

Text-to-Pay: Refunding a payment

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If you need to refund a patient's payment, you can do so under Billing > Patient Payments.

The screenshot shows the 'Patient Payments' interface with tabs for 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs is a search bar with a dropdown arrow. At the bottom, there are input fields for 'From', 'To', 'Filter by Range' (with dollar signs), and 'Provider: All' with a dropdown arrow.

- Locate the patient's chart and the payment that needs to be refunded. On the right side of the screen, you will see a button labeled Refund.
 - You will also notice, that after you process the refund, you will see the refund listed with a negative amount.

The screenshot shows a table with columns: #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, Total. A red box highlights the first row where the Amount is -\$130.00 and the Total is \$130.00. The Type is 'Refund' and there is a 'Refund' button next to the Total.

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
0	<input type="checkbox"/>	-130.00	Oct 30, 2023	Oct 30, 2023			DrChrono Payments	Refund		-130.00	\$130.00
1	<input type="checkbox"/>	0.00	Oct 30, 2023	Oct 30, 2023			DrChrono Payments	Credit		130.00	
3	<input type="checkbox"/>	133.90	Oct 30, 2023	Oct 30, 2023			DrChrono Payments	Credit		133.90	

This is a close-up of the payment table from the previous screenshot. A red box highlights the first two rows. The first row is a 'Refund' with an amount of -\$130.00 and a total of \$130.00. The second row is a 'Credit' with an amount of \$130.00 and a total of \$133.90. Both rows have a 'Receipt' button and a 'Refund' button.

Type	Notes	Amount	Total
Refund		-\$130.00	\$130.00
Credit		\$130.00	\$133.90
Credit		\$133.90	