Save Credit Card While Collecting a Payment

With cardholder consent, Credit Card information can be saved for future payments while collecting a ayment 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.**
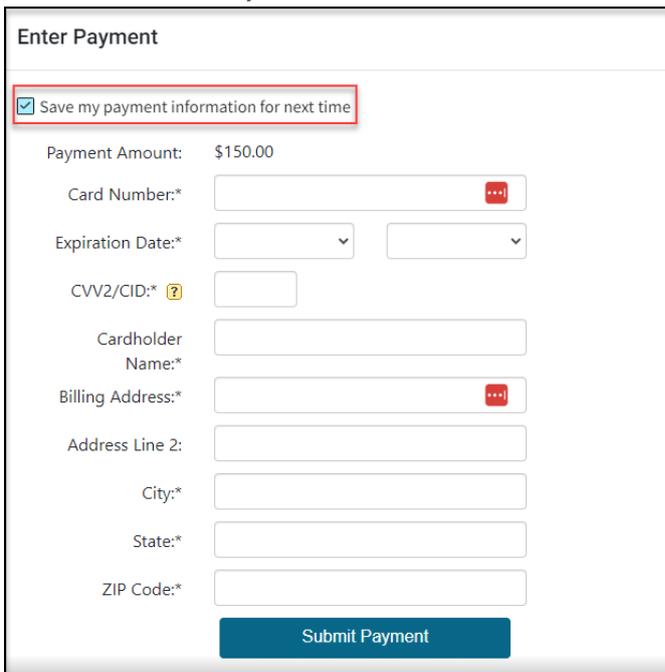
Enter Payment

☑ 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**.