Processing Payments through Square on the iPad EHR App

07/24/2024 7:35 pm EDT

You can easily process credit card payments through DrChrono's integration with Square. Payments can be processed via the DrChrono EHR app or the Check-In App.

Note: You need to have already set up your Square account and connected it to your DrChrono account.

To create a Square account, please sign up here.

For information on connecting Square to your DrChrono account, click here.

Payments on the EHR App

1. Please access a patient appointment and go to the Billing Details section. Tap Add next to Total Payment.

2:10 PM Mon Aug 10			२ न 82% 🔲		
Filters (1) Today $_{ m v}$	Ś		Q +		
Q Search Appointment		Jenny (Jen) Harris (Female 40 02/11/1980) v This is a sample patient. To turn off sample patients, go to the Account tab.	(j)		
Jenny (Jen) Harris	Exam 1	Appointment Options Super Bill Vitals	Start Visit		
	EXCITE 1	Appointment Notes			
		Tap here to add a note			
	Appointment Details				
		Appointment profile Appointment Status Histo None Selected None Selected	iry		
		OfficeExam RoomPrimary OfficeExam 1			
		Provider Billing Type Nick Riviera ICD-10			
		Billing None			
		Billing Details			
		Payment profileBilling StatusCashBalance Due			
		Co-Pay Total Payment Add Histor \$20.00 \$0.00 \$0.00 \$0.00	У		
		Patient Flags	View All		
dr chrono		No Flags			
Dashboard		dr EHR Messages	Account		

2. Tap on Cash in the Payment Method row and select Square from the menu.

2:10 PM Mon Aug 10			🗢 1 82% 🔲
Cancel	Jenny (Jen) Harris		Add Payment
		Cash	
		Check	00
		Debit	.00
Payment Method		Credit Card	Cash
Line Item		American Express	None
Payment Date		Visa	0/2020
NOTES		Mastercard	
		Discover	
		Square (Legacy)	
		Square	
		Patient Payments	
		onpatient	
		Other	

3. Enter the payment amount and tap **Pay with Square**.

Cancel	Jenny (Jen) Harris	Pay with Square
		\$20.00
Payment Method		Square
Line Item		- Auto Allocate -
Payment Date		08/10/2020

4. Select the location, if needed, and click **Swipe Card** or utilize a saved card on file.

Cancel	Jenny (Jen) Harris	Confirm
LOCATION		
Location		Office 1 >
PAYMENT METHOD		
	Swipe Card	
No saved card		>
	Connect a card reader	

5. A window will open up prompting you to swipe or enter a card.

\$20.00

Swipe to Pay

Manual Credit Card Entry

Once the payment is complete, you will be directed back to DrChrono.

Note: If processing a payment on the Check-In app, tap on **Add Payment** to start the payment process and follow steps 2-5.

2:47 PM M	on Aug 10						중 80% 🔲
Filters	Today√	C	Patient Not	es CDS Matches (1)	No Flags		
Q Searc	ch Appointment Jenny (Jen) Harris		A	Jenny (Jen) Harris (Fem Phone (650) 215-6343	nale 40 02/11/198	30)	This is a Sample Patient In the Main Menu, you can Add Patients, Customize Workflow and
	08/10 09:30AM	Exam 1		Chart ID HAJE000001			turn off Sample Data in Settings.
			+ РНОТО	New Appointment Eligil	bility		Start Onboarding
			No Appo	pointment Profile Appointment		Appointment St	atus
			08/10 09:30AM	1 Exam 1		Nick Riviera	
			Payment	Co-Pay	E	Billing Status	
			20.00	20	Add Payment	Balance Due	
					Appointment No	otes	
			K	Tau have be			
			~	Jap nere to			
				create notes			
dr ch	гопо	v2.9.6					