

Refunds/Exchanges/Remakes/Transfers

When insurance is attached to the original order

- Void original order
 - this will remove the insurance that was billed
 - you may see an insurance credit and/or a patient credit, disregard this. Billing will take care of this when they receive the refund transfer form
- Enter new order with NO insurance attached
 - Exception:** Dmerc jobs must be re-entered with the plan DME and the insurance Dmerc in order for the frame and lens to split apart; this will allow the claim to be billed out to the company properly
- ▲ Choose remake reason
- Collect any difference in money due to the upgrade
- Post the money to the line that it belongs to leaving the price alone.

DO NOT ADJUST OR TRANSFER ANY MONEY ATTACHED.

- Call billing to let the vision team know that you have entered a new job and the original claim was submitted to insurance and has not paid yet, so that billing can adjust the claim.
- **OR**
- If the claim has been paid by the insurance company, let billing know so that they can apply the insurance benefits/ insurance plan to the claim as well as adjusting the balance off the patient.
- **Fill out a refund transfer form**
- **Send to Central Supply if there is a refund or billing otherwise.**