# PRACTICE MATE CREDIT CARD TRANSACTION UPDATES



There are new updates to the check in feature in Appointments. In addition to the normal check in feature you now have the ability to check a patient in and create the visit at the same time. We have also added Credit Card transactions to both check in features. Office Ally now offers credit card processing. Simply contact our Office Ally Payments Expert at 877-696-6426 for a free statement analysis and quote.

### **Normal Check In**

- From the Appointments tab
- Click on Check In

					Monday, J	uly 21, 2008							
т	ime	Length	Patient Name	DOB	Home / Cell Phone	Provider/ Staff	Reason for Visit	Status	Add	Edit	Del	Check In	Create Visit
08	:00								<b>N</b>				
	:15								٩.				
	:30								٩.				
	:45								٩.				
09	:00:	15 mins	Smith, Mike G	7/20/1975	555-555-5555 / 555-555-5555	Frank Stokes MD	Illness	Active	٩.	<b>N</b>	Х	C Che	<u>ck In</u>
	:15								<b>N</b>			Che	ck In & Cr

• If you are a Merchant account member and you choose "Credit Card" as the Payment Method you will get the option to swipe the credit card or manually enter the credit card information for the transaction

Payment Method: Credit Card  Check Number:	Amount: Description: Copay	
Close Credit Card Panel		Instructions
Please enter the Credit Card transaction on the right panel.	Please swipe the credit card now	
If you are processing Credit Card transaction using your CC company, then	Enter Manually	

- If you choose to swipe the credit card, the name, card number and expiration date display
- If you have multiple merchant accounts for your practice you will see a drop down list to select the correct merchant to apply the payment too
- Enter the amount to charge and a comment/billing info. if applicable

Payment Method: Credit Card  Check Number:	Amount: Description: Copay
	Order Information
Close Credit Card Panel	Name: TEST CARD
Discourse the first for the formula in the	Card Number Ending: 8431
the right panel.	Exp Date: 201012
If you are processing Credit Card transaction	Amount to Charge: \$*
using your CC company, then click 'Close Credit Card Papel' and continue adding the	Invoice or Billing Info:
payment manually.	Process

- If you choose "Enter Manually" the name and address fields will be displayed with the patients information
- If you have multiple merchant accounts for your practice you will see a drop down list to select the correct merchant to apply the payment too
- If the credit card holder is different than the patient you can override these fields with the correct card holder information
- Enter the credit card #, amount to charge, CCV #, expiration date and a comment if applicable
- Click Next to continue to the Verification screen

Payment Method: Credit Card  Check Number:	Amount: Description: Copay
Close Credit Card Panel Please enter the Credit Card transaction on the right panel. If you are processing Credit Card transaction using your CC company, then click 'Close Credit Card Panel' and continue adding the payment manually.	Credit Card Transaction  * Required Fields  *Name Mike Smith *Address 589 South St. *City Cerritos *Zip Code 90703 *Card Number 411111111111111 CCV 239 Expires * January V * 2009 V *Amount: 20 Comments: Copay Next >>

• This screen allows you to verify that all the information is correct

Check Number:	Description: Copay				
	Verify Information				
	Name: Mike Smith	Card Number Ending: 1111			
Close Credit Card Panel	Address: 589 South St.	CCV: 239			
Please enter the Credit Card transaction	City: Cerritos	Exp Date: 201001			
on the right panel.	Zip: 90703				
f you are processing Credit Card	Comments	Amount			
ransaction using your CC company, then slick 'Close Credit Card Panel' and continue adding the payment manually.	Copay << Back	\$20 Process			

- If you need to make a change click the Back button
- Regardless if you swiped the credit card or entered the credit card information manually you can now proceed to the next step and process the payment
- Click Process and you will receive the message "Payment added successfully"

• The payment information and authorization # will be displayed

•

Payments (e	entered fro	m this Check Ir	page):		VISA	MasterCard	DISCOVER	Cards
Payment Date	Payer Type	Payer	Payment Method	Check/Auth No	Amount	Applied Amount	Delete	Receipt
11/30/2009	Patient	Mike Smith	Credit Card *	123456	\$20.00	\$0.00	×	<b>S</b>
Anneistannet	Pro	vider	~		un a shill Cauth	Cide Medies		
Appointment	Fra	nk Stokes MD	*	50	iperbili. South	Side Medica		
Reso	ource:	*		❤ Che	eck-In ? 📃			
yment added	successfu	lly			Print S	uperbill	Update	Canc

Click on the printer icon under the receipt column to print a receipt of the transaction

outh Side Medical	R	ECEIPT
guna Beach, CA 92651 9-464-9129		Payment ID: 1003768795 Payment Date: 11/30/2009
Received from:	Mike Smith	\$ 20.00
For: Copay		
Method:	Cash Check X Credit Card	Other
Card Type: Visa	Acct. No.: ****************************1111	Auth. No.: 123456
I agree to pay above t	otal amount according to card issuer agreement.	
Sig.:	Date:	Received By:
Mike Smith		

## **Check In and Create Visit**

- From the Appointments tab or Patient Visits tab
- Click on Check In & Create Visit or from the Patient Visit tab click Edit for a visit you wish to add a payment too
- The Edit Visit screen will be displayed
- If Check In and Create Visit option was used: Verify patient demographics and insurance company info with the patient

					Monday, J	uly 21, 2008							
т	ime	Length	Patient Name	DOB	Home / Cell Phone	Provider/ Staff	Reason for Visit	Status	Add	Edit	Del	Check In	Create Visit
08	:00								٩.				
	:15								٩.				
	:30								٩.				
	:45								<b>N</b>				
09	:00	15 mins	Smith, Mike G	7/20/1975	555-555-5555 / 555-555-5555	Frank Stokes MD	Illness	Active	1	<b>N</b>	х	Che	ck In
	:15								<b>N</b>			Che	ck In & Crea

Visit Info	Billing Info	Billing Options				
Patient ID: DOB: Address:	10012005 7/20/1975 589 South St., Ce	Last Name: Gender: rritos, CA 90703	Smith M	First Name: Phone:	Mike 555-555-5555 edit	MI: G
Visit Date (mm Reason for Visi Descriptions/Sy Allergies:	//dd/yyyy): 11 / 3 t: Check u rmptoms:	0 / 2009 IIII		Visit Status: Print Billing S Vital Signs:	Open tatement? No v Weight: Height: Temperature: Blood Pressure:	
Provider ID: Provider (First/L	ast): Frank	Stoke	s MD	rovider Notes: 🛄	(max 500 chars)	

• Click on the Billing Info tab and scroll down to the Payment options

Payments:								V	ISA 🗖	terCard	DISC	VER	Cards
Payment Date	Payer Type	Payer	Payment Method		Check/A	uth No	A	mount	Applied Amount	Edit	Delete	Receipt	Apply
11/30/2009	Patient	Mike Smith	Cash	*			s						
Applied Payme	nts:								Add P	ayme	ent	Adjustr	nent
Applied Date	Applied Type	d Aj Ar	oplied nount	Paymer Date	nt	Payme	nt ID	,	Account		Payer Type	Pay	er
No transaction													

• If you are a Merchant account member and you choose "Credit Card" as the Payment Method you will get the option to swipe the credit card or manually enter the credit card information for the transaction

	Instructions
Close Credit Card Panel	
Please enter the Credit Card transaction on the right	
panel.	Please swipe the credit card now
If you are proceeding Credit Card transaction using	Or
your CC company, then click 'Close Credit Card Panel'	Enter Manually
and continue adding the payment manually.	

- If you choose to swipe the credit card, the name, card number and expiration date display
- If you have multiple merchant accounts for your practice you will see a drop down list to select the correct merchant to apply the payment too
- Enter the amount to charge and a comment/Billing Info. if applicable

	Order Information
Close Credit Card Panel	Name: TEST CARD
	Card Number Ending: 8431
Please enter the Credit Card transaction on the right panel.	Exp Date: 201012
If you are processing Credit Card transaction using	Amount to Charge: <b>\$*</b>
your CC company, then click 'Close Credit Card Panel' and continue adding the payment manually.	Invoice or Billing Info:
	Process

- If you choose "Enter Manually" the name and address fields will be displayed with the patients information
- If you have multiple merchant accounts for your practice you will see a drop down list to select the correct merchant to apply the payment too
- If the credit card holder is different than the patient you can override these fields with the correct card holder information
- Enter the credit card #, amount to charge, CCV #, expiration date and a comment if applicable
- Click Next to continue to the Verification screen

	Credit Card Transaction
	* Required Fields
Close Credit Card Panel	*Name Mike Smith
Please enter the Credit Card transaction on the right	*Address 589 South St.
panei.	*City Cerritos
If you are processing Credit Card transaction using your CC company, then click 'Close Credit Card	*Zip Code 90703
Panel and continue adding the payment manually.	*Card Number 41111111111111 CCV 239
	Expires * January 💉 * 2010 🗸
	*Amount: 20
	Comments:
	Next >>

• This screen allows you to verify that all the information is correct

Close Credit Card Panel	Verify Information Name: Mike Smith Address: 589 South St.	Card Number Ending: 1111 CCV: 239
Please enter the Credit Card transaction on the right panel.	City: Cerritos Zip: 90703	Exp Date: 201001
If you are processing Credit Card transaction using your CC company, then click 'Close Credit Card Panel' and continue adding the payment manually.	Comments << Back	Amount \$20 Process

- If you need to make a change click the Back button
- Regardless if you swiped the credit card or entered the credit card information manually you can now proceed to the next step and process the payment
- Click Process and you will receive the message "Payment added successfully"
- The payment information and authorization # will be displayed

Payments:										Cards
Payment Date	Payer Type	Payer	Payment Method	Check/Auth No	Amount	Applied Amount	Edit	Delete	Receipt	Apply
11/30/2009	Patient	Mike Smith	Credit Card *	123456	\$20.00	\$0.00	∕∕	×	9	1
11/30/2009	Patient	Mike Smith	Cash 💌		s					
Payment added s	Payment added successfully Adjustment Adjustment									

• Click on the printer icon under the receipt column to print a receipt of the transaction

South Side Medical 31601 S. Coast Hwy	RECEIPT						
Laguna Beach, CA 92651 949-464-9129		Payment ID: 1003769046 Payment Date: 11/30/2009					
Received from:	Mike Smith	\$ 20.00					
For:							
Method:	Cash Check X Credit Card Other						
Card Type: Visa	Acct. No.: *****************1111	Auth. No.: 123456					
I agree to pay above t	otal amount according to card issuer agreement.						
Sig.:	Date: Received	By:					
Mike Smith							

### **Entering Credit Card Payments in the Accounting tab**

If you receive a credit card payment from a patient for a copay they didn't pay at the time of visit or payment from a patient statement you can use the new credit card feature to add the payment

- From the Account tab
- Click Add New Payment/Deposit
- Choose Patient as the Payer Type
- Choose the patient who made the payment
- If you are a Merchant account member and you choose "Credit Card" as the Payment Method you will get the option to swipe the credit card or manually enter the credit card information for the transaction

	Please enter the Credit Card transaction on the panel below.
Close Panel	
	If you are processing Credit Card transaction using your CC company, then click
	'Close Credit Card Panel' and continue adding the navment manually
	close creat card rand, and continue adding the payment manadity.
	Instructions
	<u>Instructions</u>
	Please swipe the credit card now
	-
	Or
	Enter Manually

- If you choose to swipe the credit card, the name, card number and expiration date display
- If you have multiple merchant accounts for your practice you will see a drop down list to select the correct merchant to apply the payment too
- Enter the amount to charge and a comment/billing Info. if applicable

	Please enter the Credit Card tran	nsaction on the panel below	v.					
Close Panel	If you are processing Credit Card transaction using your CC company, then click 'Close Credit Card Panel' and continue adding the payment manually.							
	Order	Information						
	*Provider:	Select	~					
	Name:	PAYMENTECH TEST CA	RD					
	Card Number Ending:	8291						
	Exp Date:	201012						
	Amount to Charge:	\$*						
	Invoice or Billing Info:							
	F	Process						

- If you choose "Enter Manually" the name and address fields will be displayed with the patients information
- If you have multiple merchant accounts for your practice you will see a drop down list to select the correct merchant to apply the payment too
- If the credit card holder is different than the patient you can override these fields with the correct card holder information
- Enter the credit card #, amount to charge, CCV #, expiration date and a comment if applicable

Class	Please enter the Credit Card transaction on the panel below.
Close	If you are processing Credit Card transaction using your CC company, then click 'Close Credit Card Panel' and continue adding the payment manually.
	Credit Card Transaction
	• Required Fields
	*Provider: Select 💟
	*Name Mike Smith
	*Address 589 South St.
	*City Laguna
	*Zip Code 92658
	*Card Number 4444444444444 CCV 123
	Expires * January 💉 * 2010 🗸
	*Amount: 20
	Comments:
	Next >>

- Click Next to continue to the Verification screen
- This screen allows you to verify that all the information is correct

lose F	Please enter the Credit Card trans	action on the panel below.
	If you are processing Credit Card 'Close Credit Card Panel' and cont	transaction using your CC company, then click inue adding the payment manually.
ſ	Verify Information	
	Provider: Test Test	Card Number Ending: 4444
	Name: Mike Smith	CCV: 123
	Address: 589 South St.	Exp Date: 201101
	City: Laguna	
	Zip: 92658	
	Comments	Amount
		\$20
	< Back	Process

- If you need to make a change click the Back button
- Regardless if you swiped the credit card or entered the credit card information manually you can now proceed to the next step and process the payment

• Click Process and you will receive the message "Payment has been added successfully. Please click Close button to exit"

Payer Type:	Patient 💙
Patient ID:	10012005
Patient Name:	
Payment Type:	Payment 🗸
Payment Method:	Credit Card 🗸
Check Number:	123456
Amount:	20
Description:	

• Click close to exit and return to the Payments/Deposit screen

Payments/D	Payments/Deposits - [Last 100 Entries]										
Display By: Pay	Display By: Payment Date Go   Payment Month Go   Last 100 Entries Show All										
Search For: Patient Last Name V Starts With V Search											
	Display Fi	Iter: Any	~	]							
Payment Date	Payer Type	<u>Payer</u>	Payment Method	<u>Check Number</u>	Payment Amount	Applied Amount	Where Applied	Edit	Delete	Recpt	Apply
11/30/2009	Patient	Smith, Mike	Credit Card *	123456	\$20.00	\$0.00	<u>View</u>	1	×	1	1
11/30/2009	Patient	Smith, Mike	Credit Card *	123456	\$20.00	\$0.00	View	•	×	3	1
11/30/2009	Patient	Smith, Mike	Credit Card *	123456	\$20.00	\$0.00	View	1	×	3	1
11/25/2009	Insurance	Aetna	Check	12547	\$500.00	\$0.00	View	0	×	3	1
11/25/2009	Patient	West, Adam	Cash		\$20.00	\$-20.00	<u>View</u>			୍ 🎯	1

• Click on the printer icon under the receipt column to print a receipt of the transaction

South Side Medical 31601 S. Coast Hwy	RECEIPT	
Laguna Beach, CA 92651 949-464-9129		Payment ID: 1003769297 Payment Date: 11/30/2009
Received from:	Mike Smith	\$ 20.00
For:		
Method:	Cash Check X Credit Card Other	
Card Type: Visa	Acct. No.: ************1111	Auth. No.: 123456
I agree to pay above t	otal amount according to card issuer agreement.	
Sig.:	Date: Received	By:
Mike Smith		

# **Voids and Refunds**

• From the Accounting tab highlight the Reports option and select Credit Card Transaction List

Appointments	e Patie	ent Visits	Claims/Billing	Account	ting M	anage Patients	Manag	ge Off	fice			
	Add	Reports 🕨										
Payments/Deposits - [Last 100 Entries]											sits Report	
- ayments	, Deposits	, francisco r	intrico]							Applied Paymen	ts Report	
Display By:	Payment Da	ate	Go	Payment Mon	ith	Go	Last 100 E	Entrie	s Sl	Applied Payments By Accounts		
										Daily Transaction Summary Report		
	Search F	or: Patient Last I	lame 🔽 Starts	With 🔽		Searc	sh			AR Aging Summary Report		
1 and 1					1					AR Aging Detail Report		
A REAL PROPERTY	Display F	Filter: Any		*						Patient Account Ledger		
									Chart of Accoun	ts		
<u>Payment</u> <u>Date</u>	Payer Type	Payer	Payment Method	<u>Check</u> <u>Number</u>	Amount	t <u>Applied</u> <u>Amount</u>	Where Applied	Edit	Delete	Manage Billing S	tatements	
10/27/2008	Patient	English, Tony	Credit Card *	099644	\$20	.00 \$0.00	View	∕∕	×	Credit Card Tran	saction List	

• The Credit Card Transaction List will be displayed

Credit Ca	Credit Card Transactions - [Last 100 Entries]											
112	Transactions: By Month	•		Go Filt	er: Transactior	n Type: All 💌						
- And	Search For: Name 💙	Starts Wit	th 🔽		Sea	arch Show All						
Date	Name	Amount	Auth.No	Comments	Trans.Type	Provider	Receipt	Void /				
10/27/2008	PAYMENTECH TEST CARD	\$20.00	090008	Conav	Purchase	South Side Medical	3	Refund E)				
10/27/2008	Tony English	\$20.00	000007	Copay	Purchase	South Side Medical	<u>~</u>	=)				
40/07/0000	Kally Olarla	\$20.00	030007	Oppay	Durchase	Oouth Oide Medical		~				
10/2//2008	Kelly Clark	\$20.00	099990	Copay	Purchase	South Side Medical	9	N				
10/27/2008	PAYMENTECH TEST CARD	\$25.00	099983	Copay	Purchase	South Side Medical	۵	<sup>1</sup>				
10/27/2008	JASON WILSON	\$10.00	099978	Сорау	Purchase	South Side Medical	9	ŝ				
10/27/2008	Mike Smith	\$15.00	099977	Copay	Purchase	South Side Medical	<b>\$</b>	r)				

- Click on the Void/Refund option to void or refund a payment (note: a payment will be voided if the payment has not been completely processed by the bank. If the payment has been completely processed by the bank then the payment will be refunded)
- The Verify Void/Refund page will display

verify void information	
Provide	er: Mike Berg
Transaction Dat	te: 11/30/2009 10:56:43 AM
Nam	1e: Mike Smith
Card Number Endir	ng: 1111
Amou	nt: \$20.00
Commen	ts:
Can	ncel Process

- Add a comment if applicable
- Click Process to Void/Refund the transaction

• The message: Void/Refund transaction has been processed successfully will be displayed

Veri	fy Void Information Provider: Mike Berg Transaction Date: 11/20/2000 10:55:42 AM				
	Name: Mike Smith				
	Card Number Ending: 1111				
	Amount: \$20.00				
	Comments:				
Window	vs Internet Explorer				
Window	vs Internet Explorer Void/Refund transaction has been processed successfully. Note: You will need to edit the related payment/deposit record and set th payment has been applied, you will need to unapply the payment first)	ne payment/de	epo:	sit amount to 0 or delete the payment entirely. (	íF

- Note: You will need to edit the related payment/deposit record and set the payment/deposit amount to 0 or delete the payment entirely. If the payment has been applied, you will need to un-apply it first.
- The Credit Card Transaction List will display the Void/Refund

Credit Car	d Transactions - [Last 100 En	tries]						
N.	Transactions: By Month		G	• Filter: Trar	nsaction Type:	- All 💙		
Area	Search For: Name 💙 St	arts With 🔽			Search	Show All		
Date		1990 - DA	ana ana 2	- NO.50	ana ana a		and the second second	Void /
butc	Name	<u>Amount</u>	Auth.No	<u>Comments</u>	Trans.Type	Provider	Receipt	Refund
11/30/2009	Name Mike Smith	<u>Amount</u> \$20.00	Auth.No 123456	<u>Comments</u>	<u>Trans.Type</u> Void	<u>Provider</u> Mike Berg	Receipt	Refund
11/30/2009 11/30/2009	Name Mike Smith Mike Smith	Amount \$20.00 \$20.00	Auth.No 123456 123456	<u>Comments</u>	Trans.Type Void Purchase	<u>Provider</u> Mike Berg Mike Berg	Receipt	Refund