

Refund a Settled Credit Card Payment with a Different Payment Method

Last Modified on 08/12/2021 4:48 pm EDT

Refunding a payment that was originally made with a credit card, by any means other than back to the same exact card, is against Visa/MC regulations and is not recommended by Jackrabbit.

We do realize, however, there are circumstances where it may be necessary to refund the family with a different payment method other than the credit card originally used, eg. the credit card was canceled. For these circumstances, we offer the option to *Refund by Different Payment Method*.

1. Locate the payment you want to refund in the family's *Transactions* tab (you may need to click **View Transaction History**).
2. Click the **R** on the payment line.
 - o If the *Void Transaction* pop-up box displays, refer to How to **Void a Credit Card Payment that Hasn't Settled with the Processor**.
 - o If the *Refund Transaction* pop-up box displays proceed to Step 4.
 - o Because the original payment was a credit card ePayment, the *Post Date* and *Refund Method* are not editable.
3. Click the **Refund by Different Payment Method** button.
 - o A window opens warning that changing to refund by a different method will NOT process the refund to the credit card. It will only record a refund transaction in Jackrabbit.
 - o Opt to go back and refund to the credit card by clicking the **Refund ePayment to Credit Card** button and follow the directions in **Refund a Credit Card Payment That Has Settled** To continue to only record the refund, click the **Record Refund in Jackrabbit Only** button.
 - o The *Post Date* and *Refund Method* are now editable for you to complete for the method to be used. You can't refund to a credit card other than the original card used, however, you are able to refund with a check or cash. **Note: Switching the Refund Method to a different credit card will NOT place the refund onto that card it is simply recording the refund transaction (that must be done outside of Jackrabbit) to the family's account.**
4. Add a **Note** if applicable.
5. Check which fee(s) to refund and change the *Refund Amt* field if you are refunding a partial amount.
6. Select **Due** or **Not Due** in the **Are Fees Still Due?** window for each fee being refunded.
 - o Examples:
 - Due** - A family accidentally pays a fee that is not due for another 3 months. They would like a refund and will pay the fee when it is due; the fee would be marked as due.
 - Not Due** - A student drops a class for medical reasons and is eligible for a refund. The fee will not be paid at a later date; the fee would be marked as not due.
 - Note: If payment has not been linked to fees (is unapplied) it cannot be marked as still due. An example would be an account overpayment. Because the payment was for more than the total of the fees owing, there will be an unapplied credit on the account. The unapplied credit cannot be marked as due.**
7. Click **Submit Refund**.

If the fees that had been paid by the refunded payment are still owing at a later date (you marked them **Due** in the *Are Fees Still Due?* window):

- A Refund Overpayment transaction is added to the account and is linked to the original payment.
- The account balance is increased by the amount refunded.
- The previously paid fees are now highlighted as being unpaid.

If the fees that had been paid by the refunded payment are not owing at a later date (you marked them **Not Due** in the *Are Fees Still Due?* window):

- A Refund - xxx (where x is the type of fee refunded) transaction is added to the account and is linked to the original payment and the refunded fee.
 - A Refund Adjustment transaction is added to the account for the refunded amount and is linked to the refund transaction(s)
 - The account balance is unchanged.
 - The previously paid fees remain showing as paid.
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