# Payment Gateway user guide

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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.

For specific questions, see the Payment Gateway FAQ

## Considerations

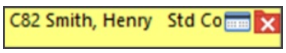
- Payment Gateway is an add-on requested via the customer request form.
- When a patient provides a credit card, the system checks its validity before accepting it.
- The Payment Gateway options only display for practices with Payment Gateway enabled.
- If a NOK provides a credit card for a child, the system adds it to the child's profile, and it can be selected at billing.
- Once a credit card is provided, it will be available for billing until the card expires.
- Once a credit card is provided, any booking will show a credit card icon in the Appointment Grid and Appointment Details.

## How to request a credit card

Staff can request credit card information using SMS and patients can be asked for a credit card when using OLA.

### When staff are booking an appointment

Office staff can send an SMS to the patient requesting credit card information if the patient does not have a card on file. When the patient provides the credit card, it is verified and can be 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.



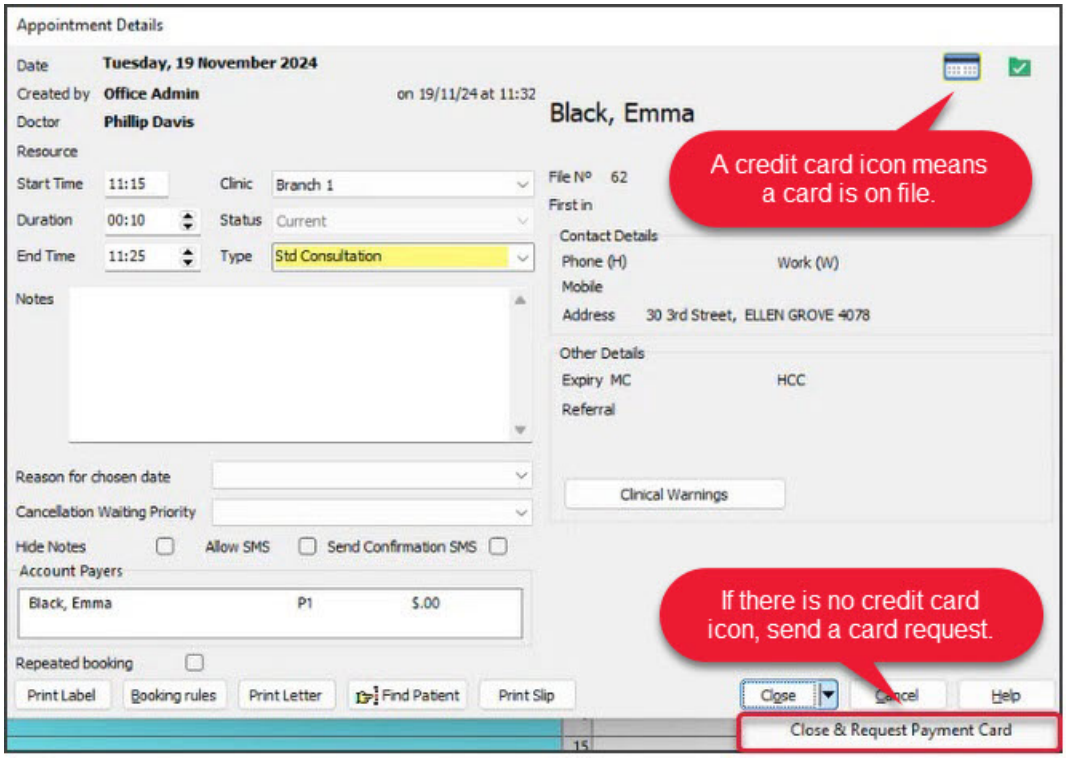

To request credit card information:

1. From the **Appointment Grid,** make an appointment for a patient.
2. In the **Appointment Details** screen, check if there is a credit card icon.

   If there is no icon, there is no valid credit card on file so perform step 2.
3. 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.

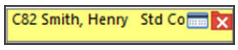
   If the patient does not have a mobile phone in their patient record, a warning will advise that the request cannot be sent.



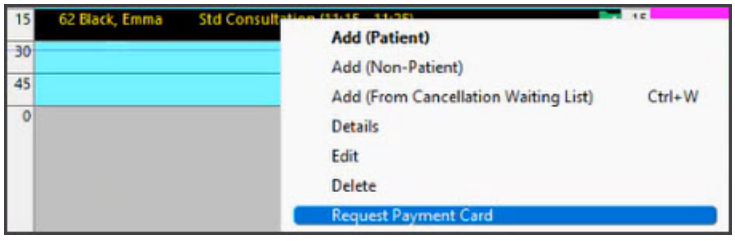

### When there is an existing appointment

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

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

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

3. The patient will receive an SMS with a link to a payment card page.

### When a patient is using Online Appointments

See the OLA booking with PG guide.

## How to bill a patient

To bill a patient, follow the private patient billing process and select **ePayment** for the payment type as shown below. This will use credit card information added to the patient record via an SMS request or an OLA booking.

Important considerations:

- For Payment Gateway, the **patient** is always the payer.
- Billing uses **QuickPay,** however, MA Online is also supported if a rebate is required.
- The invoice must have the correct treating practitioner so the correct Bank List receives the payment.
- A child with no credit card on file will show the parent's credit card/s if the parent is listed as a payer.
- ePayment can be used to part-pay an invoice, just like other payment methods. The receipt emailed to the patient will only show the amount charged using ePayment. The invoice in Zedmed will show each payment method used, the corresponding amount and the total.

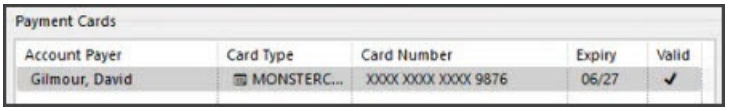
To bill the patient:

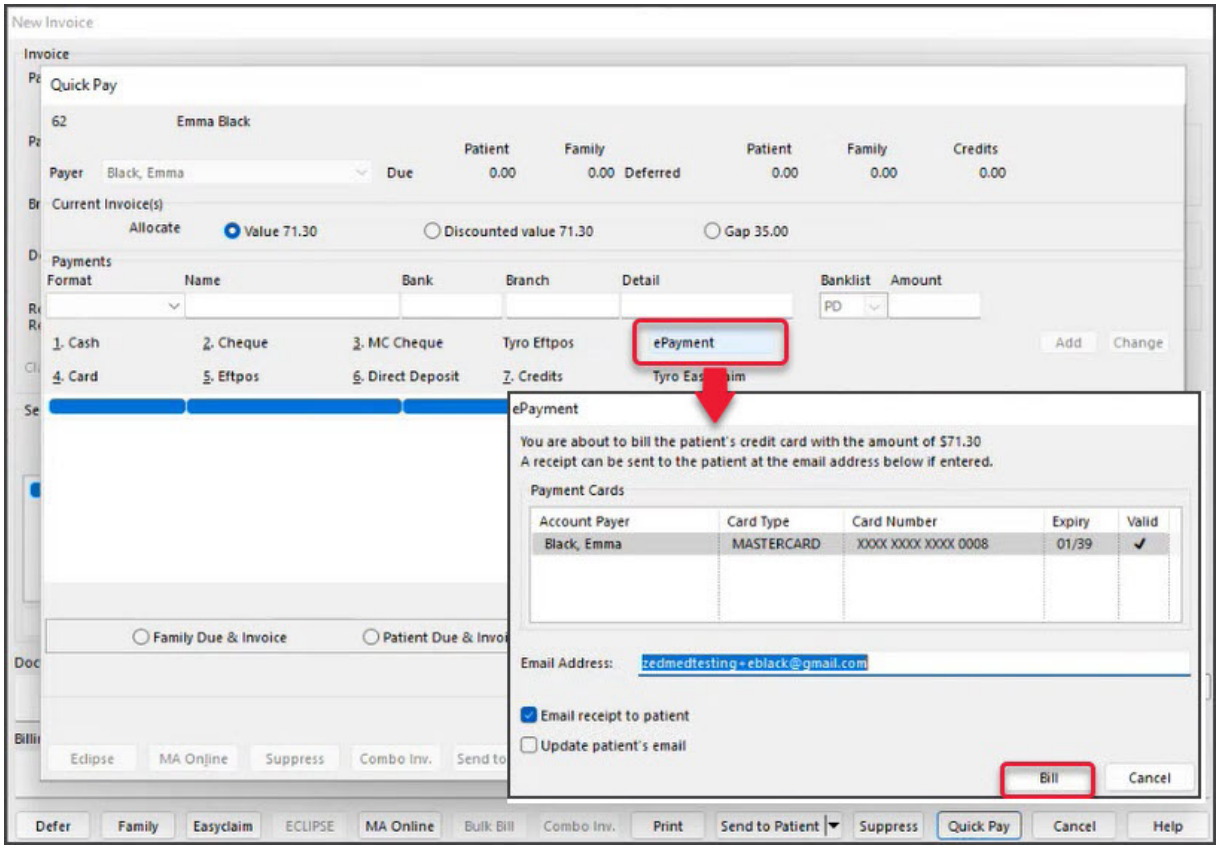
1. Check the patient as the payer.
2. Follow the private patient billing process.
3. **Important**: Check that the correct treating practitioner is selected.

   Tyro sends the payment to the bank account linked to the treating doctor. This could be the practice or the doctor's account.
4. Select **QuickPay.**
5. Select **ePayment.**

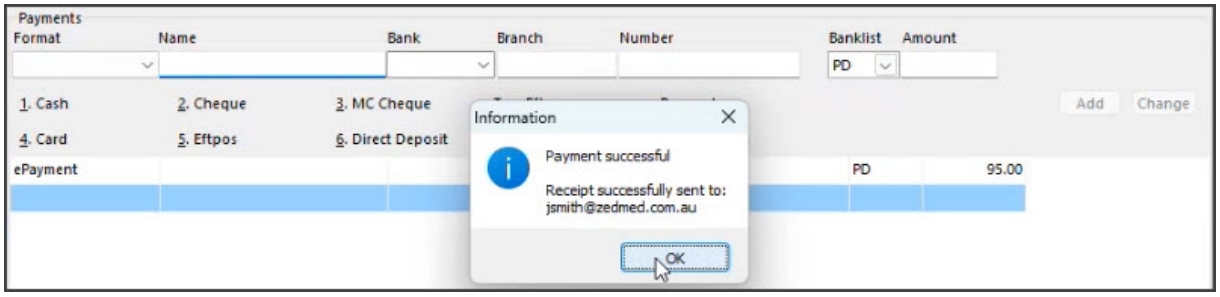
   The ePayment dialog will display the cards recorded for the patient and the patient's email address.
6. Select the card to use.

   If there is one card, it will be selected by default. For multiple cards, the selected card will have a dark grey highlight
   - Credit cards are ordered by the last card added.
   - The credit card's last 4 digits are shown so you can confirm the card with the payer.
   - If the appointment was booked in OLA, the card provided in OLA is selected by default with a card icon next to it.

   
   
7. Select **Bill.**




The ePayment dialog will close and a confirmation message will appear on the Quickpay screen.




8. Select OK to the Payment successful message.

**Email considerations:**

- By 23default, the receipt will be sent to the patient's email address. You can untick this option in the dialog.
- You can add email recipients using a comma separator, for example, the payer's email address.
- If you select **Update patient email,** it will use the email entered to update the patient's record

## Claiming a rebate (MA Online)

When a patient pays using Payment Gateway, a claim can be submitted using MA Online.

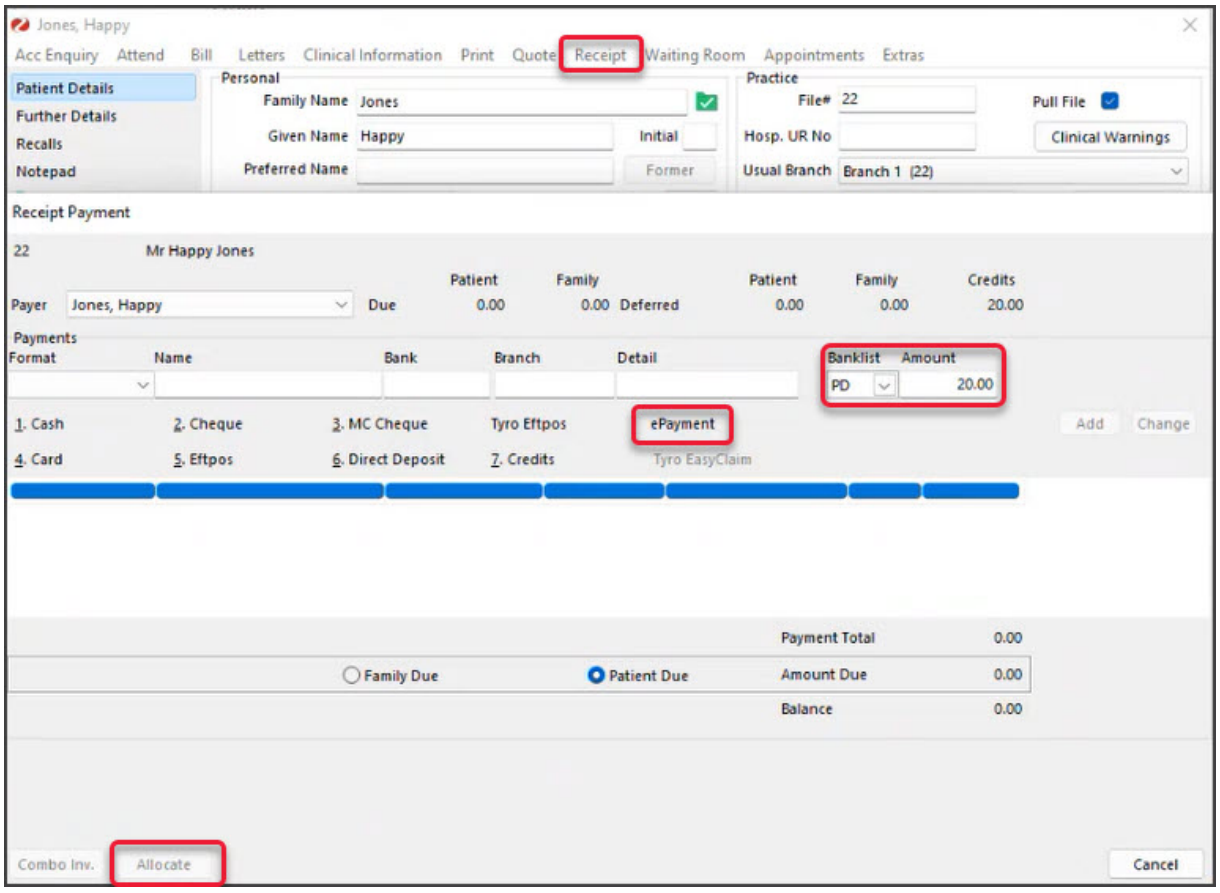
Currently, when you complete the credit card payment in QuickPay, the screen closes so you cannot select MA Online to request a rebate (as it sits in the QuickPay screen). This means you will need to go into the patient's Account enquiry to access MAOnline.

The MA Online process is documented in the Private Patient invoicing guide, starting from step 10.

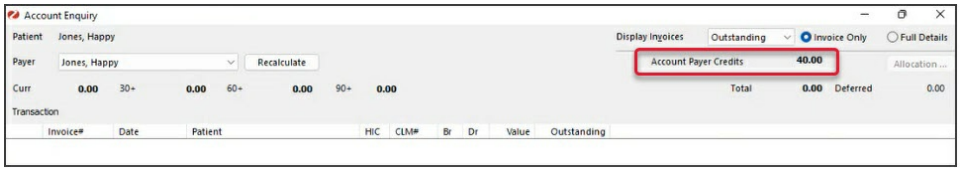
# Taking a pre-payment

## Step 1 - Take the prepayment

1. Open the patient's record.
2. Select **Receipt**. Opens the **Receipt Payment** screen.
3. Select **ePayment.**
4. Check the correct bank list is selected.
5. Enter the payment amount, **then** select Tab on your keyboard.
6. Select **Add**.
7. Select **Allocate.** The **Allocation** screen will open.
8. 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.

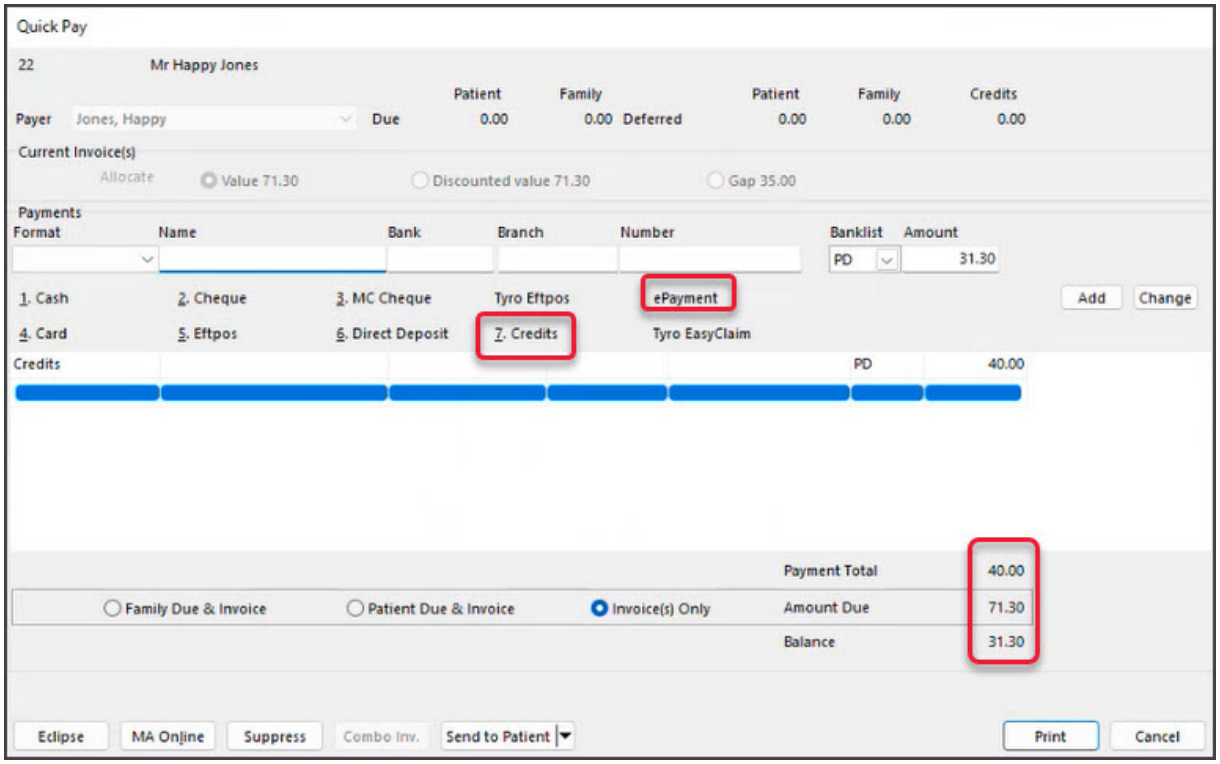



## Step 2- Apply the credit when billing

When you bill the patient:

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

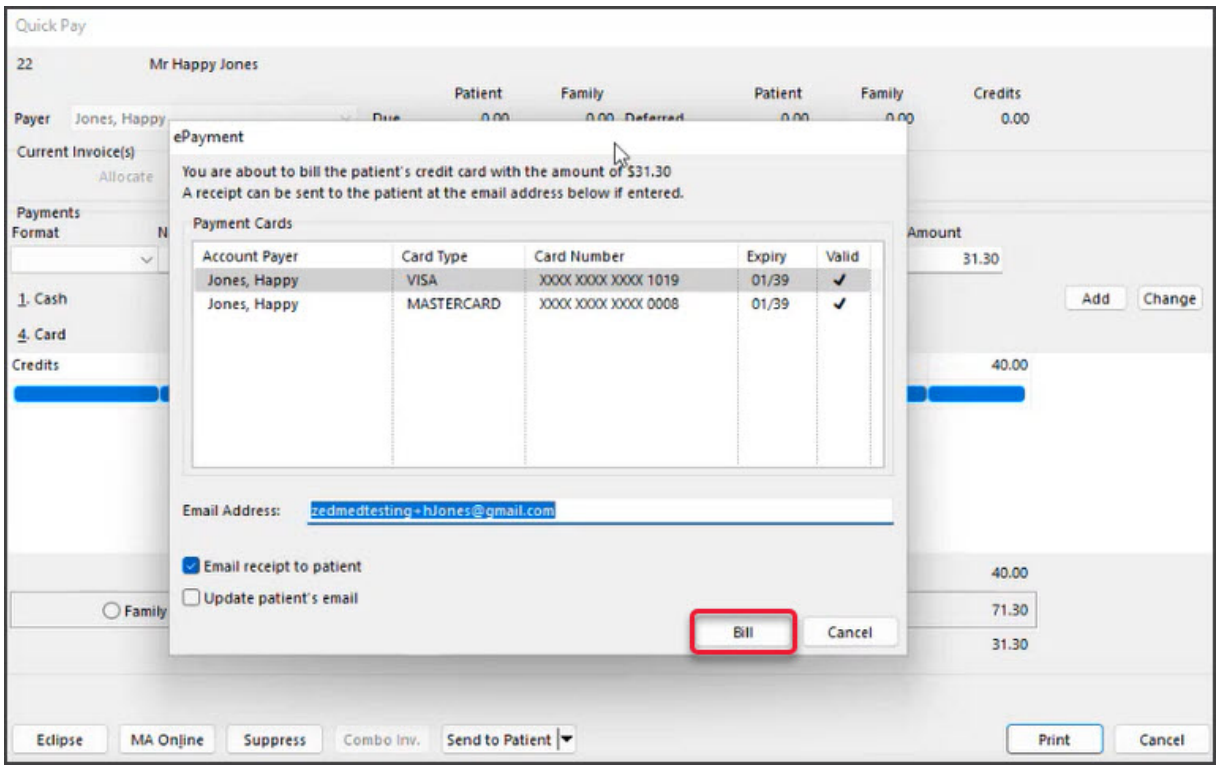
   The recorded deposit will be added as a credit, reducing the **Amount Due** and the **Balance** due.




2. **Important**: Check that the correct Banklist is selected. It will show the one linked to the treating doctor.
3. Select **ePayment.**

   The **ePayment** screen shows the credit card to be used and the email address the receipt will be sent to.
4. Select **Bill**.

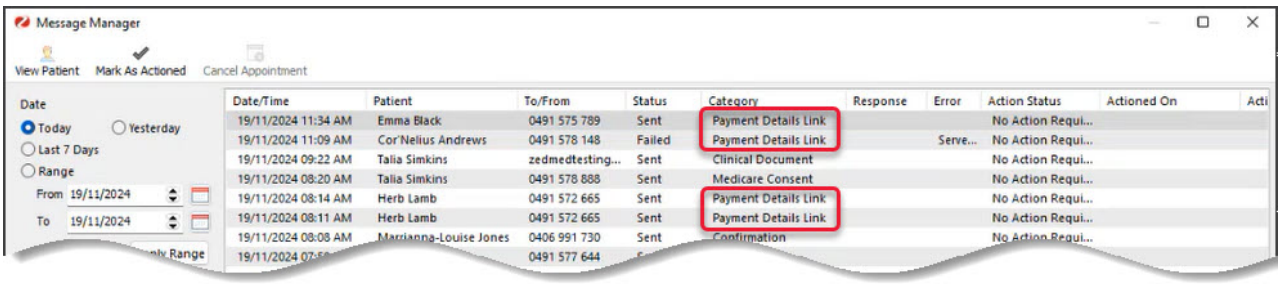
   A confirmation message will appear.

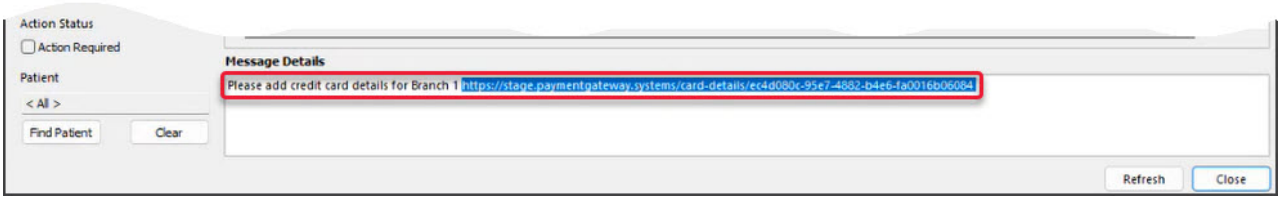



## Managing credit cards and card requests

### Message manager

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



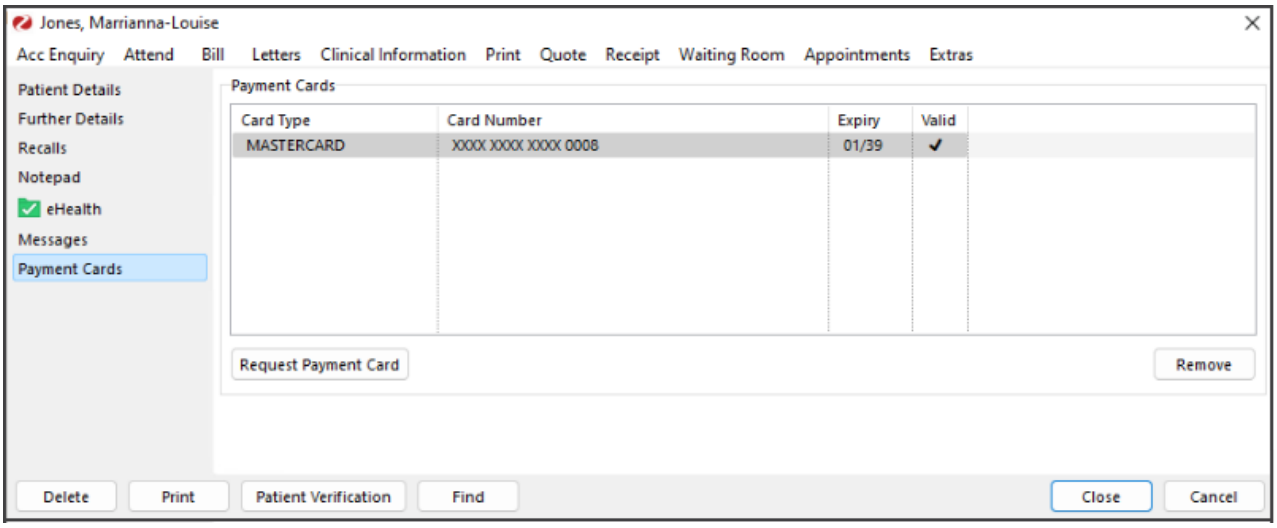




### Patient Record

In the patient's record, the **Payment Cards** menu displays all registered cards. Only the card type, last 4 digits and expiry date are recorded.

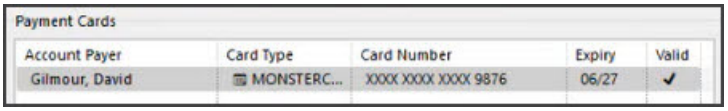
The **Valid** field
This is based on the expiry date and will have a tick if the card has not expired. If the payment does not have a valid card, a credit card icon will not appear on the appointment screens.

The **Remove** button
This button removes the highlighted card. To **Remove** a card, a user must have the **Administrator** role or the security Function 'Patient Records' > 'Patient Details- Payment Cards (Edit)'. If you add this Function, please wait an hour for the API to update or contact Zedmed Support for an API restart.




If the card was provided via Online Appointments, a credit card icon will appear next to the Card Type on the Quick Pay > Card selection screen. The card will be selected by default for the OLA appointment even if there is an

existing card.




## The patients' workflow

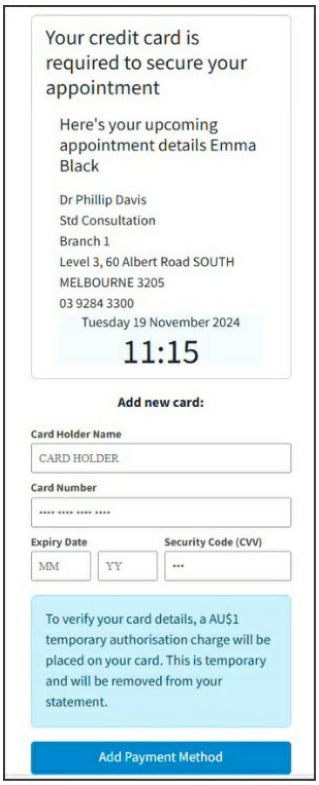
Patients can be prompted to provide credit card information when reception sends an SMS request or when making an Online Appointment. In both cases, a secure token for the card will be sent to Zedmed. This token does not contain the credit card information. Zedmed uses the token to integrate with Tyro, which manages the payment transfers.

**For Online Appointments**

- See the OLA booking with PG guide.

**For SMS card requests**

1. The patient 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.**

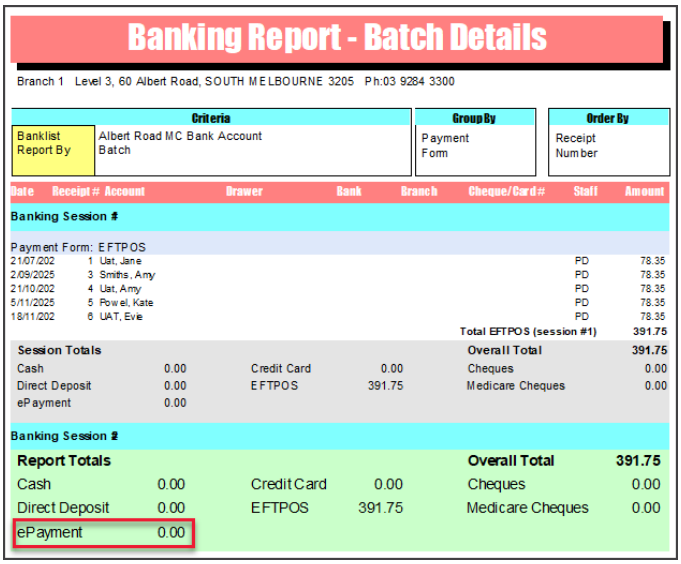
   This link cannot be used again.

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

# Banking reconciliations

Payments received using the Payment Gateway will show as **ePayments** in Zedmed's banking reports.

To help resolve any issues, you can log in to the Tyro Portal and review Tyro's Payment Report, or run Zedmed's Tyro Reconciliation report.



**Banking Report - Batch Details**

Branch 1 Level 3, 60 Albert Road, SOUTH MELBOURNE 3205 Ph:03 9284 3300

| Criteria | | Group By | Order By |
|---|---|---|---|
| Banklist Report By | Albert Road MC Bank Account Batch | Payment Form | Receipt Number |

| Date | Receipt # | Account | Drawer | Bank | Branch | Cheque/Card # | Staff | Amount |
|---|---|---|---|---|---|---|---|---|
| **Banking Session #** | | | | | | | | |
| Payment Form: EFTPOS | | | | | | | | |
| 21/07/202 | 1 | Uat, Jane | | | | | PD | 78.35 |
| 2/09/2025 | 3 | Smiths, Amy | | | | | PD | 78.35 |
| 21/10/202 | 4 | Uat, Amy | | | | | PD | 78.35 |
| 5/11/2025 | 5 | Powel, Kate | | | | | PD | 78.35 |
| 18/11/202 | 6 | UAT, Evie | | | | | PD | 78.35 |
| | | | | | | **Total EFTPOS (session #1)** | | **391.75** |

| Session Totals | | | | Overall Total | 391.75 |
|---|---|---|---|---|---|
| Cash | 0.00 | Credit Card | 0.00 | Cheques | 0.00 |
| Direct Deposit | 0.00 | EFTPOS | 391.75 | Medicare Cheques | 0.00 |
| ePayment | 0.00 | | | | |

**Banking Session 2**

| Report Totals | | | | Overall Total | 391.75 |
|---|---|---|---|---|---|
| Cash | 0.00 | Credit Card | 0.00 | Cheques | 0.00 |
| Direct Deposit | 0.00 | EFTPOS | 391.75 | Medicare Cheques | 0.00 |
| ePayment | 0.00 | | | | |