

Processing a Credit Card Payment, Saving Credit Card for Future Payments & Printing Receipts

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Posting from the Payment Screen

Daily credit card transactions can be processed within the Payment, Claim or Scheduler sections of the application. Transactions will automatically post to the patient account and be reflected on appropriate reports.

You will not see a confirmation if the transaction is successful. The system will alert you if the transaction fails or you attempt to make a credit card payment without entering the complete card information.

Transactions, such as voids and credits (refunds), must be processed through OpenEdge View and added manually to the patient's account within CollaborateMD.

Process a credit card payment within the Payment screen.

1. Select **Payment > Post**.
2. Fill in the option for **Patient Payment**.
3. **Optional:** Check the **Print receipt** box to print the patient a receipt.
4. Click the  icon next to the **Patient** search field and select the patient.
5. Enter payment details such as Amount, Date, and Check # (optional).
6. Set the payment Source to **Credit Card**.
7. Choose how to apply the payment **Credit Account (Apply Later)**, **Apply Automatically**, or **Apply Manually**.
8. Upon saving the Claim, follow the directions on the EMV device or enter the card information within the **Enter Payment Window**.

Enter Payment

i Follow the directions on the EMV device to process the credit card or begin typing the credit card number.

Payment Amount:
\$1.00

Card Data:*

⚠ Do you have an EMV device plugged in, but are still seeing the message "EMV devices are now supported"? This means that the EMV standard has not been Set up correctly.

You will need to set up a physical card entry/EMV machine and the EMV software on the computer. This software allows the EMV machine to connect with CollaboratedMD.

Still have questions, or would like to receive an EMV device? Please [reach out to the Global Payments Integrated Team](#)

1. **Card Number:** Place your cursor in the Card Number field. Swipe the patient's credit card using your card reader, or manually enter in the card number.
 2. **Expiration Date:** Use the drop-down menus to select the card's expiration date.
 3. **CVV2/CID:** Locate the CVV2 or CID number on the card and enter it into the field.
9. Click **Submit Payment**.

Posting from the Claim Screen

Process a credit card payment within the Claim screen.

1. Select **Claim > Claim**.

2. **Select** the Claim.
3. Click on the **Payment** tab within the side panel.
4. Select **Post New Payment to Claim**
5. **Optional:** Check the **Print receipt** box to print the patient a receipt.
6. Enter payment details such as Amount, Date, and Check #.
7. Set the payment Source to **Credit Card**.
8. Upon saving the Claim, follow the directions on the EMV device or enter the card information within the **Enter Payment Window**.

Enter Payment


Follow the directions on the EMV device to process the credit card or begin typing the credit card number.

Payment Amount:
\$1.00

Card Data:*

Submit Payment

Post without Processing **Cancel**

 Do you have an EMV device plugged in, but are still seeing the message "EMV devices are now supported"? This means that the EMV standard has not been Set up correctly.

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1. **Card Number:** Place your cursor in the Card Number field. Swipe the patient's credit card using your card reader, or manually enter the card number.


2. **Expiration Date:** Use the drop-down menus to select the card's expiration date.
 3. **CVV2/CID:** Locate the CVV2 or CID number on the card and enter it into the field
9. Click **Submit Payment**.

Posting from the Scheduler Screen

Process a credit card payment within the Scheduler screen.

1. Select **Appointments > Scheduler**.
2. Select the relevant appointment and then click **Edit**.
3. Select the **Payment** tab.
4. **Optional:** Check the **Print receipt** box to print the patient a receipt.
5. Enter payment details such as Amount, Date, and Check #.
6. Set the payment Source to **Credit Card**.
7. Upon saving the Claim, follow the directions on the EMV device or enter the card information within the **Enter Payment Window**.

The screenshot shows a mobile application window titled "Enter Payment". At the top, there is an information icon and a message: "Follow the directions on the EMV device to process the credit card or begin typing the credit card number." Below this, the "Payment Amount" is set to "\$1.00". The "Card Data:" field is a red-outlined text box with a vertical cursor. A blue "Submit Payment" button is centered below the text box. At the bottom of the window, there are two light blue buttons: "Post without Processing" and "Cancel".

 Do you have an EMV device plugged in, but are still seeing the message "EMV devices are now supported"? This means that the EMV standard has not been Set up correctly.

You will need to set up a physical card entry/EMV machine and the EMV software on the computer. This software allows the EMV machine to connect with CollaboratedMD.


Still have questions, or would like to receive an EMV device? Please [reach out to the Global Payments Integrated Team](#)

1. **Card Number:** Place your cursor in the Card Number field. Swipe the patient's credit card using your card reader, or manually enter the card number.
 2. **Expiration Date:** Use the drop-down menus to select the card's expiration date.
 3. **CVV2/CID:** Locate the CVV2 or CID number on the card and enter it into the field.
8. Click **Submit Payment**.

Print Receipts


Payment Tracker screen gives you the ability to pull up previously posted patient payments and print the receipts associated with those payments.


1. Select **Payment > Payment Tracker**.
2. Enter your desired **Search Criteria** or [Load a Search Filter](#).
3. Click **Search**.
4. Click the **Send** link (in the Receipt column) to open the print/send dialog box for the patient payment to be printed.
5. Select **Print**.

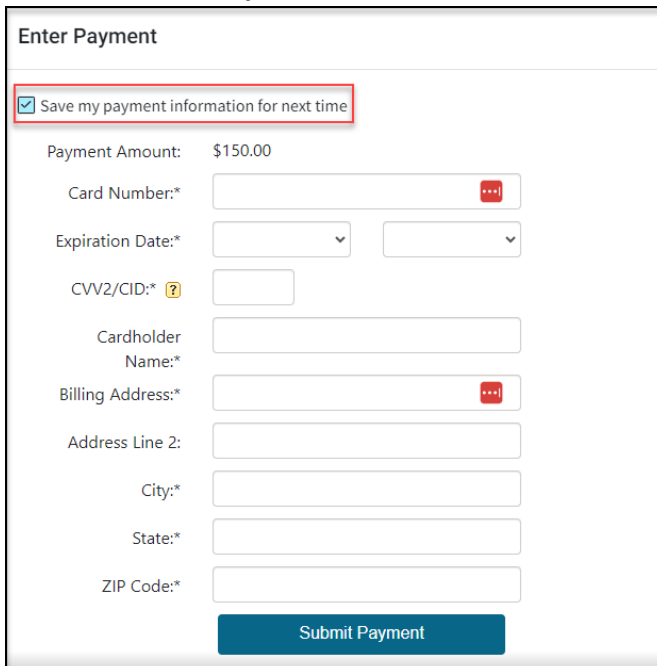
 You can also print a receipt with all the additional data required by the HSA/FSA guidelines by selecting the "Print w/HSA/FSA details" option.

Save Credit Card While Collecting a Payment

With cardholder consent, Credit Card information can be saved for future payments while collecting a payment from the Payment Screen, the Claim Screen, or the Appointment Screen.

 Need to save a credit card without collecting a payment? Visit our [Add/Save a Patient Credit Card Help Article](#) to learn how to save payment information from the **Patient** section.

1. Select **Payment > Post** (*or post it from the scheduler or claim screen*).
2. Fill in the option for **Patient Payment**.
3. **Optional:** Check the **Print receipt** box to print the patient a receipt.
4. Click the  icon next to the **Patient** search field and select the patient.
5. Enter payment details such as Amount, Date, and Check # (optional).
6. Set the payment Source to **Credit Card** and select the card type from the dropdown.
7. Choose how to apply the payment **Credit Account (Apply Later)**, **Apply Automatically**, or **Apply Manually**.
8. Upon saving the payment, follow the directions on the EMV device or enter the card information within the **Enter Payment Window**.



Enter Payment

Save my payment information for next time

Payment Amount: \$150.00

Card Number:*

Expiration Date:*

CVV2/CID:*

Cardholder Name:*

Billing Address:*

Address Line 2:

City:*

State:*

ZIP Code:*

Submit Payment

1. **Save my payment information for next time:** Check the box to save the CC info for next time.
2. **Card Number:** Place your cursor in the Card Number field. Swipe the patient's credit card using

your card reader, or manually enter the card number.

3. **Expiration Date:** Use the drop-down menus to select the card's expiration date.
 4. **CVV2/CID:** Locate the CVV2 or CID number on the card and enter it into the field.
 5. **Cardholder Name:** Enter the name on the credit card
 6. **Billing Address/City/State/Zip Code:** Enter all the billing address info for the credit card.
 7. Click **Submit Payment**.
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