Issuing a patient refund with Stripe

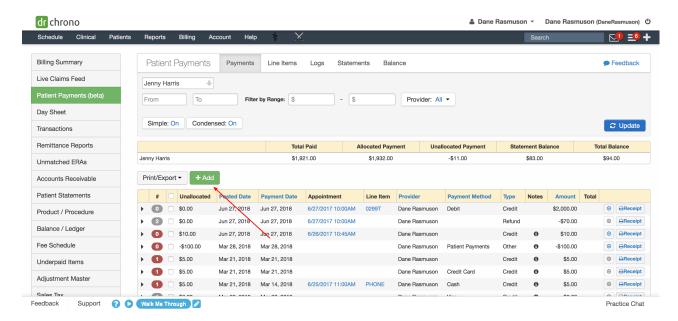
07/24/2024 6:25 pm EDT

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.

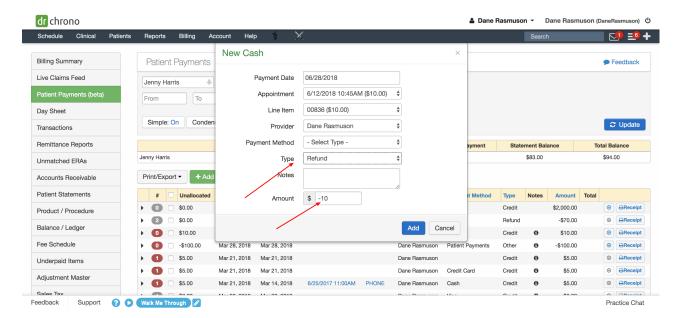
Note: If the patient's original payment was made via cash/check/money order or through a credit card processor other than Square, the practice will need to issue the patient a refund via an internal process.

If you are using Square to process payments, please see our article on issuing refunds through Square here.

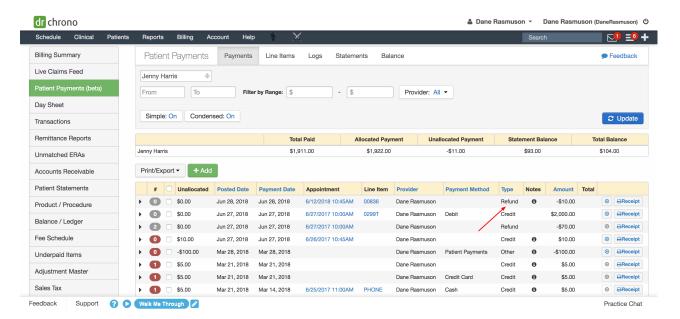
1. Please navigate to **Billing > Patient Payments** and click on the green + **Add button**:



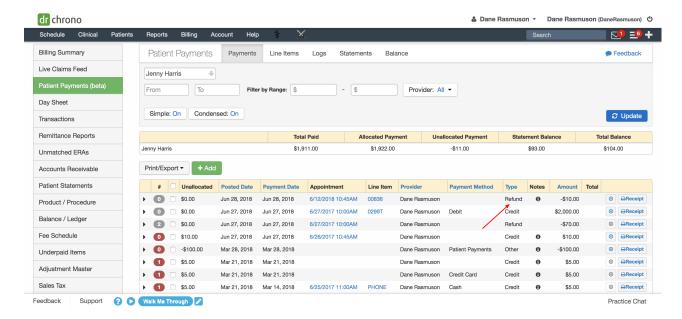
1. A pop-up window will appear. Please select the appointment to refund or credit, and the system will apply a negative amount. The payment type and amount fields toggle. **Credit must be positive**, **while a refund must be negative**.



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



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.



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.