

## How to run a CC charge in Valant (separate from an appointment)

This will save the payment in Prepayments where Jenny will apply the payment accordingly.

Step 1: Go to Billing - Apply Patient Payment (please do NOT click Get Unpaid Transactions) and select Auto Payment CC.

The screenshot shows the 'Apply Patient Payment' form in the Valant system. On the left is a navigation menu with categories: NEW, DASHBOARD, BILLING, BILLER TOOLS, DOCUMENTS, and SCHEDULER. Under BILLING, 'Apply Patient Payment' is highlighted. The main form contains the following fields: Patient (dropdown menu with a redacted name), Payment Date (10/26/2020), Amount (\$45.00), Payment Type (Auto Payment CC), and Check or Reference Number (empty). Below these fields is a 'Prepayment Credit: \$0.00' section with an 'Accept Prepayment' button. At the bottom right are 'Clear' and 'Get Unpaid Transactions' buttons.

Step 2: Then, this screen pops up:

Select Print & Save Receipt so it saves it in the Patient Chart Documents.

The screenshot shows the 'Accept Prepayment' modal dialog box overlaid on the main form. The modal has a title bar with a close button (X). It contains the following fields: Payment details (Prepayment Credit \$0.00), Amount (\$45.00), Payment Type (Auto Payment CC), and Reference Number (empty). At the bottom of the modal are three buttons: 'Save', 'Save and Print Receipt' (highlighted in yellow), and 'Cancel'.

Step 3: And, then the cc processing screen pops up: Select the cc on file you want to charge and click Submit.

### Automated Payment Processing

Payment Transaction | Card Manager

Select Card: [Redacted Card] Amount: \$45.00

Card Details: Card Number [Redacted], Expiration Date 11 - Nov 2023, CVV [Redacted]

Billing Information: Patient: Use Patient's Billing Information, New: Type Billing Information, Guarantor: Use Guarantor's Billing Information, Card Manager: Card Manager Entry (Selected)

First Name [Redacted], Last Name [Redacted], Address 1 [Redacted], Address 2 [Redacted], City [Redacted], State MN, Zip [Redacted], Email for Receipt [Redacted]

Update Card Details

[Redacted]

Submit Cancel