Payments made EASY in CGM MEDEDI

Billing and Practice Management

EASY PAYMENTS

TRAINING MANUAL

brought to you by CGM CompuGroup Medical

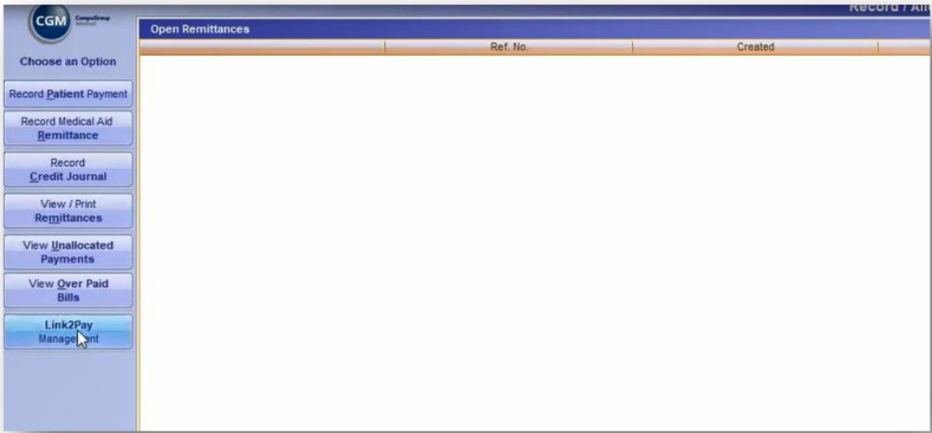
Contents

Introduction

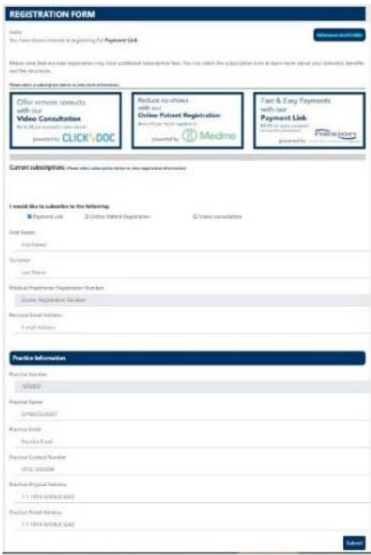
Welcome to the Payments and Collections Made Easy training manual! This manual provides guidance on how to use POS+ and Link2Pay to effortlessly collect payments from your patients. With these tools, you can accept various payment methods, including cash, cards, and contactless options, ensuring that your patients can pay in a way that suits them best. Our best-in-class security ensures that all transactions are safe, regardless of the payment method chosen. Moreover, this manual will guide you on how to use these tools to facilitate easy collections, recover the outstanding debt without any drama and keep your practice financially fit with improved cash flow.

Activating the Link2Pay service

1. The user navigates to the Payments screen.
2. The user selects the "Link2Pay Management" button.



3. If the user is registering for the first-time user will be directed to an online registration page.



MedEDI CPS 4.7.0

- You will now be redirected to the subscription web page.
- Review the options and pricing for each of the new features and select the features you are interested in.
- Confirm you first / last name and enter your email address.
- Under Practice Information retype your email address

- Once all information has been reviewed and entered click on 'Submit' on the bottom of the page.
- You will now receive an email in your inbox confirming your subscription and what's next.

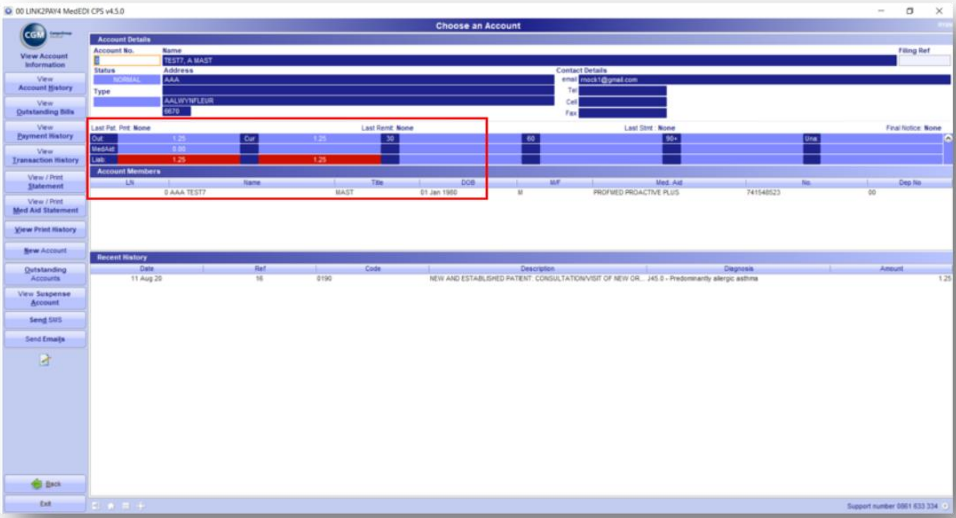
Remember that after you have registered you will receive an email from MEDEDI where you would need to register with our payment partner Nexion.

4. After completing the registration form, the user can return to the Link2Pay Management screen and can see the registration for Link2Pay has now started and is in a pending state. The status will reflect as pending while the practice completes the application form that was emailed - this form can also be downloaded manually from "https://www.nexion.co.za/resource/registration-application" the application form and FICA documents needs to be completed and then sent back to Nexion at registrations@Nexion.co.za

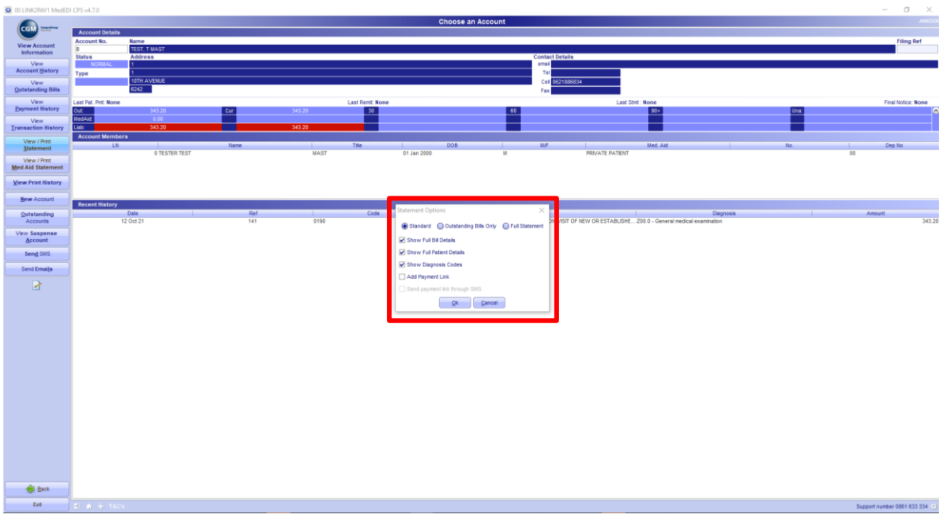
5. Nexion will contact your Practice and assist you in completing any information still required. Nexion will then complete the registration for you by registering you at the various banking Authorities. Once a Merchant Id is obtained Nexion will then activate the practice.
6. After you have been activated you will receive a confirmation email and when you enter the Link2Pay Management screen you will now see the status updated to "Active".

Using the Link2Pay service after billing a patient.

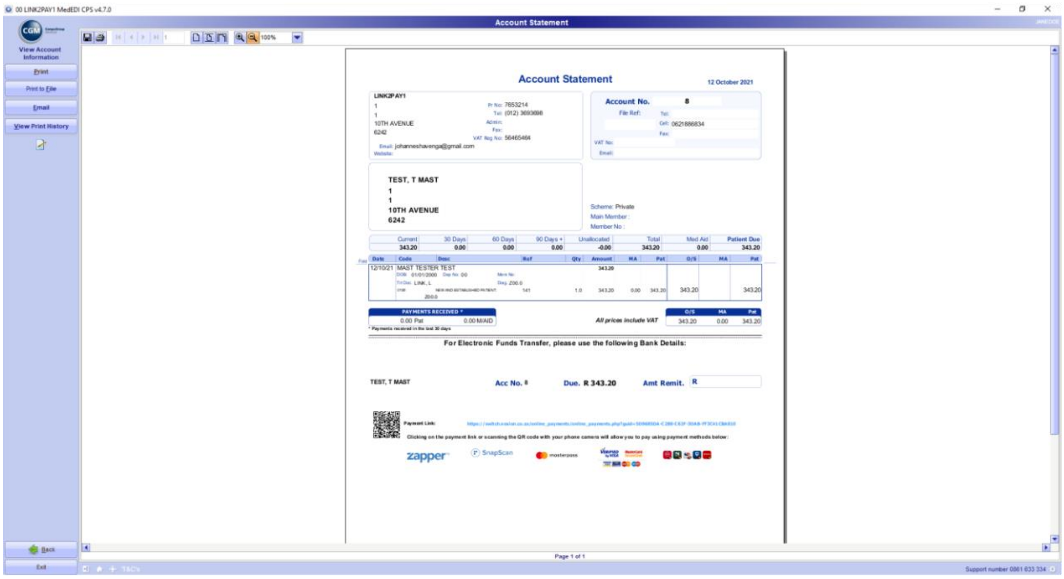
1. Select and open the Patient Account Info screen
2. View the account and the amount outstanding by the patient



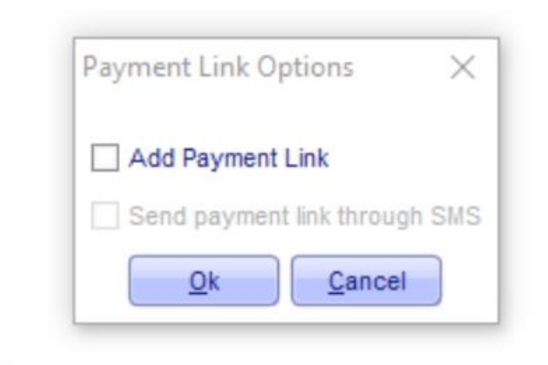
3. View / Print Statement and select "Add payment link"



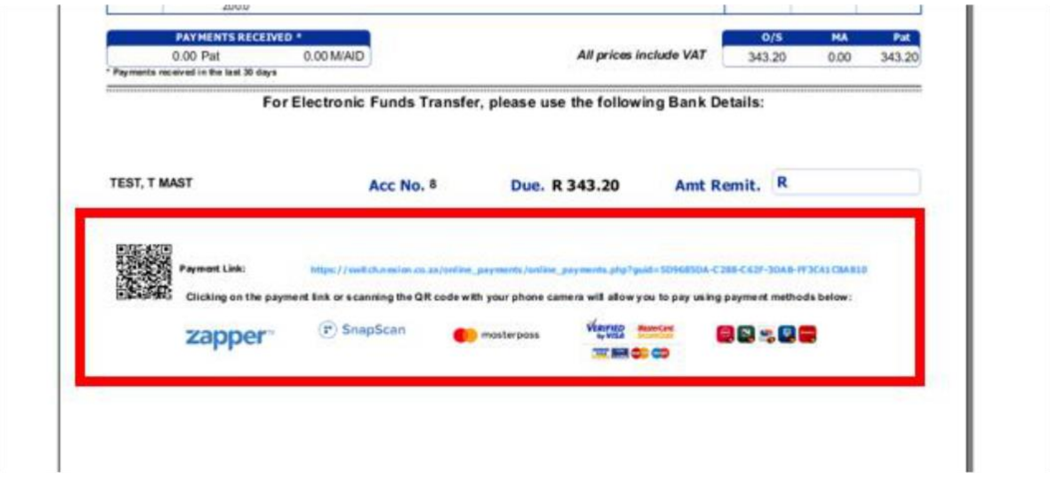
4. The "send payment link through SMS" option below "Add Payment Link" will allow you to also send the link to the patient using the account cell phone number.
5. To send the account holder this link, select "Add Payment Link"
6. The tickbox "Send Payment link through SMS" will now be enabled and by ticking the box will include the sending of the sms upon clicking "Ok".
7. Mail the statement to the patient with the payment link and QR code that can be used for online payment



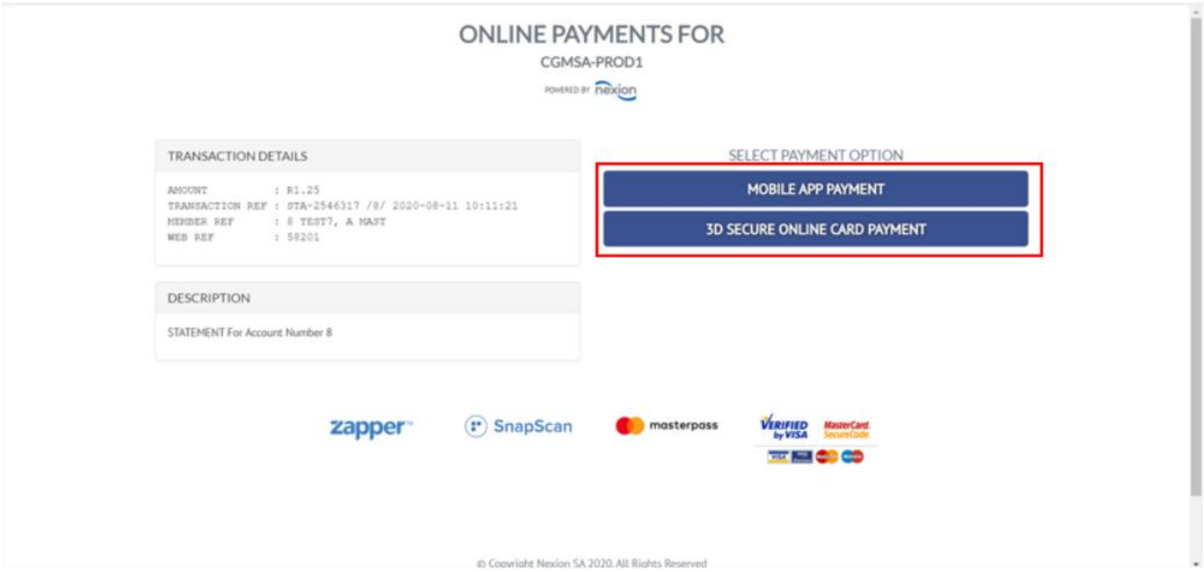
8. You can also select to create a Payment link on an Account Invoice, this will create a payment link for the invoice amount only.
9. To start Select and open the Patient Account Info screen
10. Select the account you want to create an Invoice Payment link on
11. Select View Outstanding Bills and select the bill that the patient has an outstanding amount on. This can be seen in the right-hand column “Due”.
12. Open the bill by double clicking it and select “Reprint Invoice”.
13. If there is an amount due for the Patient a new pop-up box will appear and you can select to add Payment link, you will again have the option to “Send payment link through SMS” that will also send the link to the account holder cell phone number.



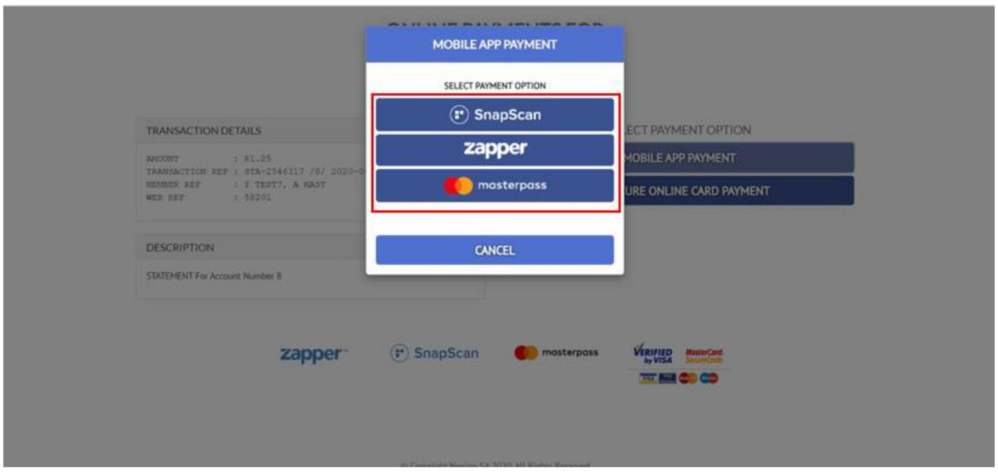
14. To send the account holder this link, select “Add Payment Link”
15. The tickbox “Send Payment link through SMS” will now be enabled and by ticking the box will include the sending of the sms upon clicking “Ok”
16. You can create individual Payment links for each of the outstanding bills on Invoices or create one payment link for the total patient liable amount on the account using the Payment link on statements.
17. Patient makes the payment
    When the patient opens the PDF statement from their email, they will see the account statement with the amount owing and a QR code and weblink at the bottom of the page.
    The QR code can be scanned by a smart phone camera or QR code scanning app. When scanned it will open up the payment portal with payment options for the patient to make payment.
    *If the patient clicks the weblink it will also open up the payment portal to make payment.



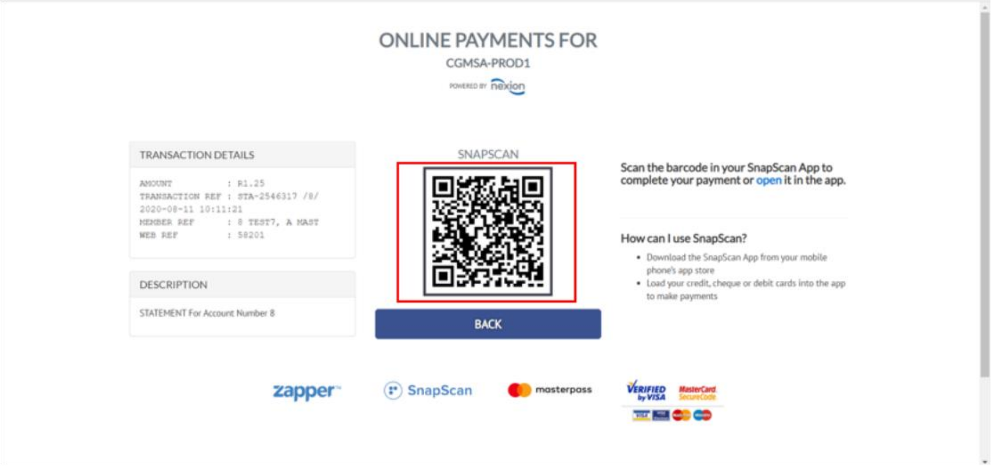
18. On the Payment portal the patient is presented with payment options available to make payment.



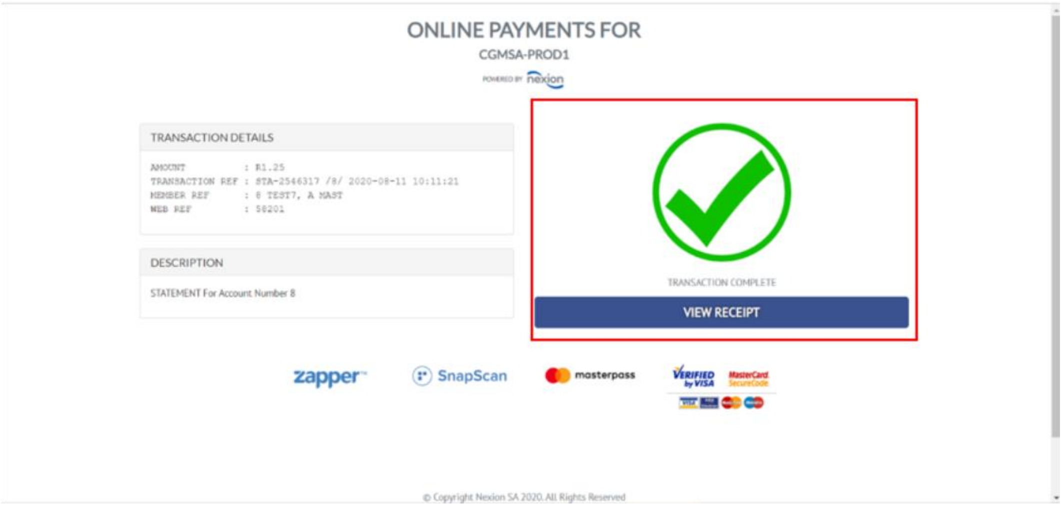
18.1. If the patient selects "mobile app payment" then they can choose if they want to make the payment via Snapscan, Zapper or Masterpass.



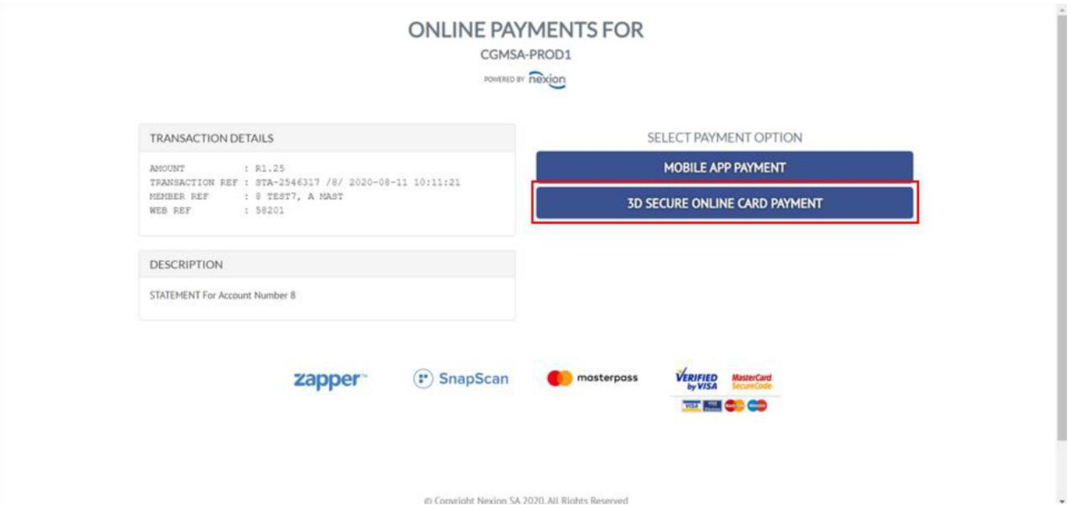
18.2. When they select the option, they will be presented with a QR code for that payment application (see Snapscan example below).
The patient can also click directly on the QR code to prepare the payment in the payment app (as an alternative to scanning the QR code).



18.3. Once the patient has completed the payment via their payment app (e.g., Snapscan) the payment portal will reflect that the payment was successful and provide the patient the opportunity to view and print the payment receipt.



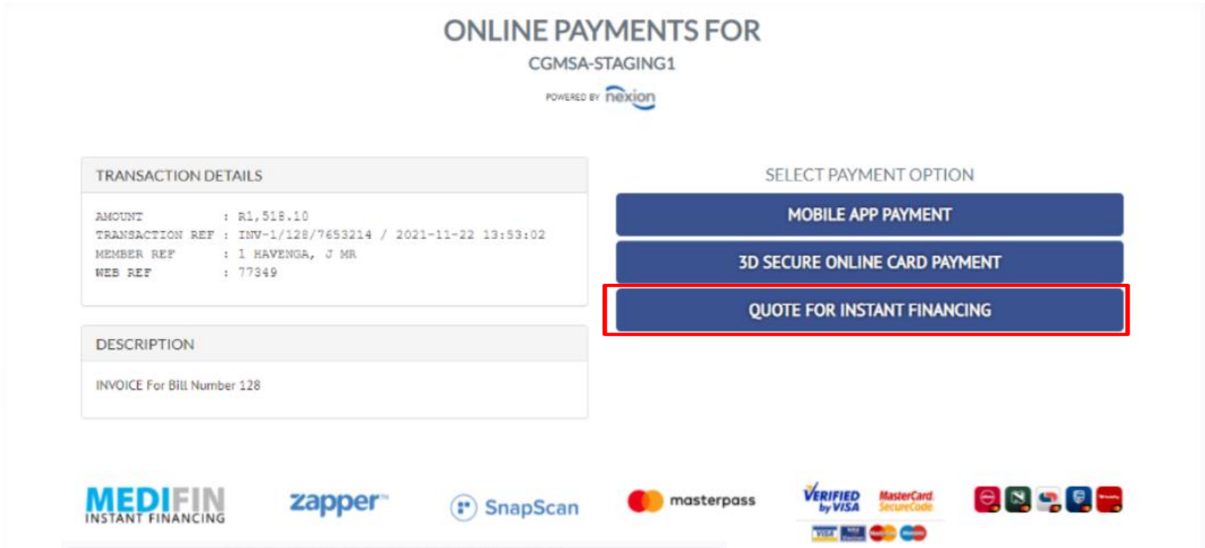
19. The other payment option the patient can make is to pay via "3D secure online card payment"

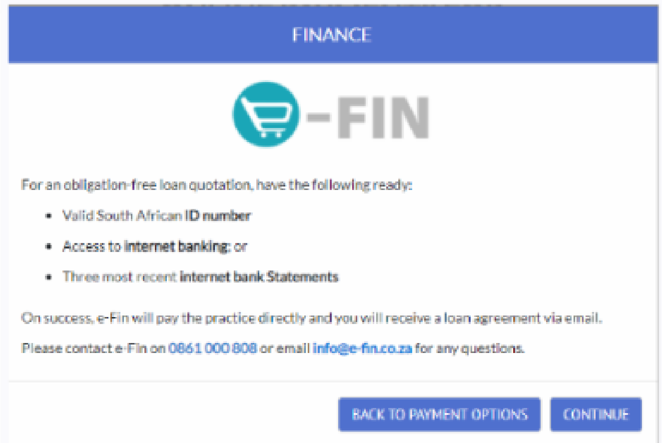


20. When the patient chooses "3D secure online card payment" to make the payment then they will be presented with a screen where they can enter their Card details to complete the payment.

21. Once the patient has completed the payment on 3D secure online card payment, they will also see the successful payment screen and again be able to view/print the receipt.

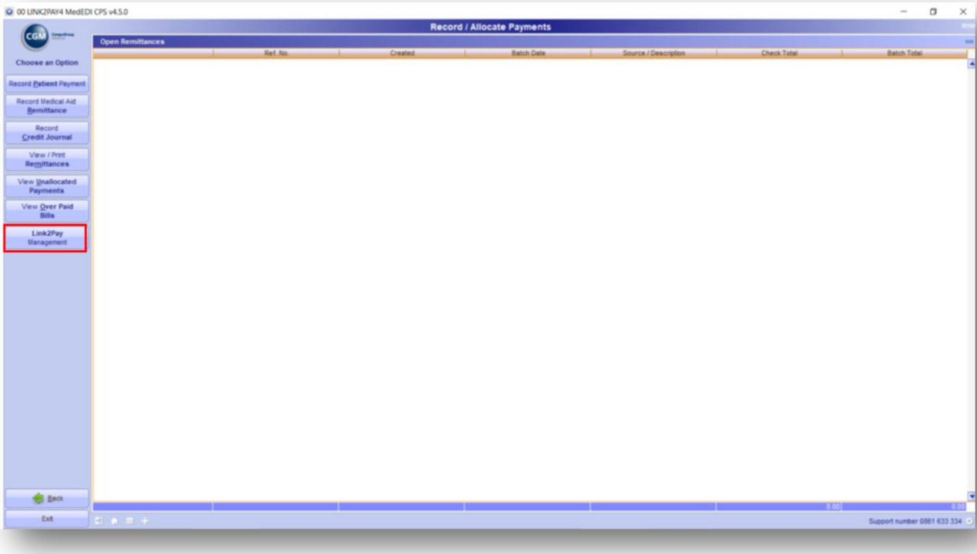
22. Patients also now have the new option on the Nexion Payment Portal to Finance their bill when it exceeds R1000.00. they will be shown a new button on the Payment Portal where they can click on and apply for Instant Medical Finance through Medifin.



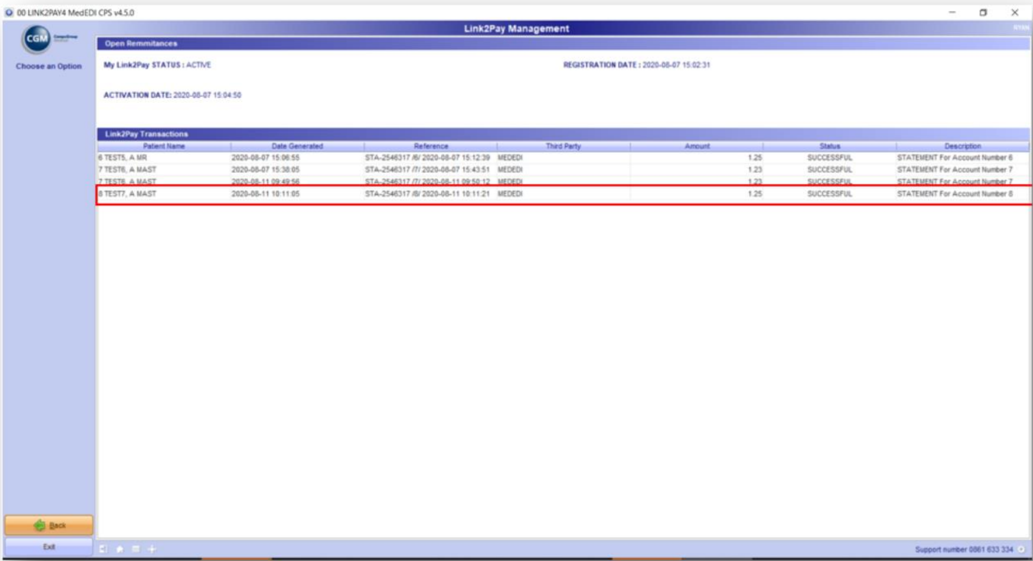


Checking the status of the payment link

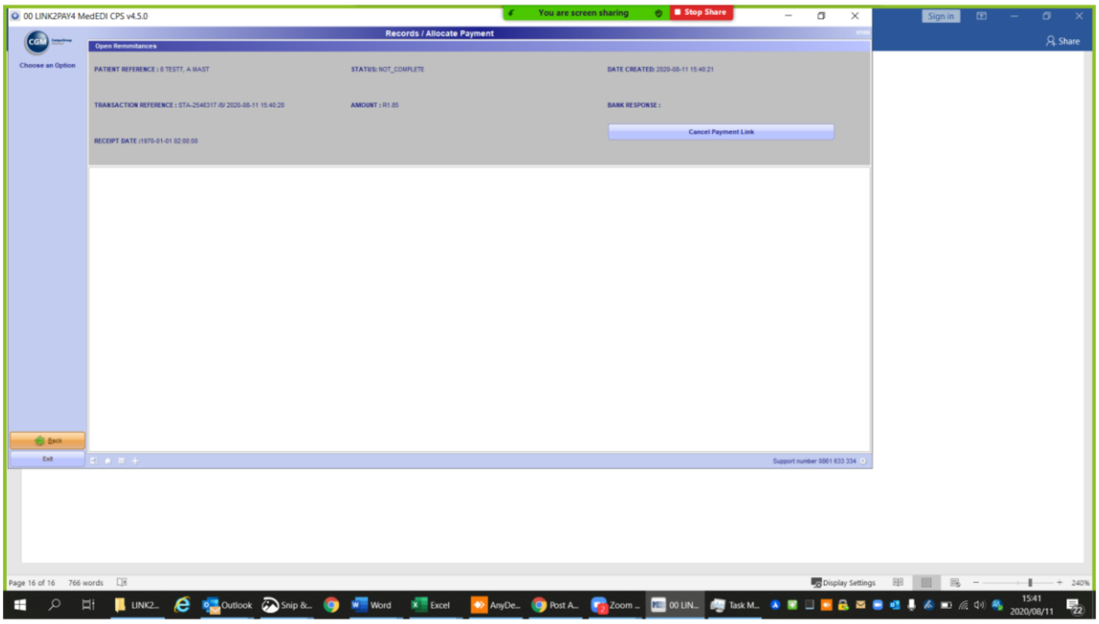
1. The user can navigate to the "Record/Allocate Payments" page, then selects "Link2Pay Management"



2. They can then see the history of payment links sent to the patients and if the patient payment was successful.

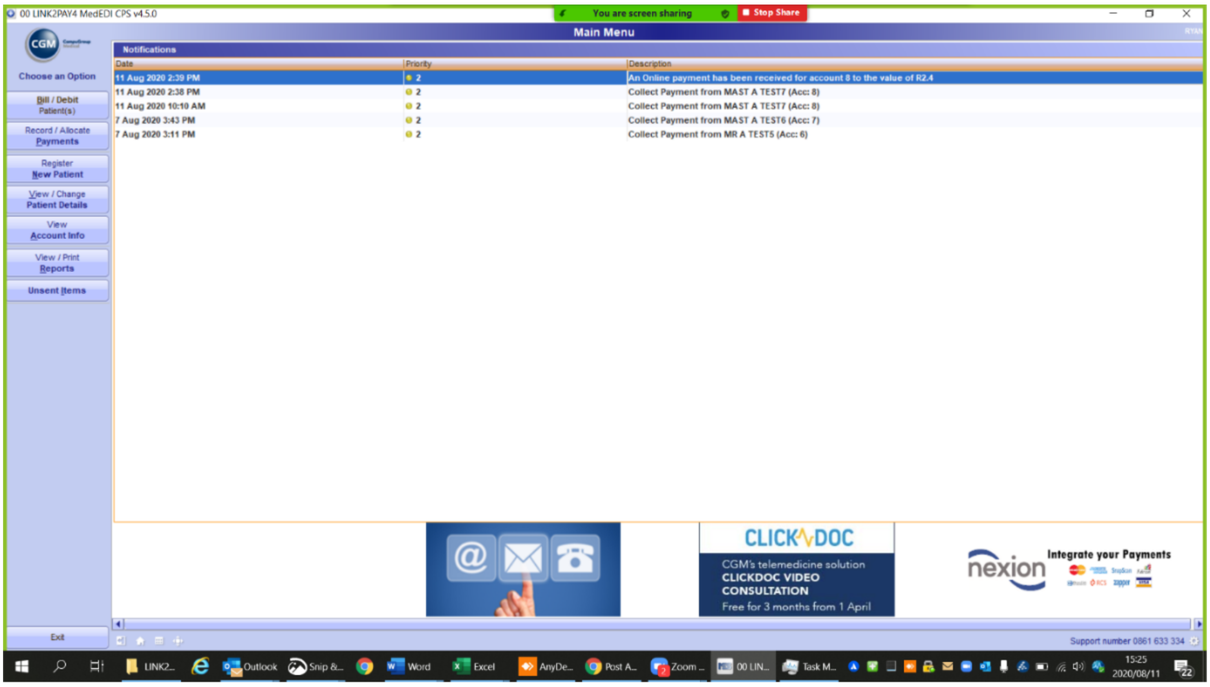


3. By double clicking on the payment link the user has the option to cancel a payment link. This is useful if the patient decides to pay with some other method i.e.: EFT / Cash / Direct Deposit etc.
4. By cancelling the payment link, the patient can't pay the amount twice by mistake.

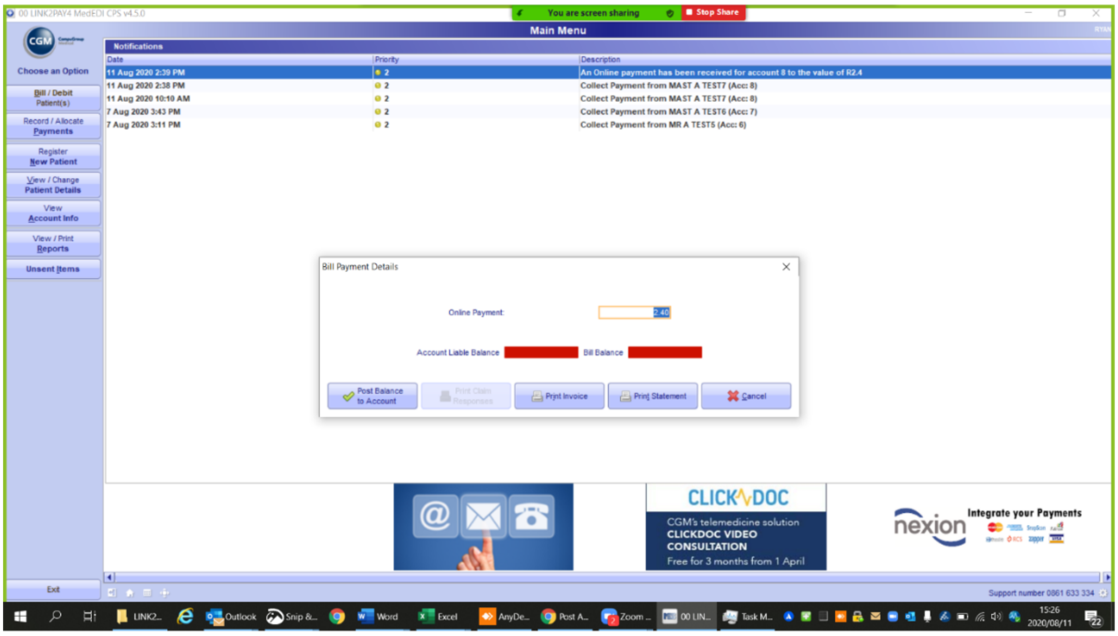

00 LINK2PAY4 MedEDI CPS v4.5.0
You are screen sharing
Stop Share
Records / Allocate Payment
Choose an Option
Open Remmitances
PATIENT REFERENCE : 8 TEST7, A MAST
STATUS: NOT_COMPLETE
DATE CREATED: 2020-08-11 15:40:21
TRANSACTION REFERENCE : STA-2546317 /8/ 2020-08-11 15:40:20
AMOUNT : R1.85
BANK RESPONSE :
Cancel Payment Link
RECEIPT DATE :1970-01-01 02:00:00
Back
Exit
Support number 0861 633 334
Sign in
Share
Page 16 of 16
766 words
Display Settings
240%
15:41
2020/08/11

Allocating payments made by Patients using the Link2Pay Payment Link

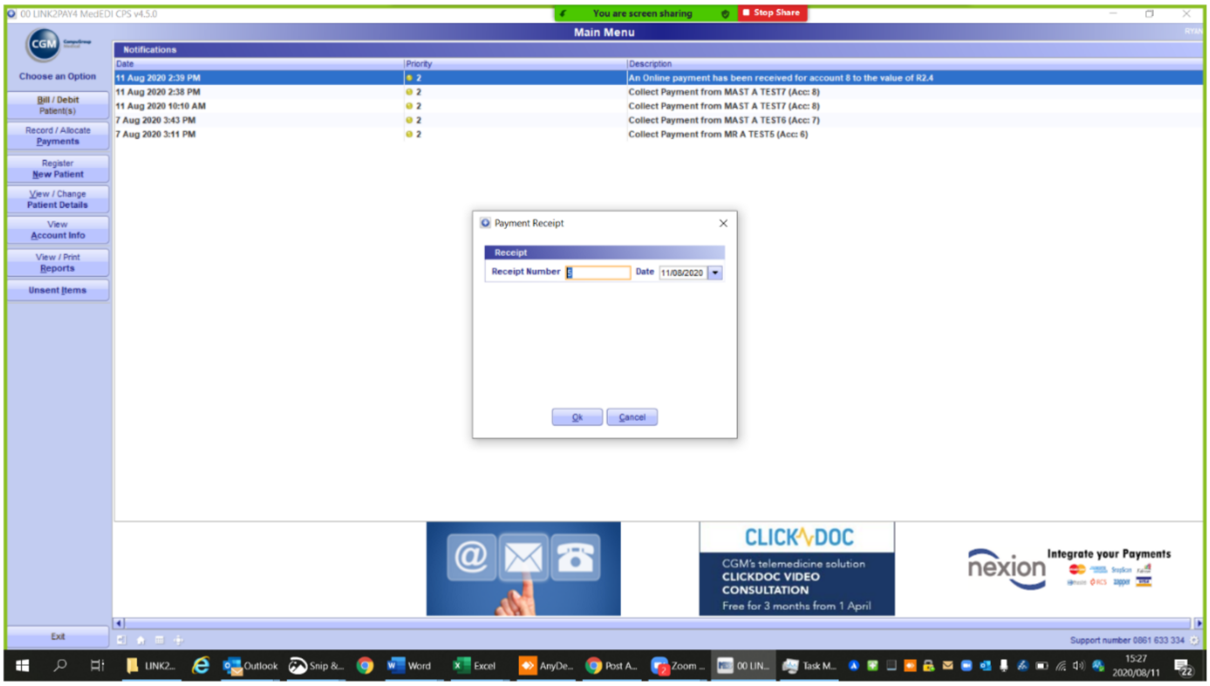
1. The user will see a notification on the main menu screen to inform them that a patient has completed a payment from a payment link.



2. The user double clicks on the payment notification to open the payment receipt screen.



3. The user confirms the amount and selects “Post Balance to Account” they then confirm the payment receipt.



Important Note:

4. Before you click ok on the Receipt, **it's important to remember that this will cancel all the account Payment links for both statements and Invoices**, please recreate any Links that you require for any additional amounts still outstanding for the patient.
5. We will in a future update allow for the cancellation of only the affected Payment Links on an account by Cancelling only the Statement Payment link and the Paid Invoice Payment Link, this will then allow the existing Payment Links on other outstanding Invoices to be retained.
6. Once you have selected Ok on the Receipt it will move you to the Allocation Screen.
7. The user then allocates the payment to the outstanding amounts in the Allocate Credit screen and selects Accept Changes

* The account outstanding amount is now settled.

*Please also remember to check the daily report Nexion will email you with successful transactions for the day.