

Vantiv

Integration Instructions for ViewPoint



The ViewPoint integration with Vantiv allows you to easily process credit card and electronic funds transfer AutoReceipts through Vantiv right from ViewPoint.

Setup

Using Vantiv for Each Orthodontist

ViewPoint should 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 **Element** field with the information provided by Vantiv. 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.

Using Vantiv for Each Office Location

ViewPoint should be updated to the most current version.

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

Next Date	End Date	Cycle	Amount	Description	ACH
2/24/2013	2/24/2014	1	\$100.00	Electronic Transfer	Yes

- 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.

Payment Interval: 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 Vantiv integration.

Description: This is the description that will appear on the Deposit Slip, Receipt, etc.

- 3 Under **Payment Integration Type**, select **Element**.

- 4 If this is an electronic transfer AutoReceipt, fill in the additional **ACH Information** fields.

ACH Information

Name on Check: [text]

Routing Number: [*****0000]

Account Number: [*****1111]

Retype Account Number: [*****1111]

Account Type: Checking Saving

Check Type: Personal Business

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.

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: All | Orthodontist: All | Payment: All | Select All | Select None | Post | Delete

Use VP Credit Card Integration | Prompt for Missing Credit Card Info | Use VP Credit Card ACH Integration | Print | Close

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 Vantiv to follow up. Any canceled transactions need to be manually reversed in the patients' ledgers.

Storing Credit Card Information

- 1 Access the responsible party tab in a patient's record and click the S button on the Credit Card line.
- 2 Either manually enter the card information in the prompts, or swipe the credit card if a swiper is available.
- 3 Use the X button to delete stored tokens, or the U button to update them.

When card information is stored, the responsible party record will display the integration name along with the card type, last 4 digits of the card number, and the card expiration date.

The screenshot shows a patient record window for Dan Doucet (WC - DO2). The 'RESPONSIBLE (1)' tab is active. The patient's name is Mr. & Mrs. David Shiel, and the address is 69 Fisher Street, Raintree, ST 12348. The financial summary table is as follows:

Financial Summary	
Ins. Expected	\$0.00
Ins. Balance	\$0.00
1 Contract	
Ins. Amount Due	\$0.00
Account Balance	\$0.00
30-60-90	Amount Due \$0.00

At the bottom right of the window, there are buttons for 'S' (Store), 'X' (Delete), and 'U' (Update) next to the 'Credit Card' field, which currently shows 'No Credit Card on File'.

Posting Credit Card Payments

Open the transaction window, select the contract, and enter the transaction amount. Choose Credit Card from the Method dropdown.

Any VP Credit Card integrations that VP finds on the system will be available selections below the Description field; if the office has more than one they'll want to make the appropriate choice, otherwise the single available option will be selected by default.

The screenshot shows the 'Post Transaction for Jason Alans (API - AL1)' window. At the top, there is a table with the following data:

Billing Name	Subscriber	Phase	TxFee Alloc	Balance	Amt. Due	AR
Mr. & Mrs. Arthur Albert		Full Tx	\$1,830.00	\$1,092.63	\$1,092.63	

Below the table, there are input fields for 'Date' (04/09/2013), 'Amount' (300), and 'Method' (Credit Card). The 'Description' field is set to 'Credit Card'. Under 'VP Credit Card Integration', the 'None' radio button is selected. At the bottom, there are buttons for 'Enter Charges', 'Enter Payments', 'Start Bulk Payment...', 'Ledger', 'Notepad', 'Enter Adj', 'Post', 'Exit Find', and 'Close'.

Contact

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