

# Issuing a patient refund with Stripe

09/03/2024 5:25 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 Chrono software interface. The top navigation bar includes 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. The user is logged in as 'Dane Rasmuson'. The main content area is titled 'Patient Payments' and shows a summary for 'Jenny Harris' with a total balance of \$94.00. Below the summary is a table of transactions. A red arrow points to the '+ Add' button in the table header.

#	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		Receipt
2	\$0.00	Jun 27, 2018	Jun 27, 2018	6/27/2017 10:00AM		Dane Rasmuson		Refund		-\$70.00		Receipt
0	\$10.00	Jun 27, 2018	Jun 27, 2018	6/28/2017 10:45AM		Dane Rasmuson		Credit		\$10.00		Receipt
0	-\$100.00	Mar 28, 2018	Mar 28, 2018			Dane Rasmuson	Patient Payments	Other		-\$100.00		Receipt
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson		Credit		\$5.00		Receipt
1	\$5.00	Mar 21, 2018	Mar 21, 2018			Dane Rasmuson	Credit Card	Credit		\$5.00		Receipt
1	\$5.00	Mar 21, 2018	Mar 14, 2018	6/25/2017 11:00AM	PHONE	Dane Rasmuson	Cash	Credit		\$5.00		Receipt

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.**

**New Cash**

Patient: Jenny Harris

Payment Date: 06/28/2018

Appointment: 6/12/2018 10:45AM (\$10.00)

Line Item: 00836 (\$10.00)

Provider: Dane Rasmuson

Payment Method: - Select Type -

Type: Refund

Notes:

Amount: \$ -10

Buttons: Add, Cancel, Update

Payment Method	Type	Notes	Amount	Total
Credit			\$2,000.00	
Refund			-\$70.00	
Credit			\$10.00	
Credit			\$5.00	
Credit			\$5.00	
Credit			\$5.00	

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

**Patient Payments**

Patient: Jenny Harris

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

Buttons: Simple: On, Condensed: On, Update

	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	6/28/2017 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.

- 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
- Sales Tax

Patient Payments Payments Line Items Logs Statements Balance Feedback

Jenny Harris

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

Simple: On Condensed: On Update

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

Print/Export + Add

#	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	

## 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.