

Refund a Payment from the Payment Center

Last Modified on 03/09/2022 4:18 pm EST

Path: Admissions > Payment Center

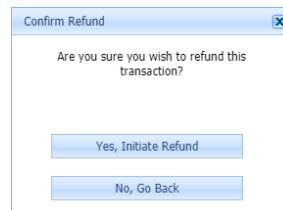
About

In the event a client payment needs to be refunded, Agencies can do this through Payment History. Or, if your Agency uses Scheduler integration, this can be performed from the appointment itself within the Payment Center. Users must have the Swerve Pay permission of **Refund Payments** selected within Maintain Users to handle refunds.

[Table of Contents](#)

Refund Payment: No Scheduler Integration

1. Navigate to the Payment Center following the path above.
2. Search for the client.
3. The **Payment History** table displays previous payments made by the client.
4. Select the sale transaction in the Payment History grid that you would like to refund.
5. Click the **Refund Payment** button. The Confirm Refund window is displayed.



6. Click the **Yes, Initiate Refund** button.
7. A Refund Submitted pop-up is displayed. Click **OK**. An entry is created in Payment History indicating a refund.

Refund Payment: Scheduler Integration

1. Navigate to the Payment Center: **Main Menu > Admissions Menu > Payment Center**.
2. Search for the client.
3. An appointment list displays a history of the selected client's appointments. Select an appointment that you have collected payment for from the appointment list and click the **Refund Payment** button.

PAYMENT CENTER

Client Search: 1021710 Team, Knowledge Active Clients Inactive Clients

Date	Time	L	A	S	Resources	Collected
8/25/2021	9:30 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AMY FABULOUS	\$5.00
6/25/2021	11:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$300.00
6/22/2021	2:15 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$0.00
6/22/2021	11:30 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$0.00
6/22/2021	9:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$15.00
6/13/2021	7:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$27.00
6/11/2021	10:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$0.00
6/8/2021	7:15 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$25.00
4/8/2020	8:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		\$20.00
4/8/2020	8:15 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		\$12.00

Payment Amount: \$5.00
 Payment Date: 8/25/2021
 Payment Method: CASH
 Name on Card:
 Save Card?
 Agency:
 Note: test cash
 *Reference #:
 Action:
 Payment / Charge
 Validate Card
 Payment Plan
* = Automatically filled when using credit/debit

4. In the Confirm Refund window, click the **Yes, Initiate Refund** button.
5. A Refund Submitted pop-up is displayed. Click **OK**. The Collected column for the refunded appointment now displays \$0.00. The appointment in the Scheduler displays that this has been refunded under the **Note** section.

9 AM

15

30 Team, Knowledge (#1021710) - INDIVIDUAL INTERACTIVE HALF SESSION (TestingSetup)

45 REFUNDED 8/25/2021 (5)--

Edit Appointment

Resource: AMY FABULOUS X

Client: Team, Knowledge (1021710 2/15/1977)

Heading: Team, Knowledge (#1021710) - INDIVIDUAL I Location: Fort Tom

SubHeading: TestingSetup Activity: INDIVIDUAL INTERACTI

Start Date: 8/25/2021 Start Time: 9:30 AM Status: None

End Date: 8/25/2021 End Time: 10:00 AM

All Day

Note: REFUNDED 8/25/2021 (5)--

Reminder Note: Don't Prompt

Payment:

Amount: 0.00 Method: CASH Ref #:
 Date: 8/25/2021 Note: test cash Addl Ref #:

Notes:

- When using the Refund Payment functionality, if the client credit is still in the Unapplied Private Payments Form in

the Billing Engine, it will be deleted from the Form.

- If the client credit was previously applied to a Line Item before the refund, then a reversal is displayed in the Unapplied Private Pay Payments Form. See [Process a Client Refund in the Billing Engine](#) for more details on how to handle this.



Unapplied Private Pay Payments Form - (UNPPPMTF)

Enter a Case No. or leave blank for all

Case No. 1035146 Kteam, Susie

Paid Date Range Remit Date Override

From // To // //

Paid Date/Time	Amount Paid	Receipt Number	Case No	Client Last Name	Client First
11/03/2021 03:13:53 PM	-25.00	REVRS: 113213	1035146	Kteam	Susie