

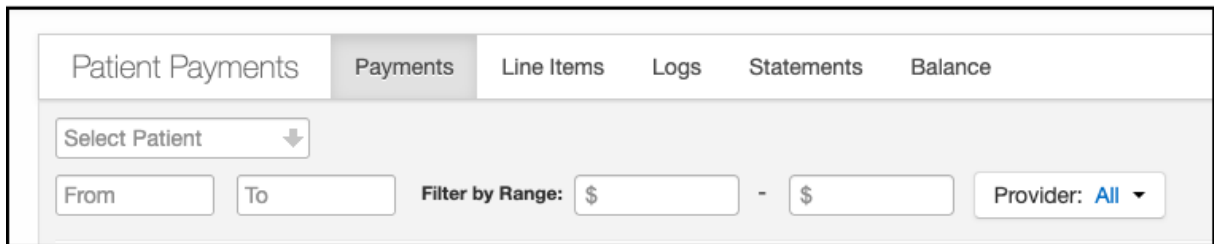
Refund Patient Cash and Check Payments

Last modified on 06/04/2026 1:37 pm EDT

If you need to refund a patient payment made by cash or check, you will need to post the refund in the DrChrono system to keep records accurate and up to date.

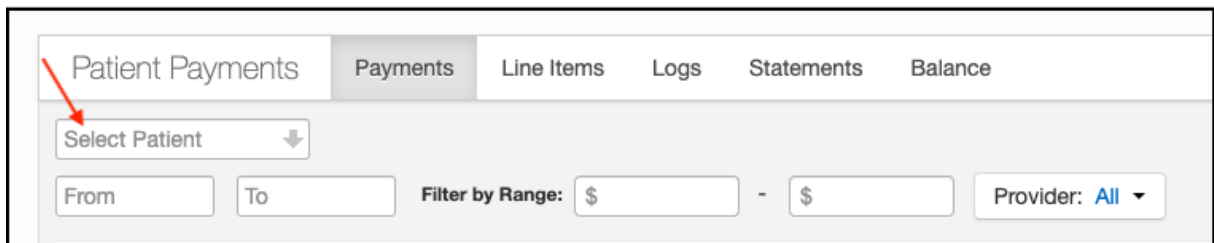
To post a refund of a cash and/or check payment:

1. Navigate to Billing > Patient Payments



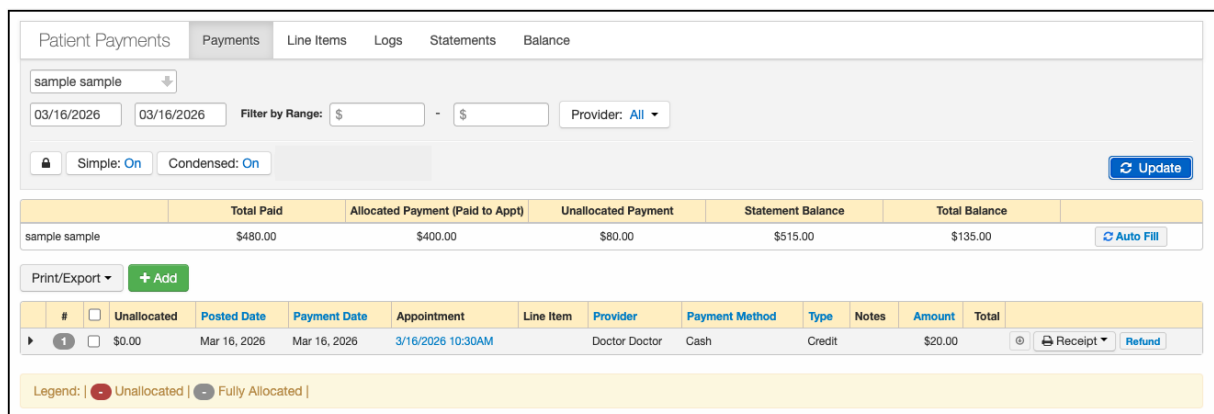
The screenshot shows the 'Patient Payments' interface. At the top, there are navigation tabs: 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs is a search area with a 'Select Patient' dropdown menu. Underneath, there are input fields for 'From' and 'To'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

2. Select the patient



This screenshot is identical to the previous one, but a red arrow points to the 'Select Patient' dropdown menu, indicating the step of selecting a patient.

3. Locate the payment that needs to be refunded.



The screenshot shows the 'Patient Payments' interface with a patient selected as 'sample sample'. The dates are set to 03/16/2026. There are buttons for 'Simple: On' and 'Condensed: On', and an 'Update' button. Below this is a summary table:

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
sample sample	\$480.00	\$400.00	\$80.00	\$515.00	\$135.00

Below the summary table is a '+ Add' button and a 'Print/Export' dropdown. At the bottom is a table of payment items:

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
1	<input type="checkbox"/>	Mar 16, 2026	Mar 16, 2026	3/16/2026 10:30AM		Doctor Doctor	Cash	Credit		\$20.00	

At the bottom right of the payment table, there are buttons for 'Receipt' and 'Refund'. A legend at the very bottom indicates that a red circle with a minus sign represents 'Unallocated' and a grey circle with a minus sign represents 'Fully Allocated'.

4. Press the refund button to the right of the payment.

Patient Payments Payments Line Items Logs Statements Balance

sample sample

03/16/2026 03/16/2026 Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On [Update](#)

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
sample sample	\$480.00	\$400.00	\$80.00	\$515.00	\$135.00

Print/Export [+ Add](#) [Auto Fill](#)

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
1	<input type="checkbox"/>	\$0.00	Mar 16, 2026	Mar 16, 2026	3/16/2026 10:30AM	Doctor Doctor	Cash	Credit		\$20.00	

Legend: | Unallocated | Fully Allocated | [Receipt](#) [Refund](#)

5. The refund box will allow you to specify the amount and method of the refund.

Refund Payment

Original Payment Cash — \$20.00 on 2026-03-16

Refund Amount \$ 20 out of \$20.00

Refund Method Cash

Notes

[Refund](#) [Cancel](#)

6. Once entering the amount and method, press Refund.

7. The system will give you a pop-up to confirm the refund.

Refund Payment

Original Payment Cash — \$20.00 on 2026-03-16

Refund Amount \$ 10 out of \$20.00

Refund Method Cash

Notes

[Confirm Refund](#) [Cancel](#)

8. Once confirmed, the system will post the negative (refund) transaction and add the amount to the patient's balance.

Code/Check Date	Description	Mods/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
						Totals:	\$125.00	\$125.00	\$0.00	\$0.00	\$0.00	\$10.00	\$125.00	-\$10.00	Not Submitted
99203			From date To date	1.00	1 0 0 0	\$125.00	\$125.00	\$125.00	\$0.00	\$0.00	\$0.00	\$10.00	\$125.00	-\$10.00	Not Submitted
P	03/16/2026	03/16/2026				Cash						20.00			
P	03/16/2026	06/04/2026				Cash						-10.00			