


Refunds

† Modified on 03/30/2025 4:22 pm EDT


Refund Credits

You have the ability to Refund Credits from the patient account. You can apply the Refund to the patient, or to the payer. You can also refund multiple credits to a patient's account, as opposed to individually. Select which credits you wish to refund based on the Practice or the Provider that the credits were applied under.


1. Select **Patient > Manage Account**.
2. Use the **Search** field to search through your patients or insured.


 Place a check in the "**Include inactive patients**" box to include inactive patients in your search results.

3. Select the **Patient**.

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.

4. Click the **Refund Credits** button.
 1. Select whether to refund **Patient** or **Insurance Credits**.
 2. Select which credits you wish to refund based on the **Practice** or the **Provider** that the credits were applied under.
 3. Enter in the **Refund Amount**.
 4. Enter the **Refund Date**.
 5. Enter a **Check or Reference #**.
 6. Enter in a **Memo Line**.
 7. Click the **Apply** button.
5. Click **Save**.


 Need to save your changes and immediately close and reopen the same patient record to take

additional actions? Use the  **Save & Re-Open** to immediately act on that item without having to manually reopen the patient record.

Run the [Refund/Reversal Report](#) for a list of credits that have been refunded. This report can be found in the Report section of the application under the AR Reports category.


Refund a Patient or Insurance Payment

You can refund any payments within the manage account section. In the event a patient or insurance company needs to reverse a payment. This is commonly used when an insurance company pays too much on a claim or denies a previously approved claim.


 When selecting the "**Refund this amount to the original credit card**" option the payment (or account credit) must be from a credit card payment that was successfully processed through **Global Payments Integrated GPI®**.

If an adjustment was associated with the original payment and you need to reverse all or a portion of the adjustment, take a look at our [Reversal Adjustment Help Article](#).


1. Select **Patient > Manage Account**.
2. Use the **Search** field to search through your patients or insured.

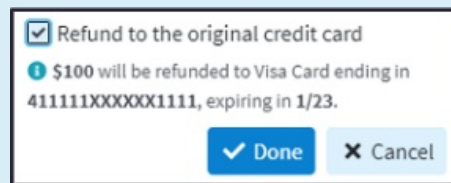
 Place a check in the "**Include inactive patients**" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Under **Transaction Listing** locate the DOS then the procedure and click the expand arrow.

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.


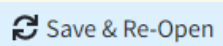
5. Select the **Payment**.
6. Click the **Refund** button.
 1. Select the **Refund Amount**.
 2. Set the **Refund Date**.
 3. Type a **Memo**.
 4. If the refund is to a credit card payment processed through **GPI®**, check the “**Refund this amount to the original credit card**” box.

 Are you utilizing our In-App Credit Card Processing feature with GPI? Did you know by utilizing this feature you can refund the actual credit card payment within CMD? Visit our [Manage In-Application Credit Card Processing](#) Help Article for detailed steps on how to request this feature.



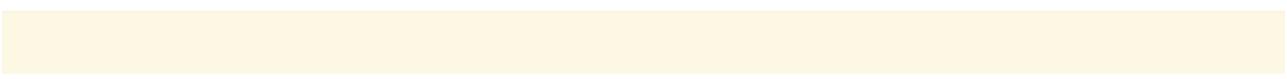
Refund to the original credit card
\$100 will be refunded to Visa Card ending in 411111XXXXXX1111, expiring in 1/23.


5. Click **Done**.
7. Click **Save**.

 Need to save your changes and immediately close and reopen the same patient record to take additional actions? Use the  to immediately act on that item without having to manually reopen the patient record.


Refund a Patient or Insurance Payment Processed Through GPI®

You can refund/void any patient or Insurance payments that have been successfully processed via Global Payments Integrated. If an insurance company makes a payment error and requests the funds back or in the event, a patient credit card payment needs to be reversed, you are able to refund the payment via CMI as long as the credit card payment was collected through the **in-app payment processing**.




 When selecting the "Refund this amount to the original credit card" option the payment (or account credit) must be from a credit card payment that was successfully processed through **Global Payments Integrated GPI®**.

1. Select **Patient > Manage Account**.
2. Use the **Search** field to search through your patients or insured.

 Place a check in the "**Include inactive patients**" box to include inactive patients in your search results.


3. Select the **Patient**.
4. Find the patient or insurance payment:
 1. Under **Transaction Listing** locate the DOS then the procedure and click the expand arrow.
 2. Under **Account Credit Listing** locate the Credit under Credits Due Insurance.

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.

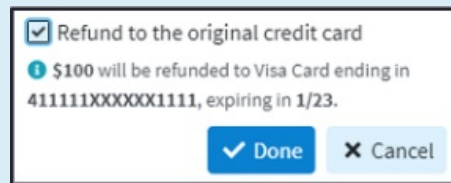
5. Select the corresponding **Payment**.
6. Click the **Refund** button.
 1. Select the **Refund Amount**.
 2. Set the **Refund Date**.

Important: If refunding a payment that was made over 180 days in the past, the refund must be requested directly within the **Edge Express portal**.

3. Type a **Memo**.
4. Check the "**Refund this amount to the original credit card**" box



 Are you utilizing our In-App Credit Card Processing feature with GPI? Did you know by utilizing this feature you can refund the actual credit card payment within CMD? Visit our

Manage In-Application Credit Card Processing Help Article for detailed steps on how to request this feature.



5. Click **Done**.

7. Click **Save**.

 Need to save your changes and immediately close and reopen the same patient record to take additional actions? Use the  **Save & Re-Open** to immediately act on that item without having to manually reopen the patient record.
