

Processing Square Payments through DrChrono EHR

07/24/2024 7:40 pm EDT

Patient credit card payments can be processed through DrChrono's Square integration on the web platform. You can easily enter card information to take payments and save a card on file for later use.

Entering Payment Information

1. Open an appointment and go to the **Billing** tab and click the (



) icon.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status [Dropdown] **HCFA Box 10 - Is patient's condition related to:**

ICD Version: ICD-10

Patient Payment: \$ 0 Copay: \$20 **+** (Arrow points to this icon)

Pre Authorization Approval [Text Field]

Referral # [Text Field]

Payment Profile: Cash

Billing Profile [Dropdown] **+**

Billing Pick List: Choose Codes from Pick List

Diagnosis Pick List: Choose Codes from Pt Problems

Credit Card Payment: **Process Credit Card**

Employment: No

Auto Accident: No

Other Accident: No

Onset Date Type: Onset of Current Symptoms

Onset Date: [Text Field]

Other Date Type: - Other Date Type -

Other Date: [Text Field]

Claim Billed: \$175.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

ICD-10 Codes Find Diagnosis codes

#	Code	Description	
1	A06.5	Amebic lung abscess	✗
2	A15.0	Tuberculosis of lung	✗
3	C39.0	Malignant neoplasm of upper respiratory tract, part unspecified	✗
4	M54.5	Low back pain	✗

CPT Codes Find CPT Procedure codes

Code	Description	Price (\$)	
1 99213	OFFICE/OUTPATIENT VISIT EST	175.00	✗

Modifiers: [Dropdown] [Dropdown] [Dropdown] [Dropdown]

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0

2. The payment window will open. Please be sure you have an **Amount**. Then click **Payment Method**.

New Cash ✕

Payment Date: 08/21/2020

Appointment: 8/21/2020 07:40AM (\$175.00) ▾

Line Item: -Auto Allocate- ▾

Provider: Brendan Wilberton ▾

Payment Method: Cash ▾

Type: Credit ▾

Notes:

Amount: \$ 20 ←

Code	Applied	Balance		Payment Type
99213	\$ 20	\$175.00	P	Credit ▾

3. Select **Square** as the payment method.

New Cash ✕

Payment Date: 08/21/2020

Appointment: 8/21/2020 07:40AM (\$175.00) ▾

Line Item: -Auto Allocate- ▾

Provider: Brendan Wilberton ▾

Payment Method: Cash
 Check
 Debit
 Credit Card
 American Express
 Visa
 Mastercard
 Discover
 Square (Legacy)
 Patient Payments
 onpatient
 Other

Type: Debit
 Credit

Notes:

Amount:

Code	Applied		Payment Type
99213	\$ 20		dit ▾

4. Fill out the card information. If you would like to save the card, check the **Save Card Information** box. When you are ready to process the payment, click **Pay with Card**.

New Cash ✕

Code	Applied	Balance	Payment Type
99213	\$	\$174.00	P Credit ▼

■ **Square**

Location ▼
 Brendan's DrChrono

Card Number E
 0000 0000 0000 0000

CVV E
 123

Expiration Date E
 12/24

Postal Code E
 12345

Save card information

Customer Notes i E

Pay with card

Cancel

5. The payment will process and a receipt will generate in the **Billing** tab.

Schedule Appointment

Appointment
Billing
Eligibility
Vitals
Growt

i Billing Status ▼
 Balance Due

ICD Version ▼
 ICD-10

Patient Payment +
 \$ 1.00 Copay: \$20

↑ Receipt ▼

Pre Authorization Approval E
 \$1.00 [08/20/2020]

Referral # E

Payment Profile ▼
 Cash

Billing Profile +
Choose Codes from Pick List

Billing Pick List E
Choose Codes from Pt Problems

Diagnosis Pick List E
Choose Codes from Pt Problems

Processing a Payment with a Saved Card

Following the same steps above, once you have saved a card for a patient, you will be able to process payments with the card on file.

