

DrChrono – Processing Voids and Credits (Refunds)

If you need to void a payment or credit/refund a payment, keep in mind that Voids can only be processed the same day of the transaction, while full or partial credits can be processed within 6 months of the date of the original transaction.

1. Locate the patient in DrChrono and Click the ClearGage App directory button to launch ClearGage.

🤨 🛔 ClearGageDemo Prad	ctice - Amy O'Kelley (sokelley) Upgrade my Plan 🕈	Family History	Last Patient Statements
]	CLEARGAGEDEMO PRACTICE Daily II Sandy Sue Beaches 1 Monthly 05/05/1955	Implantable Devices	Last Statement Date No Patient Statements
Exam 3	Exam 4	ClearGageSalesDemo	Save Demographics

2. Select the transaction you want void or credit

Editing Patient Sandy	y Beaches			Add Memo		Make Payment	Add AR Pla	n Add Subscription
Patient Details	Patient History (Click on c	olumn headel	rs to re-sort)			3	Export Filter	All Memos 🗸
Patient History	Date	Plan ID	Event	Status		Debit Amt.	Credit Amt.	User
	08/12/2021 12:00 PM		Copay Payment	Approved	0	\$75.00		DrChrono: aokelley
Patient Information	08/12/2021 11:57 AM		Credit Payment TEST299197931872	Completed			\$45.00	DrChrono: aokelley
Patient Relationships	08/12/2021 11:57 AM		Void Payment TEST891693198451	Completed			\$50.00	DrChrono: aokelley
Payment Profiles	08/12/2021 10:46 AM		Copay Payment	Voided	0	\$50.00		DrChrono: aokelley
	07/29/2021 02:40 PM		Imported new balance from DrChrono.					System
Account on File	07/29/2021 02:38 PM	A7COF4F3	Payment Plan Setup					DrChrono: aokelley
Payment Plans	07/29/2021 02:38 PM	A7COF4F3	Payment Plan Status Changed to Closed					DrChrono: aokelley
Documents	07/29/2021 02:38 PM	A7COF4F3	Plan Payment	Approved	0	\$970.00		DrChrono: aokelley
	07/29/2021 02:38 PM	A7COF4F3	Payment Plan Pending					DrChrono: aokelley
Statements	07/29/2021 02:38 PM	A7COF4F3	Payment Plan Pending					DrChrono: aokelley
Patient Consents	D6/22/2021 11:46 AM	A7COF4F3	Plan Payment	Approved	0	\$555.00		Amy O'Kelley
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3. If it is todays transaction, you will see a Void Transaction button. If it is a past transaction, you will see a Credit Full Amount button and a Credit Partial Amount button

Event Detail	× CLOSE	Event Detail		× CLOSE
System Date 09/09/2021 02:35 PM Transaction Date 09/09/2021 Reference TEST849891946668 Order # 90SJTG2CK25N6WSTVQL4	Request Type Authorize Amount \$123.77 Result Approved User Michael Morgan	System Date 06/03/2021 01:45 PM Transaction Date 06/03/2021 Reference TEST411691863202 Order # 7PP/VBSTCA910R2BV3Z3 Event	Request Type Authorize Amount \$99.00 Result Approved User DrChrono: sokelley Bax Method	
Event Plan Payment	Pay Method Visa - 1111	Copay Payment	Visa - 1111	
Payment Plan ID <u>6M08V157-A6M588V1</u> Print Receipt Email Receipt	Void Transaction	Print Receipt Email Receipt Credit Partial Amount Transaction Items	Credit Full Amount	
Type	Amount	Туре		Amount
Plan Payment	\$123.77	Copay Payment (POS)		\$99.00

4. Make your selection and add a detailed note.

Transaction Amount	\$123.77
Notes	

You can see the voided or credited transaction from the patient history page.