Transferring credit from one person to another

- Go into the patient's chart with the unapplied amount, find out what amount is unapplied
- Then go to patients financials who you want to move that money into
- Add patient payment into this patients account, making sure the payment date matches the date the first patient paid
- Add CC info that matches the other patients
- Add detailed notes in the patient's payment section stating what occurred.
- Then go into the first patient's account where you took the money from and click on that patient payment and take off the unapplied to make it as the patient no longer has a credit.
- Leave detailed notes like "Total payment $20. $5 moved to Patient B account" and "Total payment $20, $5 moved from Patient A account."

One thing to note is that you cannot run a payments report for the date payment posted because the report would only show a $15 payment for one and a $5 payment for another which wouldn't math the CC receipts showing the $20 payment. The CC number would be the same on both accounts and you would have the notes explaining what took place.