

# Valant Credit Card Processing

Below is a link with a training video:

[http://help.valant.com/79958-billing/io-card-manager?from\\_search=53606000](http://help.valant.com/79958-billing/io-card-manager?from_search=53606000)

## Saving a CC on File:

When saving a cc on file, you go to **Patients** and click on your patient then go to their **Balances** tab where you will find the **Card Manager**. Credit Card Authorizations are found in the Patient Chart Documents section – either as a CC Authorization document or included in the Intake Packet or Counseling Policies documents. It is best for therapists to save their clients credit card(s) on file, as the admin is not aware of what the preferred card or what the current card on file you are using is. For clients who have transitioned from CS, most of the current credit cards we are using should be found on the 2020 Policies, but your client may have added or changed cards since then.

If you want to create a "nickname" for the credit card, such as "Mom's HSA" or "Primary Card" for example, you can enter that in the Card Entry box.

**New Card Manager Entry**

**Card Details**

Card Entry  
Visa

Card Number  
4000-0000-0000-0184

Expiration Date  
06 - Jun 2026

CVV  
343

**Billing Information**

☒ Patient: Use Patient's Billing Information  
☐ New: Type Billing Information  
☐ Guarantor: Use Guarantor's Billing Information  
☐ Card Manager: Card Manager Entry

First Name: Klara Last Name: Sparks

Address 1: 123 Main St

Address 2:

City: Seattle State: WA Zip: 98109

Email for Receipt: test@valant.com

OK Cancel

### To Run a Charge:

When you go to charge a cc on file, you would go to Accept Payment (copays, self-pay or missed appt fees) or Accept Prepayment (coinsurance or deductible estimated payments) and select ***Auto Payment CC*** to run the charge. Please be sure to save and print receipt so that a receipt is generated for the Patient Chart.

**Accept Payment** ×

**Charges and payments**

**Charges**  
Total Charge \$0.00  
  
Primary \$0.00  
Add-on 1 \$0.00  
Add-on 2 \$0.00

**Payments**  
Copay \$0.00  
Total Payment \$0.00  
Primary (Dischg) \$0.00  
Add-on 1 \$0.00  
Add-on 2 \$0.00

**Payment details**  

This field is required

Auto Payment CC  
Cash Payment  
Check Payment  
Credit Payment  
Pre-payment Transfer

Save

Save and Print Receipt

Cancel

Once you Save and Print Receipt this will open the “Automated Payment Processing” window. From this window you can select a card stored in the Card Manager or enter card details directly on the window. *(You also have the option to save that entry into the card manager).* Click **Submit** to process the payment.

**Automated Payment Processing** ×

**Payment Transaction**

Card Manager

Select Card

Alaska Airlines Visa

Amount

\$50.00

Card Details

Card Number

\*\*\*\*\_\*\*\*\*\_\*\*\*\*-0184

Expiration Date

12 - Dec

2021

CVV

Billing Information

☐ Patient: Use Patient's Billing Information

☐ New: Type Billing Information

☐ Guarantor: Use Guarantor's Billing Information

☒ Card Manager: Card Manager Entry

First Name

Sydney

Last Name

Carlson

Address 1

1235 Hop ave

Address 2

City

Bellingham

State

WA

Zip

98466

Email for Receipt

syd@gmail.com

Update Card Details ☒

Alaska Airlines Visa

Submit

Cancel

After the payment is processed a banner will appear across the page. The payment will be visible on the View/Edit Charges page. If the "Email for Receipt" field is completed the patient will receive an e-mail receipt within minutes.