



OFFICE PAYMENTS- QUICK PAY TRAINING GUIDE- TABLE OF CONTENTS

p. 2	How to Enter a Payment for a Patient
p. 5	How to Void a Payment
p. 8	How to Reprint or Email Receipt, Option 1
p. 9	How to Reprint or Email Receipt- Option 2
p. 11	How to Refund a Payment
p. 16	Reporting for Refunds
p. 17	ACH Check Verification
p. 19	Quick Instructions (No Images)
p. 22	Frequently Asked Questions

HOW TO ENTER A PAYMENT FOR A PATIENT

ePAY Healthcare Home Help Sign Out

Active Patients | ePLAN | Point of Service | Eligibility | Reports

Home Page Demo Database

Quick Find

Operator: MBENDER Department: FCOA Station: WEB Client: DEMODB2010

- Your last login was on Friday, November 09, 2012 at 6:03:43 AM.
- Your password expires in 90 days. Click [here](#) to change it.
- To change your secret question click [here](#).

Actual Date: Fri., Nov. 9, 2012
Business Date: Fri., Nov. 9, 2012

Home
Cashiering
Quick POS
Departmental Deposits
Find Transactions
System Setup
Promotion Setup
eBILL
Checkout

Messages
DEMO DB

ePAY Healthcare Change Client:

Active Patients | ePLAN | Point of Service

Point of Service - Make Payment Healthcare Facility - DEMODB2010

Quick Find

* Fields marked with an asterisk(*) are required.

Patient Last Name * Account No. *
 Patient First Name * Date of Birth

Recent Payments
 The Last Payment Received was for **\$30.00** on 12/23/2013. [View, email or print recent payments](#)

Bill Reference	Additional Comments	Payment Amount
<input type="text"/>	CoPay	<input type="text" value="25.00"/>

TOTAL: \$25.00

Method of Payment

Pay by Credit Card
 Pay by Check

If you prefer, enter additional comments here (not required). This information will display in your Daily Transaction Detail Report (so you can post the payment to the patient's account in your Hospital Information System).

For enhanced security, this information will no longer print on the receipt but will display on your Daily Transaction Detail Report.

Enter required fields of patient name and account number, DOB is optional. This required information will print on the receipt and display on your reports.

HOW TO ENTER A PAYMENT FOR A PATIENT (continued)

Change Client:

ePAY Healthcare | Active Patients | ePLAN | Point of Service

Healthcare Facility - DEMODB2010

Quick Find

* Fields marked with an asterisk(*) are required.

Patient Last Name * Account No. *

Patient First Name * Date of Birth

Recent Payments
The Last Payment Received was for **\$30.00** on 12/23/2013. [View, email or print recent payments](#)

Bill Reference	Additional Comments	Payment Amount
<input type="text"/>	CoPay	<input type="text" value="25.00"/>
TOTAL:		\$25.00

Method of Payment
Select a Method of Payment
 Pay by Credit Card
 Pay by Check

Click here for a list of recent payment receipts which you can view, email or print.

View details regarding the last payment processed.

Bill Reference	Additional Comments	Payment Amount
<input type="text"/>	CoPay	<input type="text" value="25.00"/>
TOTAL:		\$25.00

Method of Payment
Select a Method of Payment
 Pay by Credit Card
 Pay by Check

Credit Card Information

Card Number *

Expiration Date *

Card Holder Name *

Country *

Zip Code *

Receipt Email

[Back](#)

Choose the method of payment: either credit card or check.

The system will always default to "Secure Entry" so you can bypass this field.

If you are using a swiper, make sure the cursor is in the "Card Number" field. Either swipe the card or type in the number and click "MAKE PAYMENT."

HOW TO ENTER A PAYMENT FOR A PATIENT (continued)



Change Client:

Active Patients
ePLAN
Point of Service

Point of Service - Confirm Payment

Quick Find

- Home
- Cashiering
- Quick POS
- Find Transactions
- Batch Maintenance
- Online Service Manager
- Imports
- System Setup
- ePAY Portal Setup
- Promotion Setup
- Voice Authorization

Please review the payment details and click 'Submit Payment' button.

Description	Amount
John Smith, 12345, CoPay	\$25.00
Total Amount	\$25.00

Payment Information

Credit Card Number: XXXXXXXXXXXX5454

Expiration Date: 0516

Card Holder Name: John Smith

Zip/Postal Code: 54321

Email Address: john@testreceipt.com

Submit Payment
Cancel

You can review the information entered, then click "Submit Payment." The system authorizes and processes the transaction in real-time.

Point of Service - Payment Receipt

Healthcare Facility - DEMODB2010

Quick Find

- Home
- Cashiering
- Quick POS
- Find Transactions
- Batch Maintenance
- Online Service Manager
- Imports
- System Setup
- ePAY Portal Setup
- Promotion Setup
- Voice Authorization
- Event Log Viewer
- eRefund Customer Summary
- End-of-Day
- eBILL
- Checkout

Thank you for your payment! Your transaction has been successfully processed. Please print this receipt for your records.

Demo Database

Receipt Number : **2101**

Current Date: : **12/23/2013**

Description	Total
Medical Bill Payment John Smith, 12345	
Total	\$25.00

Payments Received

CREDIT CARD

MasterCard 5454

Authorization # 437437

You will be presented with a page that confirms the completed transaction. On this page you may email/print the receipt. The system also automatically emails a receipt to your customer.

Thank you for your payment.

Your receipt has been emailed to john@testreceipt.com.

Email Another Receipt
View Printable Receipt

HOW TO VOID A PAYMENT

The following steps allow you to void a payment processed through ePAY on **the same business day**. Please note, if the payment was processed **on a prior business day** a refund must be issued.

If you know the transaction (or receipt) number, please enter it into the "Quick Find" box in the upper left corner, then skip to the bottom of p. 6.

If you do not have the transaction (or receipt) number for the payment you wish to void, one way to find that number is to access the patient's receipt. To do so, please click on "Quick POS."

Operator: MBENDER Department: FCOA Station: WEB Client: DEMODB2010

- Your last login was on Friday, November 09, 2012 at 6:03:43 AM.
- Your password expires in 90 days. Click [here](#) to change it.
- To change your secret question click [here](#).

Actual Date: Fri., Nov. 9, 2012
Business Date: Fri., Nov. 9, 2012

The payment you wish to void might be the "Last Payment Received." Click on the amount highlighted in blue (\$30.00) to view the transaction.

Or, click here to locate the correct receipt within the list of recent transactions.

* Fields marked with an asterisk(*) are required.

Patient Last Name * Smith Account No. * 12345
Patient First Name * John Date of Birth 07/01/1958

Recent Payments
The Last Payment Received was for **\$30.00** on 12/23/2013. [View email or print recent payments](#)

Bill Reference	Additional Comments	Payment Amount
	CoPay	25.00

Method of Payment
Select a Method of Payment
 Pay by Credit Card
 Pay by Check

HOW TO VOID A PAYMENT (cont'd)

Thank you for your payment! Your transaction has been successfully processed. Please print this receipt for your records.

Demo Database
Receipt Number : **2101**
Current Date : 12/23/2013

Please find the transaction (or receipt) number at the top of the receipt.

Description	Total
Medical Bill Payment John Smith, 12345	\$25.00

Payments Received	Amount
CREDIT CARD MasterCard 5454 Authorization # 437437	\$25.00
Total	\$25.00

Thank you for your payment.

[Email Another Receipt](#) [View Printable Receipt](#)

Select a Method of Payment
 Pay by Credit Card
 Pay by Check

Credit Card Information

Change Client: [Dropdown]

Home Help Sign Out

Active Patients ePLAN Point of Service Eligibility Reports

Point of Service - Make Payment Healthcare Facility - DEMODB2010

Quick Find: **2101**

* Fields marked with an asterisk(*) are required.

Patient Last Name * [Text Box] Account No. * [Text Box]
Patient First Name * [Text Box] Date of Birth [Text Box]

Recent Payments
The Last Payment Received was for \$25.00 on 12/23/2013

Bill Reference	Additional Comments	Amount
[Text Box]	[Text Box]	\$0.00

Enter the transaction (or receipt) number in the Quick Find box located on your ePAY homepage and hit ENTER.

HOW TO VOID A PAYMENT (cont'd)

Change Client: Home Help Sign Out

Active Patients | ePLAN | Point of Service | Eligibility | Reports

Find Transactions Healthcare Facility - DEMODB2010

Quick Find →

QUERY RESULTS [Change Search Criteria](#)

	Transaction	AccountNo	Date	Status	Item Code	Payment Code	Amount
Home	2101				MEDICAL	SMARTPAY	25.00
Cashiering	(1 record(s))						Display All
Quick POS	1						
Find Transactions							

* indicates there are multiple Item Codes in the Transaction.

Change Client: Home Help Sign Out

Active Patients | ePLAN | Point of Service | Eligibility | Reports

Cashiering Healthcare Facility - DEMODB2010

Cashier Dept. Deposit No Sale **Void** Refund Batch Options Checkout Reprint Email

Trans. No: 2101 Operator: DCMMH Date: 12/23/2013
Batch No: 1415 Station: WEB Time: 9:27 AM

Account Number
Item Code
MEDICAL

Balance

5, CoPay

TOTAL

PAYMENTS TEND

Pay Code	Description	Amount
SMARTPAY	SmartPay CC	25.00
<input type="button" value="DELETE"/> <input type="button" value="EDIT"/> <input type="button" value="ENDORSE"/>		
REPRINT SLIP		
Account No:	XXXXXXXXXXXX5454	Show Details
Auth Code:	437437	Reference: 9915
TOTAL		25.00
Change Due		0.00

Message from webpage

Are you sure you want to void this transaction?

OK Cancel

HOW TO VOID A PAYMENT (cont'd)

ePAY
Change Client:

Active Patients
ePLAN
Point of Service
Eligibility
Reports

Cashiering
Healthcare Facility - DEMODB2010

<input type="button" value="Cashier"/>	<input type="button" value="D"/>	<input type="button" value="Batch Options"/>	<input type="button" value="Checkout"/>	<input type="button" value="Reprint"/>	<input type="button" value="Email"/>
--	----------------------------------	--	---	--	--------------------------------------

Trans. No: 2101 Date: 12/23/2013 Business: 12/23/2013 Status: **Voided**
 Batch No: 1415 Time: 9:27 AM Effective: 12/23/2013 Module: Web

	Account Number	Balance Due	Min. Due	Amount
	MEDICAL			25.00
Description: John Smith, 12345, CoPay				
Discount: 0.00				
TOTAL				25.00

PAYMENTS TENDERED

Pay Code	Description	Amount
SMARTPAY	SmartPay CC	25.00
<input type="button" value="DELETE"/> <input type="button" value="EDIT"/> <input type="button" value="ENDORSE"/>		
<input type="button" value="REPRINT SLIP"/>		
Account No: XXXXXXXXXXXXX5454		Reference: 9915
Auth Code: 437437		
TOTAL		25.00
Change Due		0.00

The status of this payment is now "Voided." The transaction **will not be settled**, nor will it appear on any reports.

HOW TO REPRINT or EMAIL RECEIPT – OPTION 1

ePAY
Change Client:

Active Patients
ePLAN
Point of Service
Eligibility
Reports

Cashiering
Healthcare Facility - DEMODB2010

<input type="button" value="Cashier"/>	<input type="button" value="D"/>	<input type="button" value="Batch Options"/>	<input type="button" value="Checkout"/>	<input type="button" value="Reprint"/>	<input type="button" value="Email"/>
--	----------------------------------	--	---	--	--------------------------------------

Trans. No: 2101 Date: 12/23/2013 Business: 12/23/2013 Status: **Voided**
 Batch No: 1415 Time: 9:27 AM Effective: 12/23/2013 Module: Web

	Account Number	Balance Due	Min. Due	Amount
	MEDICAL			25.00
Description: Medical Bill Payment				
Description: John Smith, 12345, CoPay				
Discount: 0.00				
TOTAL				25.00

PAYMENTS TENDERED

Pay Code	Description	Amount
SMARTPAY	SmartPay CC	25.00
<input type="button" value="DELETE"/> <input type="button" value="EDIT"/> <input type="button" value="ENDORSE"/>		
<input type="button" value="REPRINT SLIP"/>		
Account No: XXXXXXXXXXXXX5454		Reference: 9915
Auth Code: 437437		
TOTAL		25.00
Change Due		0.00

To reprint or email the receipt, please click on the corresponding button.

HOW TO REPRINT or EMAIL RECEIPT – OPTION 2

ePAY Healthcare | Change Client: [dropdown] | Home | Help | Sign Out

Active Patients | ePLAN | Point of Service | Eligibility | Reports

Home Page | Healthcare Facility - DEMODB2010

Quick Find: [input] [go]

Operator: IDCMIMI Department: IDC Station: WEB Client: DEMODB2010

- Your last login was on Monday, December 23, 2013 at 9:37:20 AM.
- Your password expires in 16 days. [Click here](#) to change it.

Actual Date: Mon., Dec. 23, 2013
Business Date: Mon., Dec. 23, 2013

Messages

DEMO DB

Today's Activity

Transaction Count: 1
Amount Received: \$30.00
Payment Plan Enrollments by Staff: 0
Payment Plan Enrollments by Patient: 0

ePAY Healthcare | Change Client: [dropdown] | Home | Help | Sign Out

Active Patients | ePLAN | Point of Service | Eligibility | Reports

Point of Service - Make Payment | Healthcare Facility - DEMODB2010

Quick Find: [input] [go]

* Fields marked with an asterisk(*) are required.

Patient Last Name * [input] | Account No. * [input]
Patient First Name * [input] | Date of Birth [input]

Recent Payments

The Last Payment Received was for **\$25.00** on 12/23/2013. [View, email or print recent payments](#)

Bill Reference	Additional Comments	Payment Amount
[input]	[input]	[input]
TOTAL:		\$0.00

Method of Payment

Select a Method of Payment

Pay by Credit Card
 Pay by Check

Credit Card Information

HOW TO REPRINT or EMAIL A RECEIPT – OPTION 2 (continued)

Printable View of Payment History

Payment History

Receipt Number	Date	Patient	Payments	
2101	12/23/2013	John Smith	\$25.00	View
2100	12/23/2013	Santa Claus	\$30.00	View

Select a Method of Payment
 Pay by Credit Card
 Pay by Check

Callout: Select the transaction for which you would like to print or email a receipt by clicking "View"

Thank you for your payment! Your transaction has been successfully processed. Please print this receipt for your records.

Demo Database
 Receipt Number : 2101 *VOIDED*
 Current Date : 12/23/2013

Description	Amount
Medical Bill Payment John Smith, 12345	\$25.00
Total	\$25.00

Payments Received	Amount
CREDIT CARD MasterCard 5454 Authorization # 437437	\$25.00
Total	\$25.00

Thank you for your payment.

[Email Another Receipt](#) [View Printable Receipt](#)

Select a Method of Payment
 Pay by Credit Card
 Pay by Check

Callout: Scroll down to the bottom and select "EMAIL ANOTHER RECEIPT" or "VIEW PRINTABLE RECEIPT"

HOW TO REFUND A PAYMENT

The following steps allow you to refund a payment processed through ePAY.

If you know the transaction (or receipt) number, please enter it into the "Quick Find" box in the upper left corner, then skip to the bottom of p. 12.

If you do not have the transaction (or receipt) number for the payment you wish to refund, one way to find that number is to access the patient's receipt. To do so, please click on "Quick POS."

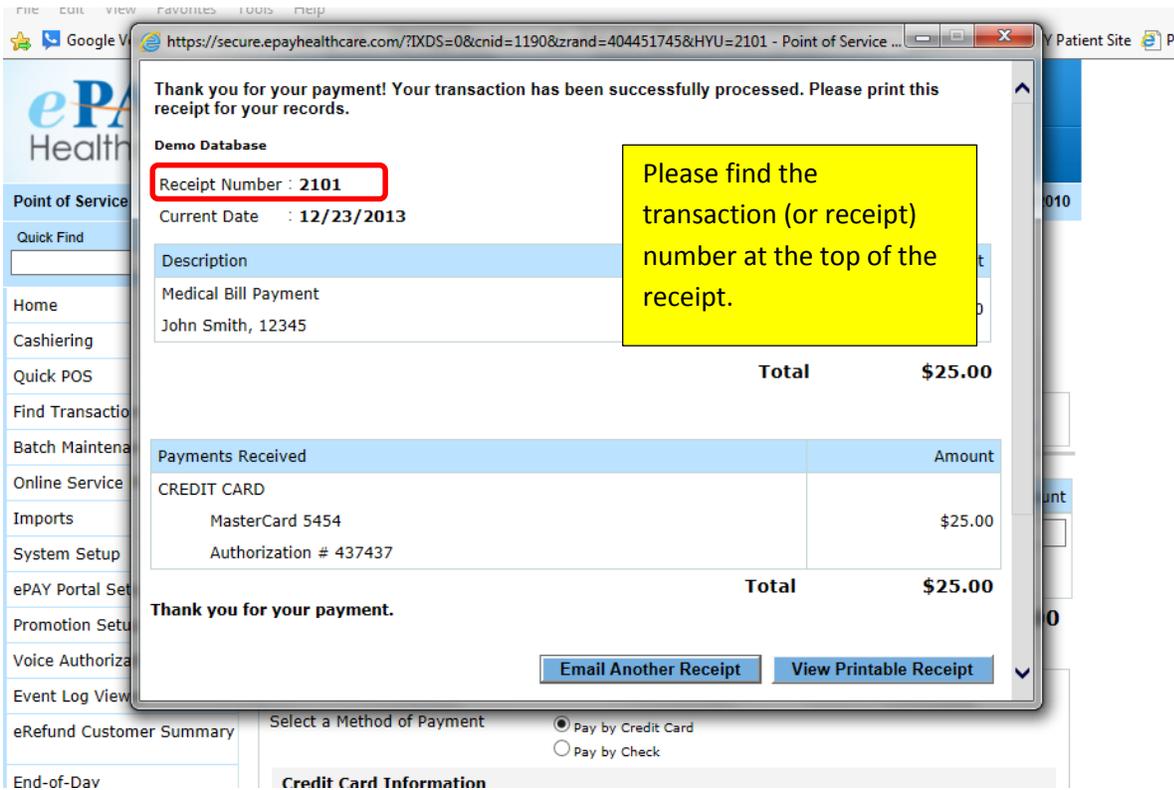
The screenshot shows the ePAY Healthcare Home Page. The "Quick Find" box is highlighted with a red rectangle. The "Quick POS" link in the left-hand navigation menu is also highlighted with a red rectangle. A yellow callout box points to the "Quick Find" box with the first instruction. Another yellow callout box points to the "Quick POS" link with the second instruction. The page includes a top navigation bar with "Home", "Help", and "Sign Out" buttons, and a secondary bar with "Point of Service", "Eligibility", and "Reports". A "Demo Database" label is visible on the right. The main content area shows "WEB Client: DEMODB2010" and a date box for "Actual Date: Fri., Nov. 9, 2012" and "Business Date: Fri., Nov. 9, 2012". A "Messages" section displays "DEMO DB".

The payment you wish to refund might be the "Last Payment Received." Click on the amount highlighted in blue (\$30) to view the transaction.

Or, click here to locate the correct receipt within the list of recent transactions.

The screenshot shows the "Point of Service - Make Payment" page. The "Recent Payments" section displays a table with columns for "Bill Reference", "Additional Comments", and "Payment Amount". The "Payment Amount" column shows a value of "25.00". A yellow callout box points to the "\$30.00" value in the "Recent Payments" section with the first instruction. Another yellow callout box points to the "View, email or print recent payments" link with the second instruction. The page includes a "Change Client" dropdown menu and a top navigation bar with "Home", "Help", and "Sign Out" buttons. The secondary navigation bar includes "Active Patients", "ePLAN", "Point of Service", "Eligibility", and "Reports". The main content area shows "Healthcare Facility - DEMODB2010" and a "Quick Find" box. The "Patient Information" section includes fields for "Patient Last Name" (Smith), "Account No." (12345), "Patient First Name" (John), and "Date of Birth" (07/01/1958). The "Recent Payments" section includes a note: "The Last Payment Received was for \$30.00 on 12/23/2013. [View, email or print recent payments](#)". The "Method of Payment" section includes a "Select a Method of Payment" dropdown and radio buttons for "Pay by Credit Card" and "Pay by Check".

HOW TO REFUND A PAYMENT (continued)



Thank you for your payment! Your transaction has been successfully processed. Please print this receipt for your records.

Demo Database
Receipt Number : **2101**
Current Date : 12/23/2013

Description
Medical Bill Payment
John Smith, 12345

Total \$25.00

Payments Received	Amount
CREDIT CARD MasterCard 5454 Authorization # 437437	\$25.00
Total	\$25.00

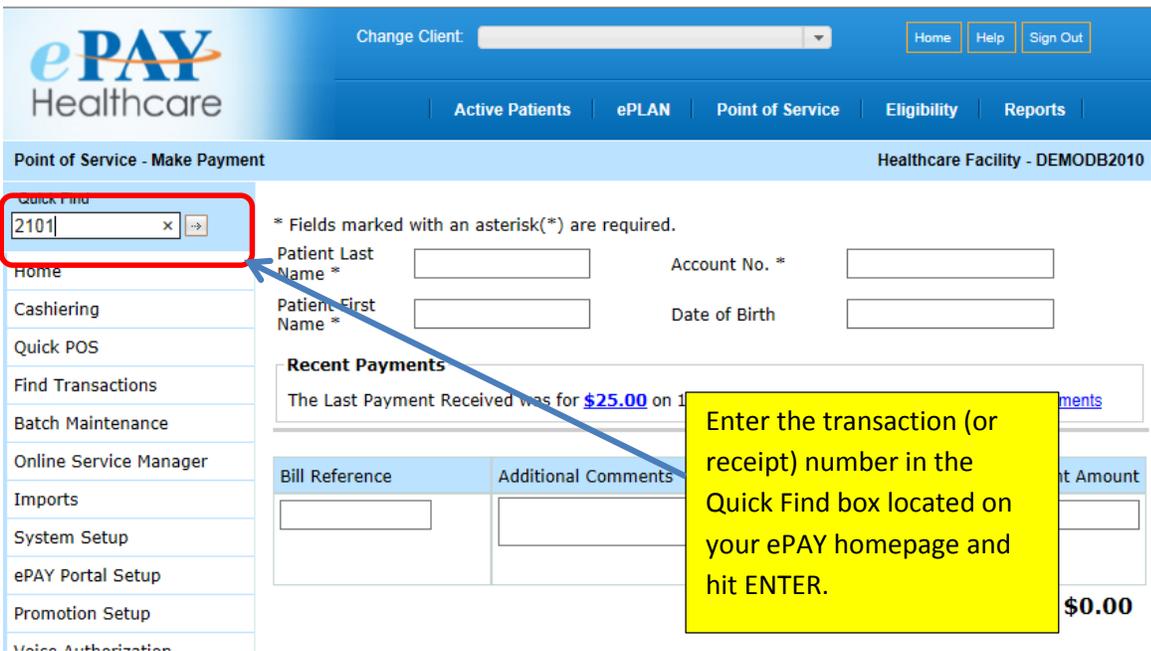
Thank you for your payment.

[Email Another Receipt](#) [View Printable Receipt](#)

Select a Method of Payment
 Pay by Credit Card
 Pay by Check

Credit Card Information

Please find the transaction (or receipt) number at the top of the receipt.



Change Client: [dropdown] [Home](#) [Help](#) [Sign Out](#)

Active Patients | ePLAN | Point of Service | Eligibility | Reports

Point of Service - Make Payment Healthcare Facility - DEMODB2010

Quick Find: [2101] [x] [→]

* Fields marked with an asterisk(*) are required.

Patient Last Name * [input] Account No. * [input]
Patient First Name * [input] Date of Birth [input]

Recent Payments
The Last Payment Received was for **\$25.00** on 12/23/2013

Bill Reference	Additional Comments	Amount
[input]	[input]	\$0.00

Enter the transaction (or receipt) number in the Quick Find box located on your ePAY homepage and hit ENTER.

HOW TO REFUND A PAYMENT (continued)



Change Client:
[Home](#) [Help](#) [Sign Out](#)

Active Patients
ePLAN
Point of Service
Eligibility
Reports

Find Transactions
Healthcare Facility - DEMODB2010

Quick Find

QUERY RESULTS [Change Search Criteria](#)

Transaction	AccountNo	Date	Status	Item Code	Payment Code	Amount
2101				MEDICAL	SMARTPAY	25.00
(1 record(s))						
1						

* indicates there are multiple Item Codes in the Transaction.

Home

Cashiering

Quick POS

Find Transactions

Cashier
Dept. Deposit
No Sale
Void
Refund
Batch Options
Checkout
Reprint

Trans. No: 0
Date: 10/30/2013
Business: 10/30/2013
Status: Closed

Click on the Refund button.

Batch No: 6
Time: 3:09 PM
Effective: 10/30/2013
Module: Web

ACCOUNT PAYMENT

Item Code	Description	Balance Due	Min. Due	Amount
MEDICAL	<div style="display: flex; justify-content: space-between; align-items: center;"> DELETE Medical Bill Payment EDIT </div> <div style="margin-top: 5px;"> ENDORSE </div>			598.28
Description: 12/13/1953 Ellen prepayment on 10/30/2013 3:09:52 PM Discount: 0.00 *G/L Code:				
TOTAL				598.28

G/L is a required field

PAYMENTS TENDERED

Pay Code	Description	Amount
SMARTPAY	<div style="display: flex; justify-content: space-between; align-items: center;"> DELETE SMARTPAY CC EDIT ENDORSE </div> <div style="margin-top: 5px;"> REPRINT SLIP </div>	598.28
Account No: XXXXXXXXXXXXX2467 Show Details Auth Code: 08702S Reference: 3778		
TOTAL		598.28

HOW TO REFUND A PAYMENT (continued)

For a full refund of the payment, click on REFUND ALL and the full payment amount will populate in the box. Then, click on "Process."

If you are refunding a payment plan installment, please make sure to either edit or withdraw the payment plan. The system will consider a refunded payment as an overdue installment.

Refund of Transaction 3484

Treat this refund as a dishonored item

Items Paid	Original Charge	Previously Refunded	Available	Refund Now
MEDICAL-Medical Bill Payment	598.28	0.00	598.28	598.28
Totals	598.28	0.00	598.28	598.28

A new transaction number will be given to the reversal (#3596) and the system will display the original transaction number as well (#3484).

◀ ▶ ▶ ▶

Trans. No: 3596
 Operator: IDCREMA
 Date: 11/12/2013
 Business: 11/12/2013
 Status: Closed

Batch No: 703
 Station: 000
 Time: 3:50 PM
 Effective: 11/12/2013
 Module: Refund

This transaction is a reversal of transaction 3484.

Account Number: PAY - CUSTOMER PAYMENT

Item Code	Description	Balance Due	Min. Due	Amount
MEDICAL	<input type="button" value="DELETE"/> Medical Bill Payment <input type="button" value="EDIT"/>			-598.28
	<input type="button" value="ENDORSE"/> Dishonored Reason:			
	Description:	12/13/1953 Ellen	prepayment on 10/30/2013 3:09:52 PM	
	Discount:	0.00		
	*G/L Code:			
G/L is a required field				
TOTAL				-598.28

HOW TO REFUND A PAYMENT (continued)

For a partial refund of the payment, enter the amount you wish to refund in the "Refund Now" box and click "Process."

Refund of Transaction 2767

Treat this refund as a dishonored item Refund All Calculate Tax Refund

Items Paid	Original Charge	Previously Refunded	Available	Refund Now
MEDICAL-Medical Bill Payment	1,170.00	0.00	1,170.00	291.00
Totals	1,170.00	0.00	1,170.00	291.00

PROCESS
CANCEL

The transaction has now been reversed.

Cashier
Dept. Deposit
No Sale
Void
Refund
Batch Options
Checkout
Reprint
◀◀ ▶▶

Trans. No: 2793
Operator: IDCREMA
Date: 11/12/2013
Business: 11/12/2013
Status: Closed

Batch No: 612
Station: 090
Time: 4:52 PM
Effective: 11/12/2013
Module: Refund

This transaction is a reversal of transaction [2767](#).

Account Number: 0024811 -

Item Code	Description	Balance Due	Min. Due	Amount
MEDICAL	DELETE Medical Bill Payment EDIT			-291.00
	ENDORSE Dishonored Reason: Description: cosmetic payment for dos on 11/7/2013 9:55:34 AM Discount: 0.00 *G/L Code:			
TOTAL				-291.00

G/L is a required field

REPORTING FOR REFUNDS

Your refunded payments will appear on the Daily Dishonored Paid Items Report, which is one of the reports included in your daily email.

Jun. 17, 2014 12:57:37 pm	Paid Items Report - Daily Dishonored Paid Items Report Demo Facility MD - CCCDEMO_MD Business Date 4/16/2014 to 4/16/2014	Page 1 Printed By: MARK DAVIES			
Tx. No.	Account No	Cust. Name	Bill Number	Bill Desc.	Amount
Business Date:	04/16/2014				
	3217 PAY	PAYMENT, CUSTOMER		Other bills 789 on 8/20/2013 12:58:16 PM	-2.00
	Refund				
	3218 WEBCASHREG ISTER1	CASHREGISTER1, WEB		Dave Gerard, 2428409	-15.00
	Refund				
	3219 33339999	JACKSON, TIMMY		Enrollment Fee	-5.00
	Refund				
SUB-TOTAL for Business Date:	04/16/2014			(Count: 3)	-22.00
GRAND TOTAL				(Count: 3)	-22.00

Refund totals will also appear on your Settlement Ledger Report:

17-Jun-2014 11:13:38 am	Settlement Ledger Report	Printed By: Mimi Bender		
Tx.No	Type	Service Fee	Amount	Net Amount
Transaction Details			Amount	
Gross Amount Collected			2,823.25	
Less: Returns and Refunds			325.00	
Net Amount Collected			2,498.25	
Less: Service Fees			141.15	
Net Settlement Amount			2,357.10	

ACH CHECK VERIFICATION

ePAY now offers unique technology incorporated in our payment services that provides additional check validations and authorizations to eliminate NSF situations.

This makes ePAY's payment processing the best at catching bad checks. Your ePAY system provides you with information on any potentially bad checks, and then lets you control whether or not to accept the check from the patient.

When a staff member enters check information that has a high probability of bouncing, the following message will appear:

Method of Payment

Select a Method of Payment ▾

Pay by Credit Card
 Pay by Check

Electronic Check Information

Bank Account Number * ×

Confirm Bank Account Number *

Account Type * ▾

Routing Transit Number *

Account Holder Name *

Receipt Email

The Payment Method will be saved as Do not save this Payment Method

Warning: Your electronic check information has been submitted to a verification service, which has identified problems with this account. Please select a different form of payment.

[Click here for more information about this service.](#)

Ignore warning

Option: You have the option of ignoring the warning or changing to another form of payment.

Make Payment

ACH CHECK VERIFICATION (continued)

When a *patient* enters check information to process a payment online, if the check has a high probability of bouncing, he/she will receive a message that states we are not able to process the payment due to a problem with the account.

The patient will also be given the following information:

- 1) A request to select a different form of payment
- 2) A link to more information about the check authorization service, including an address and phone number the patient can contact to learn more about the problem with his/her account

QUICK INSTRUCTIONS

How to Enter a Payment for a Patient

- Click on Quick POS (left hand side of the ePAY homepage)
- Enter first name, last name, patient account number, DOB (optional) in the fields at the top of the page
- Enter amount
- Choose method of payment (credit card or check)
- Enter email ID to immediately email receipt to patient
- Click Make Payment
- Review the payment on next screen
- Click Submit Payment
- Click “View Printable Receipt” to print
- Click “Email Another Receipt” to send to another email address

How to Void a Payment

- Enter transaction (or receipt) number in the Quick Find box located on the top left corner of the ePAY homepage
- Click on the transaction number that appears in blue
- Click the “Void” button on the top of the page
- Click “OK” when you are asked if you are sure you want to void the tx.
- Note the “**Voided**” status in the top right which will display in red font.

How to Find a Transaction Number

- Click on Quick POS (left hand side of the ePAY homepage)
- Click on “View, Email or Print Recent Payments”
- Locate the correct payment and note the Receipt Number in the furthest left column

How to Print a Receipt Entered Through Quick Point of Service

FOR MORE RECENT PAYMENTS:

- Click on Quick POS (left hand side of the ePAY homepage)
- Click on “View, Email or Print Recent Payments”
- Select the transaction for which you would like to print or email a receipt by clicking “View”
- Scroll down to the bottom and select “EMAIL ANOTHER RECEIPT” or “VIEW PRINTABLE RECEIPT”

QUICK INSTRUCTIONS (continued)

FOR ANY PAYMENT, REGARDLESS OF DATE:

- Enter transaction (or receipt) number in the Quick Find box located on the top left corner of the ePAY homepage
- Click on the transaction number that appears in blue
- Click on the “EMAIL” button or the “REPRINT” button

How to Print a Receipt When a Patient Pays Using Quick Pay

- Click on the “Point of Service” tab at the top of the ePAY homepage
- Enter “Web” in the First Name field
- Click on the arrow next to the account “Web CashRegister 1”
- Click on “View All Recent Payments”
- Select the transaction for which you would like to print or email a receipt by clicking “View”
- Scroll down to the bottom and select “EMAIL ANOTHER RECEIPT” or “VIEW PRINTABLE RECEIPT”

How to Unlock a Patient’s Account

- Click on ACTIVE PATIENTS which is at the top left of your ePAY homepage
- Pull up the patient whose account needs to be unlocked
- Click the “SELECT” button when you locate the correct patient
- Check to see if the account is locked
 - Toward the bottom, if the “Failed Login Count” is 5 or above, the account will be locked
 - Click on the “Unlock Account” button
- Enter a new temporary password for the patient in the “Password” field
 - The password should be at least 8 characters long and include 2 non-letters (such as numbers or symbols).
- Click on “SAVE” at the bottom
- Share the temporary password with the patient

QUICK INSTRUCTIONS (continued)

How to Process a Refund

- Enter transaction (or receipt) number in the Quick Find box located on the top left corner of the ePAY homepage
- Click on the transaction number that appears in blue
- Click on “REFUND” button
- Either click on “REFUND ALL” for a full refund or enter the amount you wish to refund for a partial refund
- Click on PROCESS

How to Enroll a Patient in a Payment Plan

- Click on ePLAN
- Choose “Enroll a Patient into Quick Plan”
- Pull up Patient Account by using the search fields
- Click the arrow next to the correct patient in the list of results
- Enter amount for Payment Plan Total
- Enter amount for Desired Monthly Payment
- Enter date plan should begin in Monthly Payment Date
- Click on VIEW SCHEDULE
- Click the box that the patient has agreed to the Terms & Conditions
- Enter email ID of the patient
- Enter method of payment (CC or Check)
- Click ENROLL

How to Enroll a Patient (Not Found in ePAY by Using the Search Boxes) in a Payment Plan

- Click on ePLAN
- Choose “Enroll a Patient into Quick Plan”
- Click on Blue Button, “Enroll a New Patient”
- Enter Last Name, First Name, Patient ID, and DOB
- Enter amount for Payment Plan Total
- Enter amount for Desired Monthly Payment
- Enter date plan should begin in Monthly Payment Date
- Click on VIEW SCHEDULE
- Click the box that the patient has agreed to the Terms & Conditions
- Enter email ID of the patient
- Enter method of payment (CC or Check)
- Click ENROLL

FREQUENTLY ASKED QUESTIONS

1. I can't remember my password. How can I get a new one?

OR

2. I received an email that my password is going to expire. What do I do?

- From the ePAY login page, click on "Need a New Password?"
- Enter your Operator ID or your email address
- Answer your "Secret Question" that you set up when you first signed into ePAY
- A temporary password will be emailed to you
- If this process does not work, you may be locked out or your email may not be correct in our system. Please contact us at support@epayhealthcare.com or call 1-888-640-7815 for assistance.

3. I can't log into ePAY because the Client Code box is blank and I am not able to enter anything in that field.

- The bookmark you were using to access ePAY is no longer working properly.
- We can provide a new link for you to access ePAY
- Please contact us at support@epayhealthcare.com or 888-640-7815
- Once you return to the ePAY login page, please click on "Bookmark This Page" and remove the bookmark that is no longer working correctly.