

# Issuing a patient refund with Stripe

07/24/2024 6:25 pm EDT

Issuing a refund or discount is a breeze with our patient payments offering. Please follow the steps below to post the action to the account.

**Note:** If the patient's original payment was made via cash/check/money order or through a credit card processor other than Square, the practice will need to issue the patient a refund via an internal process.

If you are using Square to process payments, please see our article on issuing refunds through Square [here](#).

1. Please navigate to **Billing > Patient Payments** and click on the green **+ Add** button:

The screenshot shows the 'Patient Payments' page for Jenny Harris. The interface includes a sidebar with navigation options like 'Billing Summary', 'Live Claims Feed', and 'Patient Payments (beta)'. The main area displays a summary table and a detailed list of payments. A red arrow points to the '+ Add' button located below the summary table.

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$1,921.00	\$1,932.00	-\$11.00	\$83.00	\$94.00

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
0	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM	0299T	Dane Rasmuson	Debit	Credit		\$2,000.00	
2	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson		Refund		-\$70.00	
0	\$10.00	Jun 27, 2018	Jun 27, 2018	6/26/2017 10:45AM		Dane Rasmuson		Credit		\$10.00	
0	-\$100.00	Mar 28, 2018	Mar 28, 2018			Dane Rasmuson	Patient Payments	Other		-\$100.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson		Credit		\$5.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson	Credit Card	Credit		\$5.00	
1	\$5.00	Mar 21, 2018	Mar 14, 2018	6/25/2017 11:00AM	PHONE	Dane Rasmuson	Cash	Credit		\$5.00	

1. A pop-up window will appear. Please select the appointment to refund or credit, and the system will apply a negative amount. The payment type and amount fields toggle. **Credit must be positive, while a refund must be negative.**

The screenshot shows the 'Patient Payments' page with a 'New Cash' pop-up window open. The pop-up window has fields for 'Payment Date', 'Appointment', 'Line Item', 'Provider', 'Payment Method', 'Type', 'Notes', and 'Amount'. The 'Type' is set to 'Refund' and the 'Amount' is set to '-10'. A red arrow points to the 'Amount' field.

Payment Method	Type	Notes	Amount	Total
Credit			\$2,000.00	
Refund			-\$70.00	
Credit			\$10.00	
Patient Payments	Other		-\$100.00	
Credit			\$5.00	
Credit Card	Credit		\$5.00	
Cash	Credit		\$5.00	

You'll notice under the **Type** field, the refund will appear.

The screenshot shows the DrChrono interface for Patient Payments. The patient is Jenny Harris. The interface includes a sidebar with navigation options like Billing Summary, Live Claims Feed, Patient Payments (beta), Day Sheet, Transactions, Remittance Reports, Unmatched ERAs, Accounts Receivable, Patient Statements, Product / Procedure, Balance / Ledger, Fee Schedule, Underpaid Items, Adjustment Master, and Sales Tax. The main area displays a summary table and a detailed list of transactions.

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$1,911.00	\$1,922.00	-\$11.00	\$93.00	\$104.00

  

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
0	\$0.00	Jun 28, 2018	Jun 28, 2018	6/12/2018 10:45AM	00836	Dane Rasmuson		Refund		-\$10.00	
0	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM	0299T	Dane Rasmuson	Debit	Credit		\$2,000.00	
2	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson		Refund		-\$70.00	
0	\$10.00	Jun 27, 2018	Jun 27, 2018	6/26/2017 10:45AM		Dane Rasmuson		Credit		\$10.00	
0	-\$100.00	Mar 28, 2018	Mar 28, 2018			Dane Rasmuson	Patient Payments	Other		-\$100.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson		Credit		\$5.00	
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson	Credit Card	Credit		\$5.00	
1	\$5.00	Mar 21, 2018	Mar 14, 2018	6/25/2017 11:00AM	PHONE	Dane Rasmuson	Cash	Credit		\$5.00	

Here's an example of a credit, the positive amount populates automatically, as opposed to the automatic population of a negative amount when you issue a refund.

This screenshot is identical to the one above, showing the DrChrono Patient Payments interface for Jenny Harris. The summary table and the detailed list of transactions are the same. A red arrow in the second screenshot points to the 'Type' field of the \$10.00 credit entry, which is labeled 'Refund'.

## Issuing the actual refund:

The above steps will correct the posting in the patient's account in their DrChrono account. It, however, will not transfer or issue the refund to the patient if they paid by cash/check/money order, or if the credit card was charged with a processor other than Square. If the patient paid by any of those means (cash/check/money order/credit card via Stripe our outside processor), the office will need to issue the patient a cash or check refund.