

# CGM eMDs and CGM PAY Guide

June 2024

# CGM eMDs

EHR and Practice Management

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# Chapter 1 - CGM eMDs and CGM PAY

CGM PAY Is a payment processing feature for CGM eMDs with eMEDIX. CGM PAY allows to you process patient payments with credit cards and ACH payments, and then update their balances in CGM eMDs. In addition, you can create payment plans for patients. Payments made in eMEDIX can automatically update patient balances in CGM eMDs; and you can set an option to enable or disable this.

Note: Deleted payments will appear in Italics on the Payment Source and Prepayment windows. In addition, you cannot delete ACH Payments.

## **CGM PAY Setup**

I.

First, you will need to sign up for eMEDIX and receive your credentials. Contact your Client Sales Executive for this. Then, you'll enter those credentials in Bill > File > Administration > eMEDIX Configuration.

In addition, each facility that you want to use CGM PAY will need a Statement Submitter ID. Statement Submitter IDs can be entered from the Bill > Claims > EDI Options. Statement Submitter IDs do not have to be different for each facility.

(Hint: If you are already using statements with eMEDIX, this statement submitter ID will be the same. Most clients will only have one statement submitter ID, but if you need more, please contact your Client Sales Executive).

| EDI Options                       |                  |               | ×      |
|-----------------------------------|------------------|---------------|--------|
| Save Cancel                       |                  |               |        |
| Claims Contact                    |                  | Receiver ID   |        |
| Submitter ID                      | Password         | Tran Type     | Region |
| Statement Submitter ID<br>PBTX000 | Retrieve stateme | ent responses | ~      |

Figure 1. EDI Options window

Finally, on the eMEDIX Configuration window, select the Enable CGM Pay check box. This will enable the processing of payments with CGM PAY.

| eMEDIX Config                           | uration  | ×           |
|---|--|-------------|
| Save Can                                | cel  | (i)<br>Test |
| Use eMEDI                               | ( for all clearinghouse services   |             |
| eMEDIX Cred                             | entials 🔞  |             |
| Username                                | 121212321  |             |
| Password                                | ******   |             |
| TPID                                    | 1111   |             |
|   |  |             |
| Enable CG                               | /I Pay   |             |
| Automatica                              | lly post online payments from CGM Pay  |             |
| O FIFO (P                               | ayment posted to oldest balance or<br>first. )   |             |
| O LIFO (P                               | ayment posted to newest balance or first.)   |             |
| Prorate<br>invoice                      | (Payment equally distributed to all<br>s on the statement.)  |             |
| *Because t<br>considerat<br>distributio | here are multiple patients on an invoice<br>ion should be placed on applying the<br>n methods across all those invoices. |             |
|   |  |             |

Figure 2. eMEDIX Configuration window

Hint: If you use BillFlash, enabling CGM PAY will stop that service from collecting new payments. You will want to make sure that you only check Enable CGM PAY when you are ready to start collecting payments. BillFlash payments will still continue to be collected and posted from online payments.

There is another option on this window: Automatically post online payments from CGM PAY. When this option is selected, payments made in CGM PAY will automatically be imported into your practice. You can select one of the following posting options:

- FIFO (Payment posted to oldest balance/invoice first)
- LIFO (Payment posted to newest balance/invoice first)

• Prorate (Payment equally distributed to all invoices on the statement)



Figure 3. eMEDIX Configuration window

# **Entering Payments using CGM PAY**

You can use CGM PAY to enter payments via check or credit card for a patient, for instance, their copay, when they arrive for their appointment or payments received at other times. In addition, patients can use the eMEDIX Payment Portal to enter payments to pay their bills.

## **Patient Prepayment window**

When CGM PAY is enabled, the Billflash option no longer appears and a check box for Pay using CGM PAY is available. Select this check box and enter the payment details.

| New Patient Prepayment X                             |
|--|
| Save Cancel  |
| Date posted       04/01/2024     Pay using CGM Pay @ |
| Patient Payment Classification                       |
| Copay Payment Deposit                                |
| Check/Credit Card number                             |
| CGM Pay payment methods                              |
| ACH Checking 2121                                    |
| Payment Amount Payment Type                          |
| \$0.00   |
| Adjustment Amount Adjustment Type                    |
| \$0.00   |
|  |

Figure 4. New Patient Prepayment window

The table below describes the elements on this window.

| Element                        | Description   |
|--------------------------------|---|
| Save button                    | Click to save the information on the window and launch CGM PAY where you can process the payment. |
| Cancel button                  | Click to cancel the payment and close the window without saving any information.                  |
| Date Posted                    | Enter or select a date for the payment. The default value is today's date.                        |
| Pay using CGM PAY check box    | Select this check box if the payment will be processed through CGM PAY.                           |
| Patient Payment Classification | Select the appropriate button.  |
| Check/Credit Card Number       | This field will be disabled when you select the Pay using CGM PAY check box.                      |

| Element                 | Description  |
|-------------------------|--|
| CGM PAY Payment Methods | Enter or select the payment method if the payment will be<br>processed through CGM PAY. Use the drop-down to select<br>a method if there is more than one method on file.  |
|                         | <ul> <li>This field will be disabled when you clear the Pay using CGM PAY check box.</li> <li>symbol: Use the * symbol to select a favorite payment method.</li> <li>symbol: Click the + symbol to add a new payment method. CGM PAY will open and you can enter the method details and save them in CGM PAY. This will pre-authorize the card.</li> </ul> |
|                         | a payment method. You will see a confirmation<br>message before the method is deleted.   |
| Payment Amount          | Enter the amount of the payment. If you selected Copay,<br>the appropriate amount will be pulled from the patient's<br>record.   |
| Payment Type            | Select a payment type from the drop-down.  |
|                         | This field will be disabled when Pay using CGM PAY is selected.  |
| Adjustment Amount       | Enter an amount in this field if the payment is an adjustment of some type.  |
| Adjustment Type         | Select the Adjustment Type from the drop-down.   |

#### **Bill Charges and Payments window**

When CGM PAY is enabled, the ePay at Billflash button no longer appears and the Pay using CGM PAY check box is available. Select this check box if you are entering a payment for CGM PAY.

| Save                      | Cancel Delete                    | Aging Gyarant  | or Charge Sets   | Claim Alert               | s Form                            | Mem <u>o</u> | tes Claim Va    | lidation  | Patient    | Audit        | Chart Do             | icMan Es     | it .        |    | He |
|---------------------------|----------------------------------|--|--|---------------------------|-----------------------------------|--------------|-----------------|-----------|------------|--------------|----------------------|--------------|-------------|----|----|
| voice # [                 | 101518 Facility: Bodlings        |  |  |                           | C Default                         | FGP MIX      | 2024 V Cas      | e Defa    | ult<br>5   | v Q Pc       | osting Batch<br>IONE | - <b>4 4</b> |             |    |    |
| harges                    | Payment Agency Colle             | tions Print  | CMS on Save  | Include Form?             | Print Sta                         | tement 🗹 P   | rint Invoice/Re | ceipt for | New Invoic | e Print      | Patient Ed           | ucation      |             |    |    |
| Source N                  | ame:<br>Type Payment Classificat | Source Amour   | t Source Balance   | Get                       | Patient                           | Insurance    | Guarantor Ins   | urance    | All Insur  | ance 🥜 Edit  | * * *                | Resequence   |             |    |    |
| Patie     Insur     Prepi | ance Payment<br>ayment Deposit   | Payment  | Type<br>ACH Checking                                       | Save Sourc                | e Proinform                       | a PBM        | grp_2265 2      | 265211    | C1 Abin    | don, Pe EF   | \$0.00               | 0 1 10/      | 01/2015 PPC | 5  |    |
| GM Pa                     | y payment methods                | Adjustment 1   | Type   | Last                      | -                                 |              |                 |           |            |              |                      |              |             |    |    |
| Contract of the last      |                                  | A Contractor of the local division of the lo |  | Sue top                   | -                                 |              |                 |           |            |              |                      |              |             |    |    |
| ☆ ACH                     | H Checking 2121 🗸 🔶 🕽            | Adjustment 2   | Type   | Scan Ched                 | File Histo                        | ny Pay       | using CGM Pay   | 0         |            |              |                      |              |             |    |    |
| 슈 ACH                     | H Checking 2121 V + 2            | Adjustment 2 Date Posted Delete Show all   | Type   | Scan Check                | k File Histo<br>I Diff. Adj All(F | F5) RC Desc. | using CGM Pay   | atement   | Comment    |              |                      | Q. Find      |             |    |    |
| ☆ ACH                     | H Checking 2121 V 4 12           | Adjustment 2     Date Poster Delete Show al  | Type           4/ 1/2024           open items           M4 | Scan Check<br>Pmt.gal Adg | k File Histo                      | All-Total    | using CGM Pay   | atement   | Commerit   | NPO(S Variar | NEXS Audit           | Q Find       | Adj1        | RC | G  |

Figure 5. Bill Charges and Payments window

| Bill Charges & Payments ( Abingdor   | n, Perseus )                               |               |                | <u>م</u>  |  | <b>Ø</b>                        |   | /                     | <b>ê</b>                             | <u> </u>                              | Ĝ          | >              |
|--|--|---------------|----------------|---|--|---------------------------------|---|-----------------------|--------------------------------------|---------------------------------------|------------|----------------|
| Save Cancel Delete HCPA  | Aging Guar                                 | antor         | ge Sets C      | Alerts  | Default  | Date 5/ 9/<br>FGP CHP           | 2024 V Case                               | e Defa<br>us P_IN     | Patient                              |                                       | osting Ba  | tch #          |
| Charges Payment Agency Colle<br>Source Name:<br>Source Type Payment Classificat<br>Patient Copay<br>Insurance Payment<br>Prepayment Deposit<br>CGM Pay payment methods | ion Source Am<br>Payment<br>Adjustmen      | Type<br>Check | Balance        | Gude Porm:<br><u>G</u> et<br>Ne <u>w</u><br>S <u>a</u> ve Source<br>Clear<br>Las <u>t</u><br>Delete | Print Sta<br>Patient<br>Insurance<br>ProInform | Insurance d<br>Company<br>a PBM | Guarantor Ins<br>Group # Pi<br>grp_2265 2 | urance olicy # 265211 | All Insur<br>Type Policy<br>C1 Abing | ance Sedi<br>Holder FS<br>gdon, Pe EF | t Tratient | Res<br>% Pat S |
| Djst FIFO(F2) LIFO(F3) Prorate(F4)   | Adjustmen     Date Po:     Delete     Shov | sted 5/ 9/2   | 024 ~ P<br>ems | Scan EOB<br>Scan Check<br>mt. <u>B</u> al Adj1 D  | File Histo                                     | F5) RC Desc.                    | using CGM Pay                             | r 🕥<br>atement        | Comment                              |                                       |            | QF             |
| Inv# Code M1   | M2 M                                       | 13            | M4             | DOS   | Charges  | All-Total                       | P-Due                                     | I-Due                 | NHXS Allo                            | NHXS Variar                           | NHXS AL    | udit' Payı     |

This option will be available only when you are using Patient or Prepay.

Figure 6. Bill Charges and Payments window

#### **Payment Source window**

CGM PAY payments can also be made from the Payment Source window.

| New Payment So              | urce  |  | ×                   |
|-----------------------------|---|--|---------------------|
| Save Cancel                 |   |  | Pay using CGM Pay 💩 |
| Source Type<br>Patient      | Payment Classification<br>Copay<br>Payment<br>Deposit | CGM Pay payment met<br>Visa 0011 exp 12/24<br>*Source Amount | hods<br>+ Visa V    |
| Patient Name<br>Brown, Andy | Batch No  | Adj 1 Type   | Adj 2 Type          |
|                             |   | Insurance Name   | Q,                  |

Figure 7. New Payment Source window

# **CGM PAY Payment Plans**

You can also set up payment plans for guarantors/patients using CGM PAY. Each guarantor/patient can have only one plan and you can specify the number of months they will have to pay off their bill and how much

they will pay each month. In addition, you can specify the day of the month that their payment will be charged to their credit card. You will enter these details in the Initiate Payment window as shown below

|  | Payment                              |
|--|--------------------------------------|
| 1  | 2 3                                  |
| Initiate Payment Enter   | Payment Details Confirmation         |
| Payment Identifier   |                                      |
| 1005   |                                      |
| Submitter  | Total Patient Balance                |
| PBT:   | ✓ 19.31                              |
| Select Number of Months  | Future Monthly Payment Date          |
|  |                                      |
|  | Payment Amount                       |
|  | 19.31                                |
| Save Payment Method On File<br>Select Payment Method<br>Key In Values Manually (Check) | Key In Values Manually (Credit Card) |
|  |                                      |



Payment Plans will be processed automatically through CGM eMDs based on dates and amounts chosen.

Payment Plans can be created by patients or staff. Patients can create payment plans based on administrator settings in eMEDIX and if the clinic is using statements with eMEDIX.

## Posting window

In addition, there is a button in the Payments section of the Posting window: Payment Plans. Click this button to open the CGM PAY Payment Plan window.

| Potting (Patient: Ackeriey, Erma M DOB: 08/07/89) (Default Provider: Reese, Coy S) (Inv Cht: 1)       Image:   |
|---|
| Attent       Account #       Use Date Range       DOS Provider       Agency Collections         Att       Att       Point Date       DOS Date       Fills       Exclude invoices in agency collections         Invoice #       Invoice #       Invoice #       Invoice #       Invoice in agency collections       Indude invoices in agency collections         Statement ID       Invoice #       Invoice #       Indude invoices in agency collections       Indude invoices in agency collections         Statement ID       Indude invoices in agency collections       Indude only invoices in agency collections         Isstatement ID       Indude invoices in agency collections       Indude only invoices in agency collections         Isstatement ID       Indude invoices in agency collections       Indude only invoices in agency collections         Isstate Copy Invoice       Edd Imvoice       Indude invoices in agency collections         Imvoice Copy Invoice       Edd Imvoice Dos Copy Invoice       Magency Edd Imvoice Integency Edd  |
| Adderring, Erma X Adderring, Erma X Adderring, Erma M X X Adderring, Erma M X X X X X X X X X X X X X X X X X X   |
| Atterting, Erma M <ul> <li>Post Date</li> <li>DoS Date</li> <li>Att</li> <li>Claim Batch # Financial Grp</li> <li>Post Date</li> <li>Claim Batch # Financial Grp</li> <li>Post Date</li> <li>Att</li> <li>Claim Batch # Financial Grp</li> <li>Post Date</li> <li>Att</li> <li>Claim Batch # Financial Grp</li> <li>Post Date</li> <li>Claim Batch # Financial Grp</li> <li>Post Date</li> <li>Att</li> <li>Due By</li> <li>Include only invoices in agency collections</li> <li>Include only invoices in agency collections</li> </ul> Statement ID         Balance         - 0         Status         Att         Due By         Both         Include only invoices in agency collections           okess         Balance         - 0         Status         Att         Due By         Both         Include         Post         Alext         Charges         Post         Post </td  |
| Immoise #       From To       Claim Batch # Financial Grp. Posting Batch #       O Include only invoices in agency collections         Statement ID       Balance       0       Status       ALL       Due By Both         okess       Balance       0       Status       ALL       Due By Both         wire invoice       Edgt Invoice       Mark American Print Claim       Print Form       Print Claim       Patance       Quirn Balance       Appts       Alert       Chart       ?         FGP Facility       DOS Provider       Post Date       DOS       Charges       Payments       Adjustments       P Due       Balance       D I Status       Record Count: 1   |
| Egit       Direstown       Max       Due By       Both         okes       Balance       - 0       Status       ALL       Due By       Both         okes       Balance       - 0       Status       ALL       Due By       Both         with molice       Copy Invoice       Edg Invoice       Max       Print Form       Print Claim       Pat Balance       Quer Balance       April       Alert       Chart       ?         FGP       Fool Pacility       DOS Provider       Post Date       DOS       Charges       Payments       Adjustments       P Due       Balance       D       Status       Attribute       Record Count: 1  |
| Bannee       0       + 0       Status       ALL       Due By       Both         volces       Image: Copy Invoice       Edit       Image: Amil       Print   |
| volces<br>te<br>rg/ Invoice   Edit Invoice   Mare Ant   Pint   Vjsts   Audit   Invoice Ijote   Pint Form   Pint Claim   Pat Balance   Appts   Alert   Chart     ?<br>FGP   Facility   DOS Provider   Post Date   DOS   Charges   Payments   Adjustments   P Due   Balance   D Status CSI   N   M   eMDs   eMEDIX<br>a M   P/P   Reerie, Coy 5   00/257/4   03/257/4   03/257/4   S0.00   S0.00   S0.00   S0.00   S0.00   S0.00   P   - N   eMDs   eMEDIX<br>Show S0.00 balance   Show Guarantor Invoices   Account Status: Active   Record Count: 1   |
| okoles<br>te<br>te<br>provice [ Copy Invoice [ Copy Invoice ] Mgret Amt _ Print _ Print Print Form _ Print Claim   Pat Balance _ Gurn Balance _ Appts _ Alert _ Chart _ Q ?<br>FGP Facility DOS Provider _ Post Date _ DOS _ Charges _ Payments _ Adjustments P Due _ Balance _ D Status CSI _ N _ M _ eMDs _ eMEDIX<br>as M _ PVP _ Reste, Coy 5 _ 002/25/24 _ 03/25/04 _ S0.00 _ S0.00 _ S0.00 _ 50.00 _ 50.00 _ P N _ eMDs _ eMEDIX<br>Show S0.00 balance _ Show Locked _ Show Guarantor Invoices _ Account Status: Active Record Count: 1   |
| ter<br>tyg invoice Copy Invoice Eddg Invoice Mager Amit Print Dos August Invoice Hope Print Form Print Claim Pat Balance Gurn Balance Appts Alert Chart ♀ ?<br>FGP Facility DOS Provider Post Date DOS Charges Payments Adjustments P Due Balance D Status CS N M eMDs eMEDIX<br>a M PVP Resea. Coy S 02/25/24 03/25/24 03/25/24 S0.00 S0.00 S0.00 S0.00 S0.00 P - N M eMDs eMEDIX<br>Show S0.00 balance Show Guarantor Invoices Account Status: Active Record Count: 1   |
| rgg minote Copy moute   Edg minote migrations gives moute gote minote gote gote gote gote gote gote gote g  |
| In the formation of th |
| Show 50.00 balance 🛛 Show locked 🗌 Show Guarantor Invoices Account Status: Active Record Count: 1   |
| Show 50.00 balance Show locked Show Guarantor Invoices Account Status: Active Record Count: 1   |
| Show \$0.00 balance Show locked Show Guarantor invoices Account Status: Active Record Count: 1  |
|   |
| yments  |
| Pagtient Payment Ingurance Payment Edit Payment Oriente Payment Print Becript Pre Payment Payment Plans Reverse Payment/Adjustment  |
| Ate Posted Payment Pmt Type Adj 1 Adj Type 1 Adj 2 Adj Type 2 Paid By Classification Check # Comment D User   |
|   |

Figure 9. Posting window

#### **Collections window**

There is an option on the Collections window: Pmt Plans. Click this option to open the CGM PAY Payment Plans window.



#### **CGM PAY Payment Plans window**

Use this window to view existing payment plans and create new plans.

| Close               |           |            |        |                     |                          |                |            |      |         |            |
|---------------------|-----------|------------|--------|---------------------|--------------------------|----------------|------------|------|---------|------------|
| 🚛 Guarantor         | Payment P | tan 🛛 🙆 Ne | w pays | ent plan            | ] Only show unresolved i | ssues          |            |      |         |            |
| Guarantor Name      | Active    | Amount     | Day    | Card Info           | Created By               | Created Using  | Created    | Pmts | Tot     | Recent Pmt |
| Faast, Bernard T    |           | \$90.83    | 25     | ACH Checking 1221   | Best, Wayne              | eMEDIX Payment | 03/24/2024 | 1    | \$90.85 | 03/24/202  |
| Wilkinson, Mireya A | ~         | \$91.78    | 15     | Visa 0011 exp 12/24 | Patient                  | eMEDIX Payment | 03/24/2024 | 1    | \$91.78 | 03/24/202  |
|                     |           |            |        |                     |                          |                |            |      |         |            |
|                     |           |            |        |                     |                          |                |            |      |         |            |

Figure 11. CGM PAY Payment Plans window

Note that the payment plans that appear in this window are NOT patient-specific. ALL plans will appear.

| Element                     | Description   |  |
|-----------------------------|---|--|
| Close button                | Click to close the window.  |  |
| Guarantor                   | Click this button to open the Guarantor/Policy Holder Maintenance window for the selected line item in the grid.  |  |
| Payment Plan                | Click this button to open the CGM PAY Payment Plan window for the selected item in the grid.  |  |
| New Payment Plan            | Click this button to create a new payment plan. First, the Find Guarantor window will open, allowing you to select a guarantor. Then, CGM PAY will open and you can enter plan details. |  |
|                             | Note: you must have entered a valid Statement Submitter ID in Claims > EDI Options before you can create a new payment plan.  |  |
| Show inactive plans         | Select this check box to include inactive plans in the grid.  |  |
| Only show unresolved issues | Select this check box if you want to see only plans with unresolved issues.   |  |
| Grid                        | The grid shows you details of the plans. Double-clicking an item in the grid will open the CGM PAY Payment plan window for that payment plan.   |  |

The table below describes the options on this window.

## **CGM PAY Payment Plan window**

This window shows you the details of the payment plan, including the history of payments for the plan.

| GGM Pay Payment Plan ×  |   |                          |  |  |  |
|---|---|--------------------------|--|--|--|
| Save Cancel   |   |                          |  |  |  |
| Guarantor name Wilkinson, Mireya A                                  |   |                          |  |  |  |
| Details   | Active  |                          |  |  |  |
| Amount  | 91.78   | Day of month 15 🚔        |  |  |  |
| Balance   | \$458.90  | Final payment 08/15/2024 |  |  |  |
| CGM Pay payment methods<br>☆ Visa 0011 exp 12/24<br>Payment History |   |                          |  |  |  |
| ✓ 01. 03/24   | 01. 03/24/2024 \$91.78 Visa 0011 exp 12/24 - SALE |                          |  |  |  |
|   |   |                          |  |  |  |

Figure 12. CGM PAY Payment Plan window

Note: a patient can have only one plan.

#### **Guarantor/Patient Balance window**

If a guarantor has an active payment plan, a notification will appear on the Balance window.

| Guarantor Balance - Faast, Bernard T |                                     |                                 |                                |                                 | ×                              |                           |
|--------------------------------------|-------------------------------------|---------------------------------|--------------------------------|---------------------------------|--------------------------------|---------------------------|
| )<br><u>H</u> istory                 |                                     |                                 |                                |                                 |                                |                           |
| Guarantor<br>Insurance               | 1-30 Days<br>\$0.00<br>\$0.00       | 31- 60 Days<br>\$0.00<br>\$0.00 | 61-90 Days<br>\$0.00<br>\$0.00 | 91-120 Days<br>\$0.00<br>\$0.00 | > 120 Days<br>\$0.00<br>\$0.00 | Total<br>\$0.00<br>\$0.00 |
| Balance ir<br>Guaranto<br>Insurance  | agency coller<br>r \$0.00<br>\$0.00 | s0.00                           | \$0.00<br>\$0.00               | \$0.00<br>\$0.00                | \$0.00<br>\$0.00               | \$0.00                    |
| Total<br>Last                        | \$0.00<br>Payment Date              | \$0.00                          | \$0.00<br>Last :               | \$0.00<br>Statement Date        | \$0.00<br>3/24/2024            | \$0.00                    |

Figure 13. Patient Balance window

#### **Credit Card Authorization**

When you click the 👇 sign, the Initiate Payment window in eMEDIX will open.

|                                | Payment               |                             |
|--------------------------------|-----------------------|-----------------------------|
| 1                              | 2                     | 3                           |
| Initiate Payment               | Enter Payment Details | Confirmation                |
| Payment Identifier             |                       |                             |
| 1003                           |                       |                             |
| Submitter                      |                       |                             |
| PBTX00032 (office 2)           | ÷                     |                             |
| Save Payment Method            | On File               |                             |
| Select Payment Method          |                       |                             |
| C Key In Values Manually (Chec | ik) 🕷 Key In Va       | lues Manually (Credit Card) |
| Cancel                         |                       | Next                        |

Figure 14. Initiate Payment window

Choose to key in the credit card or check manually and click Next.

CGM PAY is PCI-compliant and only a token is stored locally.

• If you select check, the window below will open when you click Next.

| Enter Payment Details |                       |                                |                     | - 🗆 X |
|-----------------------|-----------------------|--------------------------------|---------------------|-------|
|                       | 1<br>Initiate Payment | Enter Payment Detail           | a 3<br>Confirmation |       |
|                       |                       |                                |                     | - 10  |
|                       | c                     | Realing Humber Access Humber O | 1001)               |       |
|                       | Checking      Savings |                                |                     | - 10  |
|                       | First Name            | Last Nan                       | 14                  | 1     |
|                       | Routing Number        | Account Number                 | Check Number        |       |
|                       |                       |                                | Optional            | 1     |
|                       | Cancel                |                                | Submit              |       |
|                       |                       |                                |                     |       |
|                       |                       |                                |                     |       |
|                       |                       |                                |                     |       |

Figure 15. Enter Payment Details window

Complete the fields and click Submit.

• If you select credit card the window below will open when you click Next.

|   | 0                | Enter Payn | ent Details  | 3            |   |
|---|------------------|------------|--------------|--------------|---|
|   | Initiate Payment | Enter Payn | ient Details | Confirmation |   |
|   | _                |            |              |              |   |
|   |                  |            |              |              |   |
|   | Card Number      |            |              |              |   |
|   |                  |            |              |              |   |
|   | Expiration Data  | CVV        | Táp Cada     |              |   |
|   | MM / YYYY        |            |              |              |   |
|   |                  |            |              |              |   |
| _ |                  |            |              |              | _ |
|   |                  |            |              | Sobmit       |   |

Figure 16. Enter Payment Details window

Enter the credit card information and click Submit. The card details will be available in CGM eMDs.

#### Voiding a payment

You can void or refund the patient's credit card by using the Delete button in the Prepayment window.



#### Figure 17. Void Payment popup

The user will get a pop-up indicating if the transaction was processed as a refund or void. Refunds and voids are determined by the merchant and can't be decided by the user.

| Information X   |  |
|---|--|
| CGM Pay successfully processed a REFUND for this payment. |  |
| ОК  |  |

Figure 18. Refund popup