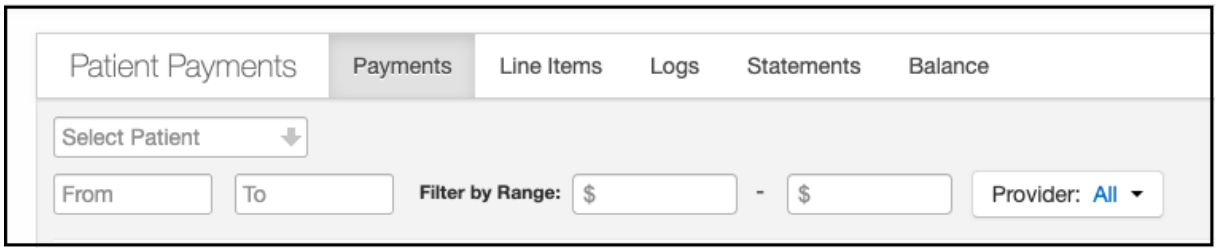
Refund Patient Cash and Check Payments

Last modified on 08/18/2026 5:05 pm EDT

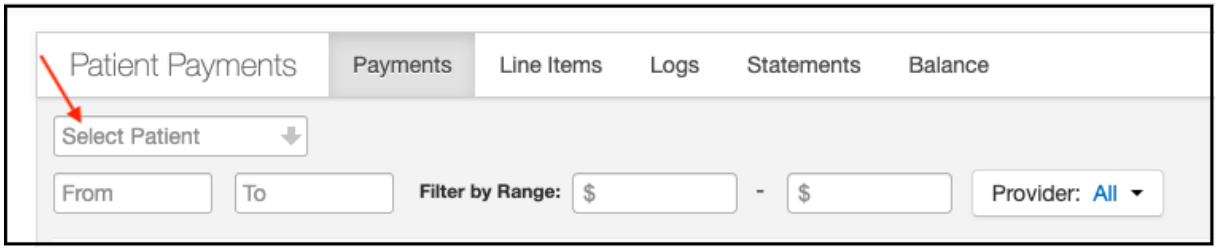
If you need to refund a patient payment made by cash or check, you will need to post the refund in the DrChrono system to keep records accurate and up to date.

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

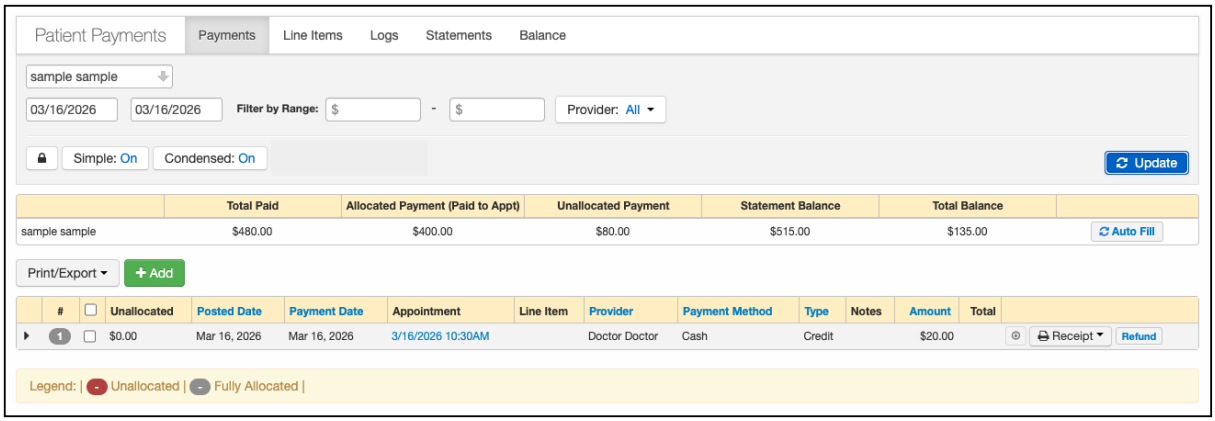
1. Navigate to Billing > Patient Payments



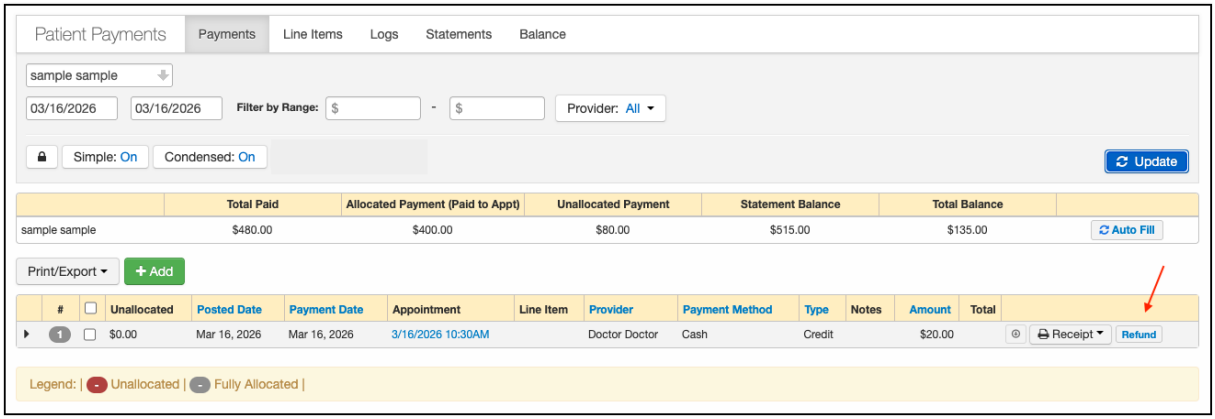
2. Select the patient



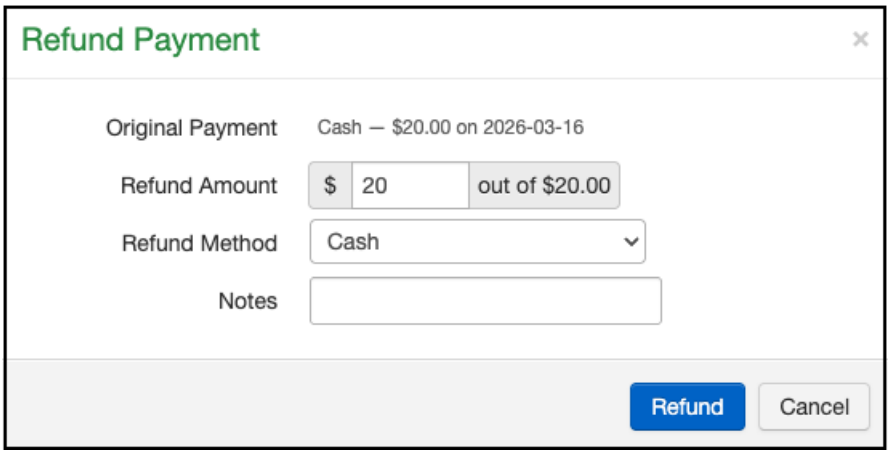
3. Locate the payment that needs to be refunded.



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

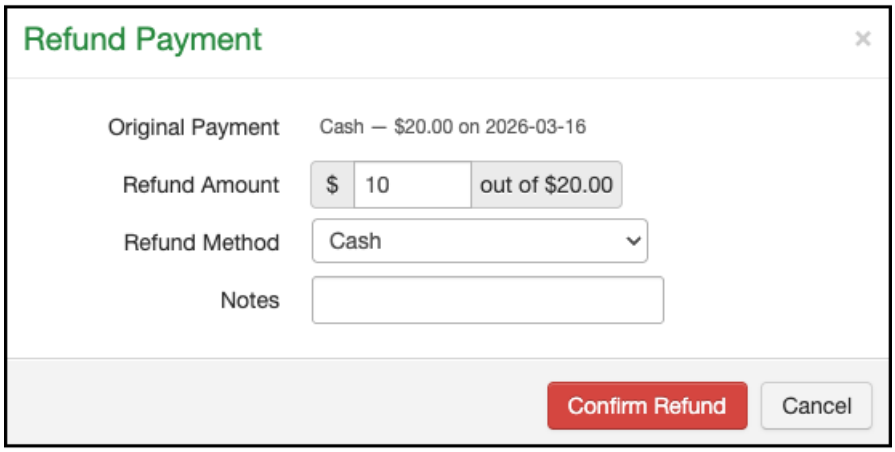


5. The refund box will allow you to specify the amount and method of the refund.

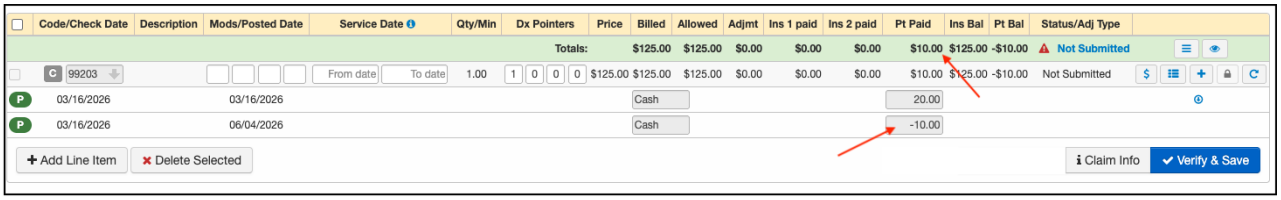


6. Once entering the amount and method, press Refund.

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



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
C 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
Add Line Item
Delete Selected
Claim Info
Verify & Save