


# Manually changing credit/debit and token balances

**Note:** to see how to add tokens, credits or debits to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).

You can manually add tokens, add credits and debits, and change account balances on a patient's account from the [Patient Profile](#) page.

## Manually changing account balances

You can manually change an account balance - for example, waiving a cancellation fee - from the [Patient Profile](#) page. Under their name, you'll see Credits - click that to expand the credits window, which includes their credit history:



Dog **Goofy P. Dog**

[goofy@disney.com](#) | (615) 555-1212

FIRST APPOINTMENT  
February 23, 2020

TOKENS  
0

CREDIT BALANCE  
\$ -20.00

Goofy has \$ -20.00 credit

Optional description for credit

0.00

Add

Date	Description	Amount
2020-08-11 12:53:17	CNCL: Aug 11 2020 10:30 am w Alexa Hulsey	(-20.00)


Enter your optional description, the dollar amount, and click Add:

Goofy has \$ **-20.00** credit

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Date	Description	Amount
2020-08-11 12:53:17	CNCL: Aug 11 2020 10:30 am w Alexa Hulse	<b>(-20.00)</b>

You'll see the new credit balance under the patient's name and the most recent entry for credits at the top of the history:



**Dog Goofy P. Dog**

goofy@disney.com | (615) 555-1212

FIRST APPOINTMENT

February 23, 2020

TOKENS

0

CREDIT BALANCE

**\$ 0.00**

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Goofy has \$ **0.00** credit

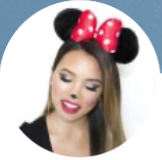
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Date	Description	Amount
2020-08-11 12:54:20	Waived CNCL fee 8/11/20	20.00
2020-08-11 12:53:17	CNCL: Aug 11 2020 10:30 am w Alexa Hulse	<b>(-20.00)</b>

# Adding tokens

**Note:** to see how to add tokens to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).

Here's how to manually add tokens to a patient account, outside of a checkin or purchase transaction. Under the patient's name on their [Patient Profile](#) page, you'll see Tokens - click that to expand the tokens window, which includes their token history:


**Minnie Mouse**

minnie@disney.com | (615) 555-1212

FIRST APPOINTMENT

February 19, 2020

✎ TOKENS

0

✎ CREDIT BALANCE

\$ 0.00

Minnie has 0 tokens

Optional description for token

0



Add

Date	Description	Amount
2020-04-15 11:02:48	Used	(-1)
2020-04-15 10:26:13	Used	(-1)
2020-04-15 10:25:38	Used	(-1)
2020-04-15 10:24:21	Used	(-1)
2020-04-14 19:48:47	Used	(-1)
2020-04-09 12:43:28	Used	(-1)
2020-04-09 12:43:05	Used	(-1)
2020-04-01 11:53:53	Checkin Reversal	1
2020-04-01 11:49:49	Checkin Reversal	1

Enter your optional description for tokens, the number of tokens, and click Add:

Minnie has 0 tokens


Bought some tokens

5



Add

You'll see the new balance of tokens under the patient's name and the most recent entry for tokens at the top of the history:



**Minnie Mouse**  
minnie@disney.com | (615) 555-1212

FIRST APPOINTMENT  
February 19, 2020

TOKENS  
5

CREDIT BALANCE  
\$ 0.00

Minnie has 5 tokens

Optional description for token

0

Add

Date	Description	Amount
2020-08-11 12:31:20	Bought some tokens	5

## Deleting tokens

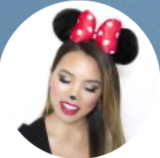
Note: if a patient chooses to pay for treatment with a token, the token will automatically be deducted from their account during the checkin transaction. For more information, please see [The Checkin Transaction](#).

To manually delete tokens from a patient's account, follow the instructions above for manually adding tokens. Instead of entering a positive number (i.e., 5), you'll enter a negative number for the amount of tokens you want to delete (i.e., -5). Once you click Add, their account balance will be updated.

## Adding credits

**Note: to see how to add credits to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).**

You can manually add dollar amount credits to a patient's account from their [Patient Profile](#) page. Under their name, you'll see Credits - click that to expand the credits window, which includes their credit history:



**Minnie Mouse**

minnie@disney.com | (615) 555-1212

12

FIRST APPOINTMENT

**February 19, 2020**

TOKENS

**5**

CREDIT BALANCE

**\$ 0.00**

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Minnie has \$ **0.00** credit

Optional description for credit

0.00

⬆  
⬆

Add

Date	Description	Amount
2020-04-16 11:44:20	Used for payment	(-45.00)
2020-04-01 11:19:22	CNCL: Feb 20 2020 10:50 am w Alexa Hulsey	(-5.00)
2020-02-18 18:22:32	Checkin Reversal	20.00
2020-02-18 18:21:57	Used for payment	(-20.00)
2020-02-18 18:21:24		50.00

Enter your optional description for credits, the dollar amount, and click Add:

Minnie has \$ **0.00** credit

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Mickey bought her credit

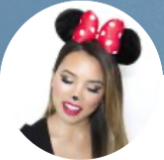
20

⬆  
⬆

Add

You'll see the new credit balance under the patient's name and the most recent entry for credits at the top of the history:

12



**Minnie Mouse**  
 minnie@disney.com | (615) 555-1212

FIRST APPOINTMENT  
**February 19, 2020**

/ TOKENS  
**5**

/ CREDIT BALANCE  
**\$ 20.00**

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Minnie has \$ **20.00** credit


Date	Description	Amount
2020-08-11 12:44:02	Mickey bought her credit	20.00
2020-04-16 11:44:20	Used for payment	<b>(-45.00)</b>

## Adding debits/money owed

**Note: to see how to add debits/money owed to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).**

You can manually add dollar amount that a patient owes from their [Patient Profile](#) page. Under their name, you'll see Credits - click that to expand the credits window, which includes their credit history:

22



**Jiminy Cricket**  
 jiminy@disney.com |

FIRST APPOINTMENT  
**February 21, 2020**

/ TOKENS  
**0**

/ CREDIT BALANCE  
**\$ 0.00**

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Jiminy has \$ **0.00** credit

Enter your optional description for debit and the dollar amount. **Be sure to enter a negative dollar amount, since this is an amount owed.** Click Add:


Jiminy has \$ **0.00** credit

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▼

Add

You'll see the new credit balance under the patient's name and the most recent entry for credits at the top of the history:



**Jiminy Cricket**  
jiminy@disney.com | 📧

FIRST APPOINTMENT  
February 21, 2020

TOKENS  
0

CREDIT BALANCE  
\$ -20.00

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Jiminy has \$ **-20.00** credit

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▼

Add

Date	Description	Amount
2020-08-11 12:47:57	Forgot wallet on 8/20/20	<b>(-20.00)</b>

## Go to the next section: Purchasing Tokens and Credits

Revision #7

Created Wed, Aug 12, 2020 8:37 PM by [Alexa Hulsey](#)

Updated Wed, Jan 27, 2021 3:54 PM by [Joe](#)