Office Practicum

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

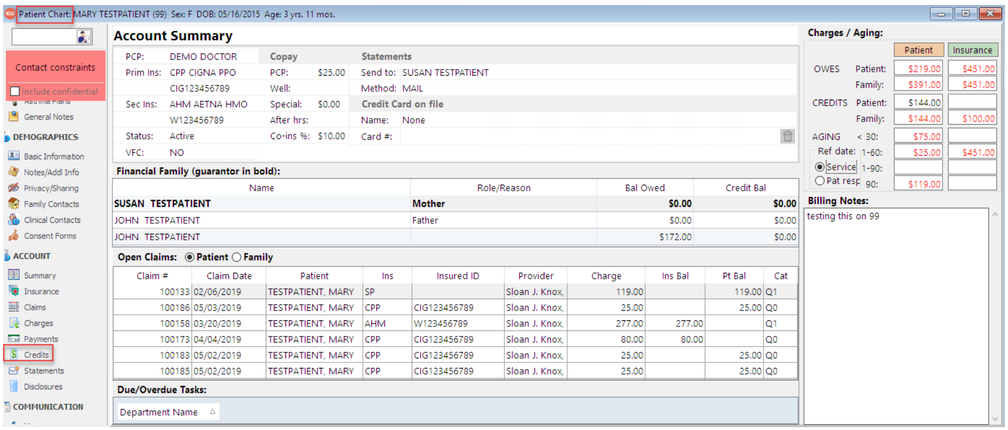
Version 14.19

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

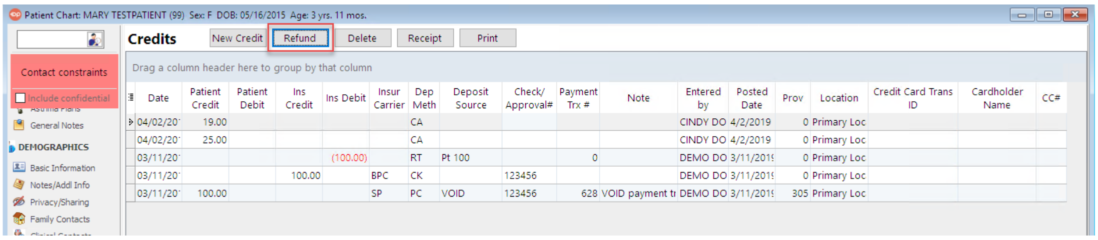
Overview

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.

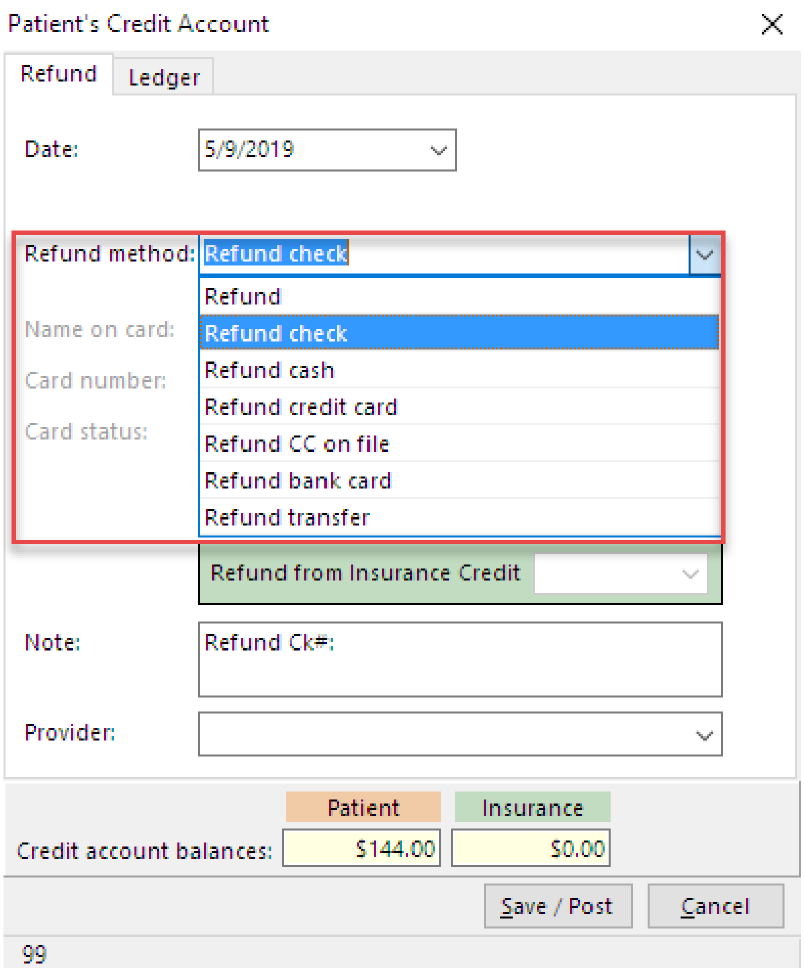


2. Click the **Refund** button.



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

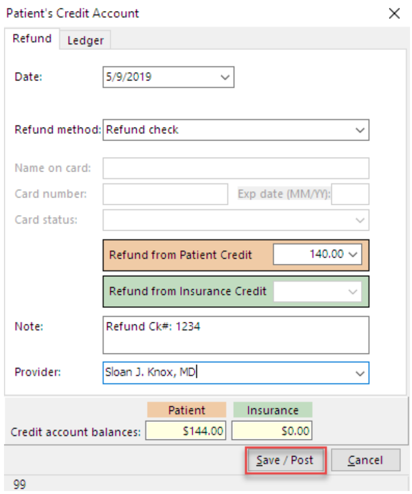
3. Select the appropriate **Refund Method** from the drop-down menu. You can select check, cash, credit card, etc.



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.



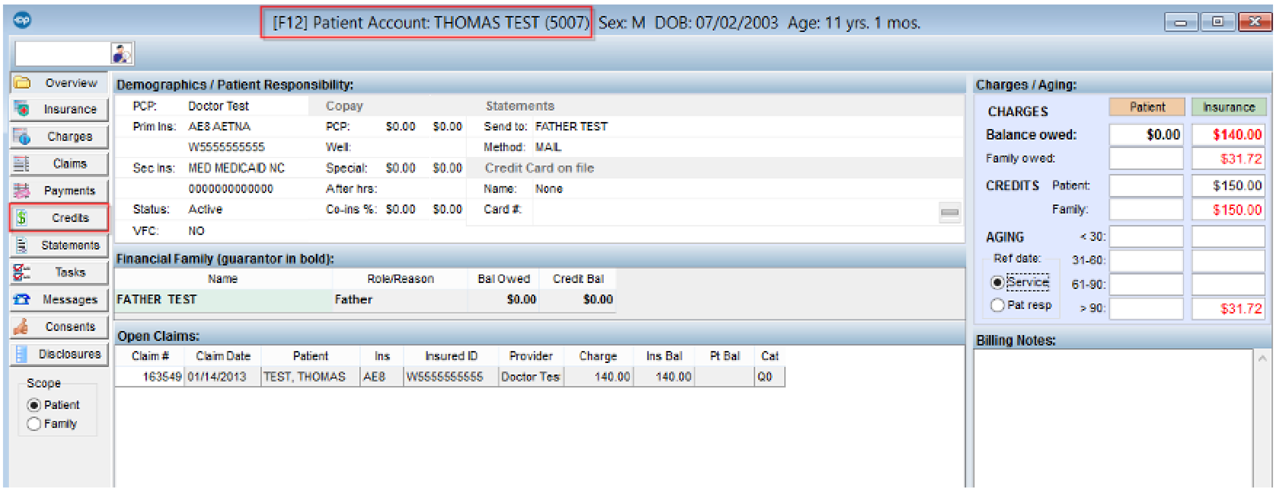
Version 14.10

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

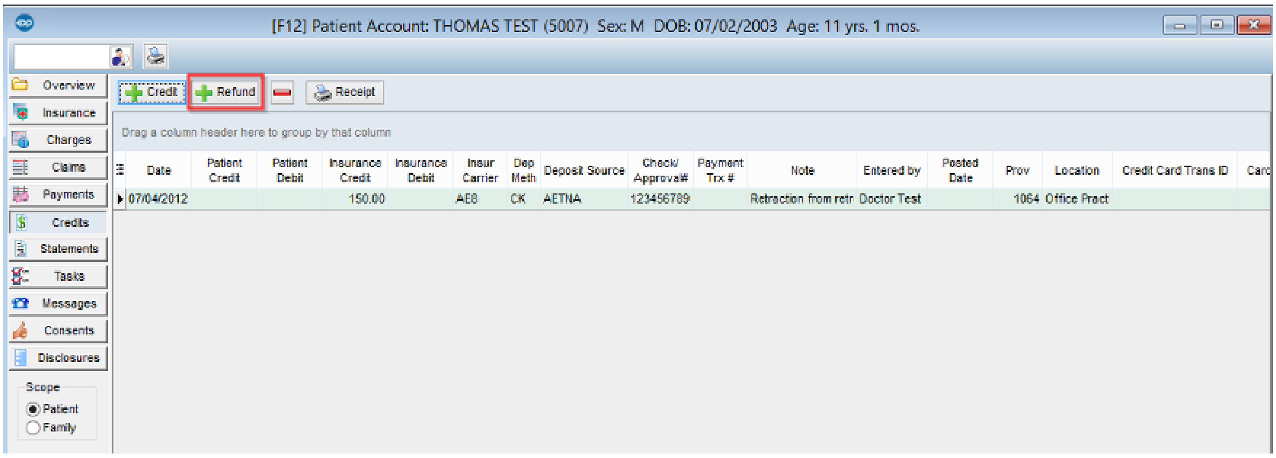
Overview

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.

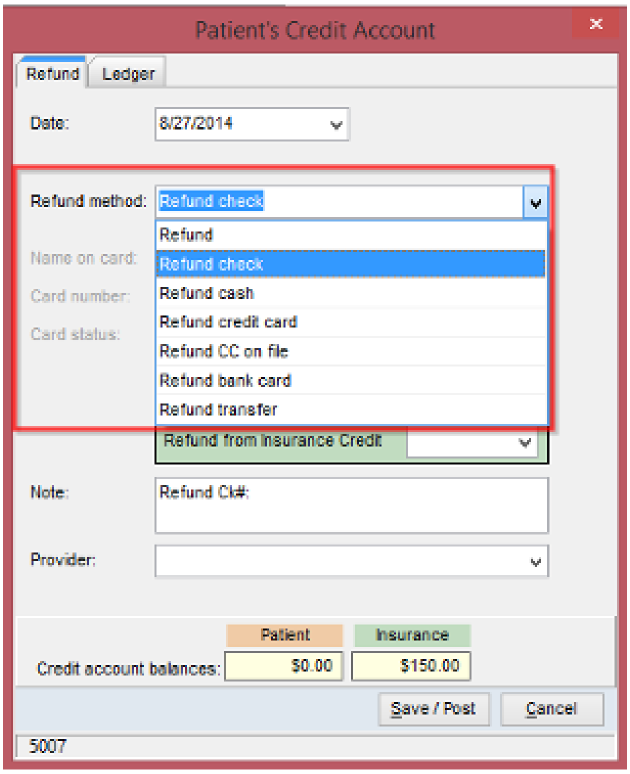


2. Click the **Add Refund** button.



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.



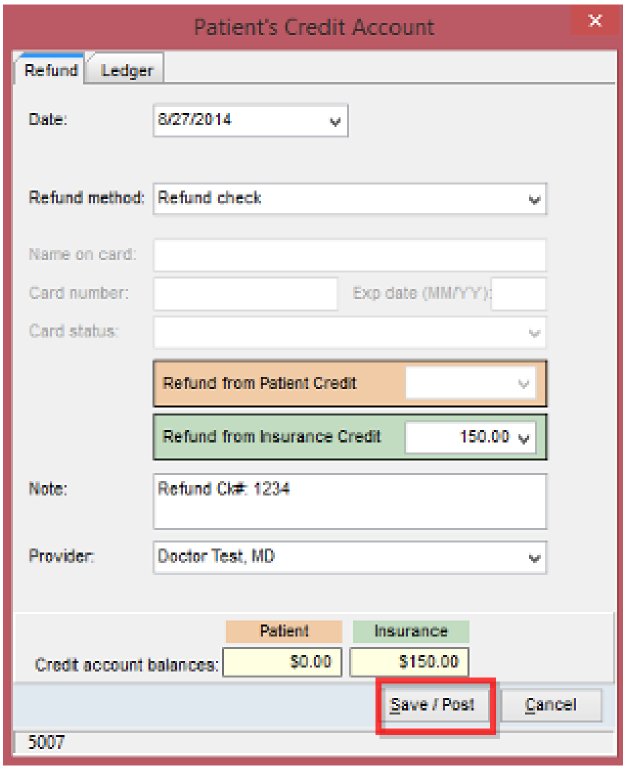
4. Enter the **Amount** to be refunded in the Refund From Patient Credit or Refund from Insurance Credit field as appropriate.

> 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 Ck#: 1234
Provider:
Doctor Test, MD
Patient
Insurance
Credit account balances:
$0.00
$150.00
Save / Post
Cancel
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