

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. At the top, there are navigation tabs: 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs is a search bar with a dropdown arrow. Underneath, there are input fields for 'From' and 'To' dates, a 'Filter by Range' section with two dollar sign (\$) input boxes separated by a minus sign, and a 'Provider: All' dropdown menu.

- 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. The table contains three rows. The first row is a Refund for -\$130.00. The second row is a Credit for \$130.00. The third row is a Credit for \$133.90. A red box highlights the first two rows, and another red box highlights the 'Amount' and 'Total' columns for the second row.

#	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	
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 view of the payment table rows. The columns are 'Type', 'Notes', 'Amount', and 'Total'. The first row is 'Refund' with a negative amount of -\$130.00. The second row is 'Credit' with a positive amount of \$130.00. The third row is 'Credit' with a positive amount of \$133.90. A red box highlights the first two rows, and another red box highlights the 'Amount' and 'Total' columns for the second row.

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