

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.

Considerations

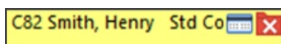
- When a patient provides a credit card, its validity is checked before the card is accepted.
- The Payment Gateway options only display for practices with Payment Gateway enabled.
- If a NOK provides a credit card for a child, that card will be added to the child's profile and can be selected when billing.
- 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**.

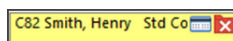
The appointment will be created, and the patient will receive an SMS asking them to enter credit card information.

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

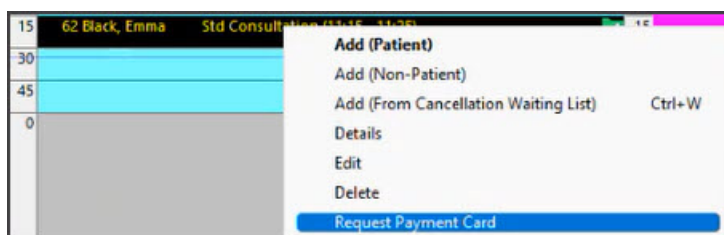
When there is an existing appointment

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**.



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.

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.

Tryo 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.

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

7. Select **Bill**.

New Invoice

Invoice

Quick Pay

62 Emma Black

Payer: Black, Emma Due: 0.00 Patient: 0.00 Family: 0.00 Deferred: 0.00 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 Detail Banklist Amount

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

4. Card 5. Eftpos 6. Direct Deposit 7. Credits Tyro Easy Sim

ePayment

You are about to bill the patient's credit card with the amount of \$71.30. A receipt can be sent to the patient at the email address below if entered.

Payment Cards

Account Payer	Card Type	Card Number	Expiry	Valid
Black, Emma	MASTERCARD	XXXX XXXX XXXX 0008	01/39	✓

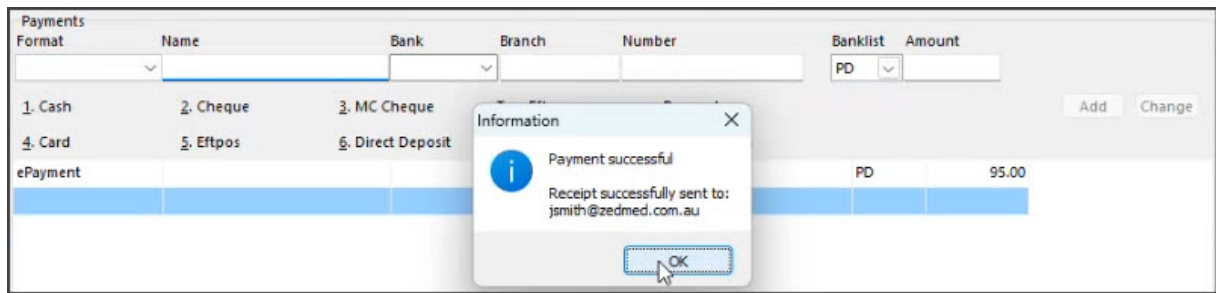
Email Address: zedmedtesting+ebblack@gmail.com

☒ Email receipt to patient ☐ Update patient's email

Bill Cancel

Defer Family Easyclaim ECLIPSE MA Online Bulk Bill Combo Inv. Print Send to Patient Suppress Quick Pay Cancel Help

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



You can now process MA Online or ECLIPSE as required.

8. Select OK to the Payment successful message.

Email considerations:

- By default, 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.

1. Follow the standard private patient billing process but use ePayment as the payment method (not EasyClaim).
2. Then select **MA Online** and complete the **Interactive claim** screen then select **Send** to transmit the request to Medicare.

The MA Online steps are outlined 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 **Amount**, 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.

Jones, Happy

Acc Enquiry Attend Bill Letters Clinical Information Print Quote **Receipt** Waiting Room Appointments Extras

Patient Details

Family Name Jones ✓

Given Name Happy Initial

Preferred Name Former

Practice File# 22 Pull File ☒

Hosp. UR No Clinical Warnings

Usual Branch Branch 1 (22)

Receipt Payment

22 Mr Happy Jones

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

Payments

Format	Name	Bank	Branch	Detail	Banklist	Amount
1. Cash	2. Cheque	3. MC Cheque	Tyro Eftpos	ePayment	PD	20.00
4. Card	5. Eftpos	6. Direct Deposit	7. Credits	Tyro EasyClaim		

Add Change

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...

Transaction	Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding

Cur 0.00 30+ 0.00 60+ 0.00 90+ 0.00

Total 0.00 Deferred 0.00

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.

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

3. Select **ePayment**.

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

4. 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

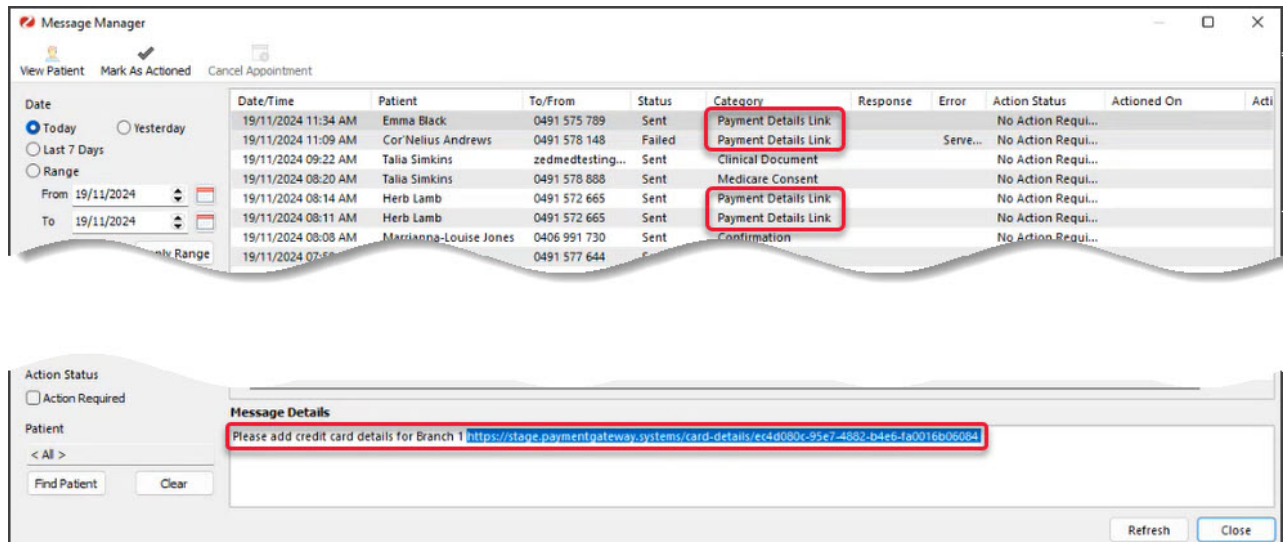
☒ Email receipt to patient
☐ Update patient's email

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

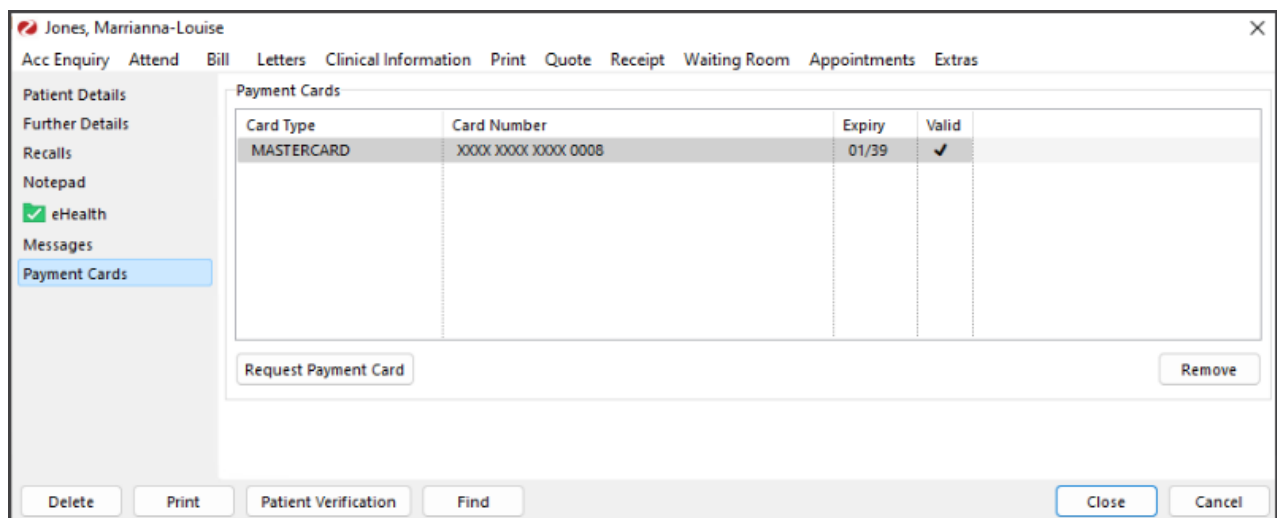
In the patient's record, the **Payment Cards** menu displays all registered cards. Only the card type, last 4 digits and expiry date are recorded.

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, there will be a credit card icon next to the Card Type in the Quick Pay > Card selection screen. The card will be selected by default for the OLA appointment even if there is 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

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 Tryo, 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.

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 AU\$1 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.

Banking reconciliations

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

To assist with resolving any issues, you can log in to the Tyro Portal and review Tyro's Payment Report. The next release of Zedmed v39 will include a 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							
21/07/2022	1	Uat, Jane				PD	78.35
2/09/2025	3	Smiths, Amy				PD	78.35
21/10/2022	4	Uat, Amy				PD	78.35
5/11/2025	5	Powell, Kate				PD	78.35
18/11/2022	6	UAT, Eve				PD	78.35
Total EFTPOS (session #1)							391.75
Session Totals				Overall Total			
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 #							
Report Totals				Overall Total			
Cash	0.00		Credit Card	0.00		Cheques	0.00
Direct Deposit	0.00		EFTPOS	391.75		Medicare Cheques	0.00
ePayment	0.00						