



## DID YOU KNOW

Some quick guidelines on how to add a refund in Socrates.

### To refund a Cash payment or refund performed on Billink

Click Patient Maintenance >> Patient Account and search for the patient.

Jack Smith  
Type: Private Age: 26 yr 2 m  
Status: Active PPSN: Unique #: T10002085  
Personal: €0.00 Family: €0.00

Insurance: None Billing Name: Jack Smith  
Account: Personal Billing: Miller Street, Ballymote, Sligo  
View: Statement

ID	Date	Description	Taken By	Remaining	Debit	Credit	Balance
0	01/03/2026	Balance Brought Forward		€0.00			€0.00
356010	18/03/2026	Blood Test	Dr Sheila Gilhooley		€30.00		€30.00
356011	18/03/2026	Cash	Dr Sheila Gilhooley			€30.00	€0.00
<b>Outstanding</b>							<b>0.00</b>

### How to refund €30.00 charge for patient in example:

- Click **Charge** on left-hand side of screen. Select same Charge type e.g. Blood Test and type the refund as a negative number in Amount (use minus symbol on the keyboard) e.g. **-30.00**

### For Cash refunds:

- Click 'Make Payment' and the refund amount will be auto-populated e.g. **-30.00** and click Save & Close.

Amount :  [Additional Notes](#)

Billink  Billink (SMS)  Billink (Terminal)

**Make Payment**

Payment Type:

Payment

### For Billink refunds:

- Change Payment Type to 'Online Payment'.

- Click 'Make Payment' and the refund amount will be auto-populated e.g. **-30.00** and click Save & Close.

The account balance will now reflect the refund processed so for example above its back to 0.00.

### To Refund on BOIPA terminal\*

*\*Only applies if you use a BOIPA 'Lane 5000' Terminal*

### Add Strike-Off type for Card Refund:

Create a Strike-Off type called 'Card Refund' in My Control Panel > Admin Console > System Types > Account Types.

Name: Card Refund  
Amount: 0.00  
Account Type: StrikeOff  Card Transaction  
 Active

Move Up Move Down To Top To Bottom Print List Show Inactive Filter StrikeOff

Name
Written Off

Enter the name of the Refund/Strike Off Type. Select StrikeOff as the Account Type and check Card Transaction and click Save.

### How to refund on BOIPA:

Highlight the payment that you want to refund and press the delete button on the keyboard. Type in Refund as the reason and click OK.

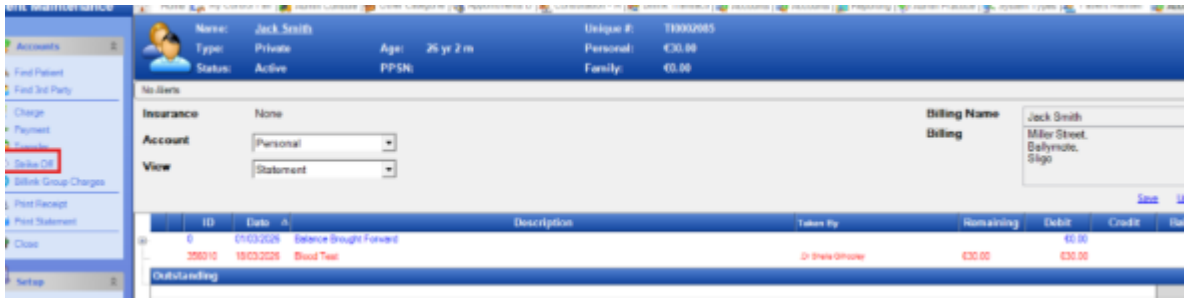
Name: Jack Smith | Age: 26 yr 2 m | Personal: €0.00 | Family: €0.00  
Type: Private | Status: Active | PPSN: | Billing Name: Jack Smith, Miller Street, Ballynate, Sligo

Reason: Refund

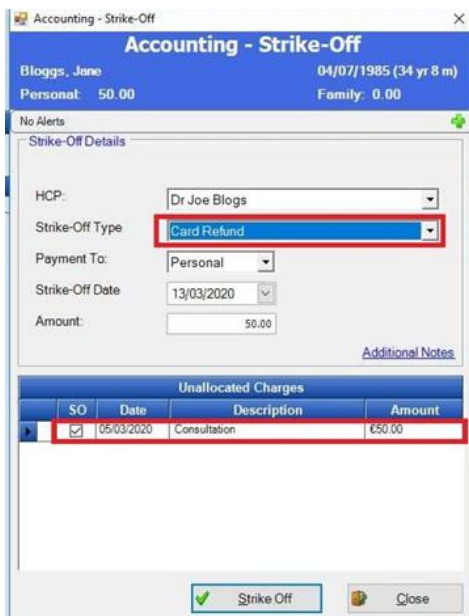
ID	Date	Transaction	Amount
0	01/02/2025	Balance Brought Forward	
358213	18/03/2025	Blood Test	
398211	18/03/2025	Cash	

Item By	Remaining	Debit	Credit	Balance
	€0.00			€0.00
Shela Ghosey		€30.00		€30.00
Shela Ghosey			€30.00	€0.00
				€0.00

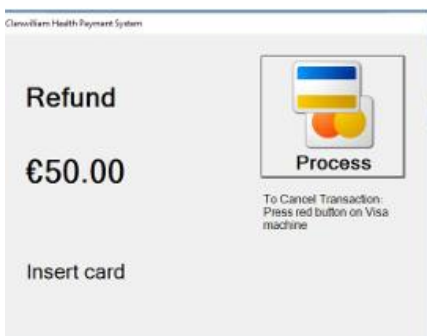
To waive the outstanding charge, select the charge and click Strike Off.



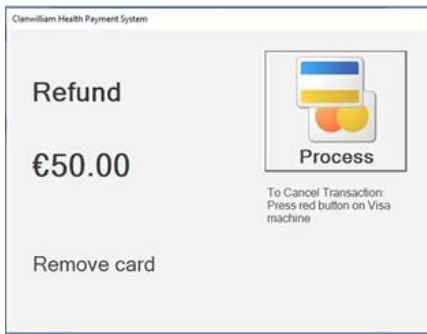
Select 'Card Refund' from the Strike-Off Type menu. Check the box beside the outstanding charge and click Strike Off.



The Card Transaction window will be displayed. Click **Process** to proceed with refund.



Insert the Card and request Patient to enter the PIN or Tap Card on Terminal.



The Refund will be processed. Click Yes to print the Card Receipt.

