

DrChrono Payments: Voiding or Refunding a patient payment

Last modified on 03/25/2026 2:47 pm EDT

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

If you are reversing a credit card payment that was processed *the same day*, you have the option to **Void** the payment. The void payment option will void the entire amount of the payment.

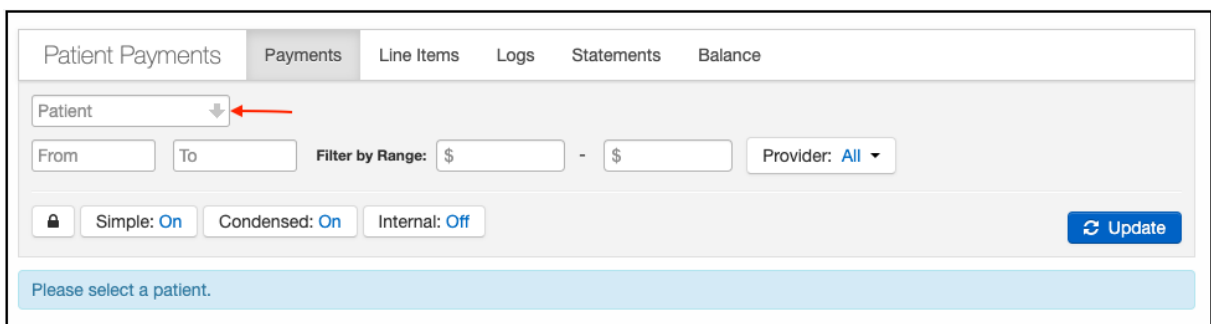
If you need to refund only a portion of the payment, you will need to wait until the payment processes, and then issue a refund. Typically it takes around 24 hours for the payment to fully process.

If you are reversing the payment *outside of the same day* it was processed or you need to return only a portion of the paid amount, you will need to **refund** the payment/amount.



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



Patient Payments | Payments | Line Items | Logs | Statements | Balance

Patient  

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

Simple: **On** Condensed: **On** Internal: **Off**

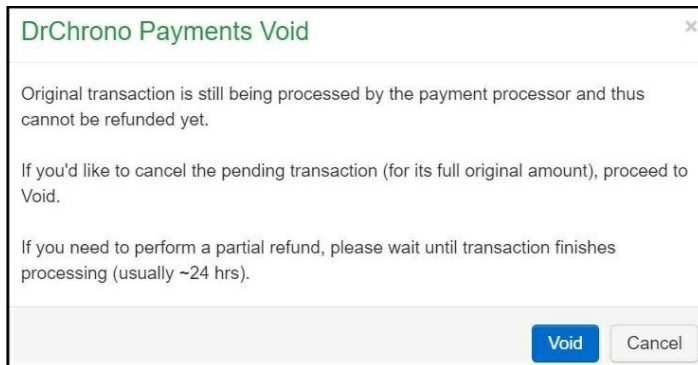
Please select a patient.

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 of the screen.

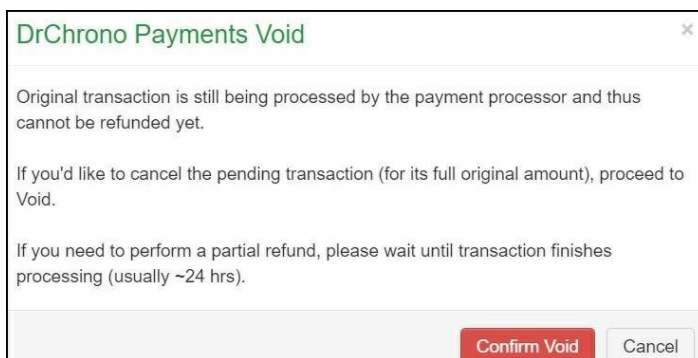


#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Payment Method	Type	Notes	Amount	Total	
0	<input type="checkbox"/>	\$0.00	Mar 27, 2023	Mar 27, 2023	11/16/2022 08:30AM	J9002	DrChrono Payments	Credit		\$6.00	<input type="button" value="Receipt"/> <input type="button" value="Void"/>

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**

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Patient

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

Simple: On Condensed: On Internal: Off

Please select a patient.

2. Select the patient who needs to be refunded

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Patient

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

Simple: On Condensed: On Internal: Off

Please select a patient.

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**

#	<input type="checkbox"/> Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total		
▶ 0	<input type="checkbox"/>	\$12.00					PSMP	Credit	!	\$12.00			
▶ 0	<input type="checkbox"/>	\$3.00					PSMP	Credit	!	\$3.00			

Patient Payments | Payments | Line Items | Logs | Statements | Balance

DrChrono Payments Refund

Payment to refund: \$100.00 11/10/2022 09:25AM

Appointment: 11/10/2022 09:25AM

Line Item: 0003M

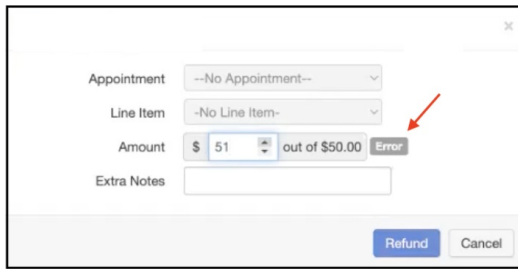
Amount: \$ 100 out of \$100.00

Extra Notes:

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.



The screenshot shows a refund form with the following fields:

- Appointment: --No Appointment--
- Line Item: --No Line Item--
- Amount: \$ 51 out of \$50.00. A red arrow points to the "Error" button next to the amount field.
- Extra Notes: (empty text box)

At the bottom of the form are two buttons: "Refund" and "Cancel".

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
