We are currently updating the OP Help Center content for the release of OP 14.19 or OP 19. OP 19 is a member of the certified OP 14 family of products (official version is 14.19.1), which you may see in your software (such as in Help > About) and in the Help Center tabs labeled 14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

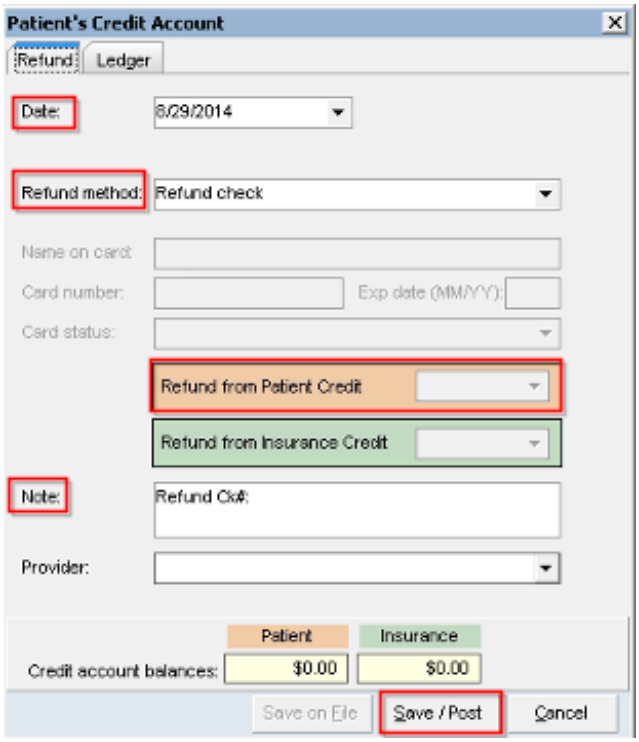
Issuing a Patient Refund

Last Modified on 10/17/2019 12:44 pm EDT

Version 14.19

The amount to be refunded must first exist as a credit in the patient's account.

1. Click the **Patient Chart** button on the Clinical, Billing, or Practice Management tab.
2. Click **Credits** in the Account section of the Window Navigation Panel.
3. Click the **Refund** button. The **Patient Credit Account** window is displayed.
4. Select the following:
    a. **Date:** Default is the current date. Select a different date if applicable.
    b. **Refund Method:** Select what type of payment method the refund will be.
    c. **Refund from Patient Credit:** The amount to be refunded to the patient.
    d. **Note:** Enter the check number and details/explanation for the refund, if appropriate.
    e. Click the **Save/Post** button at the bottom to save changes and exit.



Version 14.10

The amount to be refunded must first exist as a credit in the patient's account.

1. Click the **Patient Account** button

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2. Click the **Credit** tab

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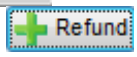
3. Click the **Refund** button 

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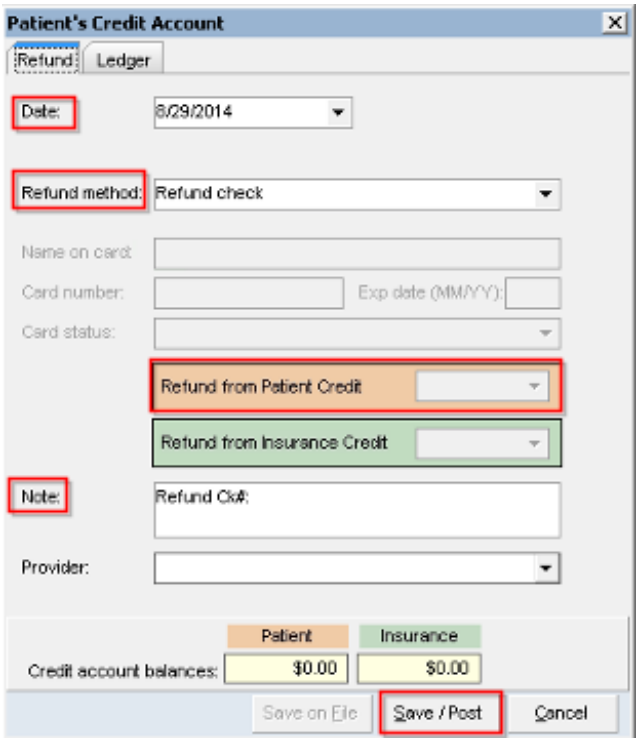
4. The Patient Credit Account window is displayed. Select the following:
    a. **Date:** Default is the current date. Select a different date if applicable.
    b. **Refund Method:** Select what type of payment method the refund will be.
    c. **Refund from Patient Credit:** The amount to be refunded to the patient.
    d. **Note:** Enter the check number and details/explanation for the refund, if appropriate.
    e. Click the **Save/Post** button at the bottom to save changes and exit.


Patient's Credit Account
Refund
Ledger
Date:
8/29/2014
Refund method:
Refund check
Name on card:
Card number:
Exp date (MM/YY):
Card status:
Refund from Patient Credit
Refund from Insurance Credit
Note:
Refund Ck#:
Provider:
Patient
Insurance
Credit account balances:
$0.00
$0.00
Save on File
Save / Post
Cancel