Correcting Patient Payments

Quick Reference Guide for RCM Clients

To review entering patient payments, please visit the [Patient Credits QRG](#) in the RCM Client Corner.

Why might I need to correct a patient payment?

When patient payments are entered, you may inadvertently attach the payment to the wrong patient's account, apply the wrong amount of money, or have some sort of other error that needs to be corrected. Accurately reflecting the amount of money collected and applied to the patient's balance is vital to balancing OP to your bank account.

Types of Payments & Corrections
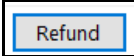
Cash & Check Corrections

When you collect cash or check payments, you are only adding the credit to OP, and you will still need to deposit that money into your bank account. For this reason, correcting cash and checks is very easy:
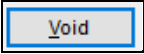
1. Open the patient's chart where you collected the cash or check payment incorrectly.
2. Highlight the credit that you want to make changes to.
   a. If the credit has been daysheeted (it is black in OP), you will need to void or refund the credit.
   b. If the credit has not been daysheeted (it is blue in OP, will only be blue on same-day transactions), you can delete the credit.
3. If you want to void or delete the credit, click the delete button. OP will prompt you to confirm that you want to delete or void. This option should be used if you are trying to correct a mistake.

Credit Card Corrections

**Note: The credit card payment refunds explained here are only for clients using Instamed Merchant services for credit card payments. If you are using any other merchant service vendor, you can follow the "Cash & Check Corrections" steps above to correct credit card payments as well.
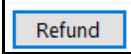
If the credit card was run today:

1. Open the patient's chart where you collected the credit card payment incorrectly.
2. Navigate to [Refund] and then choose the "Ledger" tab.
3. Locate and highlight the credit that was incorrectly run.

4. Click [Void] to remove the credit from the patient's account.

Because this was done same-day, the patient should not see any transactions on their bank account.

If the credit card was run prior to today:

1. Open the patient's chart where you collected the credit card payment incorrectly.
2. Navigate to [Refund] and then choose the "Refund Credit Card" from the refund method.
3. Enter Name on Card, Card Number, Expiration Date, Card status, and the amount to be refunded in the orange patient credit field.
4. Click "Save/Post" to post the refund.

Because this was not done same-day, the patient will likely see both a debit and a credit transaction in their bank account. Additionally, the credit transaction may take a few days to clear. Please contact Instamed for more information on how quickly these transactions can clear.