

Refund Information

1. Fill out a refund transfer form and lab remake form
 - a) printed out from compulink demographics screen
2. Scan copies into compulink
3. Send forms and glasses to Central Supply

Refunds can take 4-6 weeks to process, they will not be started until the materials and forms have been received by Central Supply.

If a pt is exchanging a material for something cheaper we DO NOT refund the difference.

Pt will pay the additional fee if they choose a higher priced item.

Some exchanges will void the lens warranty which is covered by the Optical Waiver, which must have been signed by the patient and optician prior to any refunds/ remakes/ exchanges.

All money to be refunded to the patient must be approved and signed off on by John or Deb.

Specific instructions apply to specific situations below, please follow those guidelines as well as these.

REFUND/TRANSFER FORM

PRODUCT MUST BE SENT WITH THIS FORM

OFFICE: _____ ACCT #: _____

PT NAME: _____ DATE: _____

ORDERING OPTICIAN: _____ ORDERING DR: _____

REFUND TO PATIENT YES ___ AMOUNT _____ NO ___

INV AMOUNT \$ _____

20% REB: \$ _____

TOTAL AMOUNT SHOULD MATCH REFUND

NEVER REFUND AN EXAM OR FITTING FEE

CHOOSE REASON FOR REMAKE / REFUND:

___ NON ADAPT ___ LAB ERROR ___ SCRATCH COAT ___ DR. RX CHANGE

___ WARRANTY ___ PT UPGRADE ___ PT DOWNGRADE ___ FRAME

___ PT NEVER PICKED UP ___ OPTICIAN ERROR EXPLAIN _____

PT SATISFACTION _____

OTHER: EXPLAIN _____

OPTICIAN FILLING OUT FORM: _____ DATE: _____

SUPERVISOR SIGNATURE: _____ DATE: _____

DR. SIGNATURE: _____ DATE: _____

FINAL APPROVAL REFUND PROCESSOR: _____ DATE: _____

TELL PTS. **ALLOW 4-6 WEEKS FOR THE REFUND TO PROCESS!!**

SCAN REFUND FORM INTO COMPULINK

SEND FORM AND PRODUCT TO CENTRAL SUPPLY

VOID JOB AND FILL OUT THIS FORM

Lab Remake Form

Patient Name: _____ Acct #: _____

Ordering Optician: _____ Remake Optician: _____

Original Date of Order: _____ Remake Date: _____

Ordering Doctor: _____ Remake Doctor: _____

Remake Reason _____ Office: _____

___ Optician Error ___ Dr. Rx. Change ___ Lens Defect

___ Non-Adapt ___ Lab Error ___ Pt. Satisfaction

___ Warranty ___ Walman Error

___ CD ___ OS ___ OU

Other: _____

Supervisor Signature: _____ Doctors Signature: _____

REMAKES

(all remakes include Dr. Rx change, upgrade, downgrade, and or optician errors)

Local Lab

- Spec Rx screen locate the original order by using the next or back button. (be sure it is the correct order)
- click the VOID option
- Enter reason for void. You can type in any reason or choose from the drop down.
- Tax box will pop up -click SAVE. Frame box may also pop up -click SAVE. The amounts will be in the NEGATIVE, which is because it is returning the materials.
- Once these returned materials post to the ledger you will see the original order and then the negative returned order. You are DONE with the return portion.
- Now enter the NEW JOB. ALL materials need to be entered. FRAME, LENS, and ECT. This is now a **BRAND NEW JOB** this has nothing to do with the other order.
- Choose a REMAKE REASON from the drop down menu across from the lab section
- If there is a price difference you will need to manually figure this and you are responsible for collecting this difference upfront. You will post this payment to the line item with the cost difference. (Don't forget tax).
- There may be a balance on the account after the new job is entered, DO NOT do any transferring of monies or adjusting. ONLY POST MONIES THAT PERTAIN TO ANY PRICE DIFFERENCE IN MATERIALS THAT PT NOW OWES FOR THE EXCHANGE.
- Send the returned materials to Central Supply. With refund transfer form.

OR

Walman Lab

Originally ordered from Walman Lab Remake Instructions

- Void original order
- Enter reason for void
- Add new order
- Choosing remake reason from drop down
- Choose Walman lab (DO NOT TRANSMIT)
- Save order
- Post order to ledger

Send the frame/ lenses to Alicia in Central Supply with the compulink paperwork
Alicia will send on the information to Walman

Do any refund transfer paperwork needed

INSURANCE ORDERS

- 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, CIRCLE INSURANCE BILLED SECTION**
- **Send to Central Supply**

PATIENT CANCEL'S:
SAME DAY

- you call billing to have the order deleted
- call the lab to remove the optifax #
- call Alicia C.S. if FRAME supplier is central

WARRANTY

Remaking lenses Warranty on lenses

- *Spec Rx screen select. Add new.
- *POF will be used here, you will not post this remake to the ledger (frame has already been taken from inventory on original order).
- *Pt supplied frame
- *Choose remake reason from drop down
- *Transmit to lab, **DO NOT POST TO LEDGER**
- *Fill out remake form for the lab

IF YOU ARE DOING A REMAKE THEN EVERY MATERIAL IS THE SAME FROM THE ORIGINAL ORDER AND THERE IS NO REASON FOR IT TO BE POSTED ON THE LEDGER.

Warranty on frames

- *Spec Rx screen select add new
- *Enter in the +99 lens code in SPH(no lens)
- *Enter the frame info that we are replacing under warranty
- *Choose your supplied option (Central or Dr supplied)
- *Post to ledger so the new frame will come out of inventory.
- *Choose remake reason=Frame Warranty
- *Do not transmit (this will not go to the lab).
- *Using the adjust command, enter 0.00, post to frame, choose Warranty as the description.
- *In the int. notes field put frame warranty/ reason, be sure to back out any insurance.