

# Vanco

Integration Instructions for ViewPoint



*The ViewPoint integration with Vanco allows you to easily process credit card and eCheck AutoReceipts right from ViewPoint. Vanco Payment Solutions is a PCI (Payment Card Industry) Level 1 Compliant Service Provider. Payment information is posted directly into patient ledgers. No additional ViewPoint module is required.*

## Setup

Before you begin, please fill out the form provided by Vanco and fax it back to them at the number on the form. If your office separates finances (e.g., separate bank accounts) by orthodontist or by office location, you will need to request separate Vanco accounts. Vanco will then contact you with the following information. (Note that this is not the same as the login information for the Vanco website.)

Vanco Client ID: \_\_\_\_\_

Vanco iFrame ID: \_\_\_\_\_

Vanco User ID: \_\_\_\_\_

Vanco Password: \_\_\_\_\_

If you will be processing credit cards, it is necessary to have the appropriate credit card fields (Cardholder, Credit Card #, and Expiration Date) completed on the appropriate Responsible Party tab of each patient with an AutoReceipt agreement

If you will be processing ACH electronic transfers, it is necessary to have the ACH Information fields completed in each AutoReceipt contract.

## If You Have One Vanco Client ID or One for Each Orthodontist

ViewPoint must be updated to the most current version.

- 1 From the ViewPoint Main Menu, click **System Tables** and then **System**.
- 2 Double-click **Orthodontist**. Complete each **Vanco** field with the information provided by Vanco. If you have multiple doctors, be sure to complete these fields for each orthodontist. Typically, this will be the same information for each orthodontist, but you will have requested and received unique IDs if your practice separates bookkeeping by orthodontist.

## If You Have One Vanco Client ID for Each Office Location

ViewPoint must be updated to the most current version.

- 1 From the ViewPoint Main Menu, click **Tools & Utilities** and then **DataTools**.
- 2 Click **OK** on the *DataTools Warning*. These specific instructions replace the need to consult with our support staff before running *this* DataTool.

- 3 On the VP Extras tab, click (602) Toggle VP Credit Card Posting Method. Click Run.
- 4 The results will display "VP Credit Card Posting Method Set to OFFICE." If it says "ORTHODONTIST," simply repeat step 3. Click **Close**.
- 5 From the ViewPoint Main Menu, click **System Tables** and then **System**.
- 6 Double-click **Office**. Complete each **Vanco** field with the information provided by Vanco. Be sure to complete these fields for each office.

## Using the Integration

The AutoReceipt feature allows you to set up regular automatic payments for your patients' contracts. This allows you to save time posting payments when you have set up an agreement to charge their credit card every month or make regular withdrawals from their bank account. You always have the opportunity to review and cancel any payments before posting them to ViewPoint.

A contract with an AutoReceipt contract is indicated by an X in the AR column on the Contract tab of the patient folder.

## Creating AutoReceipts

AutoReceipts are created in the Contact tab of the patient folder.

- 1 Select the contract for which you wish to create an AutoReceipt contract, and click the **AutoReceipt** button.

**AutoReceipt Contract for Carla Joiner (AF - J018)**

Billing Name: Mr. Mrs. Jack Joiner  
Subscriber: N/A - Not an Insurance Contract

Next Date	End Date	Cycle	Amount	Description	ACH
6/20/2008	8/20/2009	1	\$100.00	Credit Card	No

Next Date: 06/20/2008      End Date: 08/20/2009

Recurring Receipt Every: 1 Months      Amount: 100

Method: Credit Card      Description: Credit Card -9596

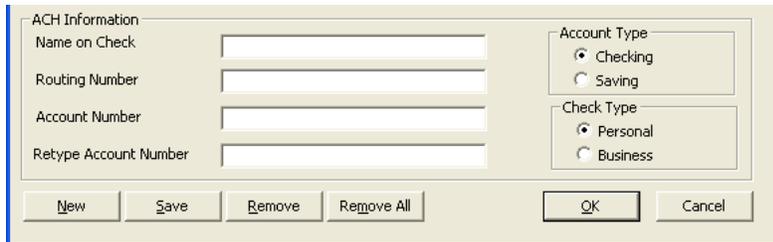
Payment Integration Type:  
 Other       X-Charge       Vanco

ACH Information:  
 Name on Check: \_\_\_\_\_      Account Type:  
 Checking  
 Saving  
 Routing Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_      Check Type:  
 Personal  
 Business  
 Retype Account Number: \_\_\_\_\_

New    Save    Remove    Remove All    OK    Cancel

- 2 Click **New** and enter the details of your agreement with the responsible party.
  - Next Date:** This is the next date on which you will automatically post a payment from this responsible party.
  - End Date:** This is the date on which you will automatically post the last payment of this amount.
  - Recurring Receipt Every \_\_ Months:** Sometimes called Cycle, this is the number of months between payments. Typically, this is 1. Use 3 if this party is paying quarterly.
  - Amount:** This is the amount that will be posted each time for this AutoReceipt contract.
  - Method:** This is the method of payment. Both Credit Card and Electronic Transfer can be used with the Vanco integration.
  - Description:** This is the description that will appear on the Deposit Slip, Receipt, etc.

- 3 Under Payment Integration Type, select Vanco.
- 4 If this is an electronic transfer AutoReceipt, fill in the additional **ACH Information** fields.



For security, after you exit and reenter the *AutoReceipt Contract* window, all but the last digits of the routing and account numbers will be masked out. If you need to make any changes, you will need to completely retype both numbers.

- 5 Click **Save**. The new AutoReceipt contract now appears in the list.
- 6 If necessary, create a second AutoReceipt contract for any additional payments this party has agreed to make on different dates or for different amounts. For example, a final payment at a lower amount.
- 7 Click **OK**.
- 8 If this is a credit card AutoReceipt, click the **Responsible Party** tab and be sure the following fields have the correct information: **Cardholder**, **Credit Card #**, and **Expiration Date**.

## Editing AutoReceipts

To edit an AutoReceipt contract, access the AutoReceipt feature just as you would when creating an AutoReceipt.

Select the AutoReceipt contract you wish to modify, make the necessary changes, and click **Save**.

To delete an AutoReceipt contract, select it and click **Remove**.

To delete all AutoReceipt contracts for this contract, click **Remove All**.

## Posting AutoReceipts

Once a month, or as often as you have AutoReceipts set to be paid, you should review and post the payments.

Access the AutoReceipt Review in this way:

- From the Main menu, click **Daily Activities** and then **AutoReceipt Review**.

The *Review AutoReceipts* window details each transaction that is scheduled to be posted.

**Review AutoReceipts** [?] [X]

Next Date	Patient Name	Billing Name	Subscriber	Amount	Description	
Credit Card Number	CC Exp. Date	CC Phone #	Address	Zipcode	ACH	Acct Balance
<input checked="" type="checkbox"/> 5/19/2008	Jason Alans	Mr. & Mrs. Arthur Alpert		\$125.00	Electronic Transfer	
			8 Debra Lane	12345	Yes	\$1,189.50
<input checked="" type="checkbox"/> 5/20/2008	Ann Bahrt	Dr. Jackie Lineweaver		\$10.00	Credit Card ...4897	
4003-0001-2345-678	8/13/2011	(800) 123-1234	9 Franklin Street	12345	No	\$0.00
<input checked="" type="checkbox"/> 5/20/2008	Greg Roberts	Mr. & Mrs. Dean Roberts		\$10.00	Credit Card ... 6653	
4003-0001-2345-678	8/13/2011	(800) 123-1234	4 Fox Lane	12348	No	\$1,925.00

**Total of Selected AutoReceipts \$145**

Office:     Orthodontist:     Payment:

Use VP Credit Card Integration    Prompt for Missing Credit Card Info     

Use VP Credit Card ACH Integration

Note: VP Credit Card box must be visible above and checked for charge processing to occur.  
Note: VP Credit Card ACH box must be visible above and checked for ACH transactions to be processed through the integration.

Each transaction contains two lines of information. The double row of column titles at the top of the screen indicates the information contained in each column.

The first line of information contains the **Next Date** that the transaction is due, the **Patient Name**, the **Billing Name** to whom this transaction will be posted, the **Subscriber** of the insurance policy (if applicable), the **Amount** of the transaction, and the **Description** of the transaction.

The second line of information contains the **Credit Card Number** (if applicable), the **Credit Card Expiration Date**, **Credit Card Phone Number**, the responsible party **Address**, the responsible party **Zip Code**, whether this is an **ACH** transaction, and the patient's current **Account Balance**.

Click any column heading to highlight that information for each transaction.

For security reasons and to remain compliant with PCI standards, complete credit card information will not appear on the responsible party tab. Tokens are stored inside of ViewPoint, rather than the actual credit card information. The last four digits of credit card numbers appear, in addition to the expiration date, instead of the entire number.

- 1 Review the pending receipts list. Limit this list, if you choose, by selecting a particular **Office**, **Orthodontist**, or **Payment** type.

You may want to only process office one's receipts at office one and office two's receipts at office two. You may want to process Dr. Smith's receipts and Dr. Jones receipts separately. Your office protocol may be to process all the credit cards and then all the ACH contracts.

- 2 Select the transactions you wish to post. You may click the box beside a transaction to select/clear it, or click the **Select All** or **Select None** buttons to select/clear all transactions. Notice the total amount of money to be posted from the selected transactions appears at the bottom of the list.

- 3 If there are any transactions you do not wish to post at this time, you can leave them pending or delete them. Delete any transactions you will not want to post by checking the box beside the transaction to select it, then clicking the **Delete** button. The selected payment is removed, but the AutoReceipt cycle in the patient folder remains intact. To permanently alter an AutoReceipt cycle, follow the instructions for Editing AutoReceipts above.

- 4 Click **Print** if you wish to generate a report of the transactions.

- 5 Click **Post**. The message "All receipts posted successfully" (or a message indicating errors) will appear. In either case, you will have the option to view the log.

Because your client has an opportunity to deny the transaction, be sure to use the reports provided by Vanco to follow up. Any canceled transactions need to be manually reversed in the patients' ledgers.

# Contact

## **Vanco**

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