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.
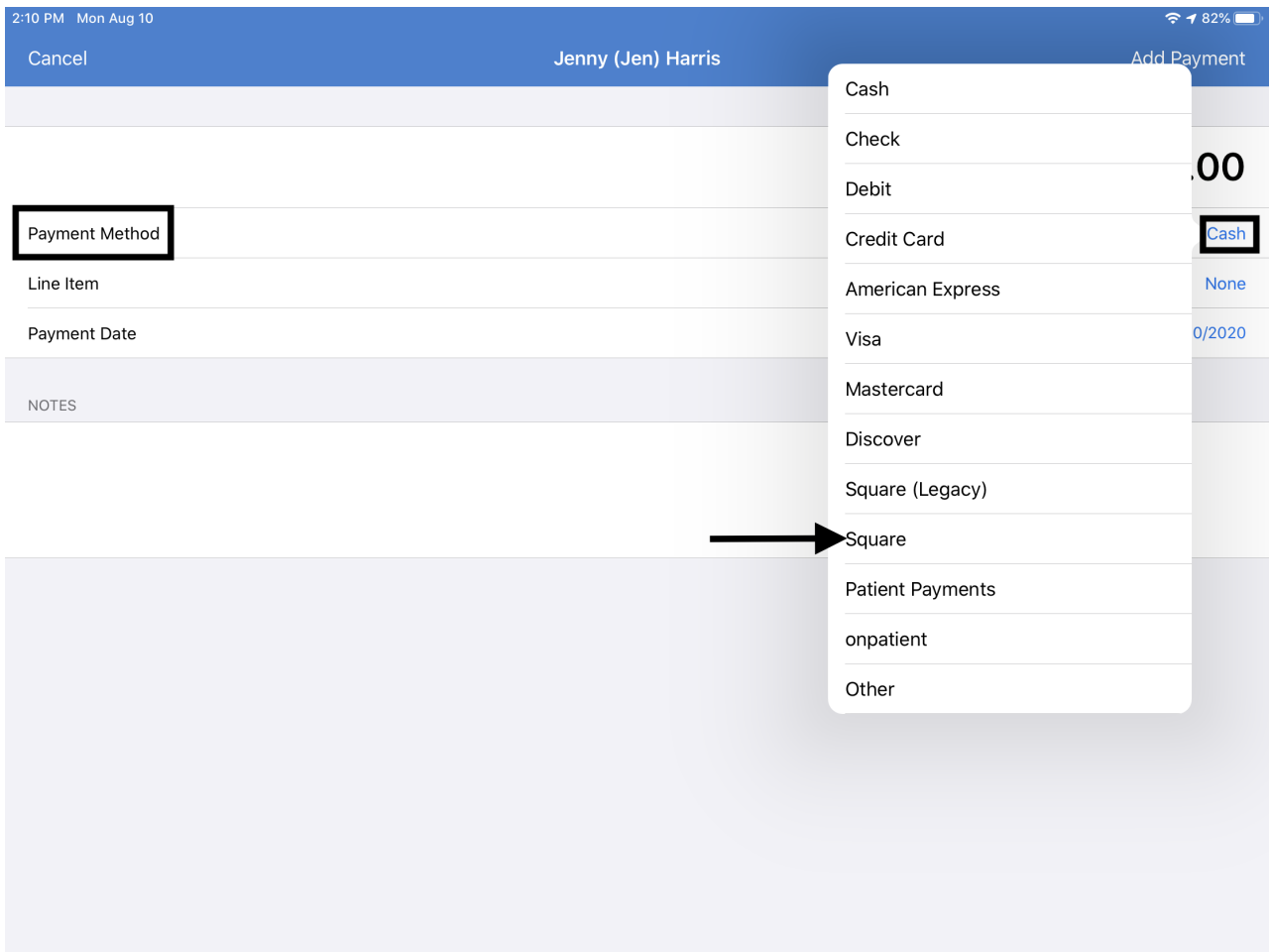
To create a Square account, please sign up here.

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

Payments on the EHR App

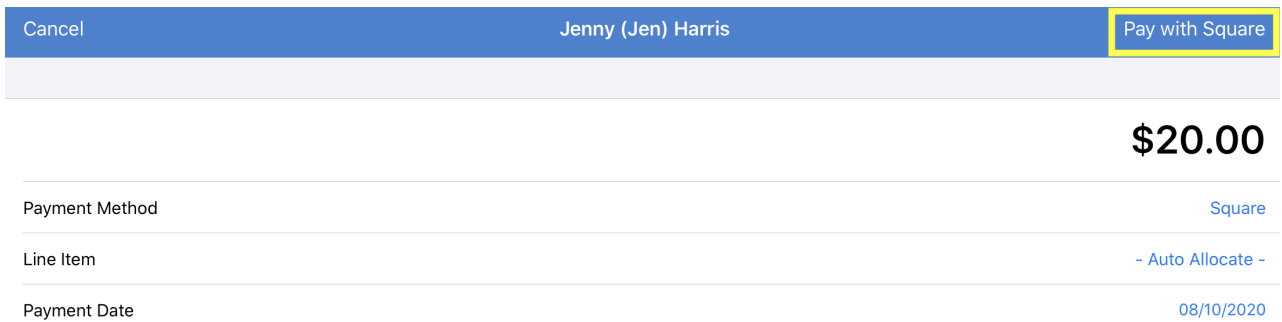1. Please access a patient appointment and go to the **Billing Details** section. Tap **Add** next to **Total Payment**.

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

Cancel   Jenny (Jen) Harris   Add Payment

Cash	
Check	
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.

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.

Search Appointment

Jenny (Jen) Harris   🔵
08/10 09:30AM   Exam 1

Jenny (Jen) Harris (Female | 40 | 02/11/1980)
Phone   (650) 215-6343
Chart ID   HAJE000001

New Appointment   Eligibility   **Start Onboarding**

🔵   No Appointment Profile   Appointment Status

08/10 09:30AM   Exam 1   Nick Riviera

Payment   Co-Pay   Billing Status
20.00   20   **Add Payment**   Balance Due

Appointment Notes

↖ *Tap here to create notes*