

InstaMed Merchant Services Taking Payments

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About

Integrating with InstaMed Merchant Services for payment processing services allows for payments to be made securely, simply, and conveniently. Credit cards can be saved on file directly in OP for easy application to patient balances.

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Posting Credit Card Payments (Copays)

1. Click the **Schedule** button located in the **Billing, Clinical, or Practice Management** tab.
2. If not already selected, select the **Calendar** radio button.
3. Locate and double-click on the patient's appointment. The **Add/Edit Appointment** window opens.
4. Click the **Copay**  button. The **Patient's Credit Account** window opens with the current date defaulted in the Date field.

Patient's Credit Account
✕

Deposit
Ledger

Date: Activate
Card
Reader

Pay method:

Name on card:

Card number: Exp date (MM/YY):

Card status:

Check/Ref #:

Credit amount: Patient:

Insurance: Payer: Ins

Credit source:

Note:

Provider:

Patient
Insurance

Credit account balances:	\$10.00	\$0.00
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Save on File
Save / Post
Cancel

802

5. From the Pay Method dropdown, select **Credit card (present)**.
6. Place your cursor in the **Name on card** field.
7. Swipe the credit card. The card information will populate in the fields.
8. In the **Patient Credit Amount** field, enter the payment amount.
9. Click the **Save / Post** button. A status bar will appear as the transaction is processed through Instamed.
10. A popup window will display the message that the transaction was either approved or denied.
11. If the transaction is approved, another popup message will ask if you would like to print a receipt.



Tip: Credits card payments that are taken for patients that do not have a scheduled appointment are entered following the same process as above, but from the Credits section of the patient chart.

Reprinting a Credit Card Transaction Receipt

1. Navigate to the patient's Chart.
2. Click **Credits**.
3. Select the transaction.
4. Click the **Receipt** button.
5. Print receipt.

Keeping a Credit Card on File if Contracted for Credit Card Services

1. Navigate to the patient's Chart.
2. Click **Credits**.
3. Click the **New Credit** button.
4. From the Pay Method dropdown, select **Credit Card (present)**.
5. Place your cursor in the **Name on Card** field.
6. Swipe the credit card. The card information will populate in the fields.
7. Click the **Save on File** button.



Note: This process may be done during the entry of a credit card payment. However, clicking the **Save on File** button does not process the payment if a payment amount has been entered. The payment will not be processed until the user clicks **Save / Post**.

Using Auto-Pay with Credit Card on File

Users are able to use a patient's credit card that has been saved on file while posting Insurance payments.

1. Navigate to the area in which you are posting the Insurance payment. Some examples include:
 - **Billing tab > Bulk Payments button**
 - **Patient Chart button > Payments > New Payment button**
 - **Billing tab > Billing Center button > Adjudications button**
2. Indicate the **Patient Responsibility amount** and **Reason of 1: Deductible Amount, 2: Coinsurance Amount, or 3: Copayment Amount**.
3. In the **Patient Action** field, use the dropdown to select **Autopay PC+CC** or **Autopay CC only**.

Removing Saved Credit Card on File from Patient Account

1. Navigate to the patient's chart.
2. Click **Summary**.
3. Click the **Delete** button  located in the **Credit Card on file** section of the **Account Summary**.

Keeping a Credit Card on File if not Contracted for Credit Card Services

For HIPAA purposes, this can not be stored securely in OP.

Why are my CC Payments Showing up as PC?

When using Instamed Merchant for Credit Card Payments, if there is more than one transaction, the first transaction will show up as CC Payment, and the other transactions will show up as PC. Balancing of the payments should be done in the **Receipts** tab of the **Billing Center**.

Processing Credit Card Refunds in OP

It is an option to do a credit card refund the next business day after the transaction was originally processed.

1. Navigate to the patient's chart.
2. Click **Credits**.
3. Click the **Refund** button.
4. Use the **Refund Method** dropdown to select how you are removing this credit from the patient. If selecting the **Refund Method of Refund credit card**, you must have the credit card information available for entry.
5. In the **Refund from Patient Credit** field, enter the amount of the credit being refunded.
6. *(Optional)* In the **Note** field, enter a note indicating why this refund is being performed.
7. Click **Save/Post**.

Voiding Credit Card Transaction in OP

When credit card transactions need to be voided the same day that they were processed, follow the steps below:

1. Navigate to the patient's chart.
2. Click **Credits**.
3. Click the **New Credit** button.
4. Click the **Ledger** tab.
5. Select the transaction that needs to be voided.
6. Click the **Void** button to refund the transaction. A confirmation window confirms you would like to void the transaction.
7. Select **Yes** or **No** in the confirmation window to confirm you would like to void the transaction.
8. Print the receipt or close the Print Preview.

Pulling Payments Made on the Instamed Portal into OP

Practices must process the payment reports (DPA files) from Instamed into OP. DPA payment files can be brought into Office Practicum the next business day. Users can log into the Instamed site throughout the day to see what is being paid by patients.

1. Click the **Billing Center** button located in the **Billing** tab.
2. Click the **Claims (A/R)** tab.
3. Click the **Fetch** button.
4. Click the **Process** button. Payments from the DPA file are auto-applied to the newest of the patient's balances.
5. Click the **Receipts** tab.
6. Filter the **Deposit Source** column to show **Portal** payments.

Balancing Payments from DPA files

The balancing or allocating of DPA files is recommended to be done before running a daysheet so that payments can be confirmed in the **Receipts** tab of the **Billing Center**. When reviewing credit card payments in OP, those with an **Auth Code** have been successfully transmitted to InstaMed. Therefore, you can safely assume the payment is underway.

1. In the Billing Center, click the **Receipts** tab.
2. Compare the credit card payments listed against Instamed's End of Day (EOD) report engine daily.

To access Instamed's EOD Report:

1. Log into your Instamed Portal using your login credentials.
2. Select the **Payment** tab.
3. Select the **Payment History** tab.
4. Select **EOD** (end of Day Summary).
5. In the **Date** tab, select the date for which you would like to balance.
6. In the **Users** tab, select the users for which you would like to view or leave blank.
7. Select the desired **Outlet** option or leave blank to see all Instamed payments across your Instamed account.
8. Click **Search**.



Note: If you have questions about a certain payment or if something in InstaMed does not match with OP, it may be best to contact Instamed. They can see each payment and authorization/denial codes related to them. In addition, they have the ability to see if a payment was deposited into your bank account or when it is scheduled to be deposited.