

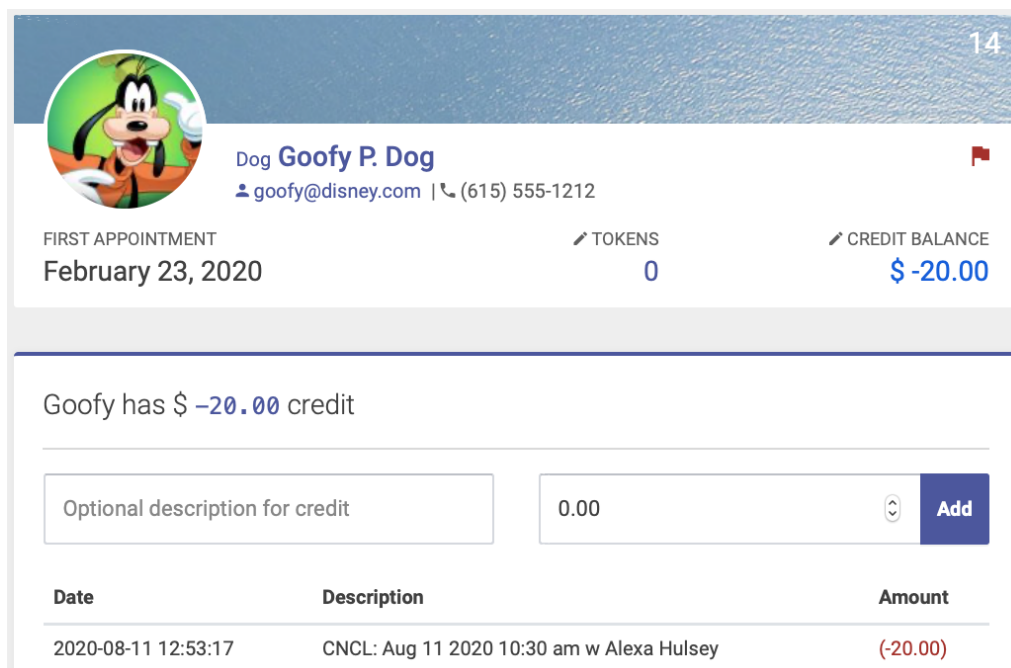
Manually changing credit/debit and token balances

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:



The screenshot shows the Patient Profile page for "Dog Goofy P. Dog". The profile includes a circular avatar of Goofy, a contact email "goofy@disney.com", and a phone number "(615) 555-1212". Below the profile information, there are three tabs: "FIRST APPOINTMENT" (showing "February 23, 2020"), "TOKENS" (showing "0"), and "CREDIT BALANCE" (showing "\$ -20.00"). The "CREDIT BALANCE" tab is selected. Below the tabs, a message states "Goofy has \$ -20.00 credit". There is a form to add a new credit entry with a text input for "Optional description for credit", a numeric input for the amount (currently "0.00"), and an "Add" button. Below the form is a table showing the credit history.


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

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

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

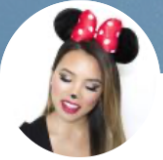
Goofy has \$ **0.00** credit

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	(-20.00)

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](#).

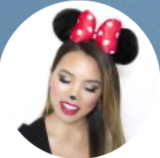
To manually delete tokens from a patient's account, follow the instructions above for manually adding tokens. Instead of entering a positive number (i.e., 5), you'll enter a negative number for the amount of tokens you want to delete (i.e., -5). Once you click Add, their account balance will be updated.

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:

12



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

FIRST APPOINTMENT
February 19, 2020

TOKENS
5

CREDIT BALANCE
\$ 0.00

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

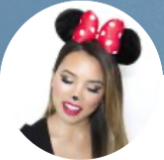
Mickey bought her credit

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

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	(-45.00)

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

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

⬇

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

Jiminy has \$ **-20.00** credit

⬇

Add

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

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](#)