Issuing a Refund Through Square

07/24/2024 6:25 pm 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, click on the **Square** hyperlink to be taken to your Square dashboard.

2. After you log in, select **Issue Refund**.

COVID-19 resources & funding ›

08/03/2021 › | All day ˅ | All Payment Methods ˅ | All Types ˅ | Complete ˅ | All Sources ˅

Card # ˅ | Filter by card (last 4)

Aug. 3, 2021

1
COMPLETE TRANSACTION ⓘ

$1.00
TOTAL COLLECTED

Tuesday, August 3, 2021

VISA 9:08 am **Drchrono payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Pati...**

Send Receipt | **Issue Refund** | •••

$1.00 Payment
Aug. 3, 2021 9:08 am

Collected at: Brendan's DrChrono
Order Source: drchrono
Sale attributed to: Untracked team member
Paid by: Jenny Harris

Custom Amount $1.00
Note: Drchrono payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001

TOTAL $1.00

Done

3. You will have the option to **Refund Items** or **Refund Amount**.

To **Refund Items** check the box(es) to select the items. Click **Refund Items** to issue the refund.

✕ **Issue Refund**

Refund Items | Refund Amount

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

☐ Items | Amount

☐ 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.

☑ Items | Amount

☑ Custom Amount
Drchrono payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001 | $1.00

Refund Items

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

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

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

☰ Transactions   🔲   🔍 💬 🔔 ❓ 🗒   Brendan's DrChrono

🛈 COVID-19 resources & funding ›   ✕

| ‹ 08/03/2021 ⌄ › | All day ⌄ | All Payment Methods ⌄ | All Types ⌄ | All Statuses ⌄ | All Sources ⌄ | All Risk Levels ⌄ | | Export ⌄ |

Card # ⌄   Filter by card (last 4)

Aug. 3, 2021

2	**$0.00**	**$1.00**
COMPLETE TRANSACTIONS 🛈	TOTAL COLLECTED	NET SALES 🛈

Tuesday, August 3, 2021 $0.00

| VIS 🔄 | 9:22 am | PENDING REFUND | Refund for #Pfyz Brendan's DrChrono | ($1.00) |
| VISA | 9:08 am | | Drchrono payment made towards appointment 181418582 scheduled at 07/21/21 09:35 for Patient Chart ID: HAJE000001 B... | $1.00 |

You will receive an email about the refund.

Square has refunded your customer

Hello Brendan's DrChrono,

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

5. After the refund has been processed, it will appear in your DrChrono account.

Payment Method	Type	Notes	Amount
Square	Credit	ⓘ	-$1.00

	#		Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▸	0	☐	-$1.00	Sep 4, 2020	Sep 4, 2020	9/03/2020 08:27AM		Brendan Wilberton	Square	Credit	ⓘ	-$1.00		⊕ 🖨Receipt
▸	0	☐	-$1.00	Sep 4, 2020	Sep 4, 2020			Brendan Wilberton	Square	Credit	ⓘ	-$1.00		⊕ 🖨Receipt
▸	0	☐	$1.00	Sep 4, 2020	Sep 4, 2020			Brendan Wilberton	Square	Credit	ⓘ	$1.00		⊕ 🖨Receipt
▸	1	☐	$0.00	Sep 3, 2020	Sep 3, 2020	9/03/2020 08:27AM		Brendan Wilberton	Square	Credit		$1.00		⊕ 🖨Receipt
▸	1	☐	$0.00	Aug 20, 2020	Aug 20, 2020	8/20/2020 10:40AM		Brendan Wilberton	Square	Credit	ⓘ	$1.00		⊕ 🖨Receipt