

Gift Certificates

Gift Certificates are a great way to advertise your business, increase revenue and increase the number of patients your practice sees. When your practice provides exceptional customer service, patients are more likely to refer you to someone they know and what a great way to spread your name, products and services than with a gift certificate.

During holiday seasons, special occasions or donations to local charitable organizations, gift certificates can be a valuable marketing tool and revenue producer.

If you want to set up ODPro to use and record Gift Certificate sales, follow these simple steps.

1. Creating the Gift Certificate Procedure

- Add Gift Certificate (e.g. GCERT) to the Default Procedures Code table (verify that the Gift Certificate procedure code is active by placing an X in the checkbox under the STAT column)
- To do this, go to Record → Insurance Related Records → Default Procedure Codes

2. Creating the Gift Certificate Adjustment

- Add Gift Certificate to the Billing Code table (verify that the Gift Certificate procedure code is active by placing an X in the checkbox under the AC column)
- To do this, go to Record → Group Billing Code Table

3. Adding the Gift Certificate to the Self Pay Fee Schedule

- Add Gift Certificate to the Self Pay Fee Schedule (verify that the Gift Certificate procedure code is active by leaving the checkbox under the I/A column unchecked)
- To do this, go to the Products Tab → expand Professional Services → double click on the Self Pay Fee Schedule

Important: Only the program administrator should add or modify any procedure code, billing code or fee schedule entry in OD Professional.

Recording the Gift Certificate as Sale

- Open New Invoice
- Enter Gift Certificate procedure code (e.g. GCERT)
- Enter Patient Payment
- Click Post All
- Print out Walk Out statement and hand to patient with Gift Certificate

Applying the Gift Certificate as Payment

- Open New Invoice
- Enter all Transactions / Charges
- Right mouse click on the invoice and Select Make Adjustment
- Enter amount of Gift Certificate and Click OK
- Change the Billing Code to Gift Certificate
- Select the Transaction to Apply. (this is usually the first self pay transaction number)

- Enter the Transaction Description as Gift Certificate No.1003 (this is what prints on the patient's statement) and Click OK
- Enter Patient Payment (if necessary)
- Click Post All
- Print Walk Out Statement (remember to obtain the gift certificate from the patient)