery level, press **Tap the charge button to start the transaction.** This is what you would want if you have hardware like an M2 on hand.
3. After pressing the **Charge** button, it tells you to now SWIPE/INSERT/or TAP card.

4. Once the payment is processed successfully, it will show **Transaction Completed**. DrChrono will update the balance field in the patient appointment.
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