How to use Payment Gateway

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This guide explains how to use Payment Gateway to request Credit Card information when booking an appointment and how to Bill a patient using the ePayment option.

Considerations

- Credit cards are recorded in Zedmed using a secure token that only contains a card's last 4 digits and expiry date.
- When a patient provides a credit card, its validity is checked before the card is accepted.
- SMS payment information requests require ZedSMS and use SMS credits.
- The Payment Gateway options only display for practices with Payment Gateway enabled.
- If a NOK provides a credit card for a child, that card will be added to the child's profile and the NOK will show as the payer.
- Once a credit card is provided, it will be available for billing until the card expires.

To learn more, see our Payment Gateway FAQ

Online appointments

With Payment Gateway enabled, Online Appointments will request a credit card when the booking is made—even if a card has already been added using an SMS request. If the card provided by OLA is the same as an existing card, no change is made, and OLA will not ask again. If a different card is on file, the OLA card will be added and made the preferred of the 2 cards. OLA bookings have a cloud icon and will show the credit card icon if the patient already has a credit card via OLA.

Requesting a credit card

Credit Card details can be requested from patients by sending them an SMS when booking their appointment. When the patient provides the credit card, it is verified then a credit card icon will displayed next to their name in the Appointment Grid. Once credit card information is provided, it can used for billing future appointments.

The Appointment Details screen will show a credit card icon if a card is already on file and does not need to be requested.

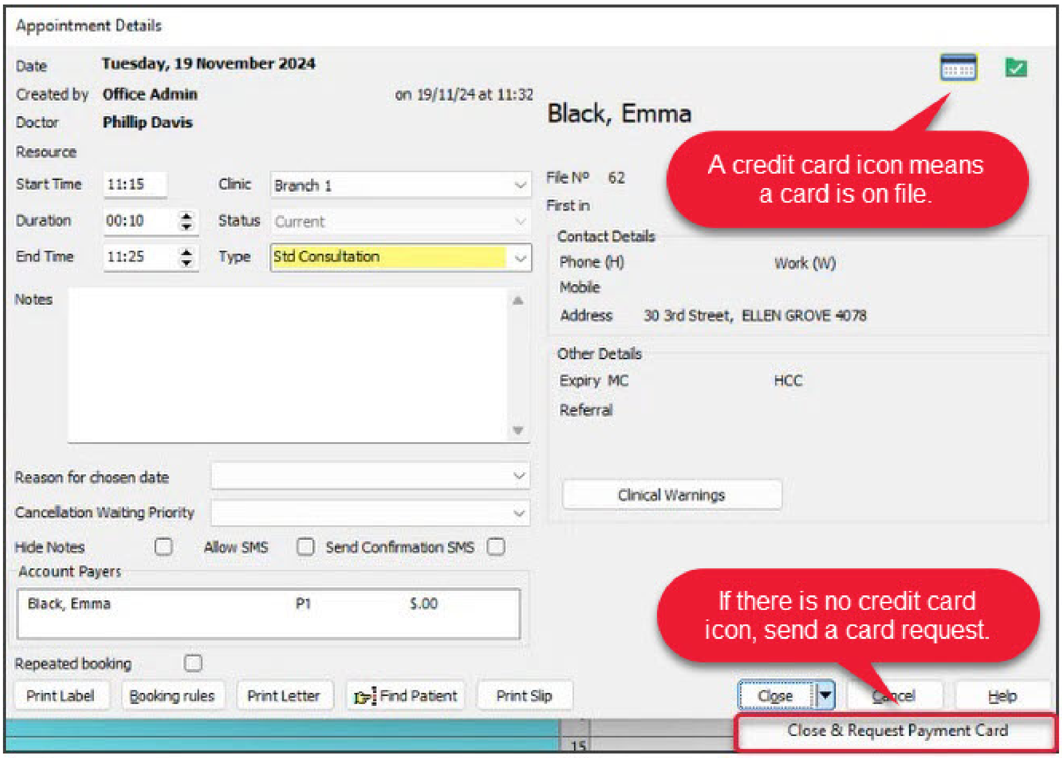
To request credit card information:

1. From the **Appointment Grid, select** right-click and **Add (Patient)**.
2. Search for the patient and select them.

   The **Appointment Details** screen will open.
3. Select the appointment **Type**.
4. Check if there is a credit card icon. If there is no icon, there is no valid credit card on file.
5. Select the arrow beside **Close** and select **Close & Request Payment Card.**

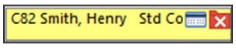
   The appointment will be created, and the patient will receive an SMS asking them to enter credit card information.

If the patient does not have a mobile phone in their patient record, a warning will advise the request cannot be sent.

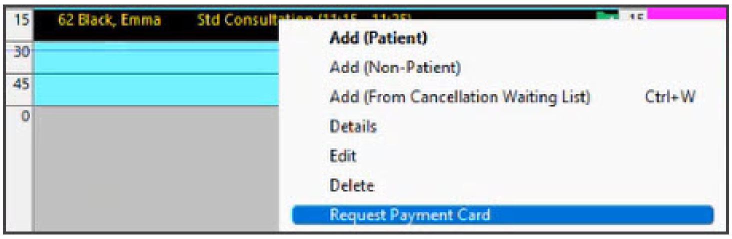


You can also send a payment card request to an existing appointment:

1. Confirm there is NO credit card icon to the left of the appointment. The example shows where the icon will display.



2. Right-clicking the appointment and select **Request Payment Card**.



Billing using Payment Gateway

for Payment Gateway, the patient is always the payer. To bill a patient using the credit card information saved for Payment Gateway, follow the normal billing process for a private patient and select **ePayment** for the payment type detailed below.

To bill for a **Did Not Attend (DNA)**, use an item code created for the DNA.

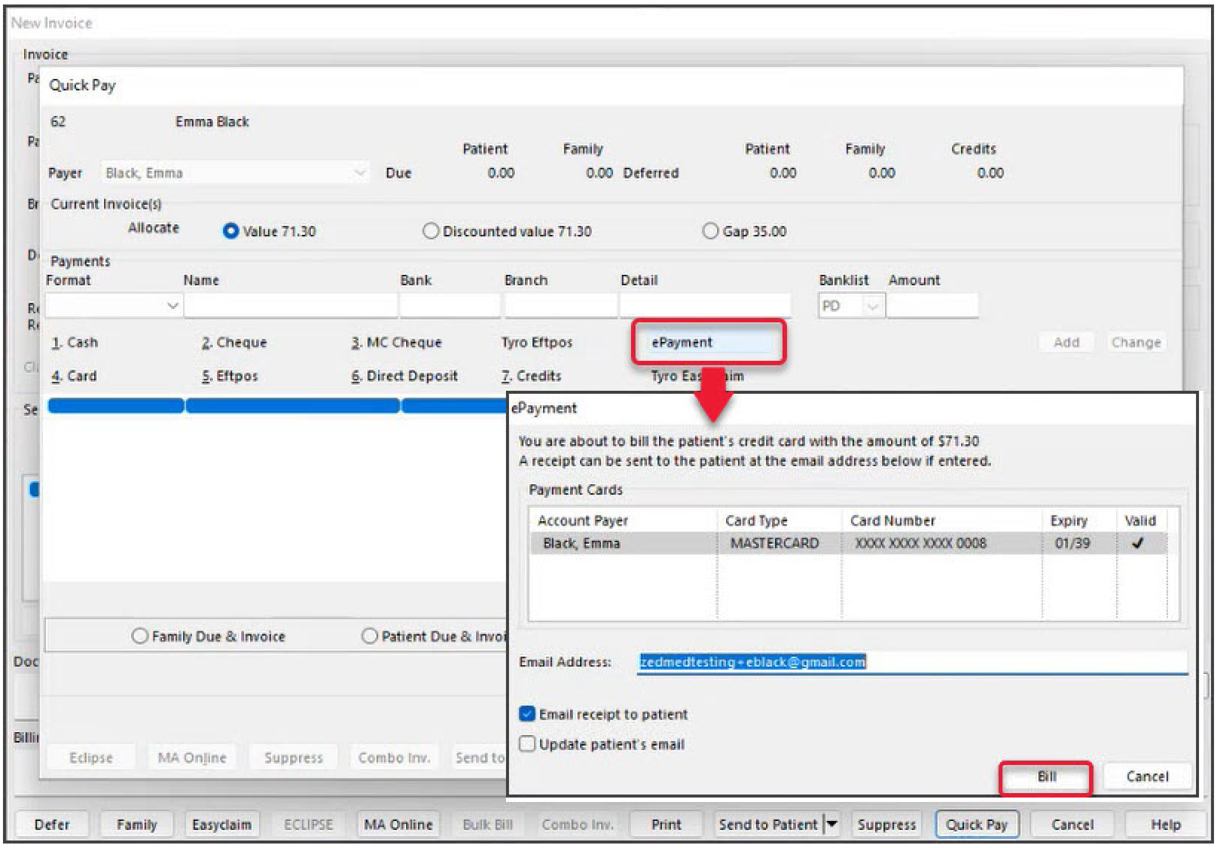
To bill the patient:

1. Follow the private patient billing process.
2. Check the patient is the payer.

3. Check the correct treating doctor is selected.
   It is the Bank List linked to the treating doctor that will receive the payment.
4. Select **QuickPay.**
5. Select **ePayment.**

   The ePayment dialog will display the cards recorded for the patient and the email address the receipt will be sent to. If there is more than one card, you can select the card to use.

   The selected card will have a dark grey highlight. If there is more than one card, you can select a different card for the payment.
6. Select **Bill.**



A confirmation message will appear.

Pre-payment using Payment Gateway

Step 1 - Take the prepayment

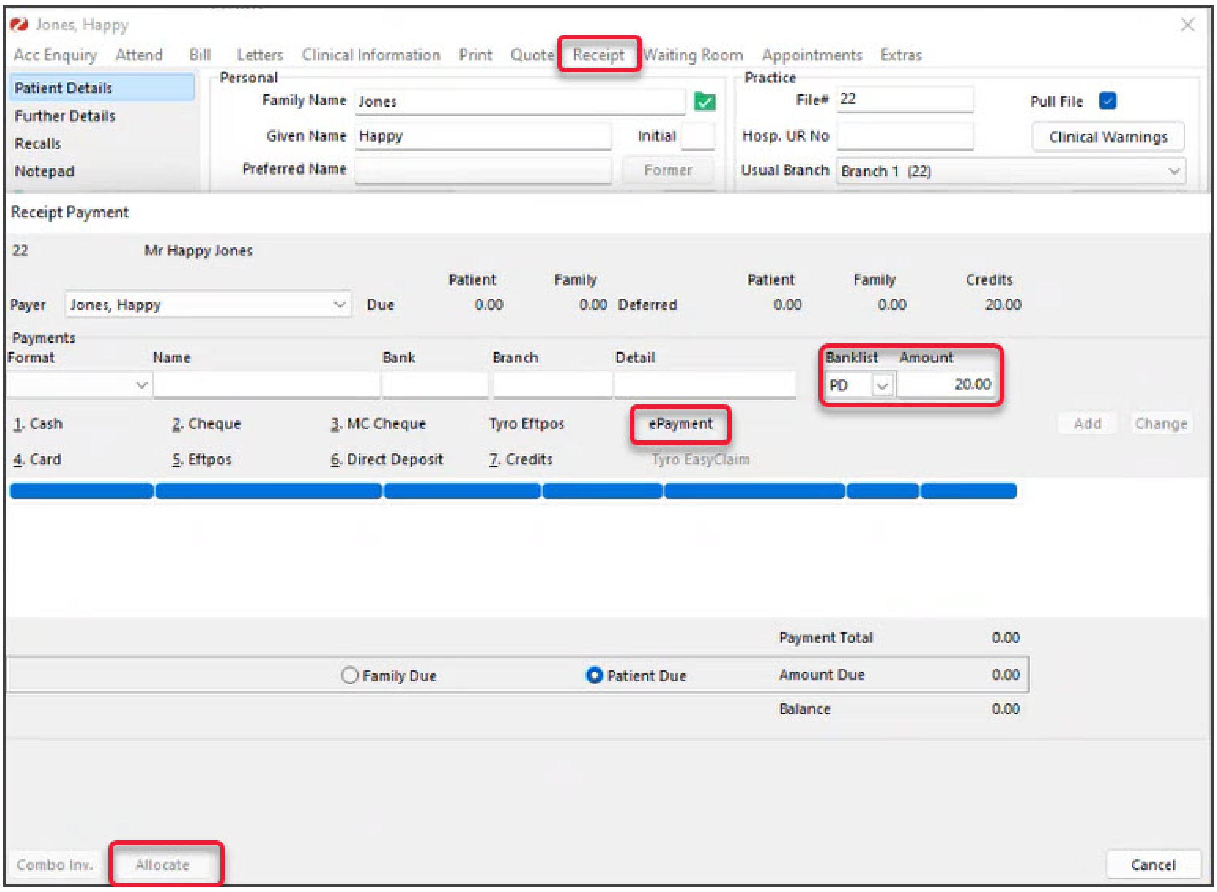
1. Open the patient's record.
2. Select **Receipt**.

   Opens the **Receipt Payment** screen.
3. Check the correct bank list is selected.
4. Enter the payment amount **Amount.**
5. Select **ePayment.**

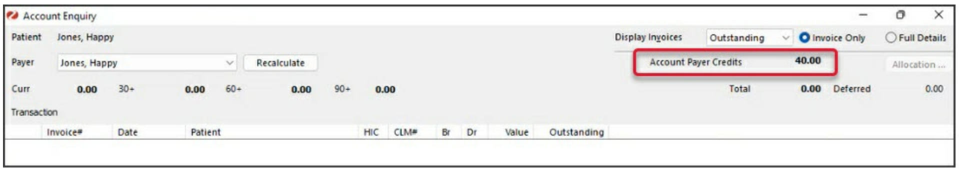
   Payment will show the confirmation message
6. Select **Allocate.**

   The **Allocation** screen will open.

7. Select **Cancel** as there is no invoice to allocate the payment to.



The patient's **Acct Enquiry** will show the total credits available to the patient.

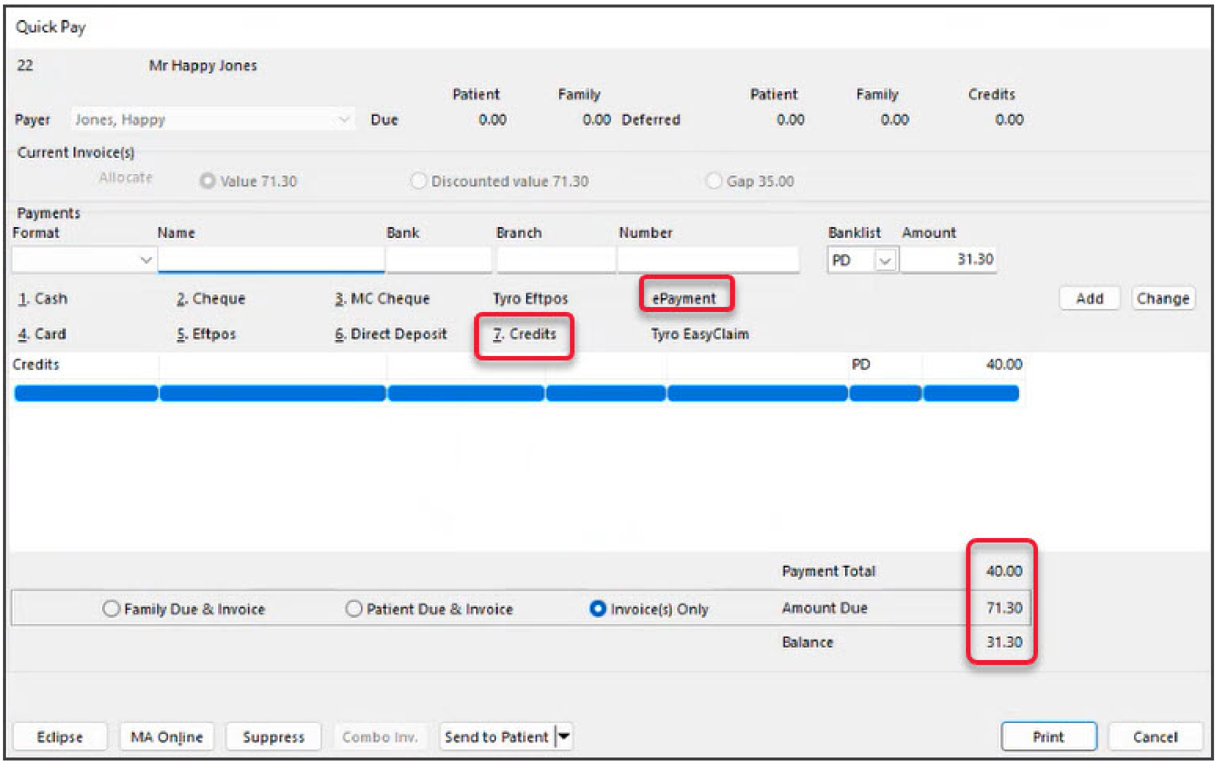


Step 2- Apply the credit when billing

When you bill the patient:

1. Select **Credits** then select **Add.**

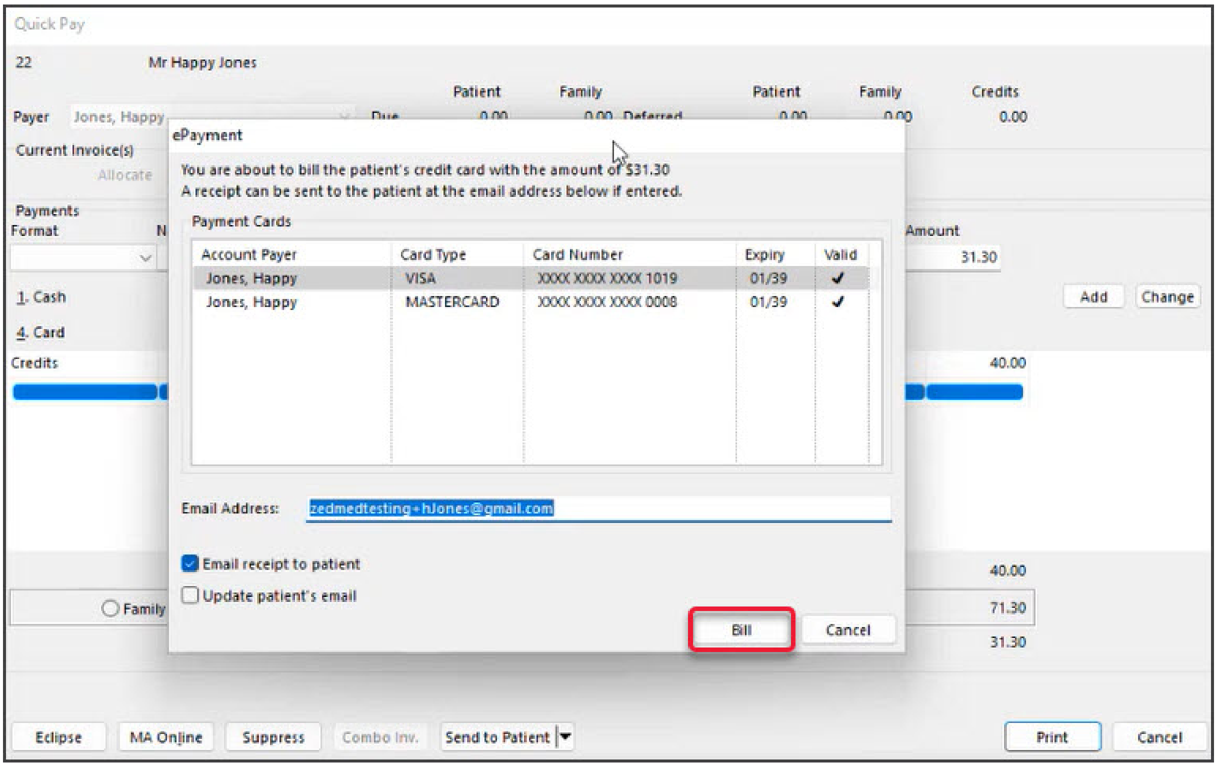
   The recorded deposit will be added as a credit and reduce the **Amount Due** and the **Balance** due.



2. Select **ePayment.**

   The **ePayment** screen will show the credit card to be used, and the email address the receipt will be sent to.
3. Select **Bill**.

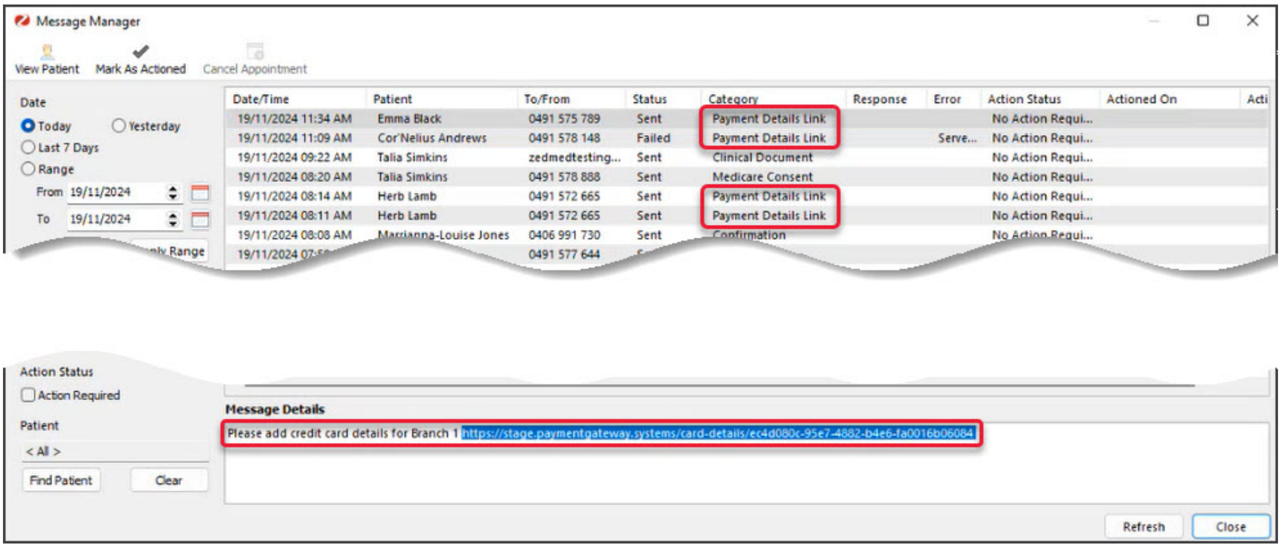
   A confirmation message will appear.



Managing credit cards and card requests

Message manager

The Message Manager shows SMS payment card requests as **Payment Details link.** There is a **Message Category** filter for Payment Details requests.

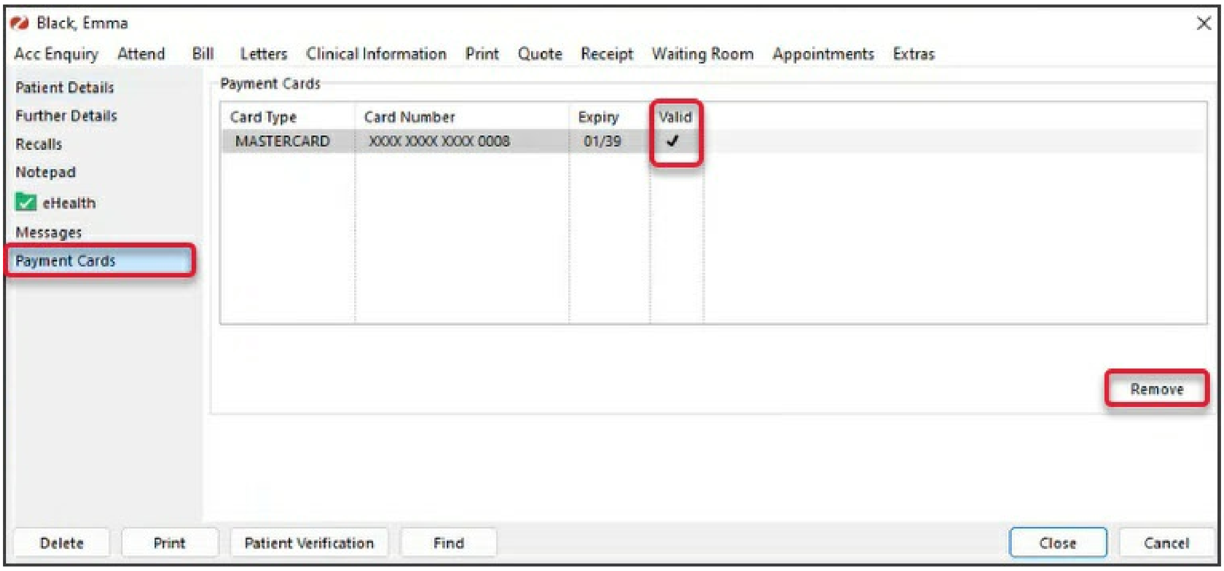


Patient Record

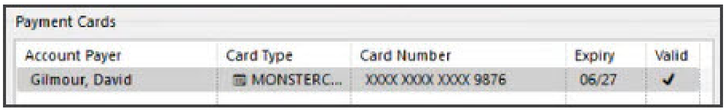
In the patient's record, the **Payment Cards** tab displays all cards on record. Only the last 4 digits and expiry date are recorded.

The **Valid** field is based on the expiry date and will have a tick if the card has not expired. If the payment does not have a valid card, a credit card icon will not appear on the appointment screens.

The **Remove** button requires a special access and will remove (delete) the highlighted card.



If the card was provided via Online appointments, there will be a credit card icon next to the Card Number. The card will be selected by default for the OLA appointment even if there was an existing card.



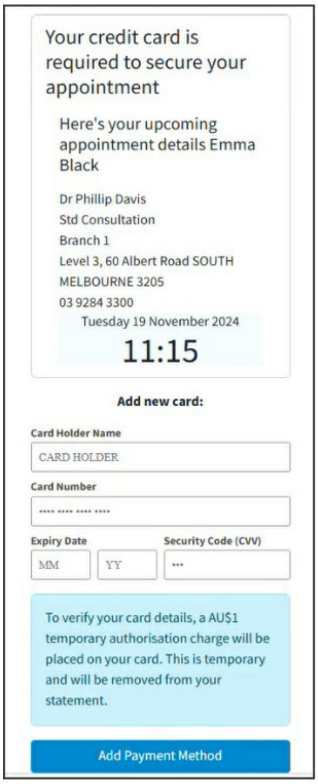
Payment Cards

Account Payer	Card Type	Card Number	Expiry	Valid
Gilmour, David	MONSTERC...	XXXX XXXX XXXX 9876	06/27	✓

The patients' workflow

The patient will perform the following steps. The credit card entry screen is a Tyro eCommerce screen. After the information has been provided, a secure token for the card will be sent to Zedmed. This does not contain the credit card information. Zedmed uses the token to integrate with Tryo, which manages the payment transfers.

1. Receives an SMS with the text 'Please add credit card details for <name of branch> and a URL.
2. Tap the URL to open the online credit card information screen.



3. Enter their credit card information.
4. Tap **Add Payment Information.**

   A confirmation message will display.

   This link cannot be used again.

Once the card is verified, Tyro will send Zedmed a secure token, and the patient's appointment will display a credit card icon.

Additional Resources

- Payment Gateway reconciliation report.
- How to process a refund in Tyro eCommerce
- How to create a Tyro refunder account.
- How patients provide a payment card in OLA.