

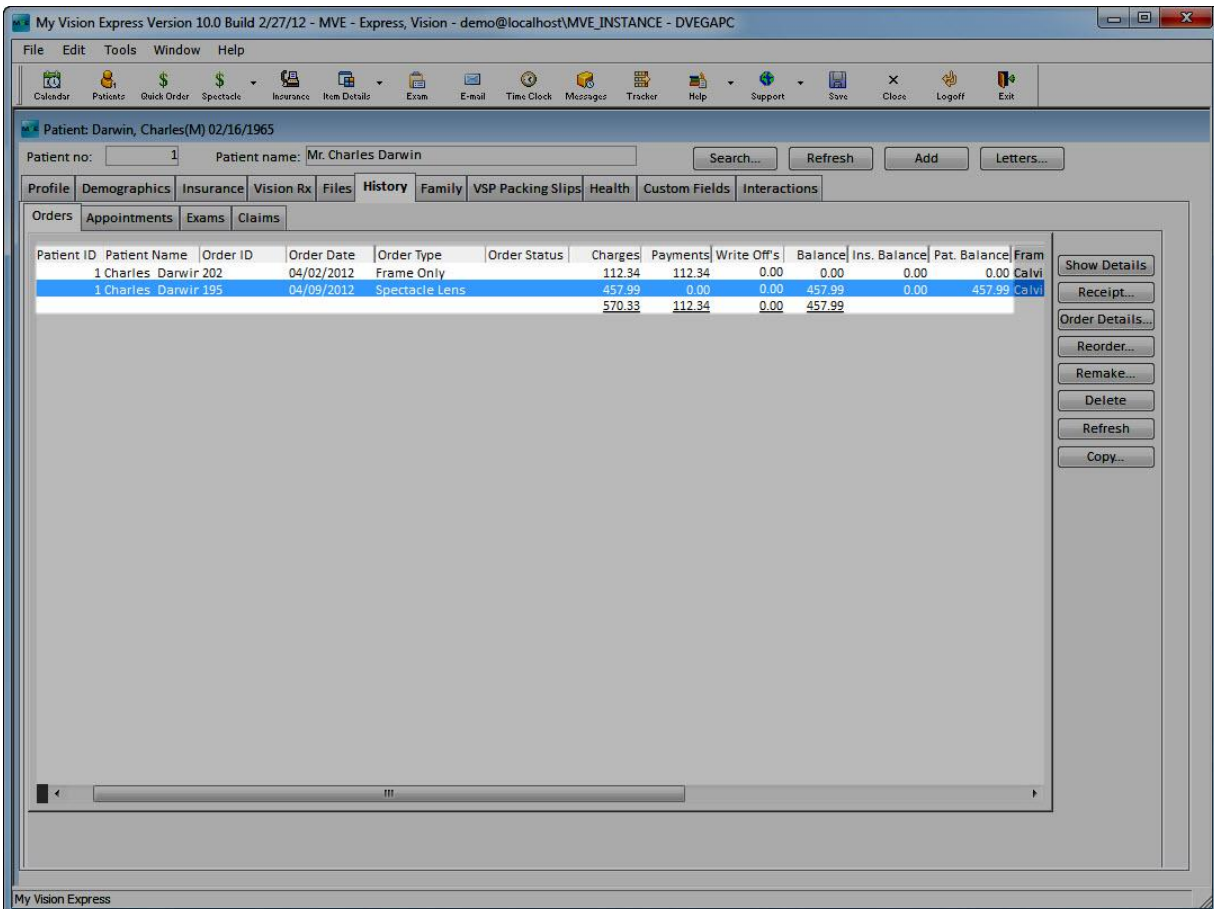
This guide will provide you with a step-by-step on refunding an item on one order and transferring the credit to another order.

Step 1 – Identify Orders

- Navigate to Patient History Tab
- Click on the Orders Tab

In this example we will be working with the following orders:

- | | |
|---|---|
| <ul style="list-style-type: none"> • Order 202 <ul style="list-style-type: none"> ○ Payment: \$112.34 ○ Charges: \$112.34 ○ Balance: \$0.00 | <ul style="list-style-type: none"> • Order 195 <ul style="list-style-type: none"> ○ Charges: \$457.99 ○ Payment: \$0.00 ○ Balance: 457.99 |
|---|---|



The screenshot shows the 'My Vision Express' software interface. The patient profile for Charles Darwin (ID: 1) is displayed. The 'Orders' tab is active, showing a table of orders with columns for Patient ID, Patient Name, Order ID, Order Date, Order Type, Order Status, Charges, Payments, Write Offs, Balance, Ins. Balance, Pat. Balance, and Fram. Two orders are listed: Order 202 (Frame Only, 04/02/2012) and Order 195 (Spectacle Lens, 04/09/2012). The interface includes a menu bar, a toolbar with various icons, and a sidebar with buttons for 'Show Details', 'Receipt...', 'Order Details...', 'Reorder...', 'Remake...', 'Delete', 'Refresh', and 'Copy...'.

Patient ID	Patient Name	Order ID	Order Date	Order Type	Order Status	Charges	Payments	Write Offs	Balance	Ins. Balance	Pat. Balance	Fram
1	Charles Darwin	202	04/02/2012	Frame Only		112.34	112.34	0.00	0.00	0.00	0.00	Calvi
1	Charles Darwin	195	04/09/2012	Spectacle Lens		457.99	0.00	0.00	457.99	0.00	457.99	Calvi
						570.33	112.34	0.00	457.99			

Step 2 – Refund

- Open Order by double-clicking on line item
- Go to the Invoice tab
- Select/highlight the item
- Click on the Return button
 - This process will return the Frame on the order creating a new line item with a negative **-112.34** in “**RED**”

Order: Darwin, Charles(M) 02/16/1965 - Frame Only

Order: 202 Order date: 04/02/2012 Patient: Darwin, Charles (M) 2/16/1965

Patient Vision Rx Frame Invoice Payments Interactions

UPC:

Charges	Eye	Copay	Patient	Patient Total	Insurance	Item Total	Retail	Qty	Tax	Tax 2	Discount	Print	Notes
Frame - Calvin - White Label			112.34	112.34	0.00	112.34	104.99	1	7.35	.00	0.00	<input checked="" type="checkbox"/>	
Frame - Calvin - White Label			-112.34	-112.34	0.00	-112.34	104.99	-1	-7.35	.00	0.00	<input checked="" type="checkbox"/>	
Totals:			0.00	0.00	0.00	0.00			0.00	0.00	0.00		

Buttons: Add... Modify... Delete Discount Return Cancel Order Exam...

- Click on Save to complete transaction
- Go to Payments tab to view new balance of \$-112.34

Order: Darwin, Charles(M) 02/16/1965 - Frame Only

Order: 202 Order date: 04/02/2012 Patient: Darwin, Charles (M) 2/16/1965

Patient Vision Rx Frame Invoice Payments Interactions

Order Date	Description	Amount Responsible	Print	Employee	XCT
2012/06/20/2012	Patient - Cash	112.34	<input checked="" type="checkbox"/>	Express, Vision	
Total Payments:		112.34			

Buttons: Add... Modify... Delete Ship To Create PO Print Lab Copy Preview

Balance: -112.34 Patient due: .00 Pat paid: 112.34 Pat Bal: -112.34 Ins due: .00 Ins paid: 0.00 Uncollected ins: 0.00

- For **Refund Only Transaction** click on Add button
 - Select Payment Type as “Refund”
 - Select Method of refund
 - Payment amount will auto-populate
 - Click Ok
 - Click Save
- For **Credit Transfer to Another Order Transaction** continue to Step 3

Step 3 – Transfer Credit to Another Order

In this example we will be transferring the credit from Order 202 of \$-112.34 to Order 195 which has a balance of \$457.99

- Open either Order 202 or 195 and go to the payments tab
- Click Add button to create new payment
- Payment Details
 - Select **Method** as “Credit Memo – Sales” from the drop-down
 - Set **Payment Amount** to 0.00 which will automatically allocate the credit in the **Allocate** table
 - Based on our example the Allocate table below displays the following:
 - Order 202 – Deduct the -112.34 by entering that dollar amount in the Allocate field as a negative amount
 - Order 195 – Apply the 112.34 by entering the dollar amount in the Allocate field as a positive amount to be applied to the balance of that order
- Click Ok button to finalize the transaction

Payment Details

Payment Type

Order (Patient)
 Insurance
 Refund (Patient)
 Account (Patient)
 Write-Off
 Transfer

Type: Print

Date: 06/20/2012 Employee: Express, Vision

Method: Cash
 Check
 Visa
 MC
 Amex

Payment amount: 0.00
 Decrease Balance
 Increase Balance

Cash tendered: .00 Change due:

Credit Card #: Expiry yymm:

Check #: Reason:

Insurance:

Description: Patient - Credit Memo - Sales

Note:

[Integrated Credit Card](#)

Allocate:

Patient	Order Detail	Order Date	Status	Pat. Bal	Ins. Bal	Payments	Charges	Balance	Allocate
Darwin, Charles	202 <input type="text"/>	04/02/2012		-112.34	0.00	112.34	0.00	-112.34	-112.34
Darwin, Charles	195 <input type="text"/>	04/09/2012		457.99	0.00	0.00	457.99	457.99	112.34
				345.65	0.00	112.34	457.99	345.65	0.00

Unapplied Balance: 0.00

- Once transaction has been completed you will see a new payment transactions created on each order
- In this example Order 202 will display a new payment entry reflecting the deduction of the \$-112.34 as a Credit Memo - Sales

Patient	Vision Rx	Frame	Invoice	Payments	Interactions
Order Date			Description		Amount Responsible
20206/20/2012			Patient - Cash		112.34 Patient
20206/20/2012			Patient - Credit Memo - Sales		-112.34 Patient
Total Payments:					0.00

- Order 195 will display a new payment entry reflecting the transfer of \$112.34 as a positive amount deducting from the balance on the order as a Credit Memo - Sales

Patient	Vision Rx	Frame	Lens	Invoice	Payments	Interactions
Order Date			Description		Amount Responsible	
19506/20/2012			Patient - Credit Memo - Sales		112.34 Patient	
Total Payments:					112.34	

- Navigate back to the Patient History Tab and click on the refresh button to view the updated balances

Profile	Demographics	Insurance	Vision Rx	Files	History	Family	VSP Packing Slips	Health	Custom Fields	Interactions		
Orders		Appointments	Exams	Claims								
Patient ID	Patient Name	Order ID	Order Date	Order Type	Order Status	Charges	Payments	Write Off's	Balance	Ins. Balance	Pat. Balance	Frame
1	Charles Darwir	202	04/02/2012	Frame Only		0.00	0.00	0.00	0.00	0.00	0.00	Calvi
1	Charles Darwir	195	04/09/2012	Spectacle Lens		457.99	112.34	0.00	345.65	0.00	345.65	Calvi
						<u>457.99</u>	<u>112.34</u>	<u>0.00</u>	<u>345.65</u>			

For additional assistance please contact My Vision Express Support

1-877-882-7456