



CollaborateMD Expert Series “10 Minute Webinar”

Integrated Payment Processing

TSYS[®]

CollaborateMD
Work Less, Paid Fast!

BECOME A COLLABORATEMD PAYMENTS EXPERT!

CollaborateMD offers an Integrated Payment Processing (IPP) system that eliminates the need for manual payment handling, stand alone credit card systems, and saves time and money for your practice!

In just 10 minutes, we're going to show you how easy it is to use in your daily work flow and accept payments through the patient portal:

- Process Credit Card Payments
- Print Receipts
- Run Reports



PROCESSING CREDIT CARD PAYMENTS – OPTION 1

As Patients check in, you can conveniently process their credit card for payments and copays as part of the check-in process! Just follow these simple steps:

1. **Select Appointments> Scheduler**
2. **Click on the appointment and select Edit or right-click and select Edit Appointment**

The screenshot displays the CollaborateMD Scheduler interface. On the left is a dark sidebar with navigation options: Home, Reports, Appointments (selected), Scheduler, Appointment Control, Superbill Batch Print, Configuration..., Patient, Claim, Payment, Documents, Interface, Customer Setup, and Account Administration. The main area shows a calendar for June 2019 with a date picker set to June 4, 2019. A context menu is open over an appointment for 'RICHARDS, NATE - C' at 12 pm. The menu options are: New Appointment, New Block, Edit Appointment (highlighted), Update Status, Schedule Follow Up, Move Appointment, Reschedule Appointment, Print Superbill, Print Label, Create Professional Claim for Visit, Create Institutional Claim for Visit, Find Claim for Visit, Find Claims for Patient, and Create Task for Patient. The calendar also shows other appointments for '[01] JESSICA DUK...', '[041] MOUSE, MICKEY DR', and '[052] LAB X'. A 'LUNCH' block is visible for the appointment at 12 pm. The top right corner shows user information: CollaborateMD COLLABORATEMD and a user ID '1111111'.

PROCESSING CREDIT CARD PAYMENTS – OPTION 1

Increase patient payments by collecting co-pays and payments upfront at check-in.

1. Click Payment next to the Patient tab from within the appointment
2. Enter the payment details and select Source as Credit Card
3. Place your cursor in the “Card Number” box and swipe the patient’s credit card through the card reader or manually enter the credit card number followed by the expiration date
4. Click Save

The screenshot displays the CollaborateMD software interface. The top navigation bar includes the logo, 'Messages', 'Tasks', 'Help', and a user profile for 'CMD CUSTOMER COLLABORATEMD'. The left sidebar contains a navigation menu with sections like Home, Reports, Appointments, Scheduler, Patient, Claim, Payment, Documents, Interface, Customer Setup, and Account Administration. The main content area shows the 'Payment' form with tabs for Appointment, Patient, and Payment. The 'Payment' tab is active, showing fields for Payment Amount, Received/Check Date (06/04/2019), Check #, Type (Copay/Payment), Source (Check/Cash/Credit Card), Merchant Account, Expiration Month (06 - June), and Year (2019). The 'Card Number' field is highlighted with a red box. A 'Save' button is located at the bottom of the form.

PROCESSING CREDIT CARD PAYMENTS – OPTION 2

You can also process a credit card payment from the Payment Section.

1. Select Payment>Post
2. Click the Patient Payment option
3. Click the  icon to search for the patient who will be paying
4. Enter the payment details
5. Select the payment Type and credit card source.
6. Place your cursor in the “Card Number” box and swipe the patient’s credit card through the card reader or manually enter the credit card and expiration date

The screenshot shows the 'CollaborateMD' interface for processing a new payment. The left sidebar has 'Post' highlighted under the 'Payment' section. The main form is titled 'New Payment' and includes the following fields and options:

- Payment Type:** Radio buttons for 'Patient Payment' (selected) and 'Insurance Payment'.
- Patient:** A search box containing the text 'Patient' with a magnifying glass icon.
- Payment Amount:** A text box with '100.00' and a 'Print receipt' checkbox.
- Received/Check Date:** A date picker showing '06/04/2019'.
- Check #:** An empty text box.
- Type:** Radio buttons for 'Copay' and 'Payment' (selected).
- Source:** Radio buttons for 'Check', 'Cash', and 'Credit Card' (selected).
- Merchant Account:** A dropdown menu showing 'Sunshine'.
- Card Number:** A text box containing '06 - June' and '2019', with the 'Card Number' label highlighted in red.
- Expiration Month/Year:** Two dropdown menus for '06 - June' and '2019'.
- Memo:** A text box containing 'PATIENT PAYMENT - MC'.

PROCESSING A CREDIT CARD PAYMENT

There are 3 ways to apply the payment. Once you select the payment application, CollaborateMD will begin processing the payment.

1. Credit Account (Apply Later)

This will apply a payment towards the patient's account. No charge has been created yet, and the account credit can be applied at a later time.

2. Apply Automatically

This will apply a payment to the oldest open charge first.

3. Apply Manually

This allows you to apply a payment directly to a specific charge on the patient's account.

Note: Clear Payment will clear all of the information from the payment screen.

The screenshot shows the 'New Payment' interface in CollaborateMD. On the left is a navigation menu with options like Home, Reports, Appointments, Patient, Claim, Payment, Post, Apply Credit, View, ERA, Payment Tracker, Settings, Documents, Interface, and Customer Setup. The main area is titled 'New Payment' and contains several controls: three buttons at the top ('Credit Account (Apply Later)', 'Apply Automatically', 'Apply Manually', and 'Clear Payment'), radio buttons for 'Patient Payment' (selected) and 'Insurance Payment', a search field for 'Patient', a 'Payment Amount' field with '100.00' and a 'Print receipt' checkbox, a 'Received/Check Date' field with '06/04/2019' and a calendar icon, a 'Check #' field, radio buttons for 'Type' (Copay, Payment selected), radio buttons for 'Source' (Check, Cash, Credit Card selected), and a 'Merchant Account' dropdown menu currently set to 'MasterCard'.

UNDERSTANDING CREDIT CARD RESPONSES

After applying the patient's payment, CollaborateMD will send the payment for approval and collect a response from TSYS.

- **If the payment was successfully processed, no pop-up/confirmation appears. The payment will just collect and post.**
- **If the transaction is not successful, you will receive a pop-up message with an error code and description.**
- **You will have the ability to edit and update the credit card information and attempt to process the payment again by selecting Change to change the card information.**

The credit card could not be processed through the merchant for the following reason:

 **Authentication failed because of wrong information (50012)**

Would you like to alter the credit card information and attempt to process the payment again?

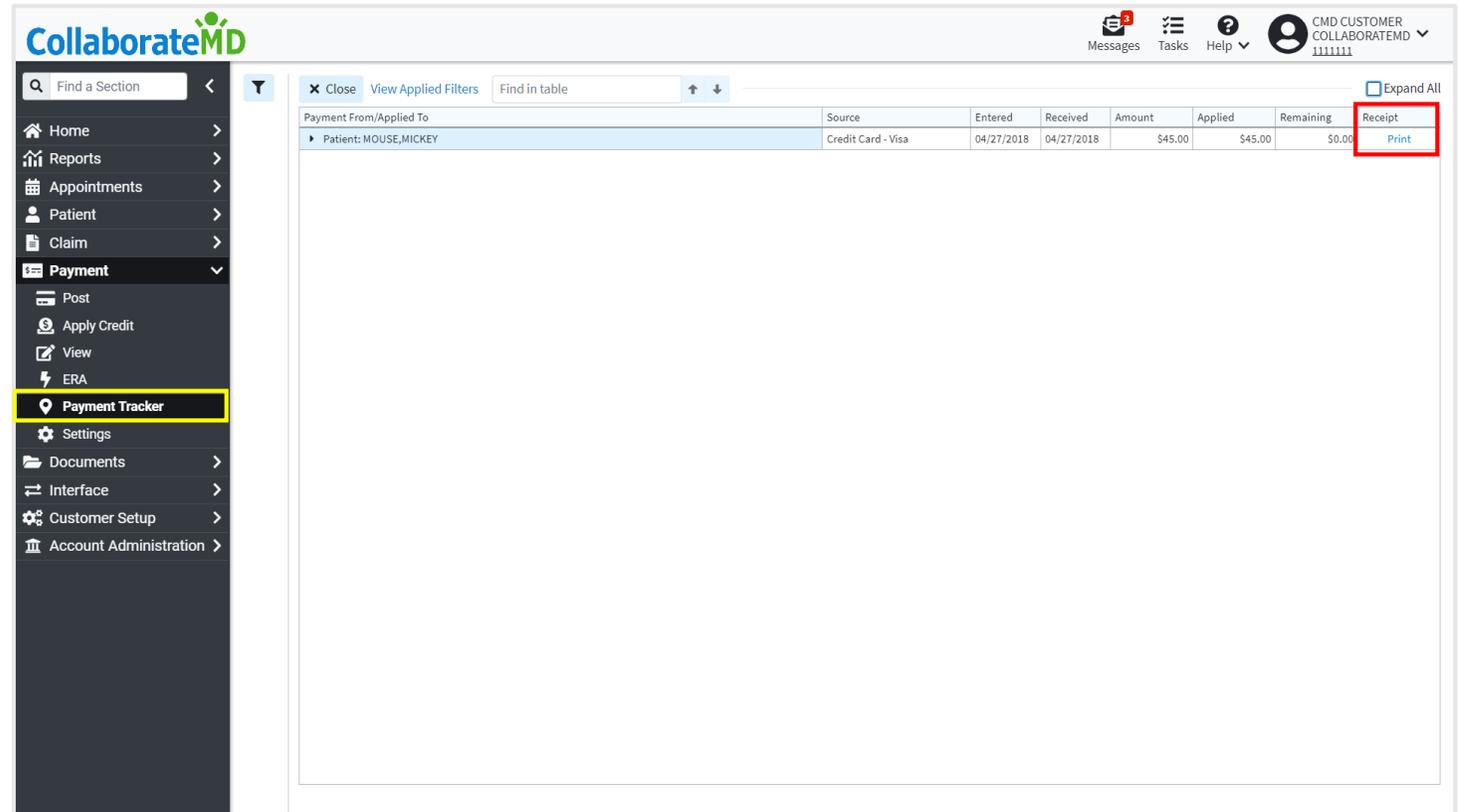
Change Post Without Processing Cancel Payment

PRINT RECEIPTS

When posting payments you are able to print receipts automatically by checking the Print Receipt .You can also pull up previously posted payments and print the receipts associated with those payments.

1. **Select Payment > Payment Tracker**
2. **Enter your desired Search Criteria**
3. **Click Search**
4. **On every row a patient payment was received, click the Print link to open the print dialog box and print the receipt**

*You will need to allow pop-ups from CMD in your browser or it may prevent the application from opening the print screen



The screenshot shows the CollaborateMD web application interface. On the left is a dark sidebar with a navigation menu. The 'Payment Tracker' option is highlighted with a yellow box. The main content area displays a table with columns: Payment From/Applied To, Source, Entered, Received, Amount, Applied, Remaining, and Receipt. A single row is visible for 'Patient: MOUSE,MICKEY' with a 'Print' link in the 'Receipt' column, which is highlighted with a red box. The top right of the interface shows user information for 'CMD CUSTOMER COLLABORATEMD 1111111' and navigation icons for Messages, Tasks, and Help.

Payment From/Applied To	Source	Entered	Received	Amount	Applied	Remaining	Receipt
Patient: MOUSE,MICKEY	Credit Card - Visa	04/27/2018	04/27/2018	\$45.00	\$45.00	\$0.00	Print

PAYMENT POSTING TO PATIENT ACTIVITY

Payments will auto-post immediately and you can view the patient's claim, debit, credit, statement, payment, and summary activity.

1. Select Patient>Patient
2. Use the Search field and select the patient you want to view payments for
3. Click the Activity button

The screenshot displays the CollaborateMD interface for a patient named Mickey Mouse. The left sidebar contains a navigation menu with 'Patient' selected. The main content area shows the patient's profile with a search bar containing 'MICKEY MOUSE'. A toolbar at the top of the profile includes buttons for 'Save', 'Close', 'Print', 'Merge', 'Eligibility', 'Activity' (highlighted in red), and 'More'. Below the toolbar, the patient's personal information is displayed, including last name 'MOUSE', first name 'MICKEY', gender 'Male', and date of birth '11/18/1928'. The 'Activity' button is highlighted in red, indicating the next step in the process. The page also shows tabs for 'Patient Info', 'Insurance Info', 'Billing Info', and 'Claim Defaults', and a right-hand sidebar with 'Account Summary', 'Notes', 'Alerts', and 'Documents'.

VIEW PATIENT ACTIVITY

- After you select Activity, a listing will open in a new window.
- Click any of the arrows to expand the row to see a detailed listing of the activity data.
- The activity page will also include hyperlinks that open specific claims, patients, payments, or credits.

Activity Listing for **MOUSE< MICKEY (#11111111)**

[View Options](#) [Close](#) Expand All

> **Claims** (Count: 4, Amount: \$1,681.00, Balance: \$124.22)

> **Debit Adjustments** (None)

> **Unused Account Credits** (None)

> **Statement History** (Count: 1, Last Statement: 05/21/2019)

> **Payment Plans** (None)

Payment History (Count: 1, Amount: \$45.00, Last Payment: 04/27/2018)

Received	Memoline	Amount	Type	Source	Applied To
04/27/2018	PATIENT COPAY - VISA	\$45.00	Copay	Credit Card - Visa	Account Credit

▼ **Summary**

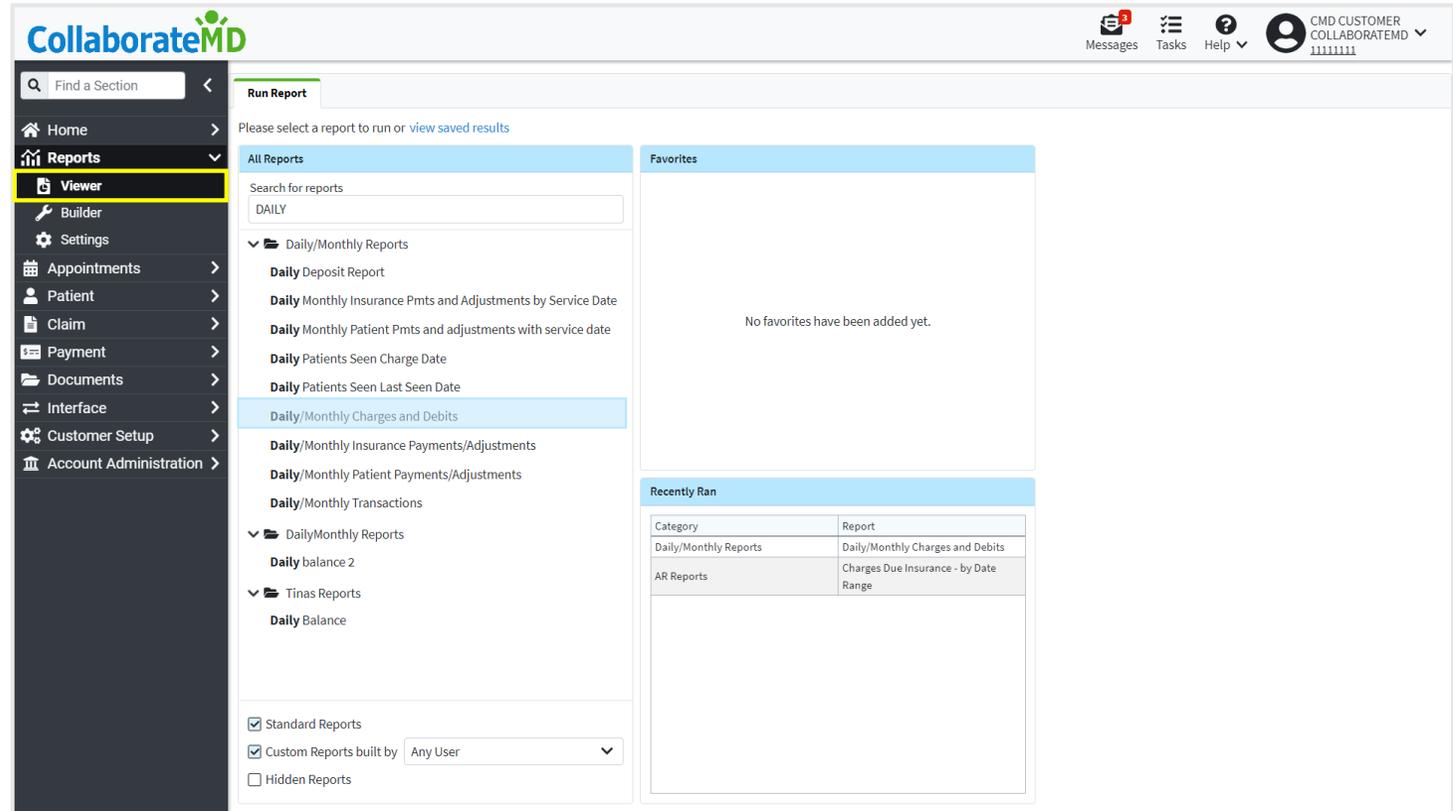
	Balance	Credits	Total
Charges Due Insurance	\$0.00	\$0.00	\$0.00
Charges Due Patient	\$124.22	\$0.00	\$124.22
Collection	\$0.00	N/A	\$0.00
Charges Due Other	\$0.00	N/A	\$0.00

	Amount
Charge Balance	\$124.22
Payment Plan Balance	\$0.00
Account Credits	\$0.00
	\$124.22

	Received	Applied
Insurance Payments	\$917.10	\$917.10

REPORTS

1. Select Reports>Viewer
2. Find the Daily/Monthly Charges and Debits report by searching the Daily/Monthly Reports
3. Click on the report



CollaborateMD

Messages Tasks Help CMD CUSTOMER COLLABORATEMD

Find a Section

Home Reports Viewer Builder Settings Appointments Patient Claim Payment Documents Interface Customer Setup Account Administration

Run Report

Please select a report to run or [view saved results](#)

All Reports

Search for reports

DAILY

Daily/Monthly Reports

- Daily Deposit Report
- Daily Monthly Insurance Pmts and Adjustments by Service Date
- Daily Monthly Patient Pmts and adjustments with service date
- Daily Patients Seen Charge Date
- Daily Patients Seen Last Seen Date
- Daily/Monthly Charges and Debits**
- Daily/Monthly Insurance Payments/Adjustments
- Daily/Monthly Patient Payments/Adjustments
- Daily/Monthly Transactions

DailyMonthly Reports

- Daily balance 2

Tinas Reports

- Daily Balance

Standard Reports

Custom Reports built by Any User

Hidden Reports

Favorites

No favorites have been added yet.

Recently Ran

Category	Report
Daily/Monthly Reports	Daily/Monthly Charges and Debits
AR Reports	Charges Due Insurance - by Date Range

DAILY/MONTHLY CHARGES AND DEBITS

A filter page will open for the report you are running. You can filter the report by charge date, payer type and patient account type.

1. Select your filters

2. After selecting your filters, click Run Report

The screenshot displays the 'CollaborateMD' interface for running a report. The top navigation bar includes 'Messages', 'Tasks', 'Help', and a user profile for 'CMD CUSTOMER COLLABORATEMD'. The left sidebar shows a 'Find a Section' search bar and a list of navigation items: Home, Reports (highlighted), Viewer (highlighted), Builder, Settings, Appointments, Patient, Claim, Payment, Documents, Interface, Customer Setup, and Account Administration. The main content area is titled 'Daily/Monthly Charges and Debits' and features a 'Run Report' button (highlighted in red), a 'Save Filters' button (highlighted in yellow), and a 'Cancel' button. Below these buttons are several filter sections: 'Filter Text Fields' with dropdowns for 'Patient Last Name' and 'Patient First Name'; 'Filter Date Ranges' with 'Charge From Date' (set to 'This Week' from 06/02/2019 to 06/08/2019) and 'Charge Entered Date'; 'Filter List Selections' with dropdowns for 'Charge Primary Payer Type' and 'Patient Account Type'; and 'Report Group Levels' with a dropdown set to 'Level 1'.

DAILY/MONTHLY CHARGES AND DEBITS

This report will display a detailed list of all the charges and debits entered into the system within a given time frame.

- The charge and debit amounts are shown as well as information surrounded their associated patients and dates.
- Totals of all charges and debits displayed can be found at the bottom of the report.
- You can Save the report, Print or Export to share with others.

Note: Charge Patient ID and Charge/Debit User information was removed for example purposes.

CollaborateMD

Run Report: Daily/Monthly Charges and Debits x Daily/Monthly Charges and Debits x Daily/Monthly Charges and Debits x

Print/Export Save Refresh More

Run date: June 5, 2019 at 9:10 AM
 Customer is CMD CUSTOMER- 123456
 Charge From Date is between 05/01/2019 and 05/31/2019
 Charge Primary Payer Type is Blue Cross Blue Shield

Main Table Totals By Practice Totals By Provider Totals By Primary Payer Totals By Facility Totals By Office Totals By User

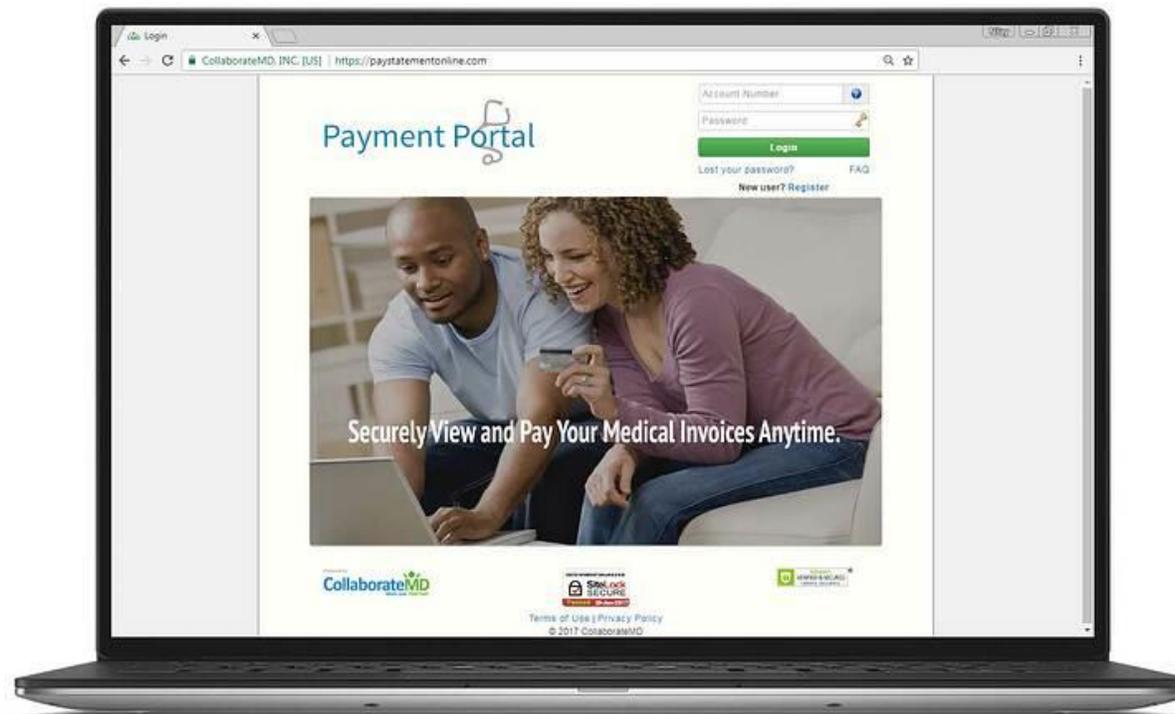
Find in table

Charge Entered Date	Charge From Date	Charge To Date	Charge CPT Code	Charge Patient ID	Patient Full Name	Charge Amount	Debit Amount	Charge/Debit User
05/01/2019	05/01/2019	05/01/2019	81025		MOUSE, MINNIE	\$13.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	J3301		DUCK, DONALD	\$3.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99213		CINDERELLA	\$109.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99213		ARIEL	\$109.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	11900		GOOFY	\$80.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99202		ELSA	\$112.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	TAX		BELL,TINKER	\$0.20	\$0.00	
05/01/2019	05/01/2019	05/01/2019	C33074		POOH,MINNIE	\$3.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	TAX		BELL,TINKER	\$0.20	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99214		HOOK, CAPTAIN	\$159.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	17000		HOOK, CAPTAIN	\$95.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99202		DUCK, DAISY	\$112.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	11104		DUCK, DAISY	\$179.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99213		RIDER, FLYNN	\$109.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	BOTOX		CARDON, LISA	\$300.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99212		SMITH, MASON	\$66.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99214		OSBORNE, MADELINE N	\$159.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99213		POTTS, MORGAN E	\$109.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	81025		POTTS, MORGAN E	\$13.00	\$0.00	
05/01/2019	05/01/2019	05/01/2019	99202		VASILESCU, ADELINA	\$112.00	\$0.00	
						\$227,603.74	\$0.00	

Sum: 34,116,093 Average: 34,116,093 Count: 1

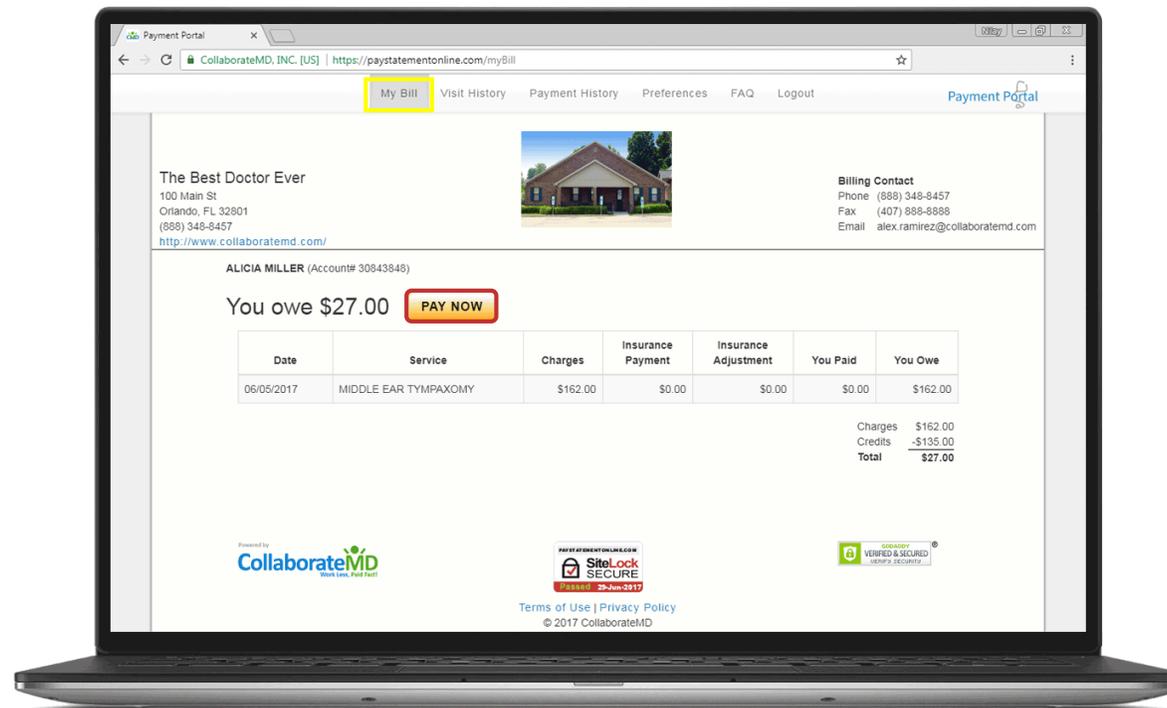
ONLINE PATIENT PAYMENT PORTAL

You can invite patients to use the online payment portal. Patients can easily make credit card payments, view their payment and their visit history.



ONLINE PATIENT PAYMENT PORTAL

After signing into the patient portal, the patient can view their open balance(s) under the My Bill page. The patient can click PAY NOW to make an online payment towards their account.



PATIENT PAYMENTS ONLINE



After the patient clicks PAY NOW, they can pay their current balance or partial amount. Partial payments will apply to the oldest balance first.

My Bill Visit History Payment History Preferences FAQ Logout [Payment Portal](#)

The Best Doctor Ever
100 Main St
Orlando, FL 32801
(888) 348-8457
<http://www.collaboratemd.com/>

Billing Contact
Phone (888) 348-8457
Fax (407) 888-8888
Email billing@collaboratemd.com

NATE RICHARDS (Account# 33398583)

You owe \$65.31 **PAY NOW**

Date	Service	Charges	Insurance Payment	Insurance Adjustment	You Paid	You Owe
01/18/2019	BX SKIN SUBQMUCOUS MEMBRA...	\$98.00	\$50.00	\$0.00	\$0.00	\$48.00
04/01/2019	ESWT INVG MUSCSKEL SYS NO...	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00

Charges \$88.00
Credits -\$40.00
Total \$48.00

My Bill Visit History Payment History Preferences FAQ Logout [Payment Portal](#)

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Billing Contact
Phone (888) 348-8457
Fax (407) 888-8888
Email billing@collaboratemd.com

NATE RICHARDS (Account# 33398583)

Payment Amount

Total Balance \$338.41

Current Balance \$65.31

Next Installment \$17.31

Other Amount

Billing Address

Name*

Address*

City*

State*
Alabama

Zip Code*

Credit Card Information

Card Number*

Expiration Date*
01 - January 2019

CVV2/CID*

Submit Payment

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PATIENT PAYMENTS ONLINE

Once the patient clicks Submit Payment, they will receive a Successful Payment response if the transaction was approved. Patients have the option to print a receipt.

Successful Payment

Authorization Code	Lexc05
Paid Amount	\$150.00
Payment Date	06/05/2019

[Print Receipt](#)

[Done](#)

JENNA VAN HALEN (Account# 35956397)

[Print](#)

UC09 FAMILY MEDICINE
589 STEWARTS FERRY PIKE SUITE A
NASHVILLE, TN 37214-3414
(615) 872-0777

Patient: VAN HALEN, JENNA
Account# 35956397

Payment Received: 06/05/2019
Payment Type: Visa
Authorization Code: Lexc05

Amount Paid: \$150.00

PATIENT PAYMENTS ONLINE

The Patient Portal Payment will auto-post to the patient activity as an online payment in CMD.

Activity Listing for **VAN HALEN, JENNA** (#35956397)

View Options Close ↑ ↓ Expand All

> **Claims** (Count: 0, Amount: \$0.00, Balance: \$0.00)

▼ **Debit Adjustments** (Count: 1, Amount: \$150.00, Balance: \$0.00)

Debit	DOS/Received	Description	Charge	Payment	Adjustment	Balance
999	06/05/2019	INTEREST	\$150.00			
	06/05/2019	PATIENT PAYMENT - VISA		\$150.00		
	Paid as of 06/05/2019			\$150.00	\$0.00	\$0.00
Debit Totals			\$150.00	\$150.00	\$0.00	\$0.00

> **Unused Account Credits** (None)

> **Statements** (None)

> **Payment Plans** (None)

▼ **Payment History** (Count: 1, Amount: \$150.00, Last Payment: 06/05/2019)

Received	Memoline	Amount	Type	Source	Applied To	Auth #
06/05/2019	PATIENT PAYMENT - VISA	\$150.00	Online Payment	Credit Card - Visa	Account Credit	Lexc05

> **Summary**

PATIENT PAYMENT MERCHANT REPORT

Search for Merchant Payments Report in the Report Viewer section and Run Report. End-of-Day reporting will tally payments in the application and payments made through the patient portal.

CollaborateMD Messages Tasks Help NATE CMD FAMILY PRACTICE 10006600

Run Report Merchant Payments x Merchant Payments x

Print/Export Save Refresh More

Run date: June 5, 2019 at 10:52 AM
Customer is CMD FAMILY PRACTICE
Merchant Payment Date is between 06/05/2019 and 06/05/2019

Main Table

Find in table

Merchant Payment Date	Merchant Payment Unique	Payment Origin	Patient ID	Patient Full Name	Payment Amount	Authorization Code	Merchant Success/Failure	Merchant Response
06/05/2019	10832040	Portal	35956397	VAN HALEN, JENNA	\$150.00	Lexc05	Success	Success
06/05/2019	10832102	Application	35956397	VAN HALEN, JENNA	\$25.00	Lexc05	Success	Success
					\$175.00			

ADDITIONAL FEATURES



Additional reporting and added features are available through TSYS's virtual terminal, Transaction Express.

- **Transaction Express is provided without any additional cost.**
- **Easy to access via any internet connection and even easier to use.**
- **Additional features includes:**
 - ACH Sales and Credits
 - Credit Card Credits
 - Credit Card and ACH Voids
 - Recurring Payments
 - Additional Custom Payment Reporting

ADDITIONAL VALUE!



Practices that use integrated payment systems can increase patient payments, and reduce collections calls and days in A/R.

- **Reduce costs of maintaining old POS terminals, added phone lines, and eliminate cords and equipment clutter at check out counters/desks.**
- **Back office/post-adjudicated payment processing can be done by any staff with access to the system without needing to come to the front desk and use the manual terminal.**
- **Faster check-out process and end-of-day balancing with all processes in one system.**
- **Quick access to payment history or details to assist patients or for in-office research.**
- **Help desk and technical support through a full service vendor, 24/7- no middle men or contractors.**
- **Gross deposits into your existing bank account for simple balancing and auditing(fees aren't charged until following month!)**
- **NO CONTRACT TERM OR CANCELLATION FEES**

ABOUT TSYS HEALTH



- **“Top 10” payment processor serving more than 200,000 merchants.**
- **Over last ten years have established reputation in healthcare and today process payments for more than 30,000 healthcare providers!**
- **In-house provider consultants, help desk, technical supports and backs up their commitment to clients with a BBB A+ rating and no required contracts!**
- **Offers a simple electronic application and merchant acceptance via email avoiding need for paperwork, contracts, and long implementation process.**
- **Provides partners users with VISA/MC, PCI, and HIPAA compliant products and services, and consult on best practices for receivable reduction.**

RESOURCES - KNOWLEDGE CENTER

Click on the picture below or visit help.collaboratemd.com for Integrated Payment Processing FAQs, step-by-step guides, and videos.





You are now a
CollaborateMD SME
(Subject Matter
Expert)

on
*Integrated Payment
Processing*

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