Patient's Credit Account

Last Modified on 09/20/2021 12:55 pm EDT

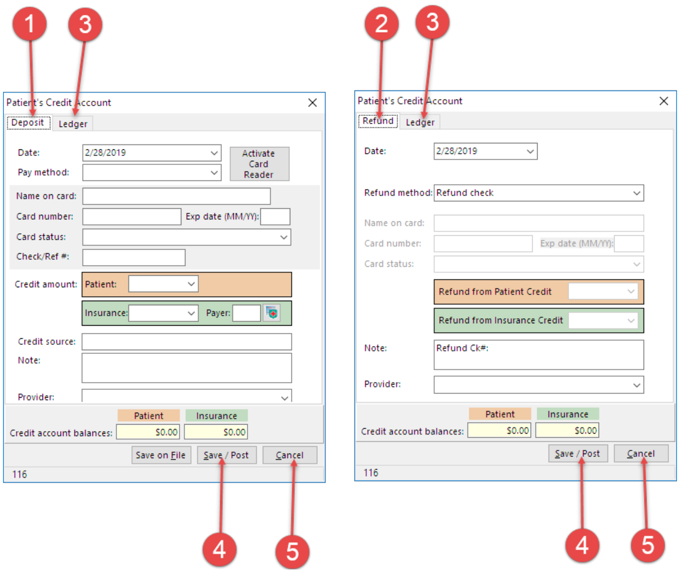
Version 14.19

This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the ***Related Articles*** *section at the bottom of this page.*

About Patient's Credit Account

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Credits > New Credit or Refund button**

The Patient's Credit Account window differs based on whether the New Credit button or Refund button is selected in the Credits section of the Patient Chart. The **New Credit** option *(image on the left)* is used to enter new patient and insurance credits into the Patient Chart or to transfer credits from a linked sibling. The **Refund** option *(image on the right)* is used to enter refunds from the patient's credits.



Patient's Credit Account Map

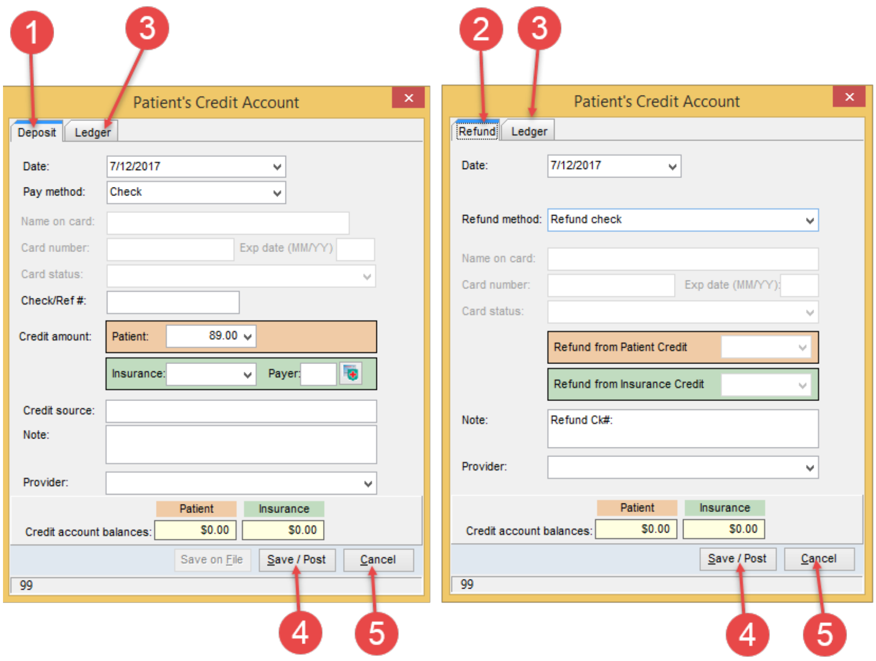
Number	Section	Description
1	Deposit tab (if New Credit button was clicked)	The Deposit tab creates credit transactions against the patient account.
2	Refund tab (if Refund button as clicked)	The Refund tab creates refund transactions against the patient account.
3	Ledger tab	The Ledger tab maintains a record for all the credits that are linked to the patient account.
4	Save/Post button	The **Save/Post** button saves and posts a credit or refund to the patient's chart.
5	Cancel button	The **Cancel** button exits the window without saving changes.

Version 14.10

About Patient's Credit Account

Path: Smart Toolbar > Account button > Credits tab > + Credit (or + Refund) button

The Patient's Credit account window enters both patient and insurance credits into the patient account. The Patient's Credit Account window differs based upon the button selected in the Credit tab of the patient's account. Credits can be held in the account, transferred, or refunded. Transfers can be set as a general transfer, family transfer or insurance transfer. Refunds can be issued to the patient account, to the patient, or to the insurance.



Patient's Credit Account Map

Number	Section	Description
1	Deposit tab (if + Credits button was clicked)	The Deposit tab creates credit transactions against the patient account.
2	Refund tab (if + Refund button as clicked)	The Refund tab creates refund transactions against the patient account.
3	Ledger tab	The Ledger tab maintains a record for all the credits that are linked to the patient account.
4	Save/Post button	The **Save/Post** button saves and posts a credit or refund to the patient account.
5	Cancel button	The **Cancel** button exits the window without saving changes.