

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.

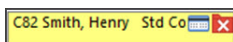
The **Appointment Details** screen will open.
3. Select the appointment **Type**.
4. Check if there is a credit card icon. If there is no icon, there is no valid credit card on file.
5. Select the arrow beside **Close** and select **Close & Request Payment Card**.

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

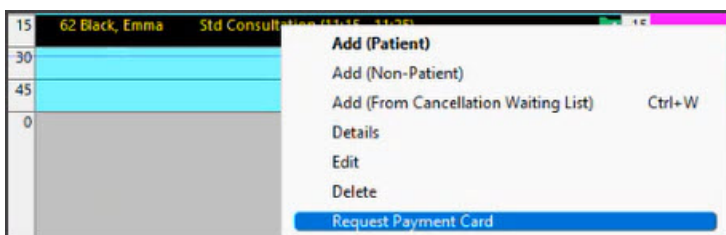
If the patient does not have a mobile phone in their patient record, a warning will advise the request cannot be sent.

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:

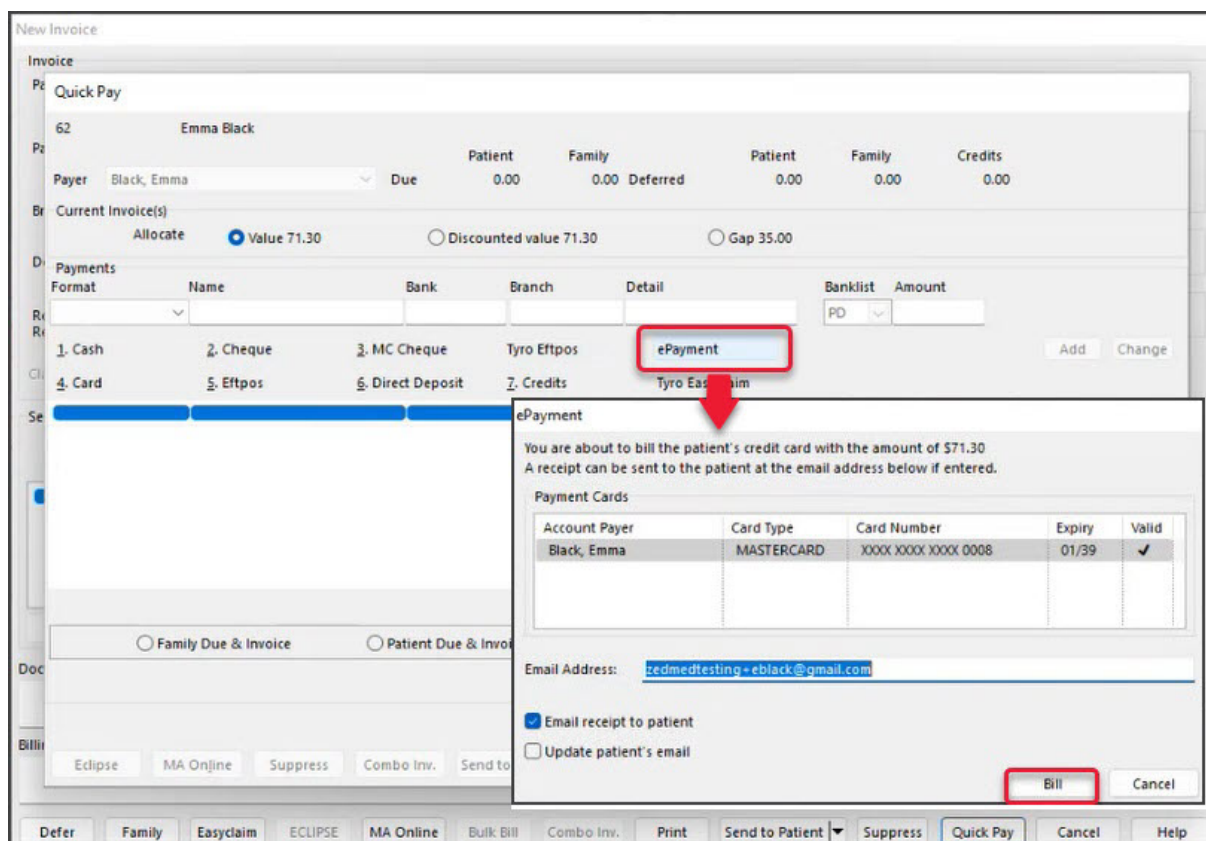
1. Follow the private patient billing process.
2. Check the patient is the payer.

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.

Receipt Payment

22 Mr Happy Jones

Payer	Due	Patient	Family	Deferred	Patient	Family	Credits
Jones, Happy		0.00	0.00		0.00	0.00	20.00

Payments

Format	Name	Bank	Branch	Detail	Banklist	Amount
					PD	20.00

1. Cash 2. Cheque 3. MC Cheque Tyro Eftpos **ePayment** Add Change

4. Card 5. Eftpos 6. Direct Deposit 7. Credits Tyro EasyClaim

Payment Total 0.00

Family Due Patient Due Amount Due 0.00

Balance 0.00

Combo Inv. **Allocate** Cancel

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

Account Enquiry

Patient Jones, Happy

Payer Jones, Happy Recalculate

Display Invoices: Outstanding Invoice Only Full Details

Account Payer Credits **40.00** Allocation ...

Curr	0.00	30+	0.00	60+	0.00	90+	0.00
Total	0.00						0.00

Transaction

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
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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**.

Quick Pay

22 Mr Happy Jones

Payer Jones, Happy Due Patient 0.00 Family 0.00 Deferred Patient 0.00 Family 0.00 Credits 0.00

Current Invoice(s) Allocate Value 71.30 Discounted value 71.30 Gap 35.00

Payments

Format	Name	Bank	Branch	Number	Banklist	Amount
1. Cash	2. Cheque	3. MC Cheque	Tyro Eftpos	ePayment	PD	31.30
4. Card	5. Eftpos	6. Direct Deposit	7. Credits	Tyro EasyClaim		
Credits					PD	40.00

Payment Total 40.00
 Amount Due 71.30
 Balance 31.30

Family Due & Invoice Patient Due & Invoice Invoice(s) Only

Eclipse MA Online Suppress Combo Inv. Send to Patient Print Cancel

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.

Quick Pay

22 Mr Happy Jones

Payer Jones, Happy Due Patient 0.00 Family 0.00 Deferred Patient 0.00 Family 0.00 Credits 0.00

Current Invoice(s) Allocate Value 71.30 Discounted value 71.30 Gap 35.00

Payments

Format	Name	Bank	Branch	Number	Banklist	Amount
1. Cash	2. Cheque	3. MC Cheque	Tyro Eftpos	ePayment	PD	31.30
4. Card	5. Eftpos	6. Direct Deposit	7. Credits	Tyro EasyClaim		
Credits					PD	40.00

Payment Total 40.00
 Amount Due 71.30
 Balance 31.30

Family Due & Invoice Patient Due & Invoice Invoice(s) Only

Eclipse MA Online Suppress Combo Inv. Send to Patient Print Cancel

ePayment

You are about to bill the patient's credit card with the amount of \$31.30
 A receipt can be sent to the patient at the email address below if entered.

Account Payer	Card Type	Card Number	Expiry	Valid
Jones, Happy	VISA	XXXX XXXX XXXX 1019	01/39	✓
Jones, Happy	MASTERCARD	XXXX XXXX XXXX 0008	01/39	✓

Email Address: zedmedtesting+hJones@gmail.com

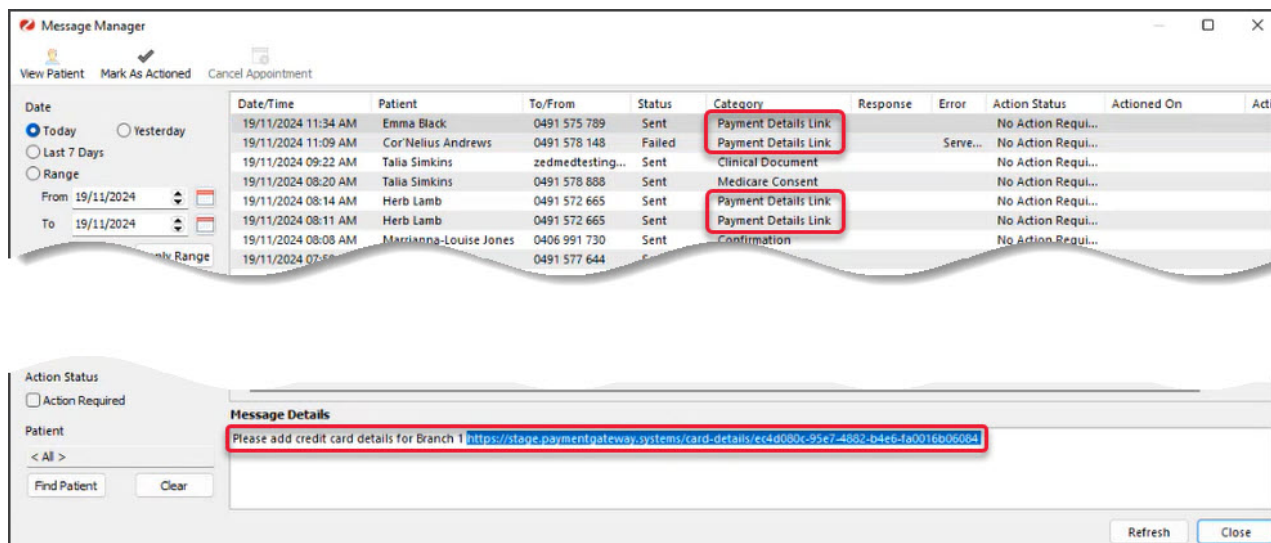
Email receipt to patient
 Update patient's email

Bill Cancel

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.

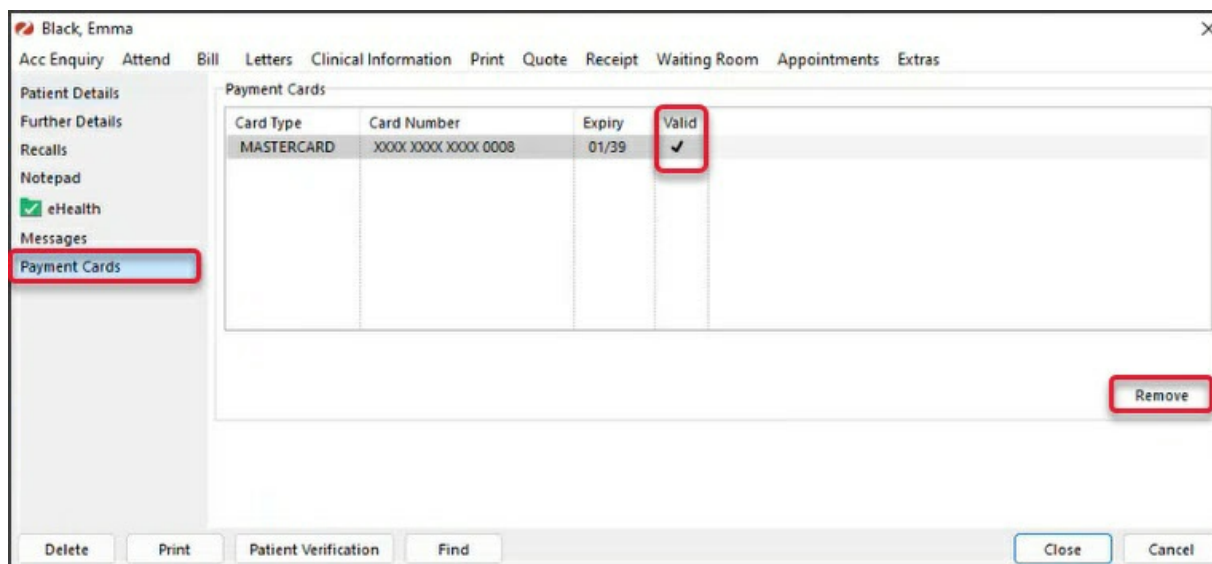


Patient Record

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 Tyro, 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.

Your credit card is required to secure your appointment

Here's your upcoming appointment details Emma Black

Dr Phillip Davis
Std Consultation
Branch 1
Level 3, 60 Albert Road SOUTH
MELBOURNE 3205
03 9284 3300
Tuesday 19 November 2024

11:15

Add new card:

Card Holder Name

Card Number

Expiry Date Security Code (CVV)

To verify your card details, a AUS1 temporary authorisation charge will be placed on your card. This is temporary and will be removed from your statement.

Add Payment Method

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](#).