

Credits and Refunds

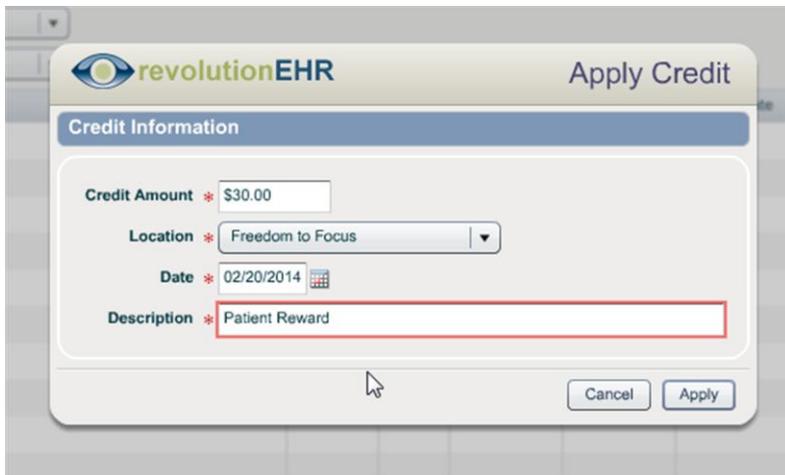
Patient Credit is a credit balance that is found in the patient's Account Pod



The screenshot shows the patient's account pod for Ernie Hansen. The Account pod displays the following balances:

Current Balance	
Patient Balance	\$0.00
Patient Credit	\$30.00
Insurance Balance	\$0.00
Collections Balance	\$0.00

From within the Account Pod, select Credit in the lower right. This will allow you to put a credit amount to the patient. This works well for credit balances being brought forward from previous software or for monies you are giving the patient to spend in practice.

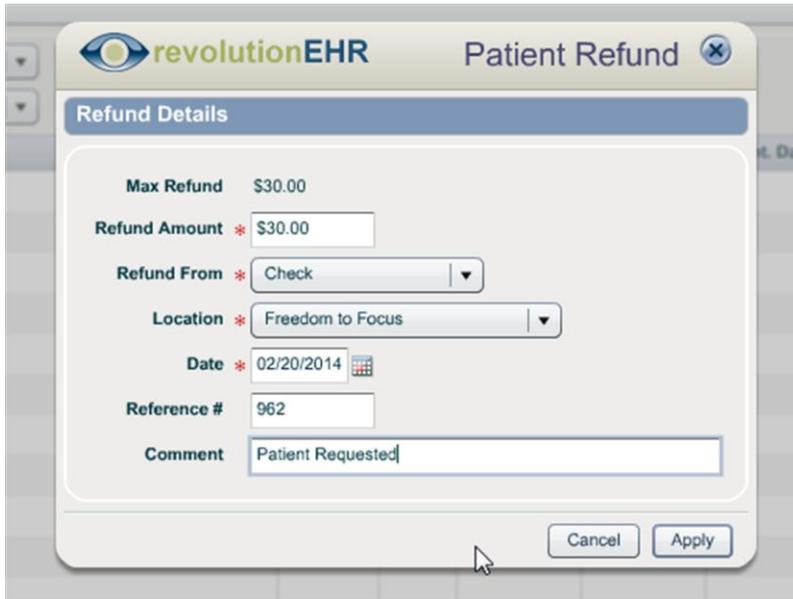


The 'Apply Credit' dialog box contains the following information:

- Credit Amount:** \$30.00
- Location:** Freedom to Focus
- Date:** 02/20/2014
- Description:** Patient Reward

You can use this credit balance to pay on outstanding invoices- be sure you have "credit" as an option for payment in your payment preferences in Admin. You can also Refund this back to the patient. Select Refund in the lower right of the Account Pod. Make sure the refund amount is correct, the method you are refunding, the date

returned (*this can be back dated*), check # can be entered into the reference box and you can include a description of why you are refunding.



revolutionEHR Patient Refund

Refund Details

Max Refund \$30.00

Refund Amount * \$30.00

Refund From * Check

Location * Freedom to Focus

Date * 02/20/2014

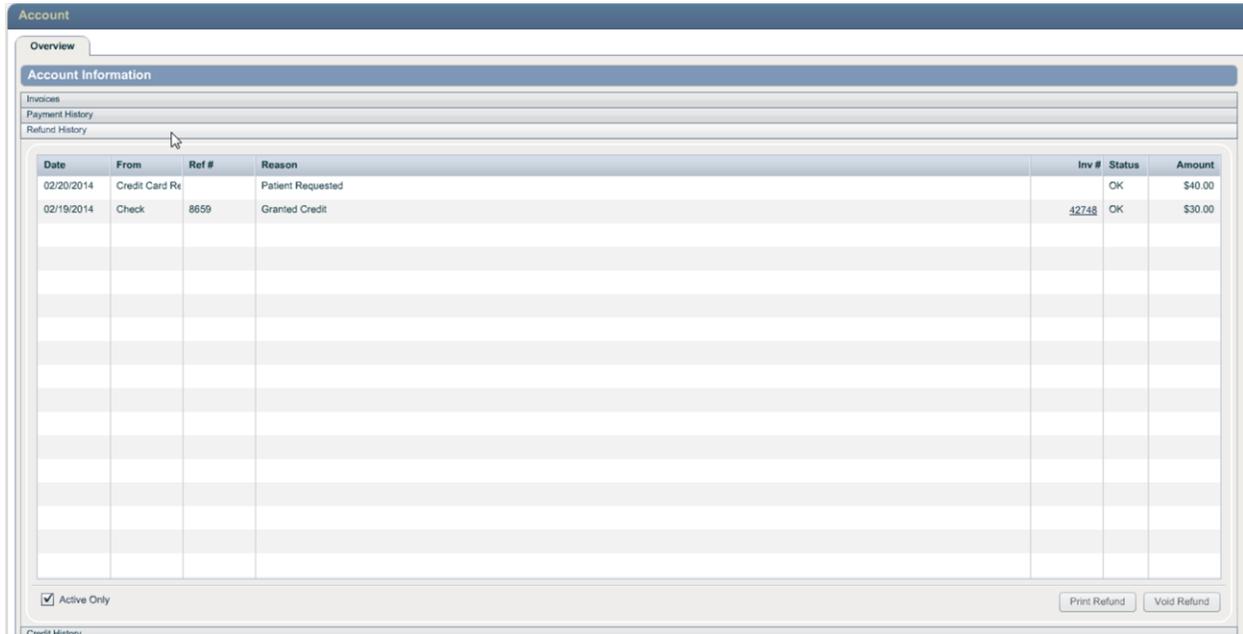
Reference # 962

Comment Patient Requested

Cancel Apply

Invoice Credits are a credit on an invoice that is the result of an overpayment. These will hold (a negative value). If you have an invoice credit on a patient invoice, you could leave this credit on the invoice or you could Grant Credit. Grant Credit will allow you to send the full balance, or a partial balance, to the patient credit in the Account Pod, to another family member linked to the patient, refund to the patient (*you cannot backdate a refund issued here*), or refund to a family member.

The refund history slider in the patient Account Pod will show all refunds whether it was a manual refund or a refund from the Grant Credit. You can Void and Print from this slider.



Date	From	Ref #	Reason	Inv #	Status	Amount
02/20/2014	Credit Card Re		Patient Requested		OK	\$40.00
02/19/2014	Check	8659	Granted Credit	42748	OK	\$30.00

Insurance invoices with credits offer the same options in Grant Credit that the patient invoices do with the addition of being able to refund back to the insurance company. Examples: If the overpay is due to insurance processing in full, you could send the credit to the patient for their portion paid. If this is a duplicate payment, you could issue refund back to the insurance.


Grant Credit

Grant Credit

	Current Balance	(\$60.00)
<input type="checkbox"/> Credit to Patient		\$0.00
<input type="checkbox"/> Credit to Family Member: White, Snow		\$0.00
<input type="checkbox"/> Refund to Patient		\$0.00
Cash Ref #: Location: Freedom to Focus		
<input type="checkbox"/> Refund to Family Member: White, Snow		\$0.00
Cash Ref #: Location: Freedom to Focus		
<input type="checkbox"/> Refund to Insurance:		\$0.00
Cash Ref #: Location: Freedom to Focus		
	Ending Balance	(\$60.00)

Cancel
Apply

Reports:

- Refunds- show refunds issued to patient and to insurance
- Receipts- will show Granted Credits because money was moved from an account
- Deposits- will show credit card reversals to match your machine totals processed that day
- Admin/Vendors/Insurance/Company- Refund and Credit sliders listed here for history

Reports to find credit balances:

- Patients/Patient Search/Import- a prebuilt report for use to find patients with a credit balance
- Build an invoice credit report to find credits on invoices- Example below

revolutionEHR Query Builder

Available Fields

- ▶ Patient
- ▶ Key Dates
- ▶ Account
- ▶ Alerts
- ▶ Communication
- ▶ Referred By
- ▶ Category
- ▶ Insurance
- ▶ Diagnoses
- ▶ Medications
- ▶ Eyeglass Rx
- ▶ Contact Rx
- ▶ Allergies
- ▶ Labs/Imaging
- ▶ Invoices
- ▶ Orders
- ▶ Appointments
- ▶ Encounters
- ▶ Recalls
- ▶ Performed Services
- ▶ Referred Out

Search Definition

Name * Invoices with Credit Balances

Description

Category Accounting

Result Fields

Patient #	⊖
Patient Last Name	⊖
Patient First Name	⊖
Invoice Balance	⊖

Sort Fields

Patient Last Name	ASC	⊖
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Access Roles

- Insurance Specialist
- Nurse
- Office Administrator
- Ophthalmologist
- Optician
- Optometrist
- Receptionist
- RevCycle

Select All Clear All

Search Criteria

Field	Operator	Comparison Value(s)
Invoice Balance	Less than	0.0

Cancel Save

****Tip**** you can go to the Accounting Module, have your status set to Active and leave all other fields blank and Search. This will bring a list of all active invoices in your system. If you click on the word Balance above the column to the far right, this will sort your invoices by balance bringing all credits to the top.



Accounting

Accounting Home

Location: All Payer Type: Any Payers Invoice #: Invoice Date: Status: Active Payer Name: Patient Name: Service Date: Approval: Either Payer Name: Patient #: Stmt. Print Date: Origin: Any Provider: All Invoice Age: Any

Clear Search

#	Payer	Patient	Age	Status	Inv. Date	Svc. Date	Stmt. Date	Amount	Balance
42838	UHC	Charming, Prince	0	Active	02/20/2014	02/20/2014		\$60.00	\$60.00
13319	Peter Pan	Pan, Peter	665	Active	04/25/2012	04/25/2012		\$237.00	\$38.60
35843	Jimmy Crackles	Com, Jimmy Crackles	166	Active	06/06/2013	06/07/2013	09/06/2013	\$70.00	\$25.00
42784	Prince Charming	Charming, Prince	0	Active	02/19/2014	02/19/2014		\$0.00	\$20.00
42819	Grass Hopper	Hopper, Grass	0	Active	02/19/2014	02/19/2014		\$0.00	\$20.00
42824	Kermit The Frog	The Frog, Kermit	0	Active	02/19/2014	02/19/2014		\$70.00	\$15.00
41836	UHC	Hopper, Grass	20	Active	01/30/2014	12/16/2013		\$0.00	\$0.00
21869	Peter Pan	Pan, Peter	436	Active	12/10/2012	04/09/2012	09/06/2013	\$95.00	\$10.00
41833	UHC	Pan, Peter	20	Active	01/30/2014	04/09/2012		\$95.00	\$20.00
41834	Yoda Skywalker	Skywalker, Yoda	20	Active	01/30/2014	05/29/2012		\$714.18	\$23.95
35769	Peter Pan	Pan, Peter	167	Active	06/06/2013	09/06/2013	09/06/2013	\$25.00	\$25.00
13630	Peter Pan	Pan, Peter	645	Active	05/11/2012	04/09/2012	09/06/2013	\$95.00	\$30.00
19139	Anna Pan	Pan, Anna	516	Active	09/21/2012	05/03/2012	09/06/2013	\$40.00	\$40.00
35768	Peter Pan	Bat, Tricker	167	Active	06/06/2013	09/06/2013	09/06/2013	\$60.00	\$60.00