Integrated Credit Card Processing

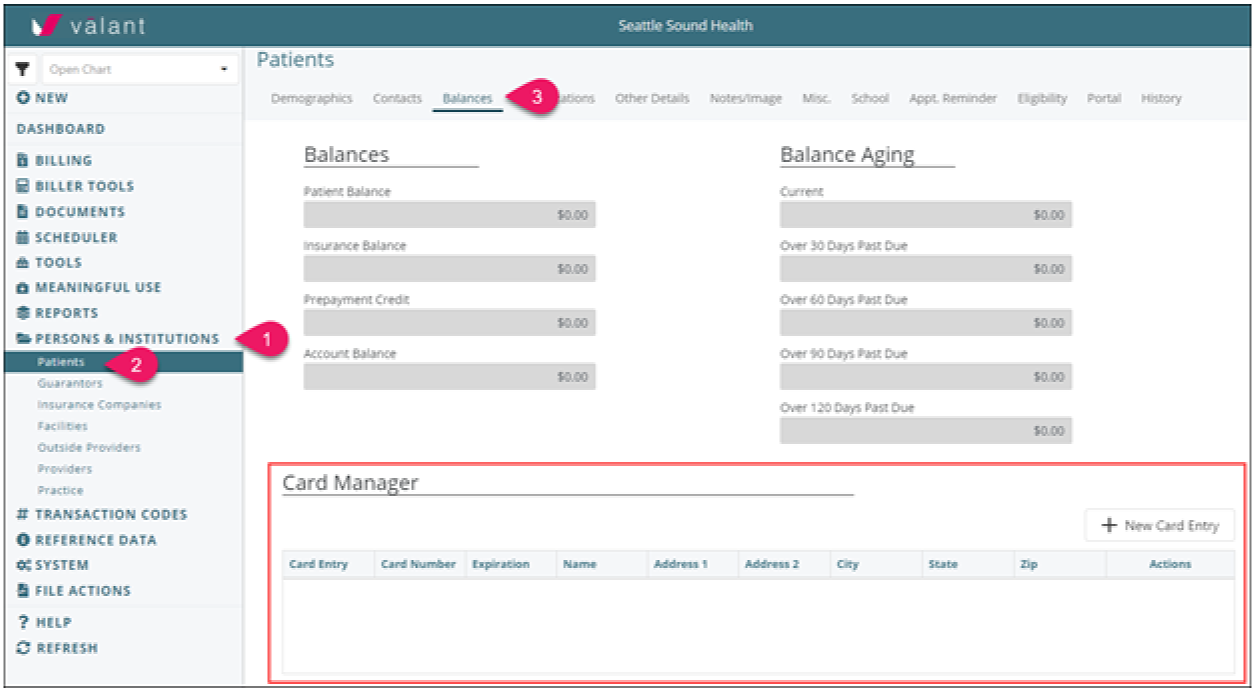
Valant Integrated Credit Card Processing can be used to collect payments from patients, store credit card information, and post credits to patient accounts. This user guide is meant to show you the functionality of integrated credit card processing and common workflows.

Contents

Card Manager

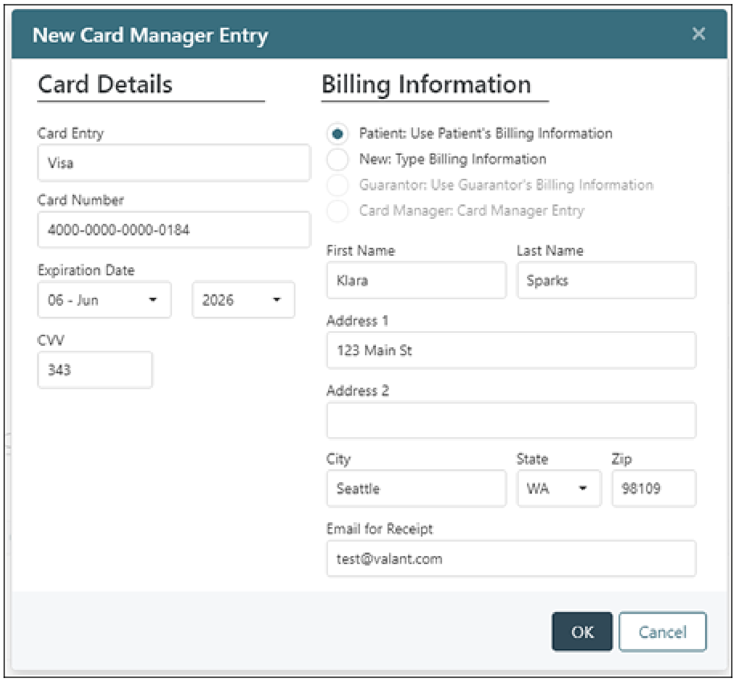
Users can access the Card Manager to store patient credit cards for future use. The "Credit Card Charge" permission is required to edit the Card Manager. Valant does not store credit card numbers in the EHR. Valant receives a token from our processing partner for each unique credit card number and store details related to the token. Users can edit all details of a card entered into the Card Manager except the credit card number and the CVV.

- To access the Card Manager, Click **Persons and Institutions | Patients| Balances.** The Card Manager will be on bottom half of the page.

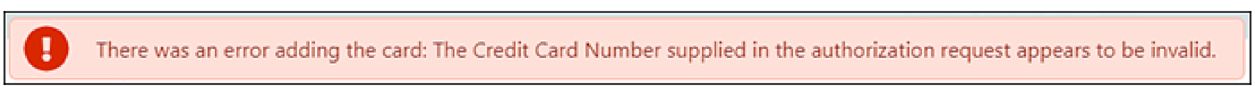


- To add a card click **New Card Entry**

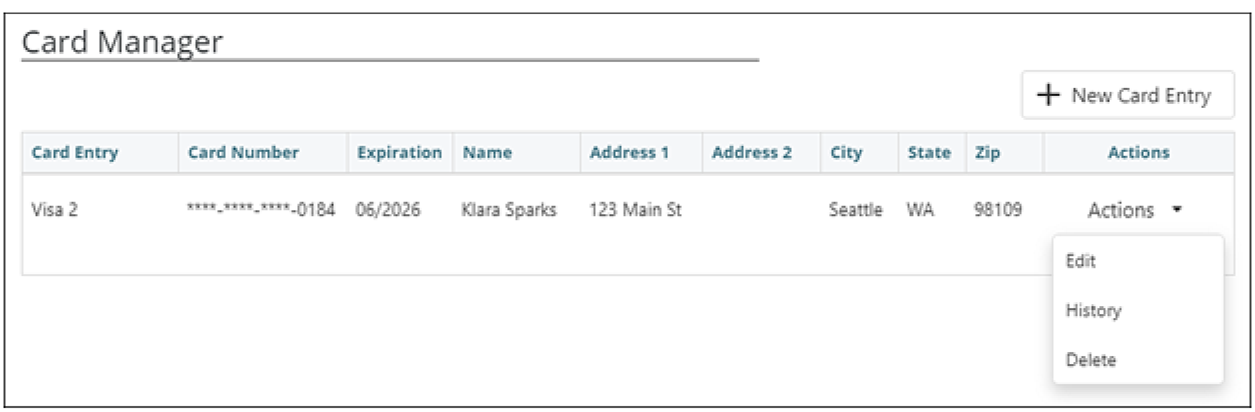
- Enter in the details of the card and billing information for the cardholder. Mastercard, Visa, Discover and American Express are supported credit card types. The billing fields will auto populate with relevant patient information, including email address. Guarantor will only be selectable if the patient has a guarantor associated with their account. Email for Receipt will auto-populate home email from the Contacts tab. If home email is empty but an email is in the work email, it will populate the email. Click **Ok**.



- When approved a banner will appear at the top of the page saying “Card successfully updated” if it is successful. If for some reason the card cannot be added the user will receive an error message. When a card is being added outside of a payment workflow the card number, CVV, expiration date, and billing information is validated with our processing partner.



- After the card had been added it will be visible in the “Card Manager” and users can click on the "Actions" drop-down to edit, delete, or view history of the card entry.



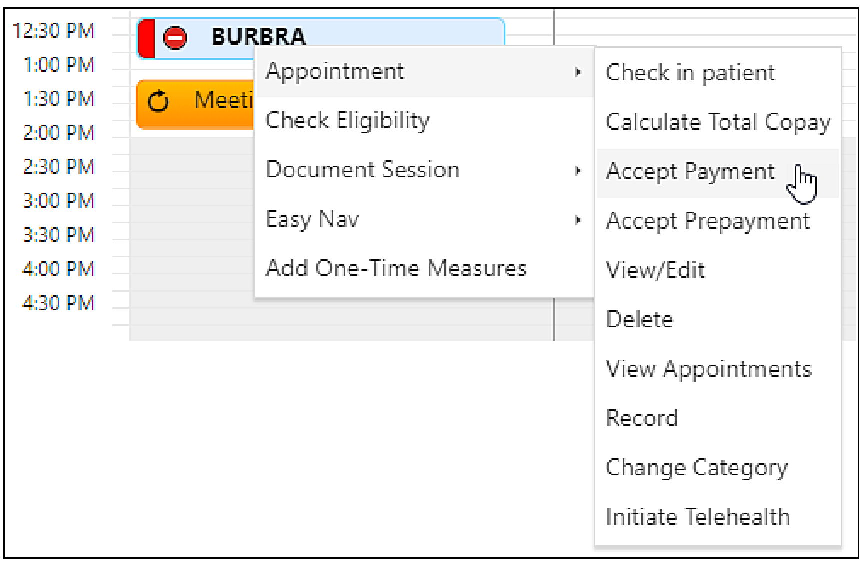
Cards stored in the Card Manager are not accessible through the Patient Portal with Online Bill Pay. Cards Saved to the Card Manger via the Patient Portal can only be accessed by the practice. The "Card Manager" tab will be available on every instance of the Automated Payment Processing" window.

Accepting Payments from the Scheduler

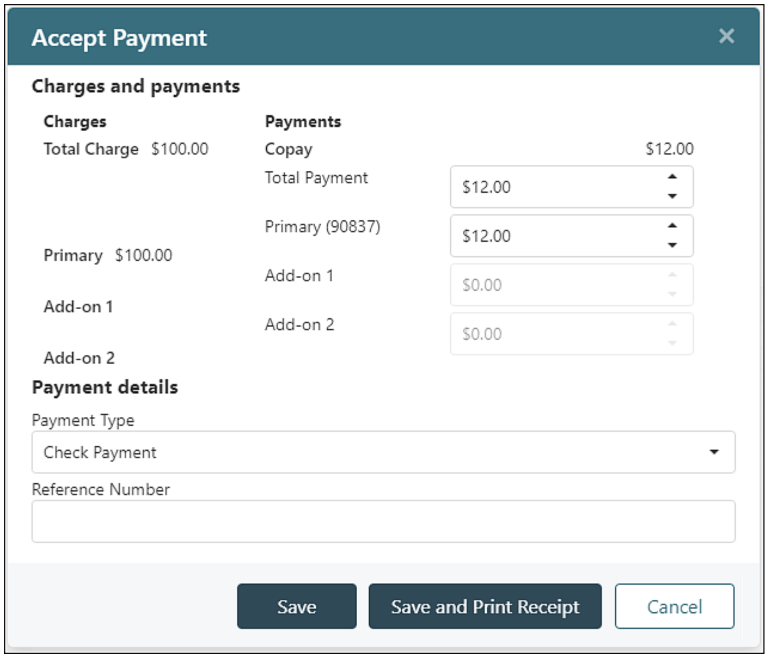
The **Accept Payment** button on an appointment in the Scheduler is used to process payment for a specific date of service directly through the calendar. This is the most popular workflow for accepting payments from patients. Practices with integrated credit card processing can also accept credit card payments and access the card manager button enabling the creation of a charge, acceptance of payment, and generation of a receipt in one simple process directly out of the calendar. To accept a payment from the scheduler the appointment needs to be recorded, which requires demographic and a diagnosis.

To see the Accept Payment option:

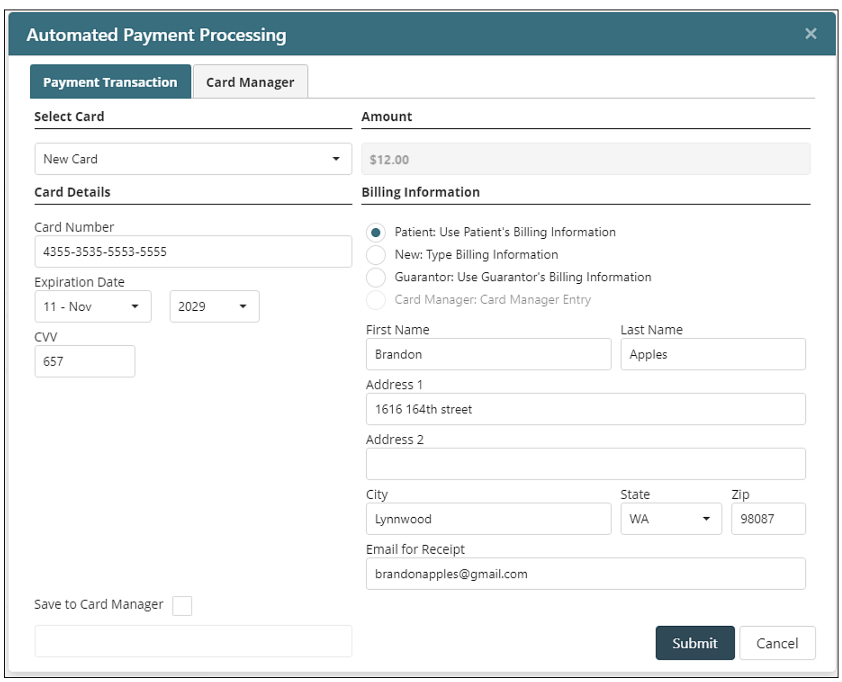
1. From the navigation menu click on **Tools** | **Scheduler**.
2. On the appointment block right-click on the **Appointment Block | Appointment | Accept Payment.**



3. The "Accept Payment" window will open and allow users to enter the payment details.



4. Click Save or Save and Print Receipt. This will complete the workflow unless "Auto Payment CC" is selected as the payment type. This payment type is for practices who use integrated payment processing and will open the "Automated Payment Processing" window when Save or Save and Print Receipt is selected.
5. Input credit card details or select a card stored in the card manager and click Submit.



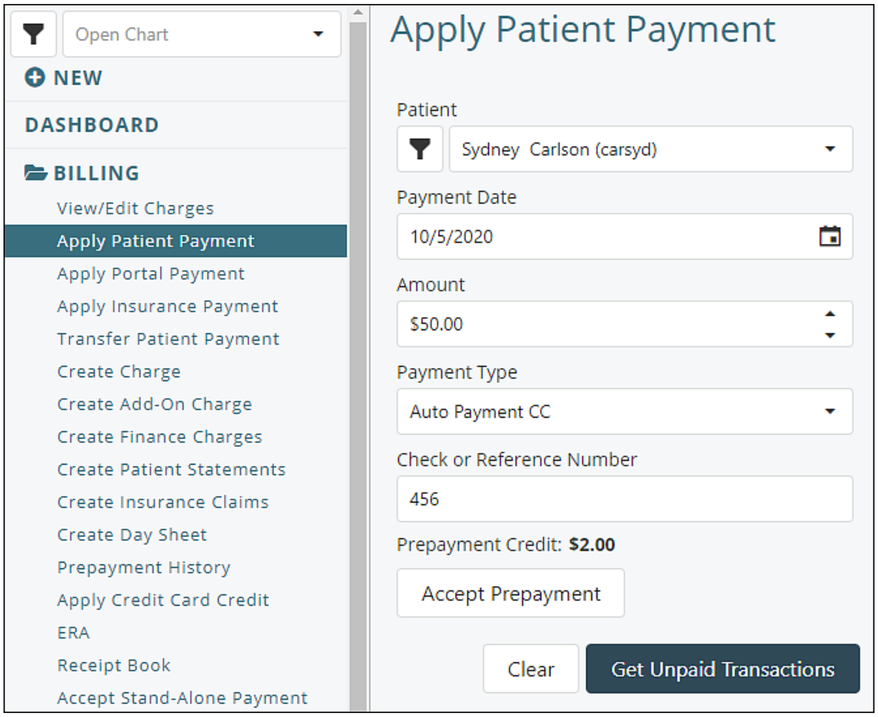
Definitions

- Total Charge field: overall charge for the session, the summation of all primary and add-on codes.
- Primary field: shows the CPT code of the primary transaction code as well as the charge for that specific procedure.
- Add-on 1 field: shows the CPT code of the add-on transaction code as well as the charge for that specific procedure.
- Add-on 2 field: shows the CPT code of the add-on transaction code as well as the charge for that specific procedure.
- Pre-payment Credit field: if the patient has prepayment credit from a prior over payment the remaining amount left to still be applied will appear here.
- Copay field: if the patient has a co-pay listed for him/her then the amount of that co-pay appears in this field.
- Total Payment field: the total amount of payment being accepted.
- Primary field: the total amount of payment being applied to the primary procedure code.
- Add-on 1 field: the total amount of payment being applied to the add-on procedure code.
- Add-on 2 field: the total amount of payment being applied to the second add-on procedure code.
- Payment Type drop-down: shows the different methods of payment that can be chosen from to reflect the method by which the patient paid for the session.
- Reference Number field: an optional field that can be used to track the check or card number used to pay for the session.
- Save button: enables creation of a charge and acceptance of payment without generation of a receipt.
- Save and Print Receipt button: this button enables creation of a charge, acceptance of payment, and generation of a receipt that the patient can use to submit for insurance reimbursement.
- Cancel button: this button cancels the accept payment option. Checking this cancels the creation of a charge and acceptance of payment, and no receipt is generated.

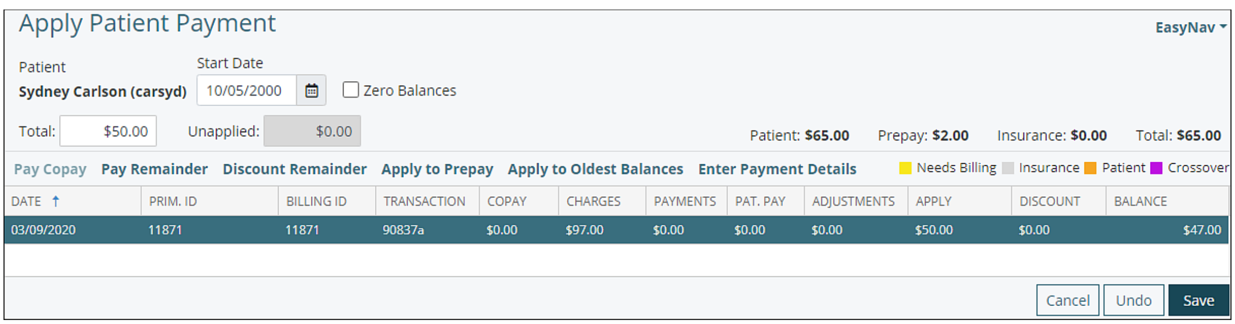
Apply Patient Credit Card Payment

Credit Card payments can be processed and applied on the Apply Patient Payment screen. This page will be used mostly when accepting a payment after a date of service has happened. A common occurrence is a patient making a payment in response to a statement and processing the payment through this workflow.

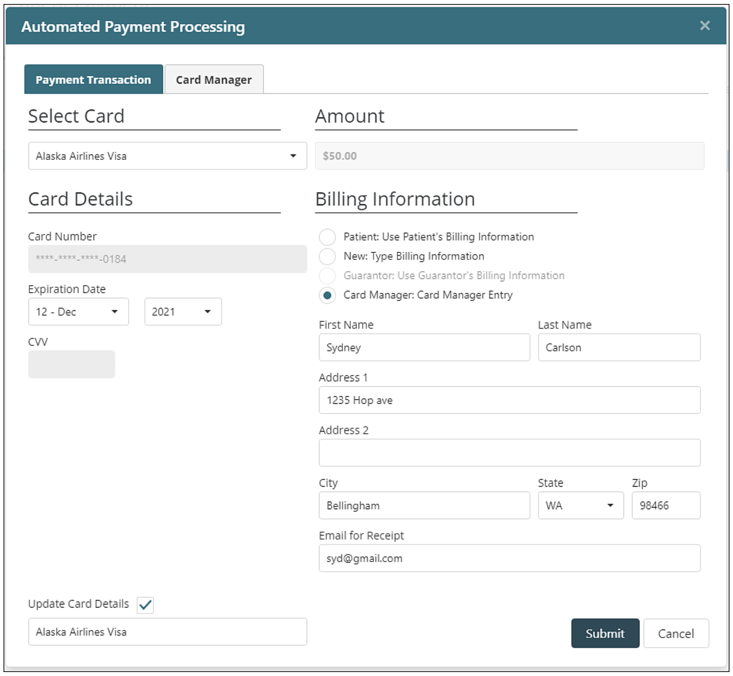
1. Click Billing | Apply Patient Payment
2. Select the Patient, date, amount, and select “Auto payment CC” under “Payment Type”
3. Click Get Unpaid Transactions



4. Apply payment amount to the date of service. Click Save



5. This will open the “Automated Payment Processing” window. From this window users can select a card stored in the Card Manager or enter card details directly in the window. Users have the option to save that entry into the card manager. Click Submit to process the payment.



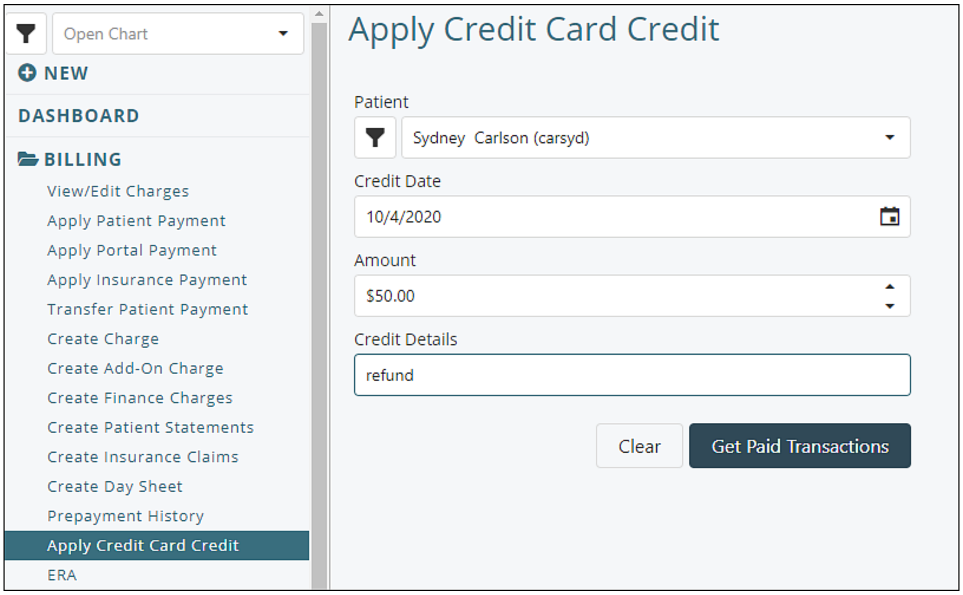
After the payment is processed a banner will appear across the page. The payment will be visible on the View/Edit Charges page. If the "Email for Receipt" field is completed the patient will receive an e-mail receipt within minutes.

Apply Credit Card Credit

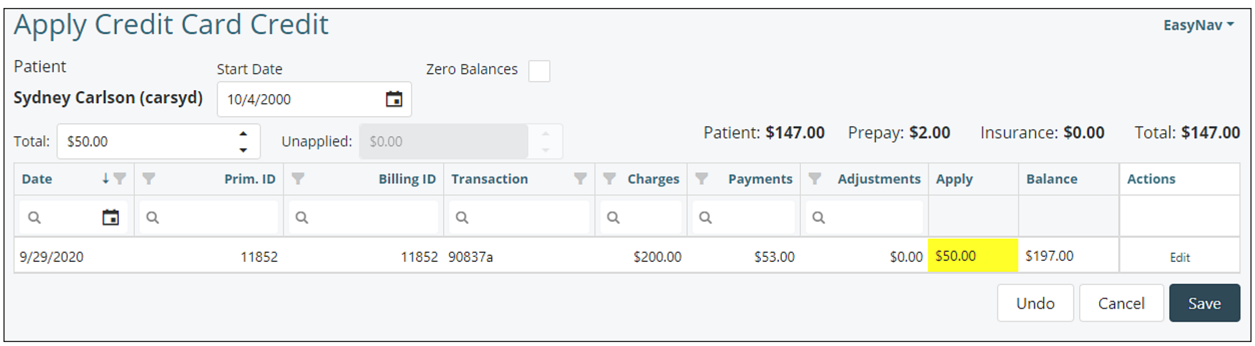
Practices who utilize Valant's integrated credit card processing can use the Apply Credit Card Credit page to post credits to patients. This will work for any payments taken via the "Auto Payment CC" payment type, as well as other credit card payment types in Valant. Users are required to have the Credit Card Credit permission to access the Apply Credit Card Credit. The patient transactions that appear in the Credit Card Credit page are limited to charges with a credit card payment. This can be any credit card payment type, not just Auto CC. To apply a credit card credit:

1. From the Navigation Menu select **Billing | Apply Credit Card Credit.**

2. On the "Apply Credit Card Credit" screen enter details for the patient, credit date, the amount to be credited, and select **Get Paid Transactions.**

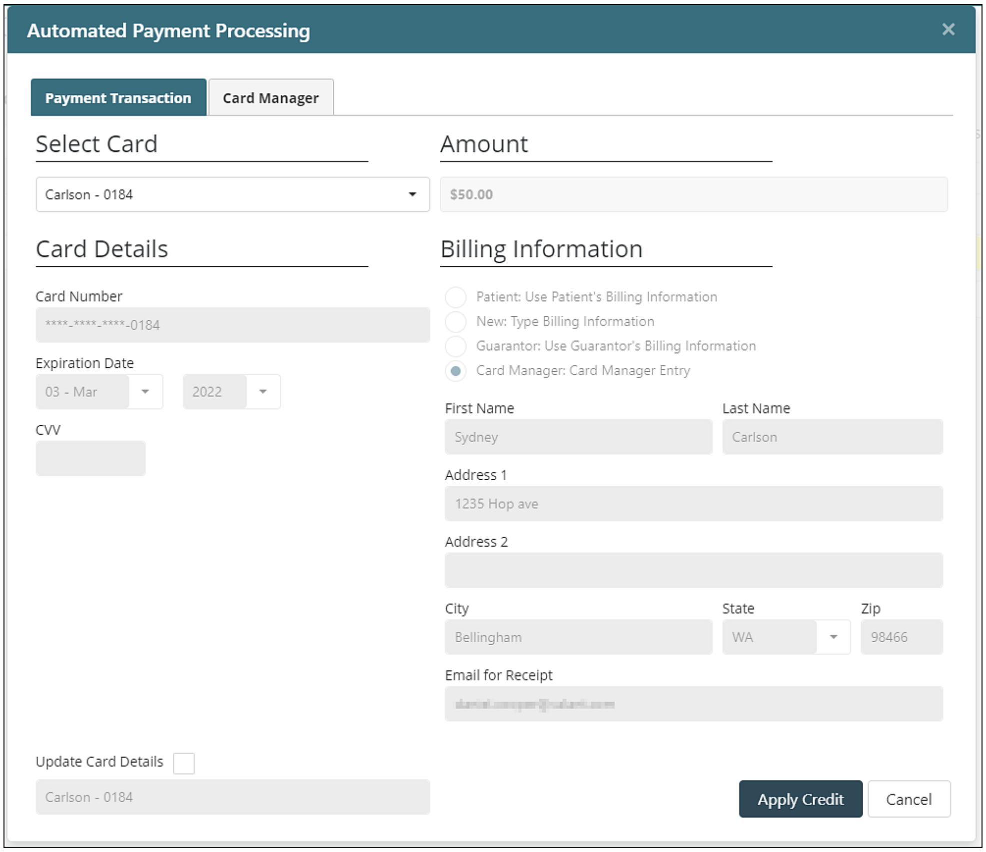


3. The next screen will show a list of all "Auto Payment CC" payments and a user will need to select which credit card payment to take the credit from. This page behaves like other payment grids in the system. Enter the amount of credit into one or more "Apply" field. Click **Save.**



4. This will open the “Automated Payment Processing” window. This allows the user to input card details, select a previously saved card, or access the Card Manager to edit any existing cards. When applying a credit, it is required to use a card previously saved, save a new card, or save updated card details to process a credit.

5. Once the information is completed click **Apply Credit**



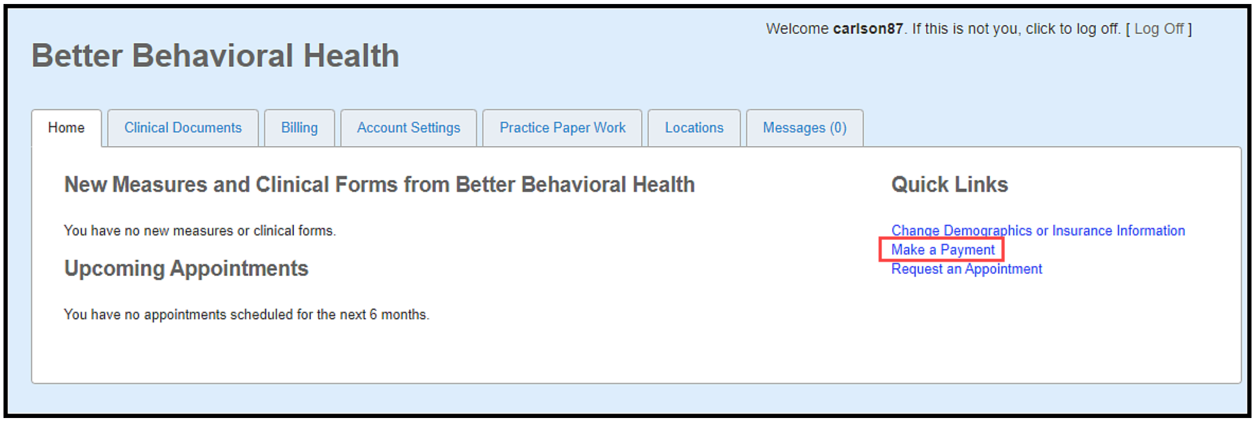
6. The system will confirm the payment was processed with a banner message when complete. The credit will be visible on the View/Edit Charges page.

Online Bill Pay

Online Bill Pay allows patients to submit a credit card payment through their Patient Portal Account. Practices can apply the patient's payment to their account. In order to use Online Bill Pay, practices must have the Patient Portal Module, Valant's integrated payment processing, and the Online Bill Pay Module enabled. Users must have the "Easy Billing" permission enabled to access the "Apply Portal Payment" page.

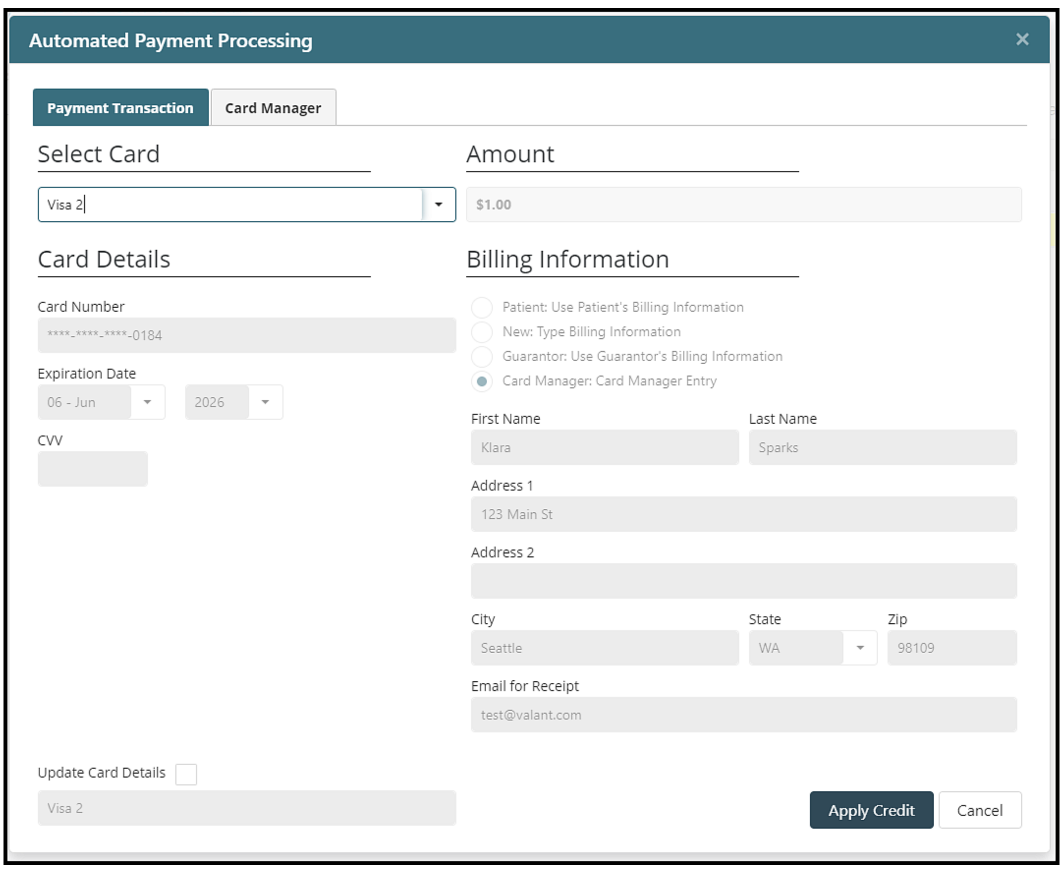
Patient Perspective

The patient will log into the Patient Portal and click on the “Make a Payment” under “Quick Links” or on the “Billing” Tab. Clicking either link will open the “Automated Payment Processing” window.



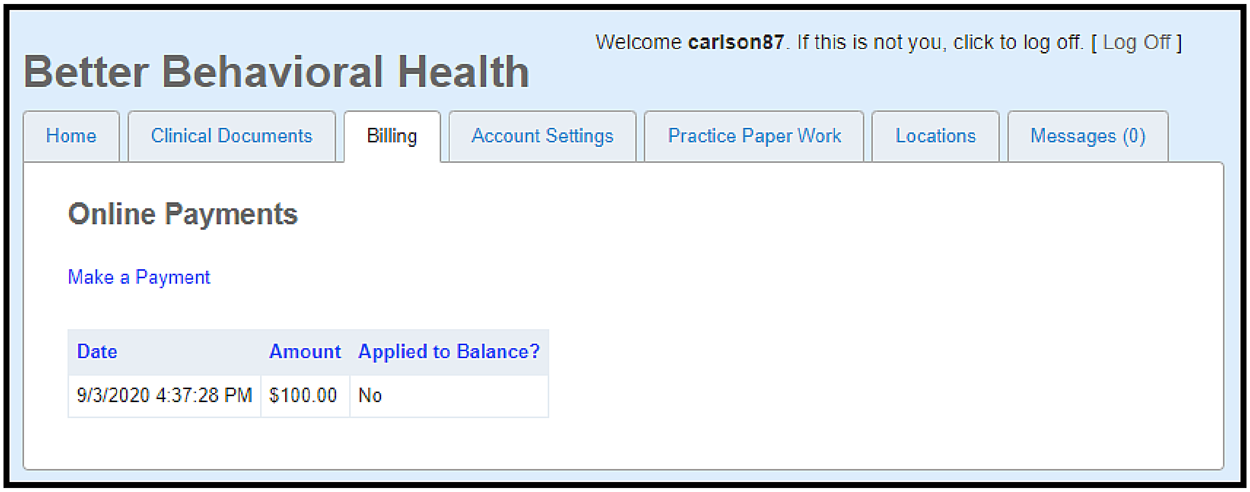
Automated Payment Processing Window

The "Automated Payment Processing" window will appear which allows the patient to enter their credit card information, the amount they want to pay, and can check the "Save to Card Manager" box to store the credit card for later use. Patients will also have access to the "Card Manager" but they can only see cards that were saved from the Patient Portal. This is to protect information that was potentially given by someone other than the patient (i.e. divorced parents, or guarantor).



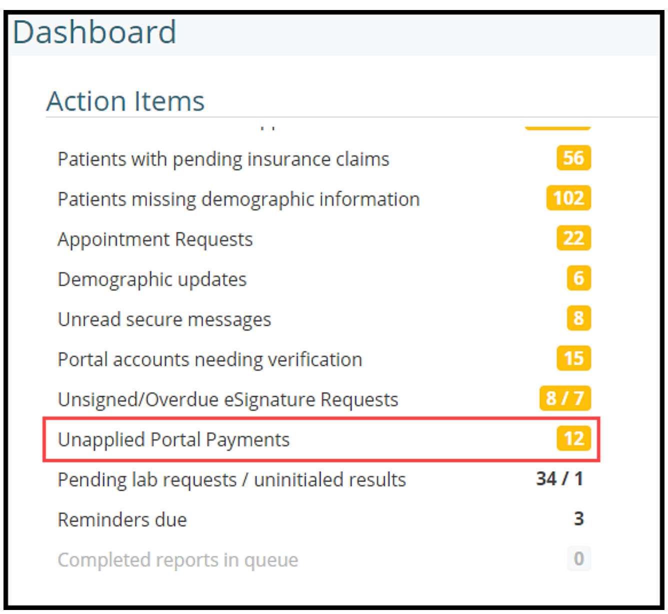
Applied to Balance

After successful payment the patient will see a new row added to the grid displaying the payment date, amount and “Applied to Balance?” on the billing tab. The applied to balance will say “No” until the practice manually applies the payment. Patients cannot select where the balance is applied. When a patient submits a payment, their card will be charged but their balance will not be updated until the practice manually applies the payment. The patient will receive an email receipt when the email for receipt field is completed.



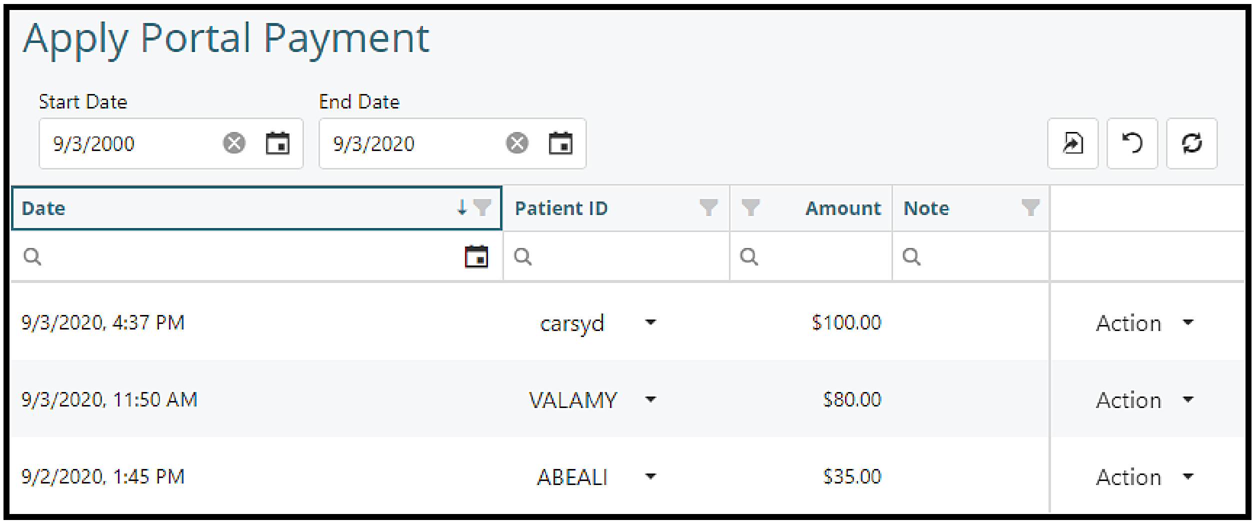
Practice Perspective

In the EHR there is a new Action Item called “Unapplied Portal Payments”. Clicking the action item will take the user to the “Apply Portal Payment” page. Users can also access the page by selecting **Billing | Apply Portal Payment** from the navigation menu.

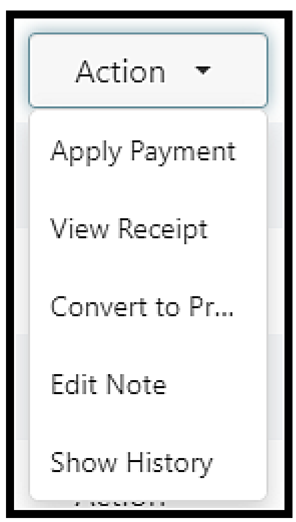


Apply Portal Payment

This page will show a list of all unapplied portal payments and their specific details. Payments made through the portal are not attached to any specific visit. It is at the discretion of the practice how to apply those payments.



Users should click the “Action” drop-down to apply the payment, view a receipt, convert to prepayment, edit the note or view a history of the payment and any edits. Converting a payment to pre-payment will change the "Applied to Balance" field in the Patient Portal to say "Yes". When Apply a Payment is selected it will function take users to the Apply Patient Payment and require the same workflow as applying a patient payment.



Resources

Payments Insider

- Visit https://www.mypaymentsinsider.com/ to access your account information, statements, and to customize reporting and create alerts. To register for this site, you will need your Merchant ID (MID) and last 4 digits of your business bank account.

PCI Compliance managed by Sysnet

- You will be required to validate compliance with Payment Card Industry Data Security Standards (PCI-DSS) within the first 90 days of activation or you may receive non-compliance fees. Please visit https://pcicompliancemanager.com or call 855-750-0747 to begin this process.

Elavon Customer Care

- Available 24/7 by calling 800-725-1243 or via email at custserv@elavon.com. Customer care can assist with questions related to daily account activity, funding, or billing.

Valant Knowledge Base

- Visit Help.valant.com for how-to-guides, videos, webinars, and other training solutions.

Valant Customer Support

- Available 6am – 5pm PST, Monday – Friday at 888-282-8085 or at support.valant.com