



Portal Payments and Beyond: Make the Most of CCOF and PCC

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Session Objectives

1. How to get started with Portal Payments and Credit Card on File
2. Portal Payments Configuration
3. Credit Card on File (CCOF) Configuration
4. Identify Portal and CCOF Payments in PCC EHR
5. Navigating Cardpointe
6. The future of Payment Processing integration





How do Portal Payments work?

Portal users can see their balances in detail

Messages

Create Message

Personal Balance as of 10/02/19

Fred Flintstone\$30.00 ▾

Make a Payment

Contact Us

Click to see balance details

Dino's chart is privacy-enabled, so while Pebble's charges show the provider, location, and procedure name, Dino's do not

Personal Balance as of 10/02/19

Fred Flintstone\$30.00 ▲

Dino Flintstone (Privacy Enabled)

10/02/19

Total Charge	\$135.00
Payments/Adjustments	-\$0.00
Pending Insurance	-\$120.00
Personal Balance	\$15.00

Pebbles Flintstone (Crusher, Winooski)

10/02/19OV Detailed H&E

Total Charge	\$130.00
Payments/Adjustments	-\$0.00
Pending Insurance	-\$115.00
Personal Balance	\$15.00

Total Personal Balance\$30.00

This is not a bill and may not reflect the entire account balance.

Make a Payment

Home My Kid's Chart

PCC Pediatric Test Associates
(800) 722-1082

Payment Info

Amount
17.00

Defaults to current balance but may be changed to any amount

VISA MASTERCARD AMEX DISCOVER

Credit Card Number

CVV2

Expiration Date
Month Year

Credit card data is never stored on PCC servers. Saved cards are hosted by our PCI-compliant partner, BluePay

☐ Save this card for future payments.

Billing Contact Info

First Name

Last Name

Billing Address 1

Billing Address 2

City

State

Zip Code

Phone

Email

Make Payment Reset

BluePay Secure Payment Processing

How do Portal Payments work?

- ← Portal Users can save multiple cards for future use
- And Edit or remove Stored Cards →

Back Edit Payment Method

Card Type: Mastercard (Preferred)
Card Number: xxxxxxxxxxxx0004

Expiration Date: 02 2019

☒ Preferred card

Save

Cancel

Remove

Edit as needed

Check to set as preferred

Click to "forget" this card

Sign Out My Kid's Chart Settings

Welcome Wilma

Edit Account
Payment Methods
New Password
Activity Log

Patient Charts

Pebbles Flintstone

Dino Flintstone (Privacy Enabled)

Upcoming Appointments

Mon 10/14/19 9:45am Pebbles

Wed 11/06/19 12:22pm Pebbles





Getting Portal Payments Enabled

1. Are you using the Patient Portal?
 - a. If not reach out to your client advocate or PCC Support to get this enabled at no cost!
2. Are you enabling Personal Balance display in the Portal?
 - a. This is enabled in Configuration > Practice Preferences
 - b. Be sure to select a Billing Account for personal balance display →
 - c. **Add Billing Account Assignment to Your Check-In Workflow:** Review the Patient Portal Users component during Patient Check-In to see if a family uses the patient portal, and to see if a billing account for personal balances is assigned for the user. You can click “Manage Portal User” if you need to add one.

Patient Portal Manager

Administration Configuration

Administration

Add Portal User Manage Portal User

Manage Portal User: Wilma Flintstone

Edit Portal User Delete Portal User

Portal User Name: Wilma Flintstone
Email Address: wilma@bedrock.com
Phone Number: 800-722-1082
Temporary Password: uuTyvC48 [Print Password](#) [Reset Password](#)

Patients connected to this portal user [Add Siblings](#) [Add Patients](#)

Name	Hide at age 18	DOB	Age	PCC #	Custodian
remove Pebbles Flintstone	Yes	07/11/08	10y 1m	3336	Wilma Flintstone

Select billing account for personal balance display
The balance will not include charges for patients in *italics*. These patients have privacy enabled or are not connected to the portal user.

☒ Fred Flintstone
Patients: *Dino Flintstone, Pebbles Flintstone*

☐ Do not display balance

Getting Portal Payments Enabled

1. Reach out to Payment Pros to get set up with a Merchant Account
 - a. info@paymentpros.net
 - b. paymentpros.net > Contact
 - c. Payment Pros can also provide a Credit Card on File merchant account
 - d. They also provide physical card terminals for buy or lease
2. When your account is ready, Payment Pros will alert PCC to complete the implementation
 - a. PCC will reach out to you when Portal Payments are ready to enable
 - b. Feel free to reach out to PCC Support with any questions





Getting Portal Payments Enabled

- Decide Whether to Post Automatically or Manually
 - Configuration > Patient Portal
 - PCC can autopost Portal Payments to the linked Billing Account
 - These will apply to the oldest balances first
 - Unique Payment Types can be mapped for Portal Payments

Patient Portal Configuration

Configuration Messaging Templates

Patient Portal Configuration

☒ Enable personal balance

Payments

☒ Automatically post portal payments
Portal payments will be applied to the billing account charges from oldest to newest. Overpayments will be applied as unlinked credits.

Select payment types for autoposted portal payments

Visa Payment Type	Visa Card Payment
MasterCard Payment Type	Master Card Payment
Discover Payment Type	Discover Card Payment
American Express Payment Type	American Express Payment

Report on Portal Payments

- PCC Report Library
 - Billing > Payment Reconciliation
 - Portal Payments will be posted as user 'Patient Portal'
 - You can use User as a report filter to identify just portal payments
 - Patient Portal > Portal Payments
 - Will show you all Portal Payments in the date range
 - You can filter by Results (accepted, declined, error)
 - Note: This report will not show deleted payments
- Bluepay (reach out to Payment Pros for assistance logging in)
 - Menu > Processing > Transactions > Transaction List
 - This goes back 90 days
 - Can be exported to a CSV file
 - Can review reasons for a payment error or declined transaction
 - Reach out to Payment Pros for questions on errors
 - You can also refund or void payments from the Bluepay Transaction List
 - Deleting a Portal Payment in PCC does NOT reverse the Transaction
 - Payment Pros can also assist you setting up daily settlement reports





How Does Credit Card on File work?

- Once CCOF is enabled, a new component will appear in Checkin and the Payments Tool
- You can use this component to add or edit cards

Payments Jeffrey Addington Account #1238 730 Grandview Drive

Posting History

Payments
Jeffrey Addington (Account # 1238)

Pers Due Description
207.00 Previous Balance (as of 03/26/26 11:19am)
0.00 Unsaved Payments
207.00 Balance

Transaction Date Payment Type Amount Check # Apply to Prev Bal Unapplied Provider

03/26/26 [Dropdown] [Credit Card Icon] 0.00 [Dropdown] 0.00 0.00 [Dropdown]

► Distribution

Save Payment Print Receipt

Enter a new credit card while posting a payment

Credit Card On File

Credit Card On File - Add

Card number: [Text Field] VISA

Expiration Date: [Dropdown] [Dropdown]

Name on card: [Text Field]

Card Nickname: [Text Field]

Cancel Save

Credit Card On File

Jeffrey Addington (Account # 1238) Edit Card Add Card

Nickname	Name on Card	Card Number	Expiration Date
Dad Visa	Jeffrey M Addington	Visa (ending in 1234)	03/2026

- 





Getting Credit Card on File Enabled

1. Contact Payment Pros at <https://www.paymentpros.net> or info@paymentpros.net to create an account.
2. If you already have a merchant account with Payment Pros, reach out to them to migrate your existing merchant account to an ISV merchant account.
3. Payment Pros will provide you with a merchant ID, an access URL, a username, and a password.
4. Enter these credentials in Configuration > Practice Preferences
5. We recommend that you also map unique payment types for reporting purposes
6. You can add multiple merchant accounts if you need to separate your transactions by location

Practice Preferences

Settings Hours

Credit Card On File

☒ Enable Credit Card On File

CardPointe Gateway API Credentials:

▼ Winooski Pediatrics

Description: Winooski Pediatrics

Merchant ID: 800000050009

URL: fts.cardconnect.com

Username: testing

Password: Authenticated

Add Merchant Account

Accepted Payment Types and Mapping:

Visa Payment Type: Visa Card Payment

MasterCard Payment Type: Master Card Payment

☐ Discover Payment Type: select a credit card payment type

☐ American Express Payment Type: select a credit card payment type

Cancel Save

If you have already been using CardPointe for CCOF, PCC is offering a 1 time migration of your saved Card Tokens into PCC EHR! Reach out to PCC Support.

Report on CCOF Payments

- PCC Report Library
 - Billing > Payment Reconciliation
 - If you mapped unique payment types for CCOF, you can identify these by the Payment Name and use the Group By feature to sub-sort
 - Financial Oversight > Payments and Adjustments by Payment Type
 - You can Customize this report to include Criteria for Payment Name to identify JUST CCOF Payments (requires unique payment types)
 - You can also Customize to include additional Columns for Transaction Date for a more detailed report
- CardPointe
 - Reporting > Transactions
 - Can be exported to a CSV file
 - Can review reasons for a payment error or declined transaction
 - Reach out to Payment Pros for questions on errors
 - You can also refund or void payments from the Cardpointe Transaction List
 - Deleting a Portal Payment in PCC does NOT reverse the Transaction, we do have reversals on our roadmap!
 - Payment Pros can also assist you setting up daily settlement reports



The future of Integrated Payment Processing

- CardPointe Customer Profile Integration
- Automatically update Expiration Dates
- Automatically post Swiped Transactions (Card Present) to PCC
- Migrate Portal Payments to Cardpointe
 - Single Login and Merchant Account for both Portal Payments and CCOF
- One time Credit Card Payments through PCC EHR
- Automatically email a receipt for CCOF Transactions
- Refund / Void CCOF Transactions from within PCC



Session Takeaways

1. Payment Processing Integration saves time and effort collecting on Personal Balances
2. Payment Pros can help with all your Merchant services needs
 - a. Email info@paymentpros.net
3. We have much more planned for the future of Credit Card on File!
4. Stop by the Wishing Well to submit enhancements!





**Please complete the course
survey in the UC App.**





Asking Questions:

Virtual attendees: Use the chat if you have a question that you want answered

In-person attendees: Go to the stationary microphone in your room.

CEUs:

You can request CEU codes for qualifying sessions using the form PCC shares out at the conclusion of the conference.

Do you have any questions?

