PRACTICE MATE CREDIT CARD TRANSACTION UPDATES

OFFICE ALLY

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

- 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

- 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

- 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 ⌄ | | Amount: | |
| Check Number: | | | Description: | Copay |

Credit Card Transaction
* Required Fields

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.

*Name: Mike Smith
*Address: 589 South St.
*City: Cerritos
*Zip Code: 90703
*Card Number: 4111111111111111   CCV 239
Expires * January ⌄ * 2009 ⌄
*Amount: 20
Comments: Copay

Next >>

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

| Payment Method: | Credit Card ⌄ | | Amount: | |
| Check Number: | | | Description: | Copay |

Verify Information

Name: **Mike Smith**   Card Number Ending: **1111**
Address: **589 South St.**   CCV: **239**
City: **Cerritos**   Exp Date: **201001**
Zip: **90703**

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.

Comments   Amount
Copay   **$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 added successfully"

- The payment information and authorization # will be displayed

Payments (entered from this Check In page):

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	✕	🖨

Payment Method: Check   Amount: _____

Check Number: _____   Description: _____ **Add Payment**

Appointment With: Provider / Frank Stokes MD   Superbill: South Side Medical

Resource: _____   Check-In ? ☐

Payment added successfully   **Print Superbill**   **Update**   **Cancel**

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

South Side Medical
31601 S. Coast Hwy
Laguna Beach, CA 92651
949-464-9129

RECEIPT

Payment ID: 1003768795
Payment Date: 11/30/2009

Received from: Mike Smith $ 20.00

For: Copay

Method: ☐ Cash   ☐ Check   ☒ Credit Card   ☐ Other

Card Type: Visa   Acct. No.: ************1111   Auth. No.: 123456

I agree to pay above total 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

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

- 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

- 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

- 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

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

Verify Information

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.

Name: **Mike Smith**
Address: **589 South St.**
City: **Cerritos**
Zip: **90703**

Card Number Ending: **1111**
CCV: **239**
Exp Date: **201001**

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 added successfully"
- The payment information and authorization # will be displayed

Payments:

VISA   MasterCard   DISCOVER   American Express 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	✎	✗	🖨	✎
11/30/2009	Patient	Mike Smith	Cash ▼		$					

Payment added successfully

Add Payment   Adjustment

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

South Side Medical
31601 S. Coast Hwy
Laguna Beach, CA 92651
949-464-9129

RECEIPT

Payment ID: 1003769046
Payment Date: 11/30/2009

Received from: Mike Smith $ 20.00

For: _____

Method: ☐ Cash   ☐ Check   ☒ Credit Card   ☐ Other

Card Type: Visa   Acct. No.: ************1111   Auth. No.: 123456

I agree to pay above total 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

- 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

- 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

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 payment manually.

Credit Card Transaction
* Required Fields

*Provider: -- Select --
*Name Mike Smith
*Address 589 South St.
*City Laguna
*Zip Code 92658
*Card Number 4444444444444444   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

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 payment manually.

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

Cancel

- 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"

Payment Date (mm/dd/yyyy):	11 / 30 / 2009
Payer Type:	Patient
Patient ID:	10012005
Patient Name:	
Payment Type:	Payment
Payment Method:	Credit Card
Check Number:	123456
Amount:	20
Description:	

Payment has been added successfully. Please click Close button to exit   **Update**   **Close**

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

Payments/Deposits - [Last 100 Entries]

Display By: Payment Date ☐ ☐ ☐ 🖩 **Go** | Payment Month ☐ ☐ 🖩 **Go** | Last 100 Entries **Show All**

Search For: Patient Last Name ▾ Starts With ▾ ☐ **Search**

Display Filter: Any ▾

Payment Date	Payer Type	Payer	Payment Method	Check Number	Payment Amount	Applied Amount	Where Applied	Edit	Delete	Recpt	Apply
11/30/2009	Patient	Smith, Mike	Credit Card *	123456	$20.00	$0.00	View	✎	✗	🖨	✎
11/30/2009	Patient	Smith, Mike	Credit Card *	123456	$20.00	$0.00	View	✎	✗	🖨	✎
11/30/2009	Patient	Smith, Mike	Credit Card *	123456	$20.00	$0.00	View	✎	✗	🖨	✎
11/25/2009	Insurance	Aetna	Check	12547	$500.00	$0.00	View	✎	✗	🖨	✎
11/25/2009	Patient	West, Adam	Cash		$20.00	$-20.00	View			🖨	✎

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

South Side Medical
31601 S. Coast Hwy
Laguna Beach, CA 92651
949-464-9129

RECEIPT

Payment ID: 1003769297
Payment Date: 11/30/2009

Received from: Mike Smith $ 20.00

For:

Method: ☐ Cash   ☐ Check   ☒ Credit Card   ☐ Other

Card Type: Visa   Acct. No.: ************1111   Auth. No.:   123456

I agree to pay above total 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

- The Credit Card Transaction List will be displayed

- 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

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

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

Verify Void Information

Provider: **Mike Berg**
Transaction Date: **11/30/2009 10:56:43 AM**
Name: **Mike Smith**
Card Number Ending: **1111**
Amount: **$20.00**
Comments: [   ]

Windows Internet Explorer

⚠ Void/Refund transaction has been processed successfully.
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 unapply the payment first)

[OK]

- 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 Card Transactions - [Last 100 Entries]

Transactions: [By Month ⌄] [ ][ ] 🗓 [Go]   Filter: Transaction Type: [-- All -- ⌄]

Search For: [Name ⌄] [Starts With ⌄] [   ] [Search] [Show All]

Date	Name	Amount	Auth.No	Comments	Trans.Type	Provider	Receipt	Void / Refund
11/30/2009	Mike Smith	$20.00	123456		Void	Mike Berg		
11/30/2009	Mike Smith	$20.00	123456		Purchase	Mike Berg	🖨	↩
11/30/2009	Mike Smith	$20.00	123456	Copay	Purchase	Mike Berg	🖨	↩