Valant Credit Card Processing

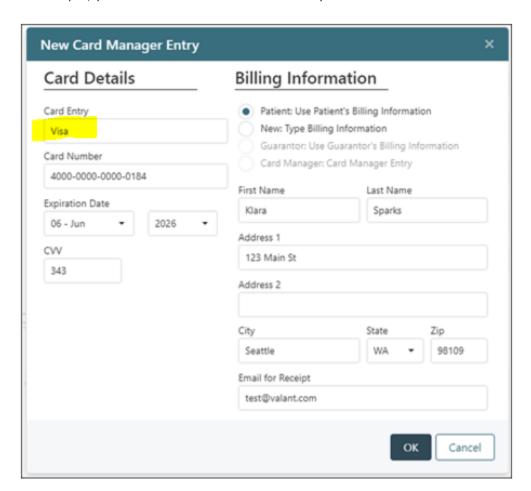
Below is a link with a training video:

http://help.valant.com/79958-billing/io-card-manager?from_search=53606000

Saving a CC on File:

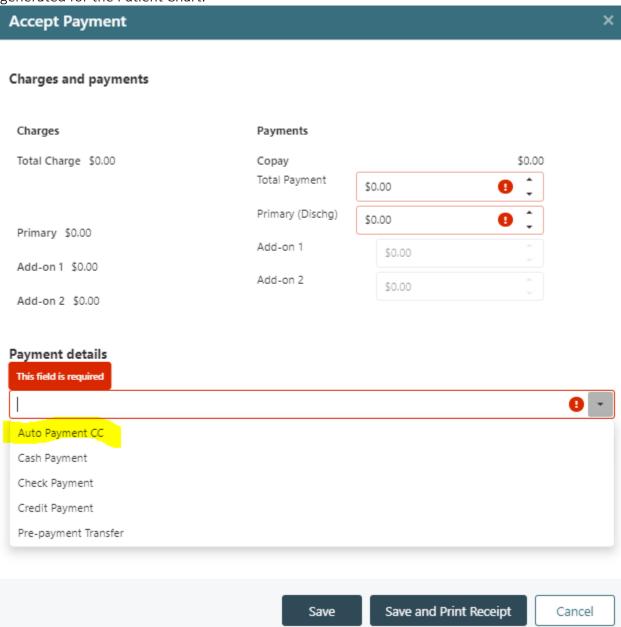
When saving a cc on file, you go to **Patients** and click on your patient then go to their **Balances** tab where you will find the **Card Manager.** Credit Card Authorizations are found in the Patient Chart Documents section — either as a CC Authorization document or included in the Intake Packet or 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.

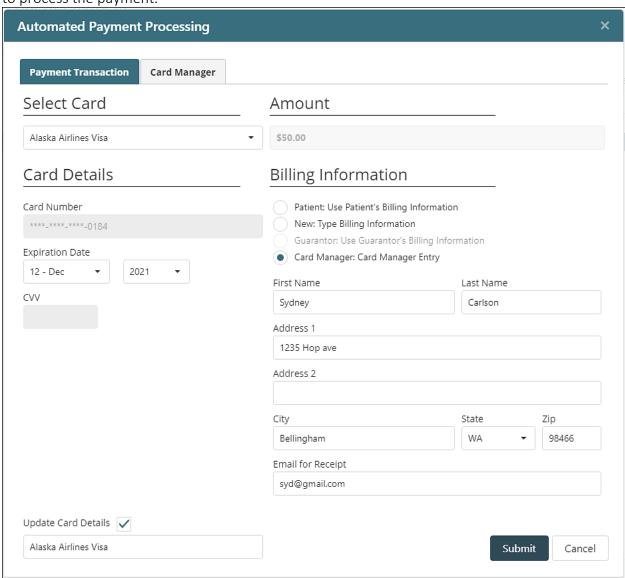


To Run a Charge:

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.



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.



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.