With the holiday season approaching, we want to track gift certificates our patients purchase. We need to know who purchased them and track which certificates have been used.

No problem! Here's what you do.

1. Make sure your gift certificates are numbered in sequence (i.e. #1 - #100)
2. Create a billing code for gift certificates (GIFT) to be used when selling and redeeming the certificates.
3. When you sell a gift certificate to a patient, use the GIFT code in the "Misc" category in the billing. Example: John Smith purchases gift certificate #15 for the amount of $100. John's billing looks something like this:

Misc   *GIFT*   *Gift Certificate #15*   *$100.00*

Remember to add the Gift Certificate # to the description line.

4. John gives the gift certificate to Julie Smith for Christmas. In January, Julie comes into your office to use her gift certificate towards a new pair of glasses.
5. You bill Julie for the glasses – her entire billing comes to $250.00. Julie's billing looks something like this.

Lens   *Lens*   *Lenses*   *$ 50.00*

Frame *GU001*   *Guess model 56 – green*   *$ 75.00*

Prof   *DSVNF*   *Dispensing – single vision new frame*   *$125.00*

Misc   *GIFT*   *Redemption of Certificate #15 =*   *-$100.00*

                                              Total: *$150.00*

6. At any time, you can track the certificates that have been purchased and which ones have been redeemed by printing a Billing File Report as follows:

   a) Billing
   b) Bill Codes
   c) Billing File Report
   d) Enter the date range you wish to use (start with a date prior to when you first started selling the certificates).
   e) Enter the GIFT code as the start code and end code.
   f) You can separate the report out by doctors if you wish (leave the doctor field blank for ALL doctors).
   g) Make sure the "Other" category is bulleted – tells the program to look on the patient billings for the GIFT code in the Misc. category.
   h) No need to sort by code because you are only selecting one code (GIFT).
   i) Click on the printer in the menu bar to print the report.

The report will list all the certificates purchased and also the certificates that have been redeemed. The purchased certificates will be listed as positive amounts and the redeemed certificates are listed as negative amounts. When the report balances out to $0.00, you know that all certificates have been redeemed.