

Credit Card Processing

Last Modified on 10/15/2024 6:05 pm EDT

This category covers the key workflows on using the integrated credit card processing within the system.

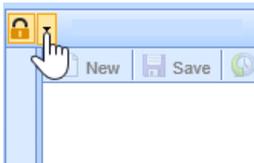
Run a Patient Credit Card Payment

To collect and run a credit card payment with the PaySimple Credit Card Processing, follow the step-by-step guide or watch the short video below.

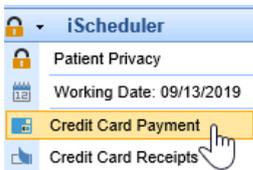
Watch the Video

Step-By-Step Instructions

1. Open the Credit Card Payment screen from the dropdown arrow in the upper left corner.



2. Choose the Credit Card Payment option.



3. For a patient payment, select the patient, payment amount, and then click the "Copay" button for a patient copay. For a general payment, leave this box unchecked.
4. For a payment plan, select the plan from the "Payment Plan" search option or create one by searching for a payment plan, and then selecting "New". If this is a Payer payment, select the Payer option. Proceed to capture the payment.

Payee Patient Payer

Smith, Alayna

Payment Batch

Payment Plan

Payment Amount

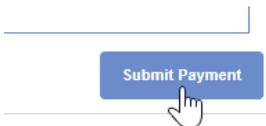
\$ Copay

5. If you have an integrated Swiper, choose the "Swipe" option. Otherwise, a card may be manually entered.

Credit Card Capture Method

Manual Entry Swipe

6. Click "Submit Payment" to process the payment and print the receipt for the patient.



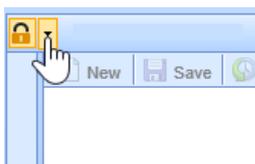
Run a Payer Credit Card Payment

To collect and run a credit card payment with the PaySimple Credit Card Processing, follow the step-by-step guide or watch the short video below.

Watch the Video

Step-By-Step Instructions

1. Open the Credit Card Payment screen from the dropdown arrow in the upper left corner.



2. Choose the Credit Card Payment option.



3. Select the Payer option, choose the payer, enter the payment amount, and continue to capture the payment.

Payee

Patient Payer

Anthem Bcbs Fep

Payment Amount

\$15.00

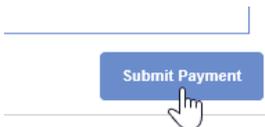
Next: Capture Payment Method

4. If you have an integrated Swiper, choose the "Swipe" option. Otherwise, a card may be manually entered.

Credit Card Capture Method

Manual Entry Swipe

5. Click "Submit Payment" to process the payment. Once processed, a Deposit will be created in the billing portal to be reconciled and processed by a billing team member.



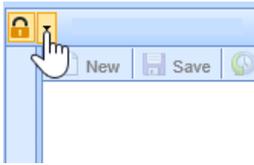
Open, View and Print Credit Card Receipts

To open, view, or print a credit card receipt with integrated credit card processing, watch the video or follow the step-by-step guide below.

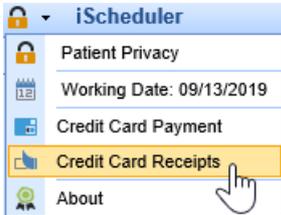
Watch the Video

Step-By-Step Instructions

1. Open the Credit Card Payment screen from the dropdown arrow in the upper left corner.



2. Choose the Credit Card Receipts option.



3. Search by Date or Patient by entering your search parameters and click "Search"
Today's date will always pre-populate in the Date Range by default.

Date Range

Patient

No data found for that search criteria.



4. Click on the receipt you would like to print. It will highlight blue to indicate it is selected.

08/29/2019	1145713	Blake, A JOSEPH
08/16/2019	1320166	Weber, Amanda
08/13/2019	817218	Blake, AUSTIN J.
08/09/2019	1320134	lewis, stella
08/09/2019	1320136	Lewis, Wrigley
08/08/2019	1320122	Head, Blake A.
08/08/2019	1320134	lewis, stella

5. Click the "Print" button to print the selected receipt.



Reverse a Credit Card Payment (Receipts Screen)

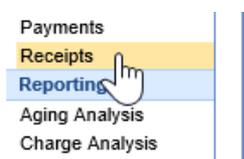
To reverse a credit card payment that was taken through the integrated credit card processing portal via the Receipt Details screen, follow the step-by-step guide below. Please note this can also be done from the [Quick Pay](#) screen.

Step-By-Step Instructions

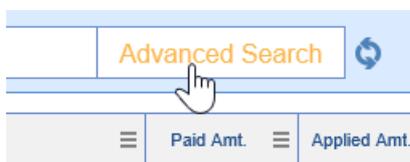
1. Open the Billing Portal from the lower left hand corner.



2. Open the Receipts window from the left-hand navigation pane.



3. Search for the patient name or chart number, or navigate to the Advanced Search window.



4. Set the date of the receipt and choose the "OfficeEMR" Receipt Type

Receipt Date

Receipt Type N/A MML OfficeEMR Int

Has a Balance N/A Yes No

ient Demographics

5. Click Search at the bottom of the Advanced Search to run the search.



6. Double-Click on the Receipt desired to open it and view details.

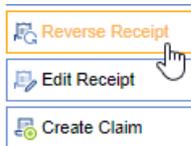
Chart Number	Patient Name
1256356	Blake A. Head
1256356	Blake A. Head
1320122	Blake A. Head
1256356	Blake A. Head

7. To confirm this receipt was run through the PaySimple integration, you will see this in the Source field:

Method	Credit Card
Unapplied	\$25.00
Source	OfficeEMR (PaySimple)

OfficeEMR (PaySimple)

8. To reverse the payment, click the "Reverse Receipt" button to void or reverse payment.



9. The Receipt Reversal window will open. On it you will have a textbox to enter a comment for the reversal or use one of the default comment options. The **Refund credit card payment** checkbox will be checked by default, and the **Refund Amount** will be listed as the full amount of the receipt. If you wish to proceed with the credit card reversal for the full amount of the receipt click **Save** to finalize the reversal.

Receipt Reversal ✕

You have elected to reverse this receipt, this means any payments and/or refunds associated with the receipt will be removed.

You have the option of entering a comment as an explanation for this reversal.

Wrong Patient Incorrect Amount
 Duplicate Entry Other

In addition, if the receipt was created from a credit card payment, you may choose to refund the credit card.

Refund credit card payment

Refund Amount Last 4

Save Cancel

10. If you do NOT want to reverse the full amount of the receipt to the credit card you will be able to modify the **Refund Amount** to the amount you wish to reverse. Once you click **Save** the original receipt will be reversed for the full amount and a new receipt will be created for the difference. The messages section on the original, reversed, and new receipt will provide details on the partial reversal.

Receipt Reversal
✕

You have elected to reverse this receipt, this means any payments and/or refunds associated with the receipt will be removed.

You have the option of entering a comment as an explanation for this reversal.

Wrong Patient Incorrect Amount
 Duplicate Entry Other

In addition, if the receipt was created from a credit card payment, you may choose to refund the credit card.

Refund credit card payment

Refund Amount Last 4

Comments	Payment received from OfficeEMR
Messages	10/15/2022 No claim can be found to apply the copy to 11/08/2022 \$25.00 receipt has been reversed 11/08/2022 \$10.00 was refunded to credit card mastercard 5454 11/08/2022 \$15.00 receipt was created

11. If you do NOT want to reverse the credit card payment, uncheck the **Refund Credit Card Payment** checkbox before clicking **Save**.

Receipt Reversal
✕

You have elected to reverse this receipt, this means any payments and/or refunds associated with the receipt will be removed.

You have the option of entering a comment as an explanation for this reversal.

Wrong Patient Incorrect Amount
 Duplicate Entry Other

In addition, if the receipt was created from a credit card payment, you may choose to refund the credit card.

Refund credit card payment

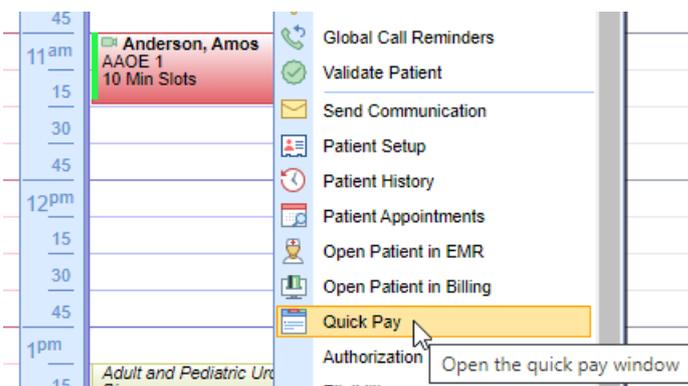
Refund Amount

Reverse a Credit Card Payment (Quickpay Screen)

To reverse a credit card payment that was taken through the integrated credit card processing portal via the Quick Pay screen, follow the step-by-step guide below. Please note this can also be done from the [Receipt Details](#) screen.

Step-By-Step Instructions

1. Right click on the patient appointment and select Quick Pay to Open the Quick Pay screen from a scheduled appointment.



2. Select the payment that was made by left-clicking on the transaction.

Receipt Transactions

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
\$33.00	10/26/2022	Amos Anderson	General Payment	Credit Card	tx_635957a0e857db...	Payment received fr...	admin
\$22.00	10/26/2022	Amos Anderson	Co-Pay	Credit Card	tx_6359576fe857db...	Payment received fr...	admin

3. Select the **Reversal Receipt** button at the bottom left corner of the window.

Receipt Transactions

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
\$33.00	10/26/2022	Amos Anderson	General Payment	Credit Card	tx_635957a0e857db...	Payment received fr...	admin
\$22.00	10/26/2022	Amos Anderson	Co-Pay	Credit Card	tx_6359576fe857db...	Payment received fr...	admin

Reverse Receipt Print Receipt Quick Statement

Total Paid \$55.00

4. The Receipt Reversal window will open. On it you will have a textbox to enter a comment for the reversal or use one of the default comment options. The **Refund credit card payment** checkbox will be checked by default, and the **Refund Amount** will be listed as the full amount of the receipt. If you wish to proceed with the credit card reversal for the full amount of the receipt click **Save** to finalize the reversal.

Receipt Reversal

You have elected to reverse this receipt, this means any payments and/or refunds associated with the receipt will be removed.
Note: At this time 1 payments will be removed.

You have the option of entering a comment as an explanation for this reversal.

Wrong Patient Incorrect Amount
 Duplicate Entry Other

In addition, if the receipt was created from a credit card payment, you may choose to refund the credit card.
 Refund credit card payment

Refund Amount Last 4

Save Cancel

5. If you do NOT want to reverse the full amount of the receipt to the credit card you will be able to modify the **Refund Amount** to the amount you wish to reverse. Once you click **Save** the original receipt will be reversed for the full amount and a new receipt will be created for the difference. The Receipt Transactions will now show 2 additional transactions now, one for the reversal of the full receipt amount and one for the difference of the reversal amount and the receipt.

Receipt Reversal

You have elected to reverse this receipt, this means any payments and/or refunds associated with the receipt will be removed.
Note: At this time 1 payments will be removed.

You have the option of entering a comment as an explanation for this reversal.

Wrong Patient Incorrect Amount
 Duplicate Entry Other

In addition, if the receipt was created from a credit card payment, you may choose to refund the credit card.
 Refund credit card payment

Refund Amount Last 4

Save Cancel

Receipt Transactions

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
\$20.00	11/09/2022	Amos Anderson	General Payment	Credit Card	tx_635957a0e857db...		lmichell
\$-33.00	11/09/2022	Amos Anderson	General Payment	Credit Card	tx_635957a0e857db...		lmichell
\$33.00	10/26/2022	Amos Anderson	General Payment	Credit Card	tx_635957a0e857db...	Payment received fr...	admin
\$22.00	10/26/2022	Amos Anderson	Co-Pay	Credit Card	tx_6359576fe857db...	Payment received fr...	admin

6. If you do NOT want to reverse the credit card payment, uncheck the **Refund Credit Card Payment** checkbox before clicking **Save**.

Receipt Reversal



You have elected to reverse this receipt, this means any payments and/or refunds associated with the receipt will be removed.



You have the option of entering a comment as an explanation for this reversal.

- Wrong Patient Incorrect Amount
 Duplicate Entry Other



In addition, if the receipt was created from a credit card payment, you may choose to refund the credit card.



[Refund credit card payment](#)

Refund Amount



Save



Cancel