Manually Add a Credit for an Overpayment

Last Modified on 05/23/2019 2:20 pm EDT

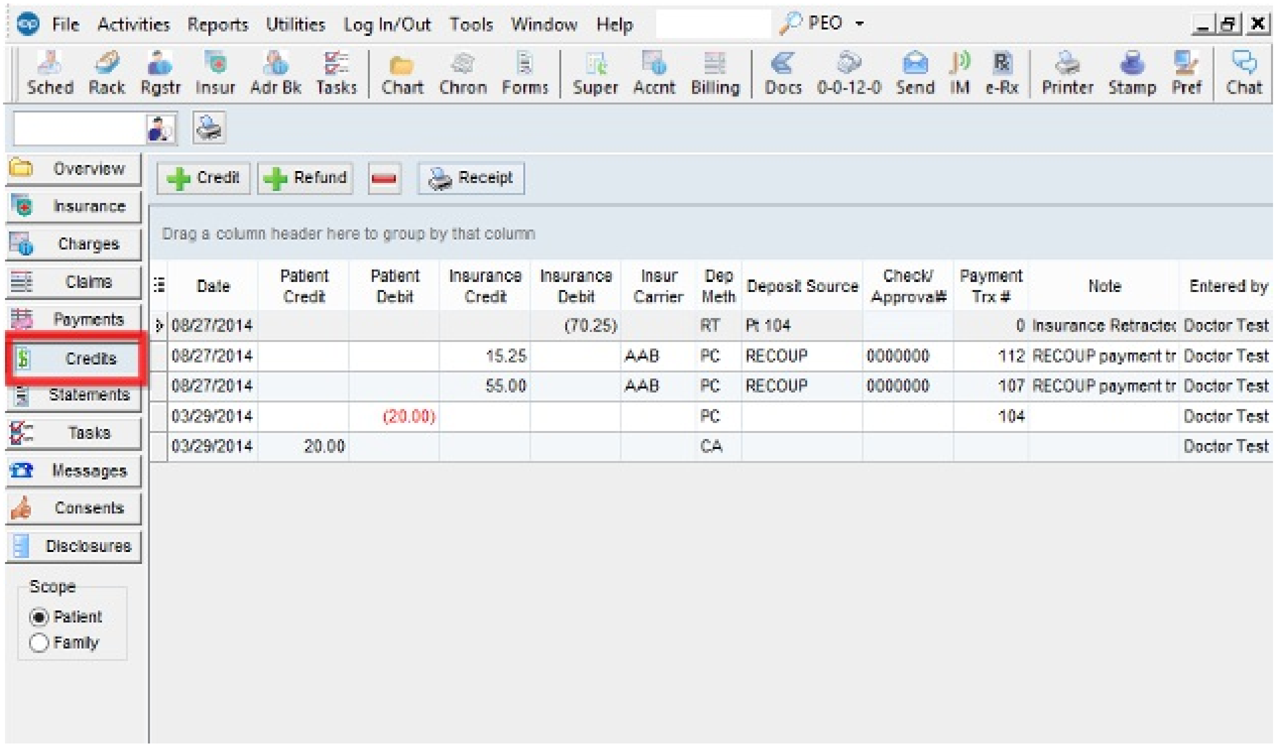
Version 14.19

Path: Smart Toolbar > Account button > Credits tab

Overview

Overpayments can be received by a patient and/or an insurance payer via an EOB or an ERA. When a payer identifies an insurance overpayment, the payer will ultimately either request a refund or apply the overpayment to another patient account.

1. From the patient account, click on the **Credits** tab.

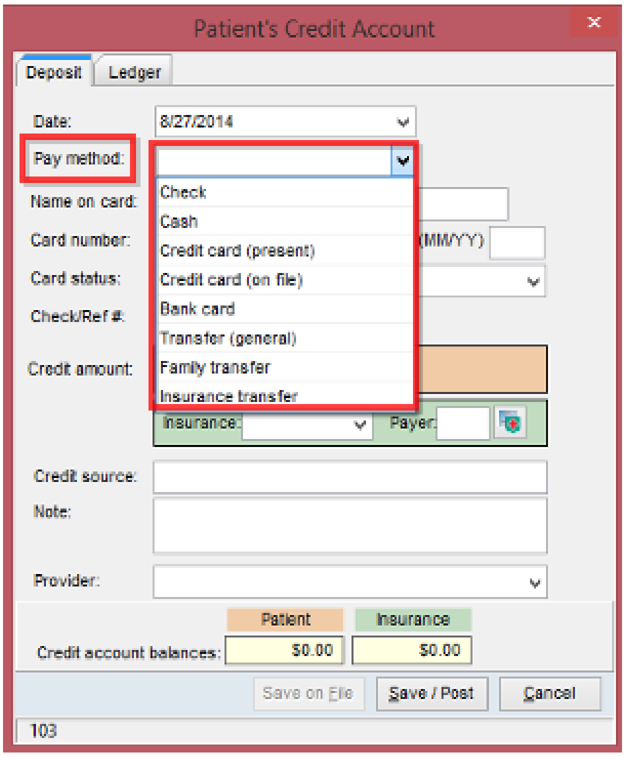


Account

2. Click on the **Plus Credit** button Credit .

> **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. Click the **dropdown** box next to the Pay method field and select the appropriate method of the overpayment. Choose from check, cash, credit card, etc.



Patient Credit Account

⚠	**Note**: If the method of payment is check, you **MUST** also enter the check number in the Check/Ref # field.

4. Enter the amount of the overpayment in the Patient or Insurance Credit Amount field as appropriate.

⚠	**Note**: For Insurance credits ONLY, you **MUST** also select the payer by clicking on the lookup button next to the Insurance Payer field.

5. Enter a **Credit Source**, if applicable.
6. Enter the credit details/explanation in the**Note** field.

✔	**Note**: Include as many details as possible, including any information about an error or retraction, if applicable. (e.g., "Duplicate payment for date of service, xx/xx/xx").

7. Click on the **dropdown** box to the right of the provider field to select the individual provider the credit is being issued against, if applicable.

ℹ	This feature is for offices who isolate payments and credits by provider for financial purposes.

8. Click the **Save/Post** button to return to the Patient Account.

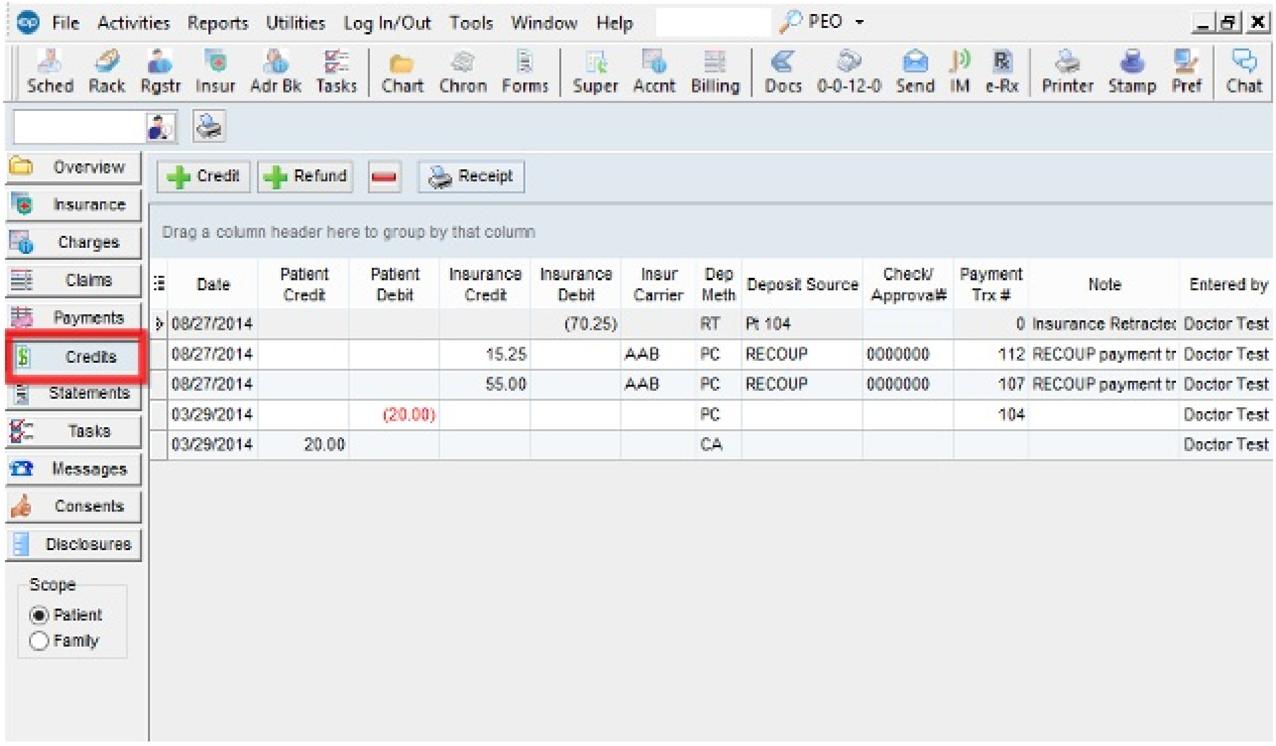
Version 14.10

Path: Smart Toolbar > Account button > Credits tab

Overview

Overpayments can be received by a patient and/or an insurance payer via an EOB or an ERA. When a payer identifies an insurance overpayment, the payer will ultimately either request a refund or apply the overpayment to another patient account.

1. From the patient account, click on the **Credits** tab.

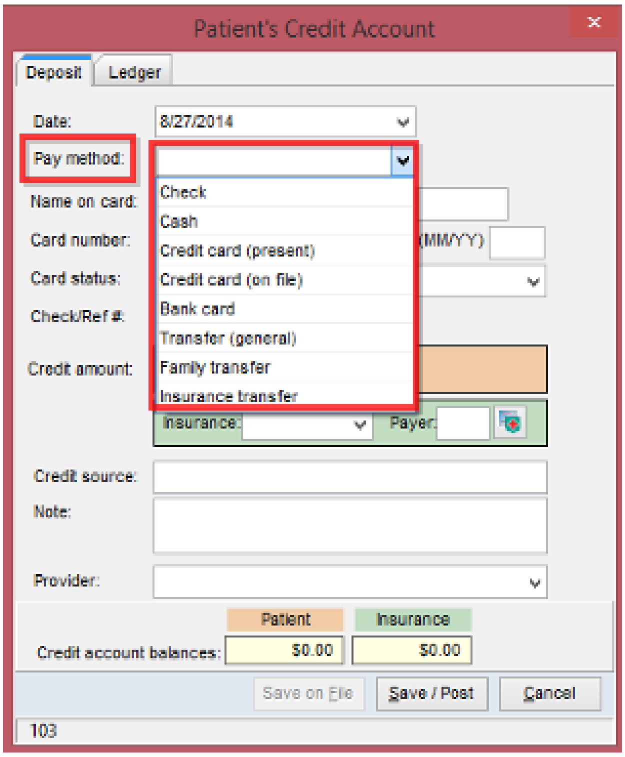


Account

2. Click on the **Plus Credit** 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. Click the **dropdown** box next to the Pay method field and select the appropriate method of the overpayment. Choose from check, cash, credit card, etc.



Patient Credit Account

Note: If the method of payment is check, you **MUST** also enter the check number in the Check/Ref # field.

4. Enter the amount of the overpayment in the Patient or Insurance Credit Amount field as appropriate.

Note: For Insurance credits ONLY, you **MUST** also select the payer by clicking on the lookup button next to the Insurance Payer field.

5. Enter a **Credit Source**, if applicable.
6. Enter the credit details/explanation in the**Note** field.

Note: Include as many details as possible, including any information about an error or retraction, if applicable. (e.g., "Duplicate payment for date of service, xx/xx/xx").

7. Click on the **dropdown** box to the right of the provider field to select the individual provider the credit is being issued against, if applicable.

This feature is for offices who isolate payments and credits by provider for financial purposes.

8. Click the **Save/Post** button to return to the Patient Account.