DrChrono Payments: Voiding or Refunding a patient credit card payment

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If you need to reverse a patient credit card payment processed through DrChrono Payments, there are two ways to do it.

- **Same Day- full refund**

If you need to reverse a credit card payment that was **processed the same day,** you can use the **Void Payment** option. Voiding a payment cancels the transaction in full and can only be used for the entire payment amount.

- **Partial refund**

If you need to return only a portion of the payment, you'll need to wait until the transaction has finished processing and then issue a refund. Most payments are fully processed within approximately 24 hours.

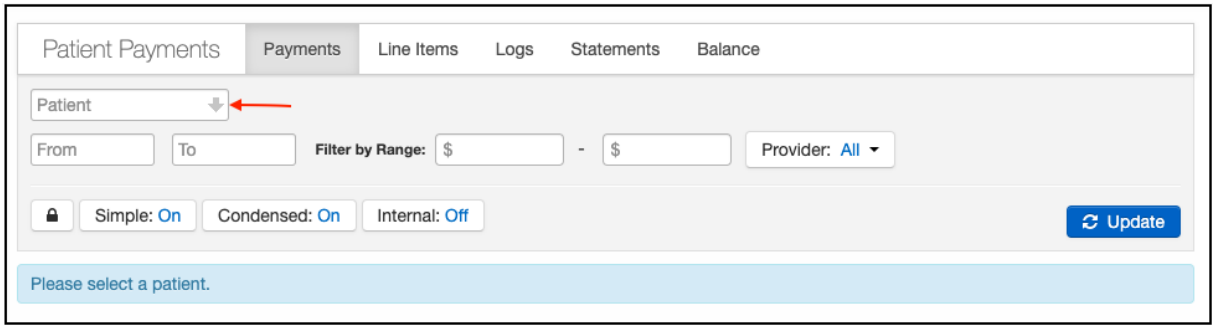
- **Full or partial refund processed on a previous day**

For payments that were processed on a previous day, or when only part of the payment amount needs to be returned, use the **Refund** option to return the appropriate amount to the cardholder.

Voiding a payment | Refunding a payment

Void a payment

1. Navigate to **Billing > Patient Payments**
2. Ensure you are on the **Payments tab**
3. Select the patient whose payment you are voiding

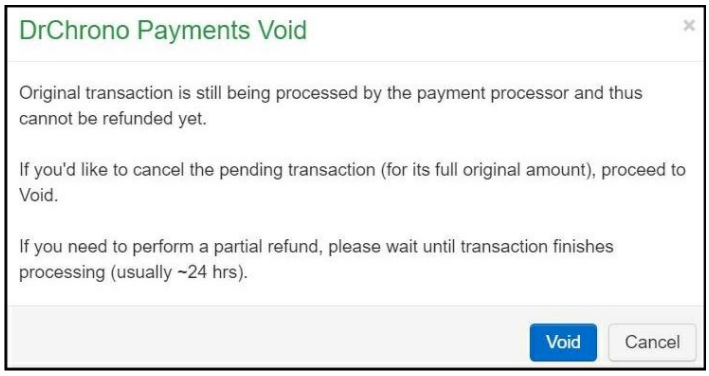


4. Press **Update** on the right side of the screen.

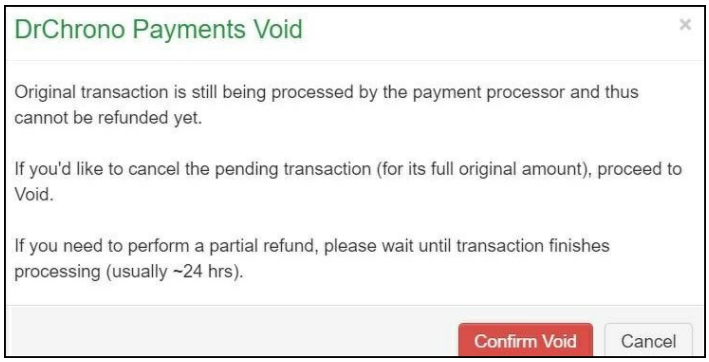
5. Scroll down and identify the payment you would like to void.
6. Press the **Void** button on the right side of the screen.



7. Once selected, you will see this message. This is to let you know that the transaction is still pending and that proceeding will cancel the entire payment amount.
8. To continue, press the blue **Void** button.



9. The system will then ask you to confirm that you want to void the entire paid amount. To confirm, press the red **Confirm Void** button.



After confirming, the entire payment will be refunded to the patient's credit card. A reverse posting will show in the patient's account to document the full or partial refund.

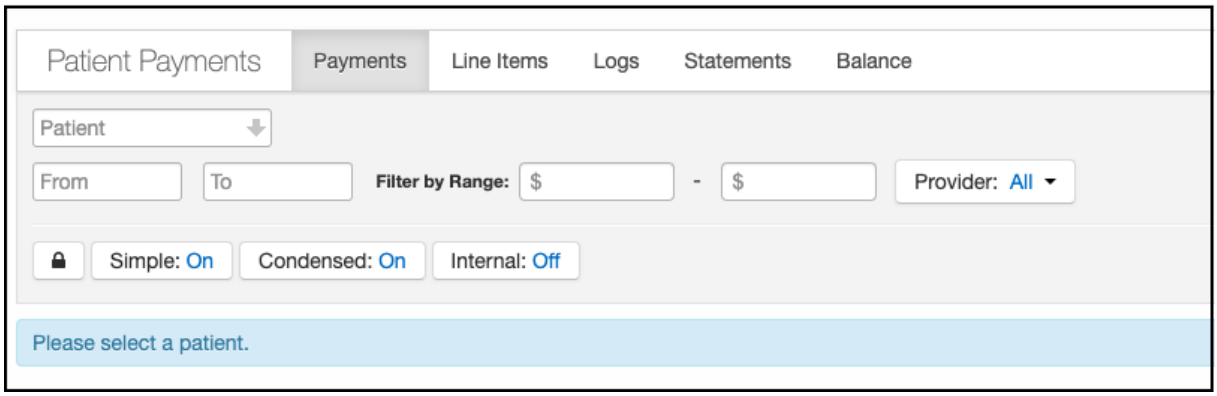
Refund a payment

Any refunds must be processed through the web, not on a mobile device.

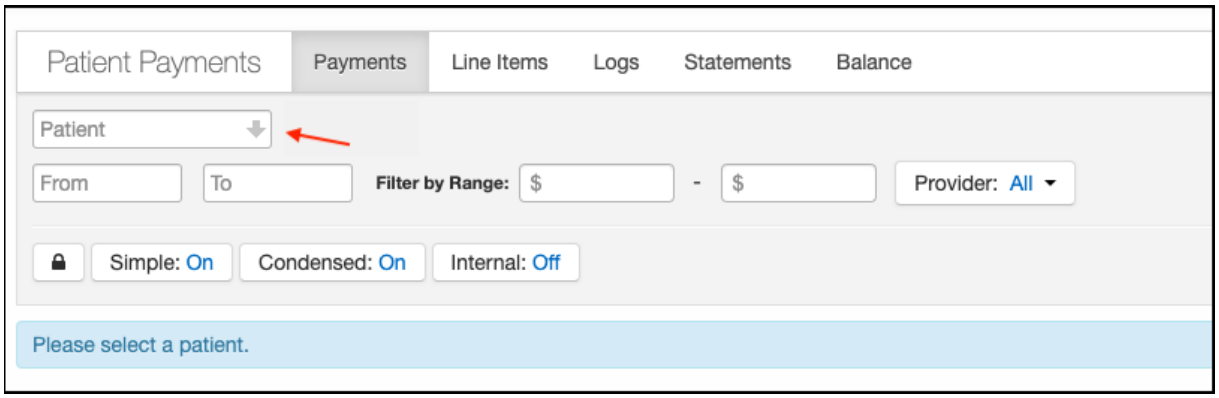
If the payment has not been fully processed, you can select to refund the entire amount by selecting void in the patient payment screen. If only a portion of the payment needs to be refunded, the payment has to be finished

processing, which takes approximately 24 hours.

1. Navigate to **Billing > Patient Payments > Payments tab**



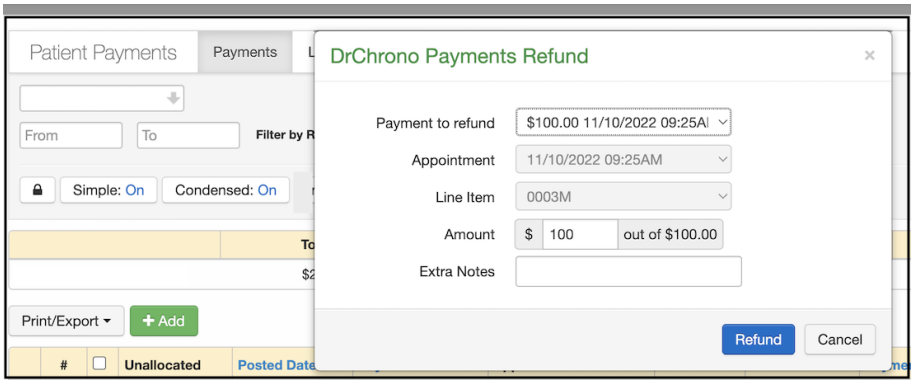
2. Select the patient who needs to be refunded



3. Identify the payment that needs to be refunded.

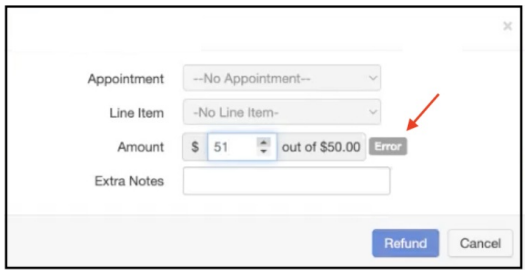
4. If you follow the payment line over to the right, there will be a button labeled **Refund**





The system will default the refund amount to the total original payment; however, you can adjust this number and only refund a portion of the amount.

The system will not let you refund more than what was originally paid. It will give you an error message if you attempt to refund more than the original payment.



Please note: WorldPay and Stripe have established allowable refund windows. Any credit card refund will only be allowed during this time.

WorldPay - the window is less than 45 days from payment
Stripe - the window is less than 180 days from payment

Refund transactions created through PaySimple, WorldPay, and Stripe are now more closely linked to their original payments, improving payment tracking and reporting.

Allocated and unallocated patient payments are respected to ensure balances, payment allocations, and reporting remain accurate after a refund is issued. Refunds properly reverse the applicable payment amounts without affecting unrelated allocations, and patient statements, dashboards, and financial reports will continue to display accurate payment and balance information.

Refunding from a specific CPT/HCPCS/Custom Code

If you need to refund money from a specific code, first move the payment to the patient's unallocated funds, and then process the refund. By unallocating the funds, the system will first apply the refund to the unallocated funds before selecting a specific code to reverse.