

Refund a private patient

Last Modified on 29/11/2024 12:48 pm AEDT

Refund a patient who paid their own bill. You may need to do this if the invoice was incorrect or billed incorrectly and you want to refund the payment.

To refund a payment to a private patient:

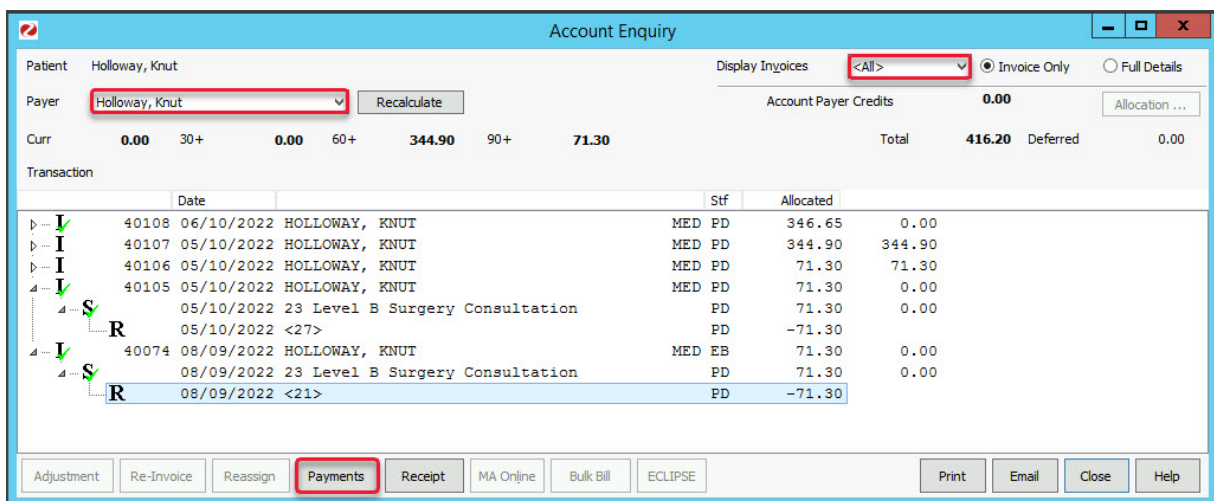
1. Locate and **open the patient's record**.
2. From the top menu, select **Acc Enquiry**.

The **Account Enquiry** screen will open.

3. In the **Display Invoices** field, select **All**.
4. In the **Payer** field, select the patient.
5. Select the invoice you want to refund.

Use the invoice number to confirm it's correct and that it has a green tick, indicating it was paid.

Note: Just processing a refund would leave the invoice unpaid and prevent you from voiding the invoice. For this reason, we will first reverse the amount paid and then process the refund.



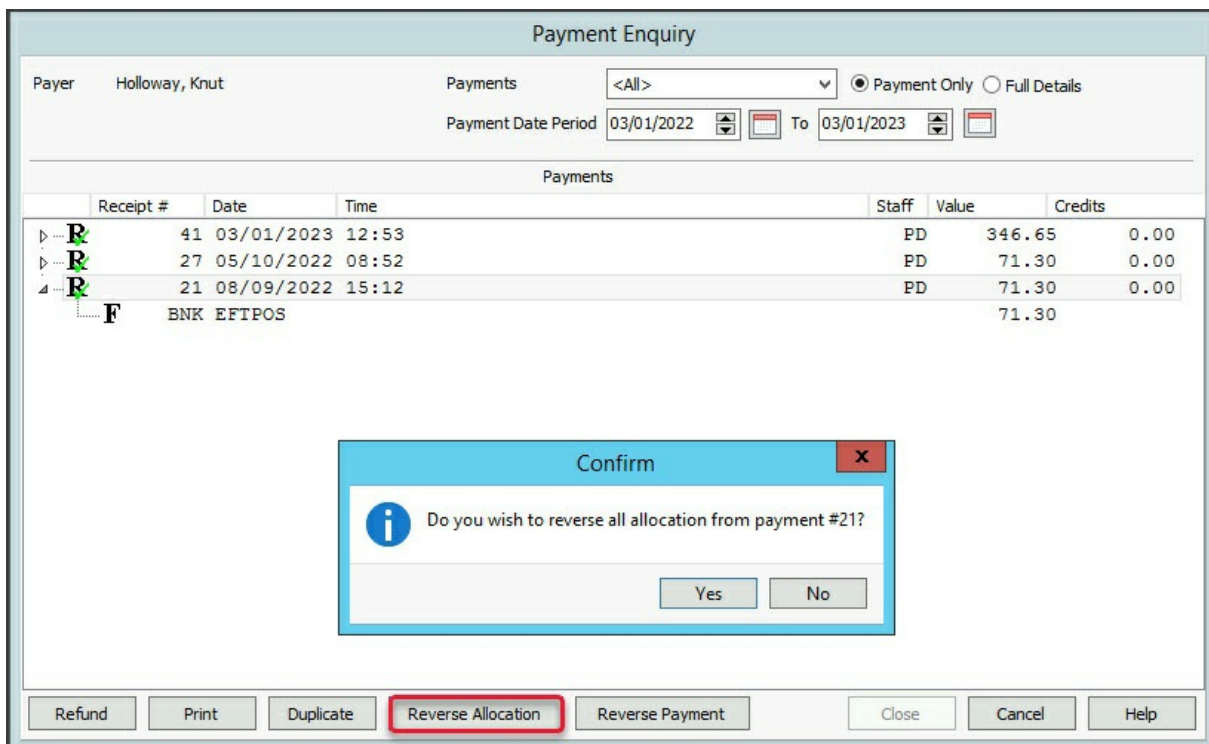
Transaction	Date	Description	Stf	Allocated
40108	06/10/2022	HOLLOWAY, KNUT	MED PD	346.65
40107	05/10/2022	HOLLOWAY, KNUT	MED PD	344.90
40106	05/10/2022	HOLLOWAY, KNUT	MED PD	71.30
40105	05/10/2022	HOLLOWAY, KNUT	MED PD	71.30
	05/10/2022	23 Level B Surgery Consultation	PD	71.30
	05/10/2022	<27>	PD	-71.30
40074	08/09/2022	HOLLOWAY, KNUT	MED EB	71.30
	08/09/2022	23 Level B Surgery Consultation	PD	71.30
	08/09/2022	<21>	PD	-71.30

6. Select **Payments**.

The **Payments Enquiry** screen will open.

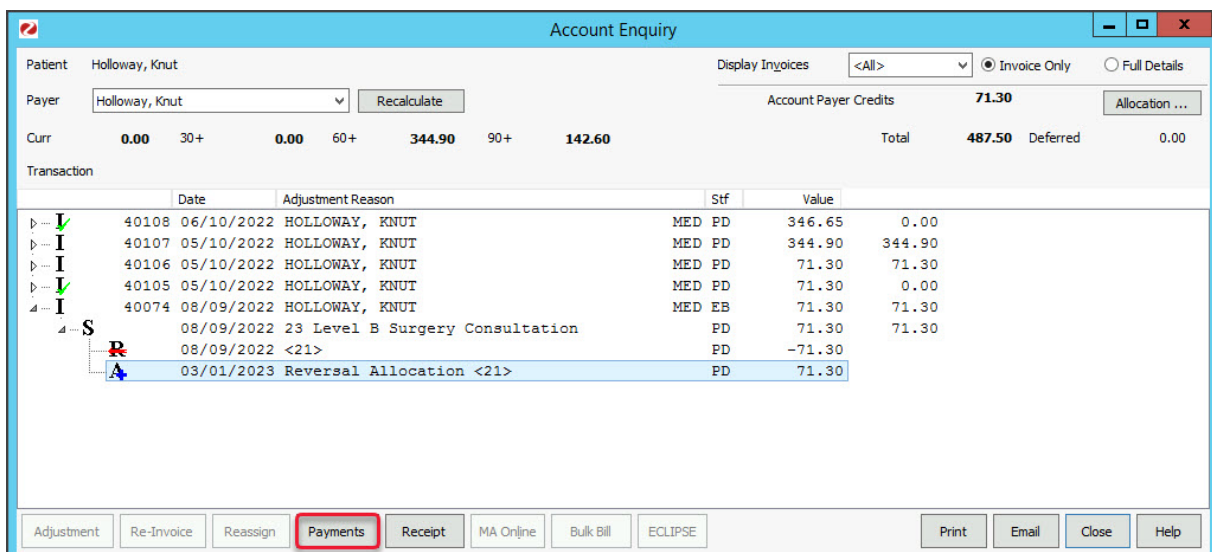
This screen shows every payment taken from the patient. Every time a payment is made, a receipt is created.

7. Select the receipt, and use the receipt number to confirm it's the correct one.
8. Select **Reverse Allocation**.
9. Select **Yes** to make the reversal.



10. Select **Close** to save the change.

You will see the reversal under the receipt.



You can now process the refund.

11. Select **Payments**.
12. Select the receipt again.
13. Select **Refund** to open the **Refund** screen.
14. Select the refund method: **Cash, Cheque** or **Eftpos**.
15. In the **Details** field, enter a reason for the refund.
16. Select **OK** and the amount will disappear from the receipt and the refund will be recorded in Zedmed.
17. Select **Close** to save and exit.

Payment Enquiry

Payer: Holloway, Knut Payments: <All> Payment Only Full Details
 Payment Date Period: 03/01/2022 To 03/01/2023

Payments						
Receipt #	Date	Time	Staff	Value	Credits	
R 41	03/01/2023	12:53	PD	346.65	0.00	
R 27	05/10/2022	08:52	PD	71.30	0.00	
R 21	08/09/2022	15:12	PD	71.30	71.30	
F	BNK EFTPOS			71.30		
C	03/01/2023	In Banklist : BNK	PD		71.30	

Refund

Refund amount: 71.30 Bank list: Albert Road MC Bank Account

Method:

Cash Cheque Eftpos

A cash refund will appear on your banking reports as a negative cash amount.

A refund cheque will be treated as a negative DIRECT DEPOSIT so as not to affect your banking.

A EFT refund will appear on your banking reports as a negative EFT amount.

Warning: This refund will affect the total amount received on the transaction report of the original receipt date. You should reprint that transaction report if this was in the past.

Details:

OK Cancel

Refund Print Help

You will return to the **Account Enquiry** screen and the unallocated credit will be gone.

Payment Enquiry

Payer: Holloway, Knut Payments: <All> Payment Only Full Details
 Payment Date Period: 03/01/2022 To 03/01/2023

Payments						
Receipt #	Date	Time	Staff	Value	Credits	
R 41	03/01/2023	12:53	PD	346.65	0.00	
R 27	05/10/2022	08:52	PD	0.00	0.00	
R 21	08/09/2022	15:12	PD	0.00	0.00	
F	BNK EFTPOS			71.30		
F	BNK CASH	Cash Refund	Processing erro 03/01/2023	PD	-71.30	

Refund Print Duplicate Reverse Allocation Reverse Payment Close Cancel Help

18. Now you need to **cancel the invoice** or **receipt a new payment**