

# 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.

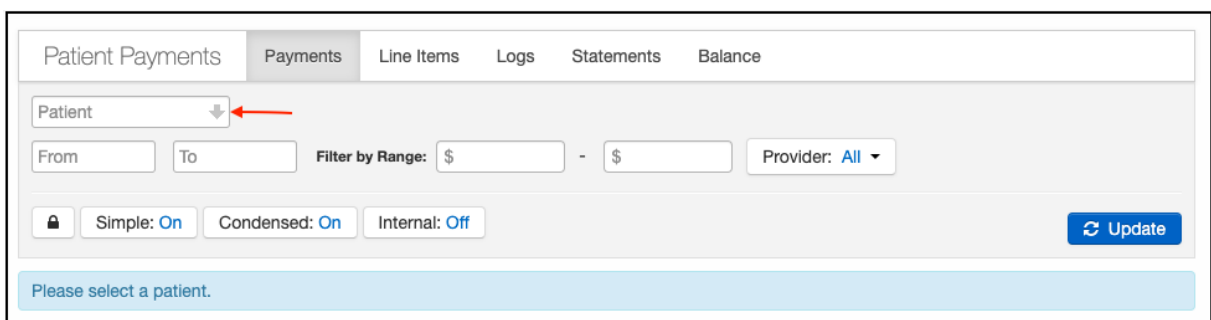
- **Full or partial refund processed on a previous day**

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



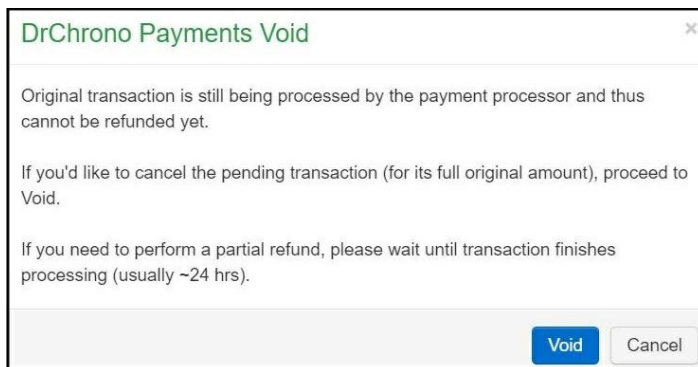
The screenshot shows the 'Patient Payments' interface with the 'Payments' tab selected. A red arrow points to the 'Patient' dropdown menu. Below the dropdown are fields for 'From' and 'To' dates, a 'Filter by Range' section with dollar signs, and a 'Provider: All' dropdown. At the bottom right is an 'Update' button. A blue message bar at the bottom says 'Please select a patient.'

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

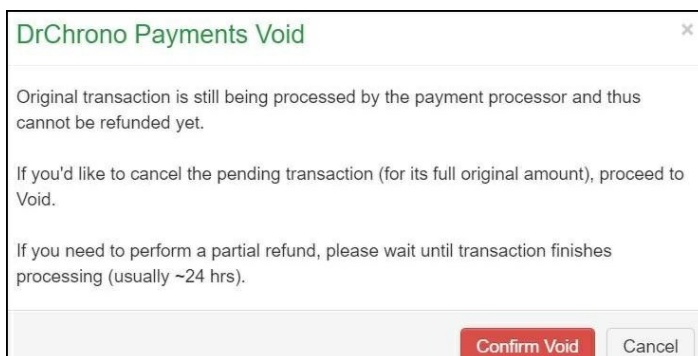
5. Scroll down and identify the payment you would like to void.
6. Press the **Void** button on the right of the screen.

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Payment Method	Type	Notes	Amount	Total	
0	\$0.00	Mar 27, 2023	Mar 27, 2023	11/16/2022 08:30AM	J9002	DrChrono Payments	Credit		\$6.00		Receipt 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**

The screenshot shows the 'Patient Payments' interface with the 'Payments' tab selected. At the top, there are navigation tabs: 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below these, there is a 'Patient' dropdown menu, 'From' and 'To' date input fields, a 'Filter by Range' section with two dollar sign input fields, and a 'Provider: All' dropdown. There are also three toggle buttons: 'Simple: On', 'Condensed: On', and 'Internal: Off'. A light blue banner at the bottom contains the text 'Please select a patient.'

2. Select the patient who needs to be refunded

This screenshot is identical to the previous one, but a red arrow points to the 'Patient' dropdown menu, indicating the step of selecting 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		<input type="button" value="Receipt"/> <input type="button" value="Refund"/>
▶ 0	<input type="checkbox"/>	\$3.00					PSMP	Credit	!	\$3.00		<input type="button" value="Receipt"/> <input type="button" value="Refund"/>

A red arrow points to the 'Refund' button in the second row of the table.

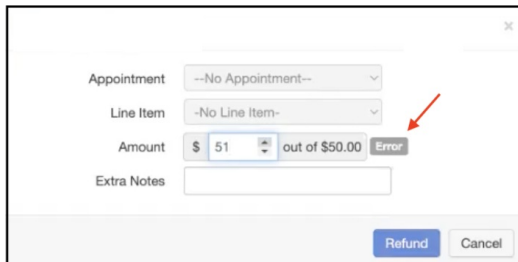
The screenshot shows a 'DrChrono Payments Refund' dialog box overlaid on the 'Patient Payments' interface. The dialog box contains the following fields:

- Payment to refund: \$100.00 11/10/2022 09:25AI
- Appointment: 11/10/2022 09:25AM
- Line Item: 0003M
- Amount: \$ 100 out of \$100.00
- Extra Notes: (empty text box)

At the bottom right of the dialog box, there are two buttons: 'Refund' and 'Cancel'.

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 web form for processing a refund. It includes the following fields and controls:

- Appointment:** A dropdown menu with the selected option "--No Appointment--".
- Line Item:** A dropdown menu with the selected option "--No Line Item-".
- Amount:** A numeric input field containing "51" with a dollar sign "\$" to its left. To the right of the input is the text "out of \$50.00" and a small red "Error" message. A red arrow points to the "Error" message.
- Extra Notes:** A text input field.
- Buttons:** "Refund" and "Cancel" buttons at the bottom right.



**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.