




Process a Refund or Reversal with a New Check Number

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Did your payer send back an EOB that contains a refund or reversal? If the EOB contains a **new check number**, learn how to create a new check to process the refund/reversal.

 Processing a refund/reversal with a new check number? Reference our [Process a Refund or Reversal with an Existing Check Number Help Article](#) for step by step instructions.

1. Select **Payment > Post**.
2. Fill in the option for **Insurance Payment**.
3. Click on the  next to **Payment By** to search for the insurance payer you received the payment from. Or click on the claim  icon to "**Find by Claim**".
4. Enter the check information (Payment Amount, Received/Check Date, Check/EFT#, Other Ref#, and Source), and then click **Apply as EOB**.
5. In the **Payment** window, choose any of the options below to **Add payments for**:
 1. **Claim**: Search for any other claim you would like to associate with this EOB.
 2. **Account Debit**: This will search for debits.
 3. **Claims at <PAYER NAME>**: This will search for claims that are currently at the payer the EOB is associated with.
6. Click on the **Payment Line** to open the detailed payment information for the selected claim.
7. Click the **Action** drop-down and select **Refund/Reversal**.
8. Select if you want to automatically reverse the payment or if you want to manually enter a corrected payment.
9. Click on the **Status** drop-down and set to **Claim At [Insurance]** or the desired status.
 1. **If the option to automatically reverse the payment was selected, skip to step 12.**
10. In the **Paid** field, enter a minus sign (-) and the refund amount.
11. In the **Adjustment** field, enter a minus sign (-) and the reversal amount.
12. Click the **Done** button.

13. Click  .

