

# Credit an overcharge

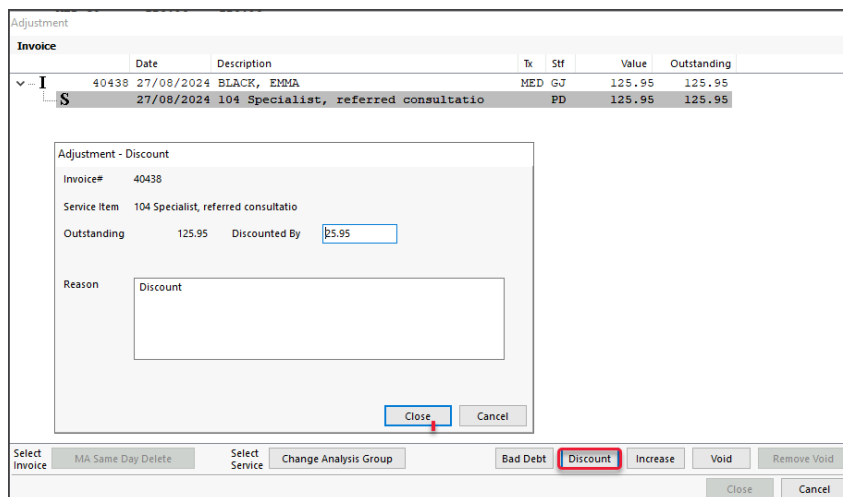
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If a patient has been overcharged, you can credit their account with the overcharged amount instead of doing a refund. For example, if an invoice was receipted for \$300 when the service only cost \$200, you could adjust the invoice to \$200 and save a credit of \$100 against the patient.

To credit an overcharge:

1. Open the patient's record.
  2. Select **Acct Enq.**
  3. Select the invoice then the **Payments** button.
- The **Payment Enquiry** screen will open.
4. Select the Receipt to be reversed.
  5. Select **Reverse Allocation** then **Yes** to confirm.
  6. Select **Close** to return to **Account Enquiry**.
  7. Select the invoice.
  8. Select **Adjustment > Discount**.
  9. Enter the **Discounted by** amount (e.g \$100) then **Close** to save the adjustment.

Now that the Outstanding Amount is correct, you can receipt the invoice again.



Invoice	Date	Description	Tx	Stf	Value	Outstanding
40438	27/08/2024	BLACK, EMMA	MED	GJ	125.95	125.95
104 Specialist, referred consultatio	27/08/2024		PD		125.95	125.95

Adjustment - Discount

Invoice# 40438

Service Item 104 Specialist, referred consultatio

Outstanding 125.95 Discounted By 125.95

Reason Discount

Close Cancel

Select Invoice MA Same Day Delete Select Service Change Analysis Group Bad Debt Discount Increase Void Remove Void Close Cancel

10. Select the **Allocation** button (top right corner).
11. Select the invoice then select **Fully Receipt**.
12. The overpayment (e.g \$100) will show as a credit next to **Account Payer Credits**.

The credit can now be applied to the next invoice raised for the patient.

Transaction									
	Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
▼ - I	40438	27/08/2024	BLACK, EMMA			MED	GJ	125.95	100.00
> - S		27/08/2024	104 Specialist, referred consultatio			PD		125.95	100.00
Value	100.00	Allocated	0.00	Outstanding	100.00	Fully Receipt		Partly Receipt	
						Close	Cancel	Help	