

Square: Save Patient Card Info & Process Payment

07/24/2024 9:21 pm EDT

DrChrono has increased functionality with the Square app to bring you easier card saving and patient payment processing.

1. Please ensure you are connected to Square by clicking on the **Account** tab. Once you're on the account page, please click on the **Patient Payments** tab, it should look like this:

The screenshot shows the 'Patient Payments' settings page in DrChrono. The navigation bar at the top includes: Profile, General, Email, Medical Billing, eRx Info, Services, Usage, My Billing, Sample Data, Security, and Patient Payments. The main content area is divided into three sections:

- General**: Contains a 'Require balance' section with a checked checkbox for 'Require an outstanding patient balance for credit card payments'.
- Square**: Contains a 'Connect to Square' section with a 'Connected' status and a 'Disconnect' button. Below it is a 'Default Location' dropdown menu set to 'Coffee & Toffee SF', an unchecked checkbox for 'Enable Square access for the entire practice group', and an 'Update Square Settings' button.
- onpatient**: Contains an 'Allow onpatient payments' section with a checked checkbox for 'Allow patients with onpatient access to make payments through the onpatient portal'. Below it is an 'onpatient payment default' dropdown menu set to 'Square', and a 'Minimum onpatient payments' input field set to '1.00' with a note 'Set minimum amount for payments from onpatient'.

An 'Explore His' button is visible in the bottom right corner of the onpatient section.

2. Please instruct your patients to log into their OnPatient account [here](#).

3. Please have the patient go to their **Billing** tab and click on **Payment Methods**. They'll need to save their banking information.

Statements **Select a Doctor** Lynn Tran

Payment History

Payment Methods

Saved Cards

Card	Name	Expiration	
XXXXXXXXXXXX5858	Lynn Hao Tran	10/2029	✕ Remove

Add a Card

Name on card

Card number **CVV** **Expiration**

Zip code **Email**

Billing Address

Save Card

4. Select a doctor to send payment to.

Select a Doctor Lynn Tran

Saved Cards

Card	Name	Expiration	
XXXXXXXXXXXX5858		10/2020	✕ Remove

Add a Card

Card number

Name on card

Expiration Date **CVC** **Zip code**

Save Card

Note: Patients have the option to input their banking information and make one-time payments.

Make Payment



Doctor

Lynn Tran

Card

VISA 5858 - Lynn Hao Tran - 10/2029

Amount

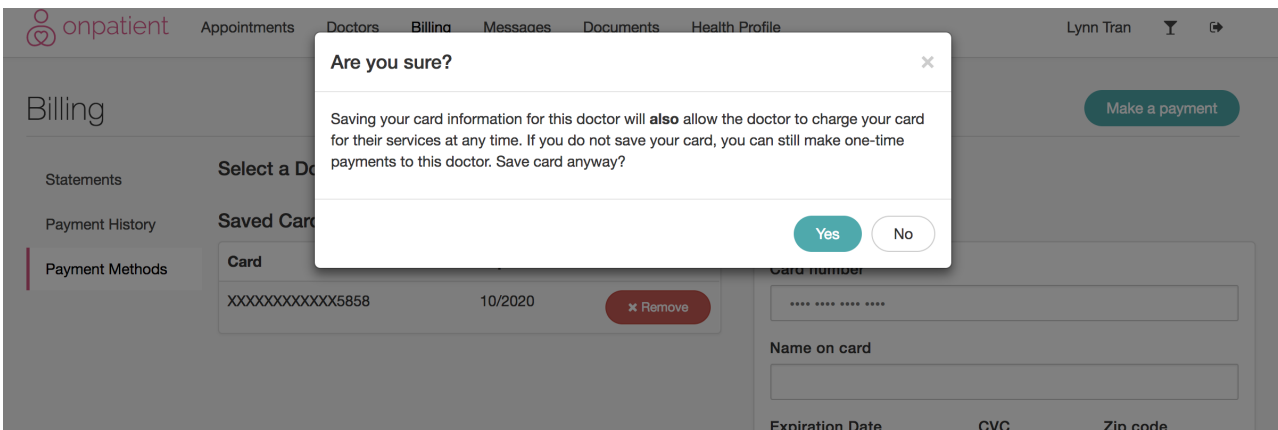
\$ 0.00

Enter one-time payment information

Cancel

Pay

If a card is saved, providers will be able to charge that card for their services when needed.



When a patient saves a card through OnPatient, it will be available to charge in your Square dashboard under the customer directory.



Directory

Feedback

Insights

Settings

NEW! EMPLOYEE PERMISSIONS FOR CUSTOMER DIRECTORY
Set up permissions to choose exactly which customer information your employees can access or modify. To get started, be sure to update your POS app.

Try now

Search Directory

Import

All Customers 10 Total Customers 1 Duplicate Suggestion

<input type="checkbox"/>	Name	Email	Phone
<input type="checkbox"/>	Homer Simpson		
<input type="checkbox"/>	Jenny Harris		
<input type="checkbox"/>	Jenny Harris		
<input checked="" type="checkbox"/>	Jenny Harris		

Jenny Harris

Personal Information

NAME
Jenny Harris

REFERENCE ID
95143939

Card on File

VISA Ends in 11/24

Take a Payment

Messages

Take a Payment Edit Personal Information