Manage In-Application Credit Card Processing

t Modified on 10/23/2026 10:36 am EDT

CollaborateMD ensures hassle-free credit card processing that will easily reduce follow up on co-pays, eductibles, and co-insurance balances, which translates into improved A/R. By processing your patient's redit card payments within CollaborateMD, you will increase business efficiency and accuracy. As well as aving you a ton of time, helping you work less and paid faster!

Enable In-Application Credit Card Processing

f you're the Auth Rep, follow the steps below to enable, configure or disable In-Application Credit Card rocessing:

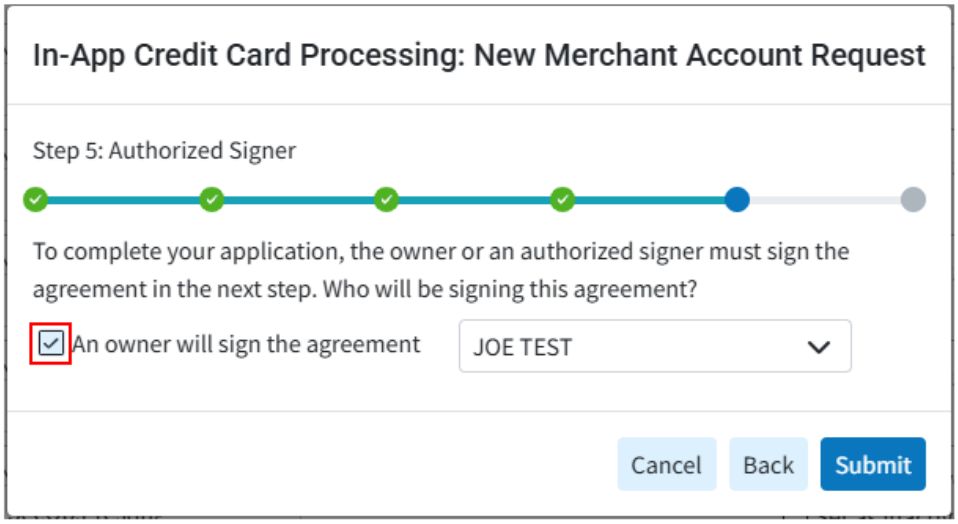
1. Select **Account Administration** > **Services**.
2. Click the **button** next to In-Application Credit Card Processing.
3. The ***Enable In-Application Credit Card Processing*** box **enables or disables this service.**
4. Click the **Add New** button.

> ⚠ For practices with more than one location, a merchant account must be added for each location and/or each tax ID. Repeat the steps for each location/tax ID listed in your Merchant's Accounts box. Click here for a step by step interactive demo on setting up In-App Credit Card Processing merchant accounts.

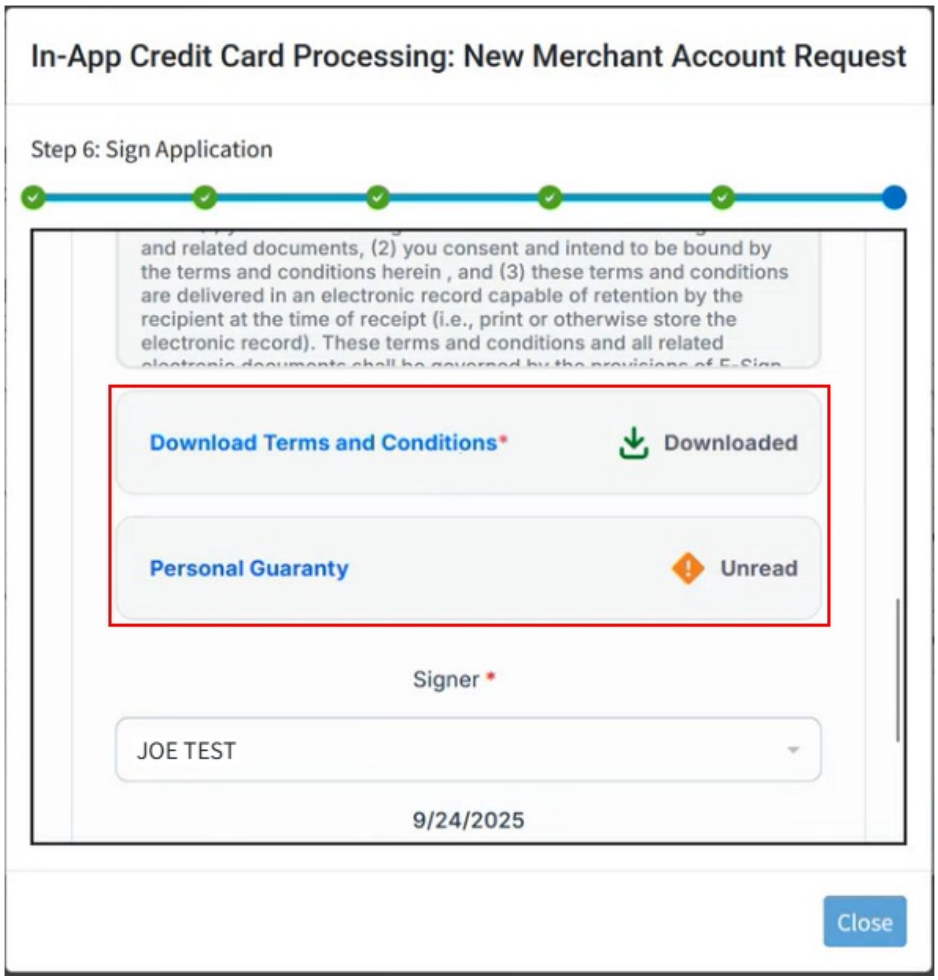
5. Select the practice to add as a merchant from your list (the office location and the location contact inf will auto populate based on your selection).
6. Enter your location primary contact information.
7. Click **Next**.
8. Under **Merchant Information**: Select your Industry (PT, Healthcare, Hospital, Chiro, etc.) and merchant category code from the dropdowns.
9. Enter your "Type of Goods/Service."
10. Check the box if "Payment is taken before delivery of services" in your office workflow.
11. Under **Credit Card Information**: Enter your average annual volume and average sales price.
12. **Optional**: Check the box if your location currently accepts credit cards and select the processing

methods used.

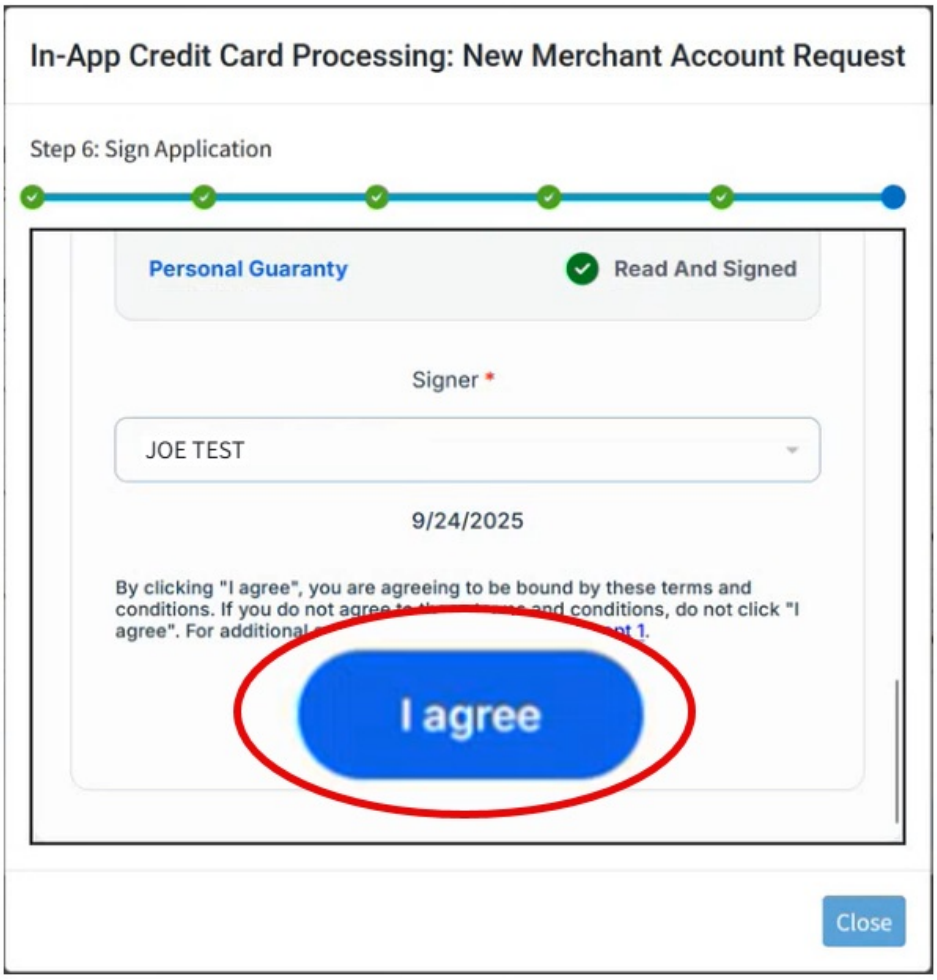
13. Select the equipment that will be used.
14. Enter your bank account information.
15. Click **Next**.
16. Verify your Company legal information and primary contact information.
17. Enter your Company Business Information (ownership type, Tax ID, etc.).
18. Enter the Primary Owner information.
19. Click **Next**.
20. Check the "*An owner will sign the agreement*" checkbox.



21. Click **Submit.**
22. Review the legally binding terms and conditions.
23. Download and sign the Terms and Conditions and Personal Guaranty from the links.



24. Click **I agree**.



25. Click **Close.**

After submission, your application is approved in 24-48 hours and fully configured within 24-48 hours after approval. When configuration is complete, the request status will then display as "Active" and the In-App Credit Card Processing feature will be ready for use. Visit the Getting Started with CMD & OpenEdge Help Page for more information on how to begin using this feature.

)isable In-Application Credit Card Processing

'roceeding with this change will disable the applicable Integrated Payment Processing service. The ustomer's account will no longer be allowed to process credit card service payments through the merchar ccount integration within CollaborateMD.

1. Select **Account Administration** > **Services**.
2. Click the **button** next to **In-Application Credit Card Processing.**
    1. Place a check in the **Set as Inactive** checkbox by the name of the account you wish to inactivate.

2. If disabling your entire account, **uncheck the Enable In-Application Credit Card Processing** box.

3. Click **Save**.

Important: You must contact GPI® to inactivate your account completely. Deactivating the CollaborateMD integration does NOT close your merchant account with GPI®