

## Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

# Entering a Refund

Last Modified on 11/19/2019 1:39 pm EST

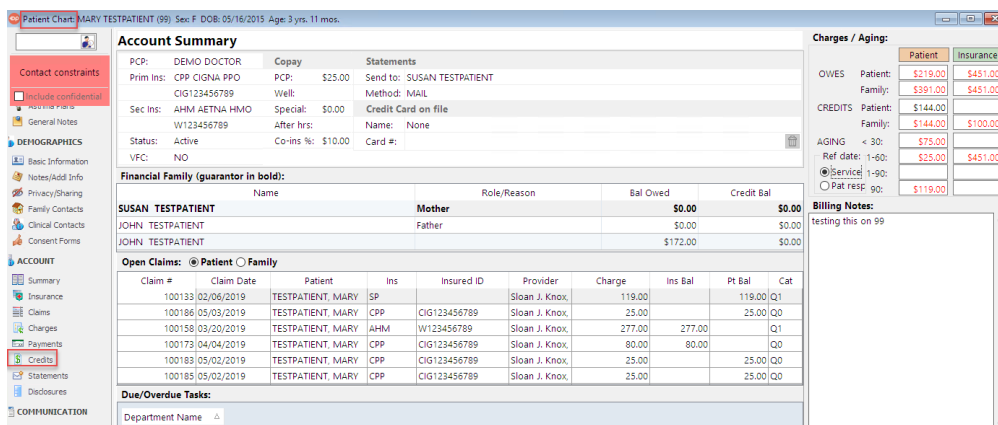
Version 14.19

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

## Overview

To issue a refund, the amount to be refunded (e.g., overpayment, erroneous patient payment) *must* first be entered as a credit in the patient's chart. If a refund is being issued as a result of a retraction, the original payment must be deleted from the corresponding claim to allow OP to record an available credit on a patient's chart. The following instructions assume there is an available credit on the specified patient chart.

1. From the patient chart, click **Credits** in the Account section of the Window Navigation Panel.



**Account Summary**

PCP: DEMIO DOCTOR    Copay:    Statements  
 Prim Ins: CPP CIGNA PPO    PCP: \$25.00    Send to: SUSAN TESTPATIENT  
 CIG123456789    Well:    Method: MAIL  
 Sec Ins: AHM AETNA HMO    Special: \$0.00    Credit Card on file  
 W123456789    After hrs:    Name: None  
 Status: Active    Co-ins %: \$10.00    Card #:     
 VFC: NO

**Financial Family (guarantor in bold):**

Name	Role/Reason	Bal Owed	Credit Bal
<b>SUSAN TESTPATIENT</b>	Mother	\$0.00	\$0.00
JOHN TESTPATIENT	Father	\$0.00	\$0.00
JOHN TESTPATIENT		\$172.00	\$0.00

**Open Claims:  Patient  Family**

Claim #	Claim Date	Patient	Ins	Insured ID	Provider	Charge	Ins Bal	Pt Bal	Cat
100133	02/06/2019	TESTPATIENT, MARY	SP		Sloan J. Knox	119.00		119.00	Q1
100186	05/03/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox	25.00		25.00	Q0
100158	03/20/2019	TESTPATIENT, MARY	AHM	W123456789	Sloan J. Knox	277.00		277.00	Q1
100173	04/04/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox	80.00	80.00		Q0
100183	05/02/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox	25.00		25.00	Q0
100185	05/02/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox	25.00		25.00	Q0

**Due/Overdue Tasks:**  
 Department Name:

**Charges / Aging:**

	Patient	Insurance
OIVES Patient:	\$219.00	\$451.00
OIVES Family:	\$391.00	\$451.00
CREDITS Patient:	\$144.00	
CREDITS Family:	\$144.00	\$100.00
AGING < 30:	\$75.00	
Ref date: 1-90:	\$25.00	\$451.00
Service: 1-90:		
Pat resp: 90:	\$119.00	

**Billing Notes:**  
 testing this on 99

2. Click the **Refund** button.

Patient Chart: MARY TESTPATIENT (99) Sex: F DOB: 05/16/2015 Age: 3 yrs, 11 mos.

Credits    New Credit    **Refund**    Delete    Receipt    Print

Drag a column header here to group by that column

#	Date	Patient Credit	Patient Debit	Ins Credit	Ins Debit	Insur Carrier	Dep Meth	Deposit Source	Check/Approval	Payment Trx #	Note	Entered by	Posted Date	Prov	Location	Credit Card Trans ID	Cardholder Name	CC#
	04/02/20	19.00					CA						CINDY DO	4/2/2019	0	Primary Loc		
	04/02/20	25.00					CA						CINDY DO	4/2/2019	0	Primary Loc		
	03/11/20				(100.00)		RT	Pt 100		0			DEMO DO	3/11/2015	0	Primary Loc		
	03/11/20			100.00		BPC	CK		123456				DEMO DO	3/11/2015	0	Primary Loc		
	03/11/20	100.00				SP	PC	VOID	123456	628	VOID payment to DEMO DO		DEMO DO	3/11/2015	305	Primary Loc		

**Note:** To change the date of the refund from the current date, click the down arrow next to the **Date** field and select a new Date from the drop-down menu

3. Select the appropriate **Refund Method** from the drop-down menu. You can select check, cash, credit card, etc.

Patient's Credit Account

Refund    Ledger

Date: 5/9/2019

Refund method: **Refund check**

Name on card: Refund check

Card number: Refund cash

Card status: Refund credit card

Refund from Insurance Credit

Note: Refund Ck#:

Provider:

Patient    Insurance

Credit account balances: \$144.00    \$0.00

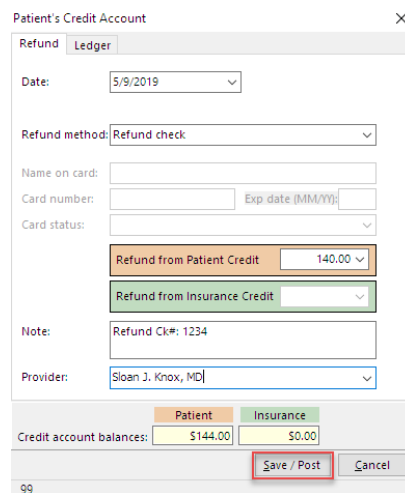
Save / Post    Cancel

99

4. Enter the amount to be refunded in the **Refund From Patient Credit** or **Refund from Insurance Credit** field as appropriate.

**Note:** If no patient or insurance credit has been entered in the patient's account, the number pad icons are grayed out and no amount can be entered.

5. Enter the refund details in the free-form **Note** field. Include a clear description of why the Refund is being issued.
  - If the refund method type selected is a Check, enter the **Refund Check Number** and any other pertinent information in regard to this refund.
  - If the refund method type selected is an **Insurance transfer**, please see: **Processing an Insurance Retraction, Takeback, or Recoupment**.
  - If the refund entry is being done to correct a previous user error of credit/payment duplication, for example, select **Refund transfer** as the refund method and enter the explanation in the Note field.
6. Click the **Save/Post** button to return to the patient's chart.



Patient's Credit Account

Refund Ledger

Date: 5/9/2019

Refund method: Refund check

Name on card:

Card number: Exp date (MM/YY):

Card status:

Refund from Patient Credit 140.00

Refund from Insurance Credit

Note: Refund Ck#: 1234

Provider: Sloan J. Knox, MD

	Patient	Insurance
Credit account balances:	\$144.00	\$0.00

Save / Post Cancel

99

Version 14.10

**Path: Smart Toolbar > Account button > Credits tab**

## Overview

To issue a Refund, the amount to be refunded (e.g., overpayment, erroneous patient payment) *must* first be entered as a credit in the patient's account. If a Refund is being issued as a result of a retraction, the original payment must be deleted from the corresponding claim to allow OP to record an available credit on a patient's account. The following instructions **assume** there is an available credit on the specified patient account.

1. From the patient account, click the **Credit** tab.

[F12] Patient Account: THOMAS TEST (5007) Sex: M DOB: 07/02/2003 Age: 11 yrs. 1 mos.

Overview

Demographics / Patient Responsibility:

PCP: Doctor Test Copay: Statements

Prim Ins: AEB AETNA PCP: \$0.00 \$0.00 Send to: FATHER TEST

W5555555555 Well: Method: MAIL

Sec Ins: MED MEDICAID NC Special: \$0.00 \$0.00 Credit Card on file

00000000000000 After hrs: Name: None

Status: Active Co-ins %: \$0.00 \$0.00 Card #:

VFC: NO

Financial Family (guarantor in bold):

Name	Role/Reason	Bal Owed	Credit Bal
<b>FATHER TEST</b>	Father	\$0.00	\$0.00

Open Claims:

Claim #	Claim Date	Patient	Ins	Insured ID	Provider	Charge	Ins Bal	Pl Bal	Cat
163549	01/14/2013	TEST, THOMAS	AEB	W5555555555	Doctor Tes	140.00	140.00		Q0

Charges / Aging:

	Patient	Insurance
<b>CHARGE</b>		
Balance owed:	\$0.00	\$140.00
Family owed:		\$31.72
<b>CREDITS</b>		
Patient:		\$150.00
Family:		\$150.00
<b>AGING</b>		
Ref date:	< 30:	
	31-60:	
<input checked="" type="radio"/> Service	61-90:	
<input type="radio"/> Pat resp	> 90:	\$31.72

Billing Notes:

2. Click the **Add Refund** button.

[F12] Patient Account: THOMAS TEST (5007) Sex: M DOB: 07/02/2003 Age: 11 yrs. 1 mos.

Overview

Insurance

Charges

Claims

Payments

Credits

Statements

Tasks

Messages

Consents

Disclosures

Scope

Patient  
 Family

Refund

Receipt

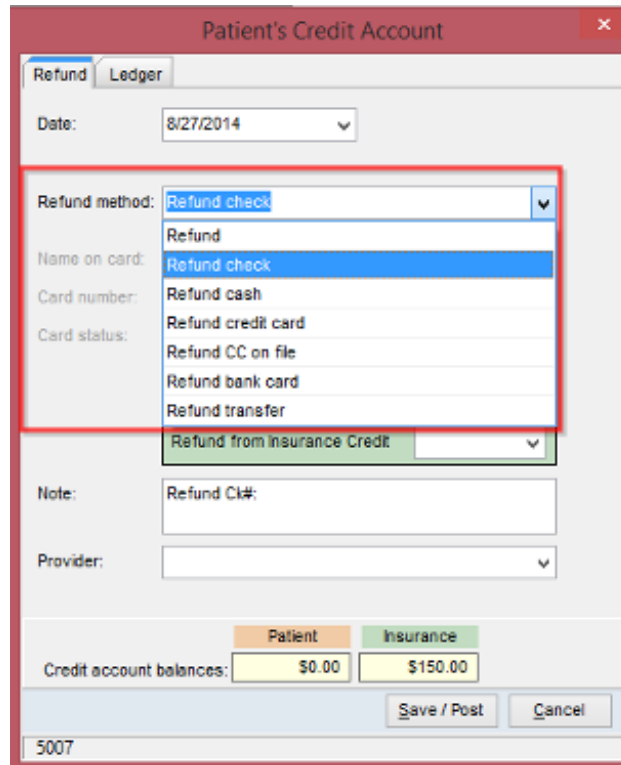
Drag a column header here to group by that column

Date	Patient Credit	Patient Debit	Insurance Credit	Insurance Debit	Insur Carrier	Dep Meth	Deposit Source	Check/ Approva#	Payment Trx #	Note	Entered by	Posted Date	Prov	Location	Credit Card Trans ID	Card
07/04/2012			150.00		AEB	CK	AETNA	123456789		Retraction from retr	Doctor Test			1064 Office Pract		



**Note:** To change the date of the refund from the current date, click on the down arrow next to the Date field and select a new date from the dropdown list.

3. Select the appropriate **Refund method** from the drop-down menu. Select from check, cash, credit card, etc.



The screenshot shows a software window titled "Patient's Credit Account" with a "Refund" tab selected. The "Date" is set to 8/27/2014. The "Refund method" dropdown menu is open, listing options: Refund, Refund check (highlighted), Refund cash, Refund credit card, Refund CC on file, Refund bank card, Refund transfer, and Refund from Insurance Credit (highlighted in green). Below the dropdown is a "Note" field containing "Refund Ct#:" and a "Provider" dropdown. At the bottom, a table shows "Credit account balances" for "Patient" (\$0.00) and "Insurance" (\$150.00). Buttons for "Save / Post" and "Cancel" are visible.

4. Enter the **Amount** to be refunded in the Refund From Patient Credit or Refund from Insurance Credit field as appropriate.

**i** If no patient or insurance credit has been entered in the patient's account, the number pad icons will be grayed out and no amount can be entered.

5. Enter the **Refund** details in the free-form Note field. Include a clear description of why the Refund is being issued.
  - If the refund method type selected is a check, enter the **Refund Check Number** and any other pertinent information in regard to this refund.
  - If the refund method type selected is an Insurance transfer, please see [Processing an Insurance Retraction, Takeback, or Recoupment](#).
  - If the refund entry is being done to CORRECT for a previous user error of credit/payment duplication, for example, select **Unspecified** as the refund method and enter the **Explanation** in the note field as appropriate.
6. Click the **Save/Post** button to return to the Patient's Account form.

Patient's Credit Account

Refund Ledger

Date: 8/27/2014

Refund method: Refund check

Name on card:

Card number: Exp date (MM/YY):

Card status:

Refund from Patient Credit

Refund from Insurance Credit 150.00

Note: Refund Cl#: 1234

Provider: Doctor Test, MD

	Patient	Insurance
Credit account balances:	\$0.00	\$150.00

Save / Post Cancel

5007