



# Refund a Sunbit (Pay Over Time) Patient Payment

† Modified on 03/30/2025 4:22 pm EDT

You can refund a Sunbit payment within the manage account section in the event a patient needs to reverse payment. This is commonly used when a mistake was made, such as the amount needing to go to secondary/appeals, or if a pending discount was not included in the amount.

 When selecting the "**Refund to the original payment method (pay over time)**" option the payment must be from a payment that was successfully processed through **Sunbit**.

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**.
    1. If the full amount is entered you are voiding/canceling the payment with Sunbit.
    2. A partial amount may be entered to reduce the Sunbit loan amount by the entered amount.
  2. Set the **Refund Date**.
  3. Type a **Memo**.
  4. Check the "**Refund to the original payment method (pay over time)**" box.

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.

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