

# In-app Payment Processing Setup Guide

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Thank you for choosing CollaborateMD and Global Payments Integrated (GPI) as your complete In-app Payment Processing (IPP) solution! This Getting Started Guide should be referenced to enable, configure and process payments for the two optional services below:

## Payment Portal

The Payment Portal is a secure website your patients can access to make online payments to charges in real time, view visit and payment history, as well as print receipts and statements. The Portal utilizes the highest form of security to protect your patient's information. By providing patients a secure online Portal, offices are reducing patient calls, increasing billing accuracy, and accelerating patient payments.

## In-App Credit Card Processing

Credit card processing can be used within the **Payment, Claim and Scheduler sections** to optimize payment collections without disturbing your normal workflow. Easily swipe or take payments over the phone with just a few clicks! By processing your patient's credit card payments within CollaborateMD you can easily reduce follow up on co-pays, deductibles, and co-insurance balances, which translates into improved A/R.

## Enable Feature(s)

To begin, an Authorized Representative (Auth Rep) will need to enable one or both of the desired features within the Services section of the application.

Click [here](#) for steps on how to enable In-app Credit Card Processing, or For steps to enable the Payment Portal, click [here](#)!

Once enabled, you'll receive an email from CMD that contains the contact information for your assigned GPI Representative (Rep). Your GPI Rep will reach out to you within 24-48 business hours to set up your Merchant account.

Here's an example of the email:

Your assigned **GPI** representative will be contacting you in 1 to 2 business days and is available to answer additional questions about this service. Please feel free to contact your representative with the information found below.

Email: [GPIrep@gmail.com](mailto:GPIrep@gmail.com)

Phone: 888-123-4567

## Account Creation

After providing your information to GPI, they will approve and create your Merchant account and send your credentials to CollaborateMD. You'll receive a **Welcome email** that includes what to expect next and other important information. They will also send a welcome package to your DBA location which includes a credit card reader if you're utilizing In-app credit card processing.

Once your Merchant Credentials are received by CollaborateMD, they will be added to CMD and you'll receive an activation confirmation email that the system is ready to use.

## Installation of The GPI Payment Device

If you're using in-application credit card processing, you'll need to install and configure the card reader (received from GPI) to start posting and processing payments directly within CollaborateMD.

Reference our [Installation Instructions For The GPI Payment Device](#) help article to learn how to install and configure your credit card reader.

## Utilizing Feature(s)

Once you have enabled and configured your in-application credit card processing, and you have installed and configured the card reader, you can start posting and processing payments directly within CollaborateMD.

Reference our [Processing a Credit Card Payment & Printing Receipts](#) help article to learn how to post payments with your credit card reader.

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If you're using the Patient Payment Portal, you will need to **Configure/Manage your Payment Portal**, and **end Invites out to your patients** before they can make payments from anywhere at anytime!

Watch our **Set up In-app Payment Processing** video to configure the Portal settings, invite patients and understand how the patient will register for the Portal. **Hint:** Begin the video at 1:25

## Additional Resources

Now that your account is set up, utilize our library of FAQ's and Help Articles to ensure your success using In-App Payment Processing.

- **In-App Payment Processing Reports:** Want to track your Merchant Payments? Use this help article for greater insight!
  - **Understanding Credit Card Responses:** Uh oh! Payment declined? Learn why with this help article!
  - **Defaulting a Merchant Account:** If you have more than one Merchant Account, learn how to default a Merchant for each user.
  - **Integrated Payment Processing FAQs:** Take a look at some of the most commonly asked questions regarding IPP.
  - **Payment Portal - Patient FAQ:** Patients ask a lot of questions! Use these Patient FAQ's to ease the learning curve.
  - **Payment Portal - Practice FAQ:** Want to become an IPP Pro? This resource is full of troubleshooting tips and commonly asked questions that will keep you off the phone with support!
  - **OpenEdge View Training Video:** This training video will walk you through how to use our OpenEdge View Portal to process reoccurring payments, run reports, refund payments and more.
  - **OEV Help Guide.pdf** 📎: Use this guide for any questions regarding your OpenEdge View Portal.
  - **Contacting Global Payments Integrated Support:** Need to reach out to OpenEdge regarding an issue, question or help? Reference this article to find the correct contact number.
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