Refund a Payment from the Payment Center

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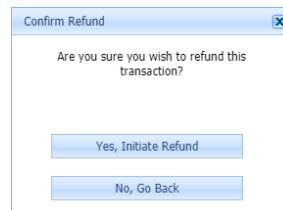> **Path: Admissions > Payment Center**

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.

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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.

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.

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.