revolutionEHR PRESENTS

# revYOU

## Managing Product Returns

Jamie Bush, Customer Support
Jennifer McManaman, Customer Support

# Invoice Returns

- Search for all invoices associated with the return.
- Make invoices Pending and remove any Transfers/Write Offs
- Item can be removed from invoice using the "-" symbol

# Credit/Refund to be given?

- If item was paid for, a negative balance will be available to credit the patient or refund to patient.
- Use the grant credit button to credit patient or refund.
- Notes slider can be used to write any notes to detail return.

# What about the Order?

- Open Order, Edit and Add comment to Comment Box on Order Details. For example "Patient unhappy with frame, returned for credit"

- Notes Slider is also available for adding in details associated to an order.

# When to Cancel an Order?

- The Cancel button on an order is used when no changes are being made to an order.

- If the order was dispensed and or Completed the Cancel button will not be available. You will need to add a note on the notes slider to notate what happened with the order.

*connect. learn. advance.*

revYOU

GIVING YOUR PRACTICE AN OPPORTUNITY TO

# Drive Excellence

# Next – 2:15 – 3:00 pm

- **Clinical Care**: Navigating the Encounter for Efficiency – Room 1
- **Back Office/Billing**: Creating a Successful Billing System in your Practice – Room 2
- **Product Ordering Professionals**: Utilizing RevAssistant with the VSP Calculator – Room 3
- **Front Office/Admin**: Creating Patient Search Reports – Room 4
- **Practice Management**: Maintaining the Finances in Your Practice – General Session Room

revYOU connect. learn. advance.