



# PATIENT MANAGEMENT PROGRAM

## Inventory Refund

A patient may return a purchased inventory item to your office for refund. This is a two step process:

1. Return the inventory
2. Process the refund
  1. **Return the inventory item.** Press **F12** on the appointment book and select your patient or get into the Patient Activity screen in your usual manner. Locate and select the original inventory item. Click into the column under Patient. Type in the cost of the item with a minus sign, i.e. -50.00 and press **Enter** or the **Tab** key. Click the radio button to the left of None in the payment amount area. Click **Post**.

Code	Description	Total	OHIP/wsib	Patient
CPIL	Cervical Orthopedic Pillow	-50.00	0.00	-50.00
*				

2. **Process the refund.** Get back into Patient Activity. Type REF or click into the Code field and select **Refund**. Press **Enter**. Press **Enter** or the Tab key to create a second line.

Code	Description	Total	OHIP/wsib	Patient
REF	Refund	0.00	0.00	0.00
*				

To create the refund amount either:

- Click the radio button to the left of Amount and type in the amount of the refund with a minus sign, i.e. -50.00 or
- Click the radio button to the left of Account Balance if the amount is correct.

Select the method of the refund i.e. Cash, Cheque, etc. under Payment Type. Click **Post**.

**Note:** Your end of day receipts will not match your summary sheets if you write a Cheque to your patient for the amount of the refund. If you refund by cash, debit or credit card, your day end receipts will be accurate.

In the Patient Information Account Activity screen add a comment to the refund by clicking onto the refund line and clicking the **Edit Comment** button. Type an explanation. Type your initials. Click **Save**.

Enter a Comment

Patient returned cervical pillow. Refund given as per DD's request. L.J

Delete Cancel Save

**Note:** If the returned inventory item can be sold again, you will want to increase your **Amount in Stock** for this item in **Fee Schedule, Inventory**.