How to Refund Products or Services on EZDERM

Scenario #1

If you are just going to delete the product/service without leaving a trail in the patients financials:

Within the financials you can do the following:

- Go to the patient's financials and see what item/service they are wanting to return or get a refund for:
- Click on the item
- Click delete- that will delete the item and you will not have a paper trail of it any longer in the financials, you can however see it in the Audit log
- Once the item has been deleted there will be an unapplied amount of money
- Click on the refunds tab
- Click patient refunds
- Click the upside-down triangle (filter icon)
- Enter patients names
- Click filter
- Once you have filtered and can see the patient and the amount to refund:
- Click generate refund
- In the refund note, you can type in why you are refunding this amount
- Select the status
- Select the form of refund (cash, check, Credit card)
- Then click generate refund

Scenario #2

If you would like to keep items/service in the financials to keep a trail of it

Within the financials you can do the following:

- Go to the patient's financials and see what item/service they are wanting to return or get a refund for:
- Click on the payment that has been distributed and remove it from the items/services
- That will leave a balance for these items
- That will also leave an unapplied amount that you will need to generate your refund
- Click on the action drop down
- Click on patient adjustment

- Adjust off the items/services purchased with a note as to why you are adjusting off these items/services
- Post the adjustment, that will zero out the balance for the items/services
- Click on the refunds tab
- Click patient refunds
- Click the upside-down triangle (filter icon)
- Enter patients names
- Click filter
- Once you have filtered and can see the patient and the amount to refund:
- Click generate refund
- In the refund note, you can type in why you are refunding this amount
- Select the status
- Select the form of refund (cash, check, Credit card)
- Then click generate refund