



First In Secure Electronic Payments



# Henry Schein: Expert Series “10 Minute Webinar”

2012

# Become an HSPS Payments Expert!

Henry Schein offers a fully integrated Payment Processing System that eliminates the need for manual payment handling, stand alone credit card systems, and saves time and money for your practice!

Today in just 10 minutes, we're going to show you how easy it is to use the system in your daily work flow to:

- Process Credit Card or PIN-Based Debit Card Payments for balance due or other amounts.
- Present a Credit Card Payment Receipt from your system.
- See posted payments in Patient and other Accounting Screens.

The product supports other functions that can be reviewed in more detailed demonstrations.

# Getting Started.....

Once you've finished posting new charges and as patient is ready to check out, you can conveniently process their credit card or PIN-based debit card payment as part of the check-out process!

•While in the *Post New Charges* screen, **Click the Green Checkmark Button**

•Next **Enter** the amount of payment in the *Amount* field

•**Choose** the payment *Method* from the dropdown menu & make sure *ePayment* is checked (*ePayment* can be set to **Checked** by default in your system settings)

•**Check Receipt** now to have a receipt to provide to your patient

•**Click OK**

**Post New Charges - [Kathy Woodmans]**

**BILLING**

New [Green Checkmark Button] Options... Speed Codes: [ ] Tx. Counselor: [ ]

Date	Provider	Code	Itvl/Quad	CPT Code	Charge	UCR	Patient	Insurance	Complete	X-Code
02/20/2007	1	007120	1	41899	\$95.00	\$95.00	\$95.00	\$0.00	<input checked="" type="checkbox"/>	Details X-Code

**Billing Summary [Kathy Woodmans]**

1. Process Payment Payor Info...

Amount:  Method:  Check #:   
 ePayment Bank #:

2. Process Adjustment

Amount:  Type:   
Minimum payment

3. Create Insurance Claim

Type  Printed  Electronic  None Extras...  Print Now

Generate  Primary  Secondary  Tertiary  Quaternary

4. Options

Mark treatment complete  Progress note  Post-op call tickler

5. Print

Post-op instructions  Receipt  include superBill  Letters / Labels

Previous Balance	\$215.00
Previous Patient Balance	\$95.00
Today's Charges	\$95.00
Tax	\$0.00
Co-Pay	\$0.00
New Balance	\$196.00
New Patient Balance	\$0.00

# On to Payment Entry.....

- **Select** Credit Card or Debit Card in the *Type* window

- **Select** *New Card* (You can also select from an existing Card on File if you have card data stored for this patient from previous transactions)

- **Click** *Swipe Card* (If card isn't available or unable to swipe, simply hand enter the card information.)

- When the Swipe Credit/Debit Card pop-up appears, **Swipe** the card then **Click** *Save & Exit*.

The screenshot shows a software interface for creating or editing an e-payment. The main window is titled "Create / Edit e-Payment" and contains several sections:

- Transaction:** Includes an "Amount" field with "\$1.00" and a "Type" section with radio buttons for "Credit Card" and "Debit Card". The "Debit Card" option is selected.
- Account Holder:** Includes fields for "Name" (Kathy Woodmans), "Street" (348598 Overlook Boulevard), and "Zip/Postal Code" (56052).
- Card Identification:** Includes radio buttons for "Card on File" and "New Card". The "New Card" option is selected. Below this are fields for "Card Number" and "Expiration Date" (00/00/0000).
- Voice Authorization:** Includes a "Code #" field.
- Buttons:** "Swipe Card" and "Get Pin" buttons are located at the bottom of the form.

A red asterisk (\*) indicates required information. A "Submit e-Payment" button is at the bottom of the main window.

A pop-up window titled "Swipe Credit / Debit Card" is overlaid on the bottom right. It contains the text: "Swipe your card through the card reader when you are ready. Then click Save & Exit to save and close this window. Do not press any keys on your keyboard while this window is open." Below the text is a "Status" field with the text "Ready - Swipe Card Now...". At the bottom of the pop-up are three buttons: "Save & Exit", "Reset", and "Cancel".

# Final Steps!

- Once you've swiped the card, if the patient is making a PIN-debit payment and you selected *Debit Card* in the *Type* window, now **Click Get Pin**

- When the *Debit Card Payment: Get PIN* pop-up window appears, **Select** the Port for your PINpad and **Click Get Pin**

- Your patient will now enter their PIN into the PINPad

- Whether processing a Credit Card or Debit Card payment, complete any remaining required fields (marked by red asterisk)

- Click *Submit e-Payment*

**Create / Edit e-Payment**

**Transaction**

Amount:  \*

Type

Credit Card  Debit Card

**Account Holder**

Name:

Street:

Zip/Postal Code:

**Card Identification**

Card on File

New Card

Card Number:  \*

Expiration Date:  \*

Voice Authorization (Enter only if required)

Code #:

\*  \*

\* = Required Information

**Debit Card Payment: Get PIN**

Have the patient enter their PIN on the PINPad now. Then click Save & Exit to save and close this window.

Select Port, Click Get Pin

Port:

# Transaction Response Auto Posts to Patient Ledger....

An **Approved** response displays *Status: Authorized* with a 6-digit *Authorization Code*...

Response from processor

Status:	Authorized
Authorization #:	858029
Posted:	01/12/2007 @ 02:04:21 pm
Settled:	01/01/0001 @ 12:00:00 am
AVS Code:	



Transaction ID: 58525937

Messages


...and the transaction **automatically** posts into your patient ledger! No more manually posting payments or hassling with multiple systems. *The red "e" icon next to the dollar amount tells you that this payment was made through the ePayment process.*

Related Transactions

Edit Delete Adjust Submit Transfer Claim Stat. Med. Codes Allocate

Date	Code	Service	Billed	Paid	Adjust
01/09/2007	307140	Pt. Pmnt/11/03/2006	\$0.00	\$0.00 	\$0
01/12/2007	307140	Pt. Pmnt/11/03/2006	\$0.00	\$0.02	\$0
01/12/2007	307140	Pt. Pmnt/11/03/2006	\$0.00	\$0.02 	\$0

Payments by... Patient: \$0.17 Insurance: \$0.00 \$125.00 \$0.17 \$0

 = ePayment (Click above for details)

# Providing a Receipt

If you **Checked Receipt** in the *Billing Summary* page during payment entry, a transaction receipt will appear in a separate window for you to print for your patient. Just **Click Print** at the top of the receipt page.

Print Preview [ Receipt for Bruce Lieberthal ]

Zoom: 100 KONICA MINOLTA 350/250/200 PCL Setup... **Print** Send Tools Save

**RECEIPT**  
 Thu., Dec. 14, 2006 at 11:41 am Page 1 of 1

**Wrentham Assoc. of Dentistry**  
 400 Blue Hill Drive  
 Suite 2B  
 Jonesville, AR 09766-9766  
 (949) 640-0020

Double-click the heading of the report to toggle between summary or detail views.

**Bruce Lieberthal (Patient #: 1)**

11 Manchester Drive Wrentham, MA 02093-	<b>Patient Information</b> Home: (508) 555-5555 Business: (310) 555-5555	Account Balance: \$169.86
Guarantor: Bruce Lieberthal		Next Recall: None Scheduled Next Appt: None
<b>Provider Information</b>		
Name: James Jones, DMD	License #: 56789	Tax ID: 573-392929
Signature: _____		

Visit Detail							
Date	Code	Service	Tth/Quad	Surfaces	Charges	Credits	Balance
12/14/2006	000170	RE-EVALUATION (NOT POST-OPERATIVE)			\$45.00	\$0.02	
					\$45.00	\$0.02	\$44.98

Summary			
Charges	\$45.00	by: VISA	
Payments	\$0.02		
Adjustments	\$0.00		
Current Balance	\$169.86		
Personal Balance	\$169.86		

Notes		Credit/Debit Sale Information	
		Merchant #: 23923	Date: 12/14/2006
		Term. #: 4800C416958000	Time: 10:05 AM
		Card #: xxxxxxxxxxxxxx5236	
		Trans. #: 55121213	
		Auth. #: 319592	
		Name: BRUCE LIEBERTHAL	

# Payment Reconciliation – Daily Transaction Reports

At the end of each day, you will use your Henry Schein Practice Solutions Software to access transaction reports. These reports allow you to review the total transactions and dollars put into the system and will help you balance on a daily and/or monthly basis. TransFirst will automatically complete settlement of all transactions in the system on a nightly basis, and route the data through the network for deposit into your bank account.

- **Click Reports** at the top of the main screen
- **Select** your desired date or date range
- **Set** any other options you want to filter your report data
- **Click OK**

DaySheet - End of Day Reports

Referrers Locations Carriers

**Providers/Dates** Patient Types Markers

Start: 03/07/2007 End: 03/07/2007

Filter by:  Posted Date  Creation Date

Click to Select Providers:  All

Group: <All>

- 1 - House Doctor
- 1 - Larry K. Morrison
- 2 - Michael M. Morrisey

Show Active Providers Only

Include Inactive Patients

Save settings for next time

OK  Close

QuickBooks Log

Daily Summary

- Include security audit trail
- Suppress Ledger Notes

Collections Report

- Filter to your log on code

Deposit Slip

- Separate credit card receipts

Reminders for next... 0 days

Routing Slips

- Print
- For which date 00/00/0000
- Include Family Info
- Include Tx Plan

Sort by...

Column  Time  Name

Accuracy Report

Accts. Receivable Summary

New Patient Reports

- List
- Address Labels
- Chart Labels



# Payment Reconciliation – Report Samples

Available reporting tools in your Henry Schein Practice Solutions software include Daily Summary, Collections Report & ePayment Log.

## Daily Summary

**Daily Reports--07/25/2007 to 07/25/2007**

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Report Parameters: Report: Daily Reports--07/25/2007 to 07/25/2007

Providers (All) Locations (All)  
 Include Markers (None) Exclude Markers (None)  
 Patient Types (All)  
 Other (None)

**Smith Dental**  
 Smith Dental  
 123 Easy Street  
 Any Town, CA 12345-2345  
 (123) 123-4567

**Daily Summary - Wed., Jul. 25, 2007** Audit Trail #: 14

Code	Tooth	Service	Charges	Credits	Balance	Payment
Transactions for Provider #: 1			Collection/Adjustments			
Patient: Ron Smith						
007120	1	EXTRACTION ADDITIONAL	\$1,000.00	\$1.00	\$999.00	VISA <span style="color: red;">■</span>
307120	1	Pt. Pmt/07/25/2007	\$0.00	\$1.00	\$998.00	AMEX
307120	1	Pt. Pmt/07/25/2007	\$0.00	\$2.00	\$996.00	VISA <span style="color: red;">■</span>
900002		Patient Refund	\$0.00	\$0.00	\$996.00	VISA <span style="color: red;">■</span>
307120	1	Pt. Pmt/07/25/2007	\$0.00	\$5.00	\$991.00	<span style="color: red;">■</span>
Subtotal for: Ron Smith			\$1,000.00	\$9.00		
Totals for Provider: 1			\$1,000.00	\$9.00		
			Collections: \$9.00			
			Insurance: \$0.00			
			Non-insurance: \$9.00			
			Adjustments: \$0.00			
<b>Totals for Report:</b>						
Charges:		\$1,000.00	Payments:		\$9.00	
Adjustments:		\$0.00	Refunds, Retnd Chks, etc.:		\$0.00	
Net Production:		\$1,000.00	Net Collections:		\$9.00	
			Insurance:		\$0.00	
			Non-insurance:		\$9.00	

■ = ePayment    Change in A/R: \$991.00

## Collections Report

**Daily Reports--07/25/2007 to 07/25/2007**

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**Collections Report**

Patient	Payment	Method of Payment	Check Number	Patient #
<b>1. Net payments made by patients/guarantors during patient visits or Monies on Account</b>				
Ron Smith	\$1.00	VISA	0	1
Subtotals for group:		\$1.00		
Cash:		\$0.00		
Check:		\$0.00		
Credit:		1		

## ePayment Log

**12. ePayment Log**

Patient	Amount	Trans. ID	Auth. Code	Method
Card Holder	Card Ends With	Type	Status	
Ron Smith	\$1.00	83722196	722196	Manual
Ron Smith	6284	Credit Card		Authorized
Ron Smith	(\$1.00)	83722413		Manual
Ron Smith	1018	Credit Card		Declined
Ron Smith	(\$1.00)	83722668		Manual
Ron Smith	4485	Credit Card		Declined
Ron Smith	\$2.00	83722903	722903	Manual
Ron Smith	6284	Credit Card		Authorized
Ron Smith	\$3.00	83723044	723044	Manual
Ron Smith	6284	Credit Card		Authorized
Ron Smith	\$5.00	20738043	CHECK IS N	Manual
Ron Smith		ACH		APPROVED
Total Submitted: \$11.00		Total Approved: \$11.00		Total Voided/Credited: (\$2.00)

# More Good News!

In addition to front office and back office **HSPS integrated payment processing**, *the system also supports electronic check processing (ACH) and recurring payment options (installment plans)!!*

- **ACH Payments**

- ✓ Duplicates deposit process just as if you had taken the check to the bank
- ✓ Flat processing fee regardless of amount of check

- **Auto Recurring Payment Plans**

- ✓ Plans can use either credit card or ACH as source of payment
- ✓ Provides ability to track payments and informs you when cards are about to expire

# Additional Value!

- Practices that use integrated payment systems can reduce costs of maintaining old POS terminals, costs of 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 front desk and use the old manual terminal!
- Faster check out process and end of day balancing with all processes handled 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!**

# A word about our partner.....

- TransFirst is a "Top 10" U.S. 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!
- TransFirst has their own in house provider consultants, help desk, technical support, and backs up their commitment to clients with BBB A+ rating and no required contract terms!
- Offers a simple electronic application and merchant acceptance via email avoiding need for paperwork, contracts, and long implementation process.
- They provide partners like HSPS and HSPS users, with VISA/MC, PCI, and HIPAA compliant products and services, and consult on best practices for receivable reduction.

# Next Steps.....

To request pricing information, see a cost comparison, or discuss the product with a consultant, contact us at [HSPS@transfirst.com](mailto:HSPS@transfirst.com) today.

 **HENRY SCHEIN®**  
**PRACTICE SOLUTIONS**

 **TRANSFIRST®**  
First In Secure Electronic Payments

Automate your patient payments  
through HSPS Practice  
Management Software

HSPS and TransFirst® make it easy with an  
integrated payment processing solution

