

## Transfer Payment

From the **Transfer Payment** screen you can transfer an unapplied patient or insurance payment from one patient or responsible party and apply it to a charge for another patient or responsible party.

**Note:** The unapplied payment cannot be partially transferred, so transferring a payment from this screen will apply the entire amount to the new patient or responsible party record.

Transfer Payment -- Patient: BABBIT, RAMONA -- Webpage Dialog

By completing this action, the original payment will be voided and a new payment will be posted and applied to the selected patient or responsible party.

**Original Payment**

Patient: ABBIT, MONA Chart #: 181

Responsible Party: ABBIT, MONA Account #: 526252

Void Note: Charged wrong patient.

**New Payment**

Patient: ABBIT, AMY J Chart #: 190

Responsible Party: ABBIT, MONA Account #: 331909

Note: Reapplied charge to correct patient.

☐ Include on Statement

Transfer Cancel

## Transferring a Payment

1. Go to **Demographics | History** or **Resp Party | Fam History**.
2. Select an unapplied charge for the patient.
3. Click **Transfer**.
4. Enter a **Void Note**.
5. Select a new **Patient, Responsible Party**, or both.

**Note:** Only patient payments will require a new **Patient** and **Responsible Party**. Insurance payments will default to the **Responsible Party** associated with the new **Patient**.

6. Enter a **Note**.

**Note:** This field will automatically contain the note from the unapplied payment, if one was provided. The original note can still be edited with new information which will then be put in the note for the new transaction.

7. Click **Include on Statement** if the note must appear on the patient statement.

8. Click **Transfer**.

The charge is now voided for the original patient and will appear as a new unapplied payment for the new patient. The payment can immediately be applied to charges.

**Note:** If the unapplied amount was charged with a credit card, you can transfer the amount to the correct patient without voiding the original transaction.