

DrChrono Payments: Processing a patient refund

07/24/2024 2:00 pm EDT

DrChrono Payments makes it easy to issue refunds to your patient directly from your DrChrono account. Any refunds must be processed through the web, not on a mobile device.

- Navigate to Billing > Patient Payments > Payments tab

Billing

BILLING

- Billing Summary
- Live Claims Feed
- Patient Payments**
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Insurance Credit Card Payments
- Accounts Receivable
- Patient Statements
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Patient

From To Filter by Range: \$ - \$ Provider: All

Simple: **On** Condensed: **On** Internal: **Off**

Please select a patient.

- Select the patient that needs to be refunded

Patient Payments | **Payments** | Line Items | Logs | Statements | Balance

Patient

From To Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off

Please select a patient.

- Identify the payment that needs to be refunded.
- If you follow the payment line over to the right, there will be a button labeled "Refund"

#	<input type="checkbox"/> Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▶	<input type="checkbox"/>						PSMP	Credit	!	\$12.00		<input type="button" value="Receipt"/> <input type="button" value="Refund"/>
▶	<input type="checkbox"/>						PSMP	Credit	!	\$3.00		<input type="button" value="Receipt"/> <input type="button" value="Refund"/>

Patient Payments | **Payments** | Line Items | Logs | Statements | Balance

From To Filter by R

Simple: On Condensed: On Internal: Off

DrChrono Payments Refund

Payment to refund: \$100.00 11/10/2022 09:25AM

Appointment: 11/10/2022 09:25AM

Line Item: 0003M

Amount: \$ 100 out of \$100.00

Extra Notes:

Print/Export

#	<input type="checkbox"/> Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
										\$2		

- The system will default the refund amount to the total original payment, however, you can adjust this number and only refund a portion of the amount.
- The system will not let you refund more than what was originally paid. It will give you an error message if you attempt to refund more than the original payment.

Appointment: --No Appointment--

Line Item: -No Line Item-

Amount: \$ 51 out of \$50.00 Error

Extra Notes:

Please note - WorldPay and Stripe have established allowable refund windows. Any credit card refund will only be allowed during this time.

- WorldPay - window is less than 45 days from payment
 - Stripe - window is less than 180 days from payment
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