

EasyPay Users Manual

S:\DOCS\EASYPAY\EZP_MAN2.DOC

EasyPay Supplemental Reference Guide

Table of Contents

Overview of Terminal Functions.....	2
2080 Keyboard Functions.....	3
2085 Keyboard Functions.....	4
Setup an EasyPay Transaction.....	5
Authorizing One Time & Annual Transactions.....	6
Authorizing Due Transactions.....	6
Recalling a Transaction Record.....	7
Modifying Transaction Records.....	9
Deleting Stored Transactions.....	11
Printing EasyPay Reports.....	12
Tips and Questions.....	13

This reference guide is a supplement for EasyPay terminal functions. For standard terminal functions, please review the NURIT Short Form User Manual.

Overview of Terminal Functions

➤ STANDARD CREDIT CARD PAYMENT MODES

CREDIT.....SALE
ACCOUNT

For standard credit card sales.

CREDIT...VOID/SALE
ACCOUNT

To void a transaction within a current batch.

CREDIT...VOID/RTRN
ACCOUNT

To void a return within a current batch.

CREDIT...VOID/FRCD
ACCOUNT

To void a forced sale within a current batch.

CREDIT.....RETURN
ACCOUNT

To refund a charge (use when batch has already been sent).

CREDIT.....VERIFY
ACCOUNT

To ensure adequate available funds on a card – (authorization # obtained but account is not charged)

CREDIT.....FORCED
ACCOUNT

Once funds are verified, use that authorization number to charge account using FORCED, or if a voice authorization was obtained over the phone.

➤ EASYPAY TYPE TRANSACTIONS

(Stores credit card information for later processing)

1. New 2. Review
3. Due 0r / 0p

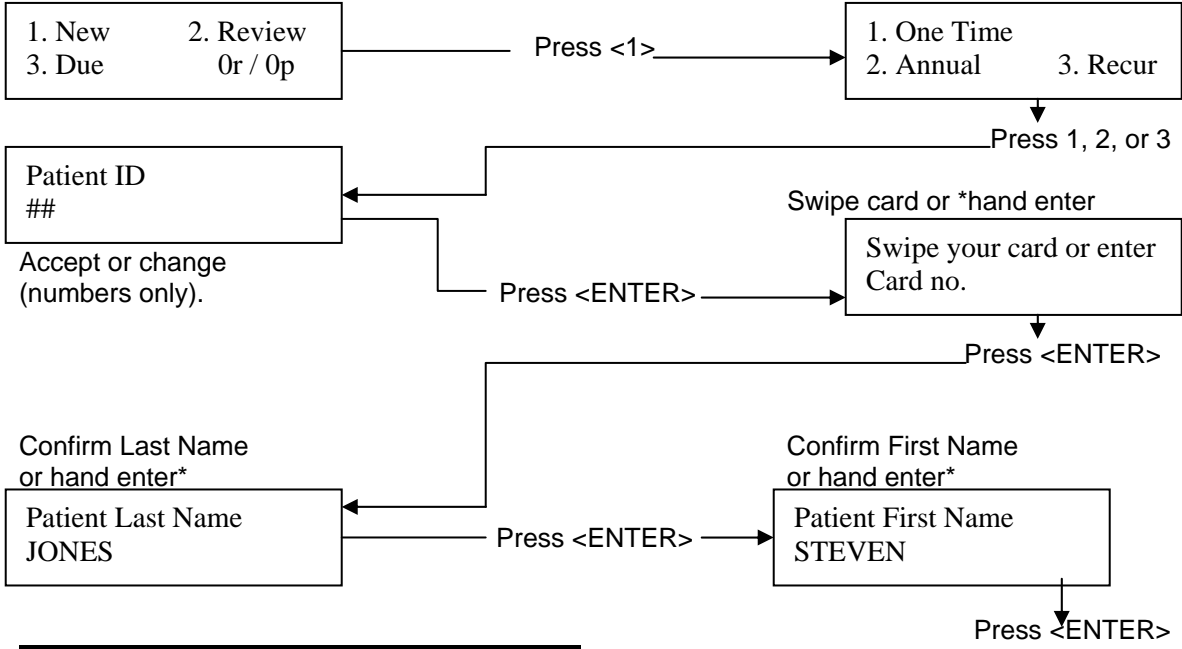
The EasyPay default screen.

1. **NEW** (processes credit card information for debiting at a later date)
 - **One Time** - for a one time charge to be processed up to 90 days later
 - **Annual** – keeps card info on file – good for all visits that year
 - **Recurring** – for charges processed on an installment or recurring basis
2. **REVIEW** (review records on file in the terminal memory). Records can be viewed by:
 - All (scroll through all records)
 - Patient's Name
 - Cardholder's Name
 - Patient ID Number
 - One Time
 - Annual
 - Recurring
3. **DUE** (reminder for either one time or recurring amounts due or overdue)

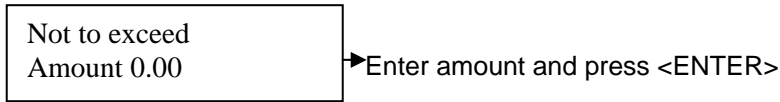
Setting Up An EasyPay Trans.

At the EasyPay screen

Choose transaction type



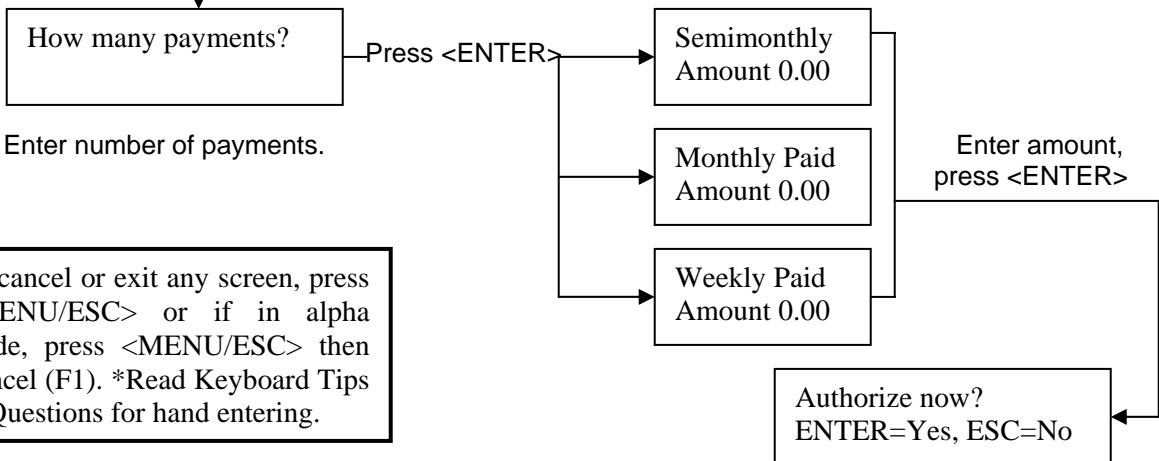
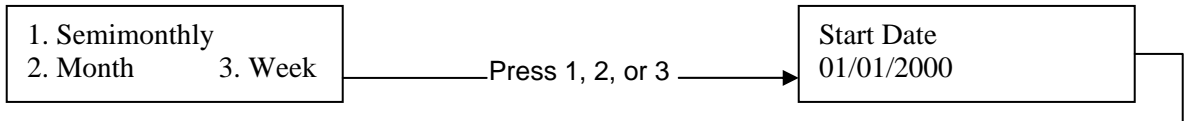
IF TRANSACTION IS ONE TIME OR ANNUAL



IF TRANSACTION IS RECURRING

Choose a payment cycle

Accept, or type new date



To cancel or exit any screen, press <MENU/ESC> or if in alpha mode, press <MENU/ESC> then Cancel (F1). *Read Keyboard Tips & Questions for hand entering.

Authorizing One Time & Annual Trans.

From the EasyPay screen,

1. New	2. Review
3. Due:	0r / 0p

Press <2>

Recall the appropriate record.
(See section on recalling transactions)

With correct transaction on screen, press <FIND>

01/01/00	\$100.00
PID 3	0

Confirm name w/right & left arrow.
Scroll records with up & down arrow.

Authorization Amount	\$100.00
----------------------	----------

Change amount or accept,
and press <ENTER>

Authorizing Due Transactions

From the EasyPay screen

1. New	2. Review
3. Due:	0r / 0p

Press <3>

This screen shows if "One Time" payments are also overdue

1. Recur. Pmnts
2. Late One Time

Scroll to recall appropriate record.

With correct transaction on screen, press <FIND>

01/01/00	\$100.00
PID 3	0

Confirm name with **right** and **left** arrow.
Scroll records with **up** and **down** arrow.

Authorization Amount	\$100.00
----------------------	----------

Authorize now?
ENTER=Yes, ESC=No

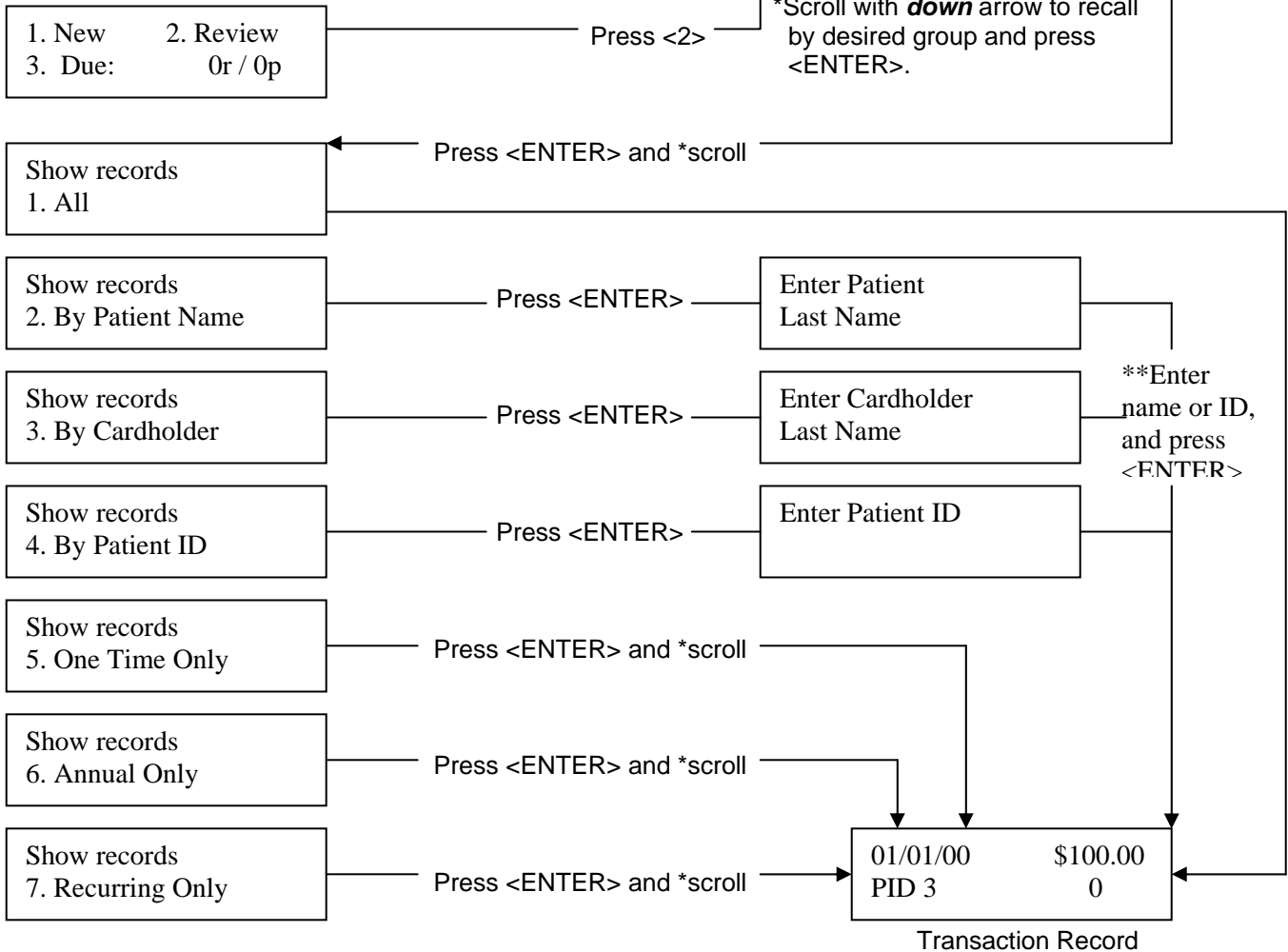
Press <ENTER> to authorize

*All Due recurring payments can be authorized together by pressing <BATCH>.

To change amounts of overdue "One Time" transactions, type in correct amount and press <ENTER> to authorize. To change a Recurring transaction, press <EDIT> - See section on modifying transactions.

Recalling A Transaction Record

At EasyPay screen



*Scroll through records to confirm.

Use <RETURN> and <FORCED> to scroll through records.

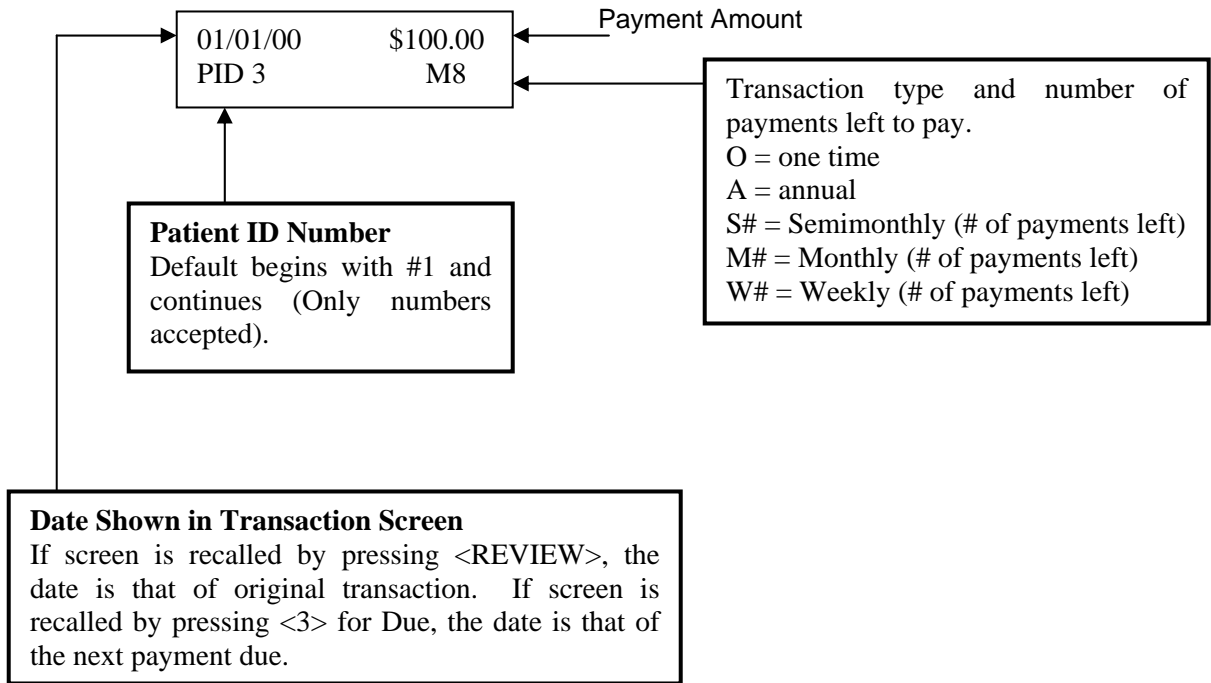
Use <VOID> and <VERIFY> to confirm names.

Recall a transaction quickly:

Select 2. By Patient Name, and type the 1st and/or 2nd letter of the last name. Then scroll with *up* and *down* arrows to locate the right transaction. Confirm the name with right arrow.

****Note:** Keyboard goes into alpha mode for typing Patient or Cardholder Last Name. Patient ID is in numeric mode.

Transaction Record Screen



Modifying Transaction Records

Dates can be postponed either globally (meaning, all payment dates moved forward together) or individually (meaning, only a single payment moved forward).

Dates are modified differently depending on how the record is recalled, either by using the **Review Mode** or **Due Mode**.

Recalled by Review Mode:

Date changes are global, affecting all subsequent dates accordingly

(e.g. If payment is moved forward by 2 weeks, then all subsequent payments will be moved forward by the same 2 weeks). A single payment cannot be changed from **Review** without changing all payments.

****Postponing a single payment without changing all subsequent payments, must be performed from the **Due** screen (payment must be already due or overdue).**

Recalled by the Due Mode:

Postponing an individual date is possible, but subsequent dates are affected differently:

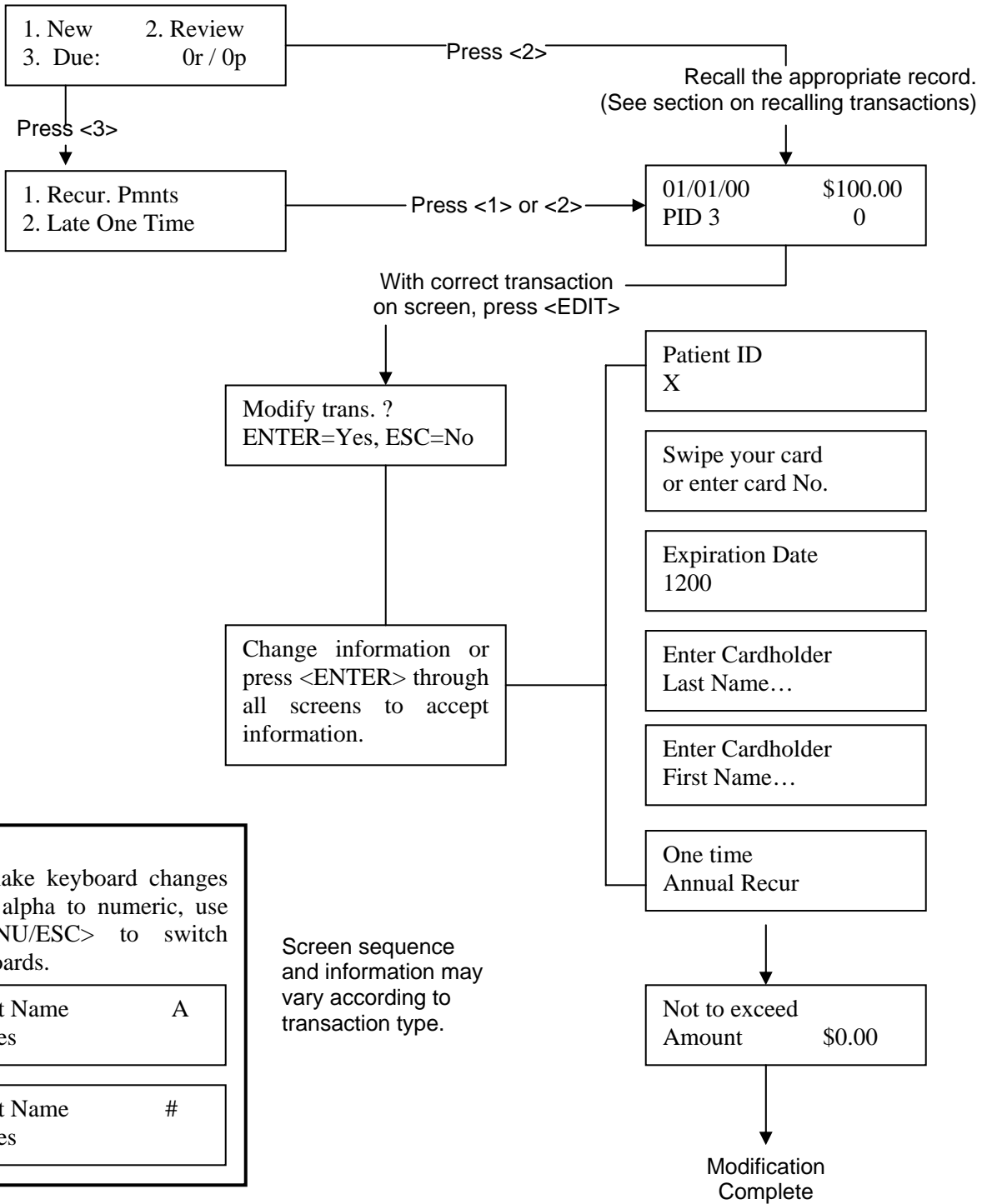
- Dates postponed by less than a payment cycle do not change the subsequent payment dates
- Dates postponed by more than a payment cycle will move the subsequent dates forward, but to the beginning of the next normal cycle.

(e.g. A transaction calls for 10 payments beginning the 1st of every month. In the 3rd month, the payment is to be postponed by 45 days. Moving the 3rd payment forward will set all other payments to begin again on the 1st of the month following the 3rd payment. If the patient wanted the payment postponed by only three weeks, than the 4th payment would be due one week after the 3rd payment).

Note: If a transaction becomes too complicated, you can always delete the transaction and start again, or change the transaction to an Annual type and debit the account as needed.

Modifying Record Through Review or Due

From the EasyPay screen



Note:
To make keyboard changes from alpha to numeric, use <MENU/ESC> to switch keyboards.

Last Name	A
Jones	

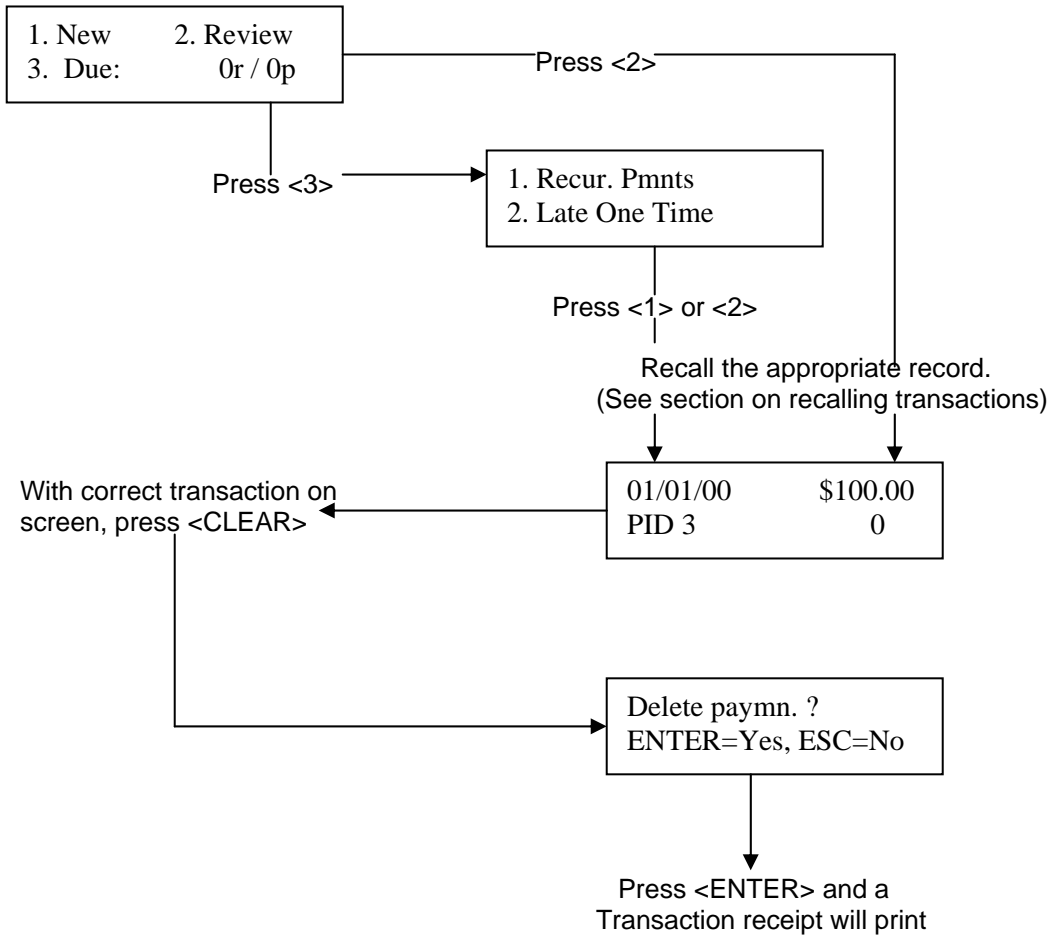
Last Name	#
Jones	

Screen sequence and information may vary according to transaction type.

*To cancel or exit any screen press Cancel (F1) or <MENU/ESC> then F1

Deleting Stored Transactions

From the EasyPay screen



Scroll records with *up* and *down* arrow keys. Confirm records with *right* and *left*.

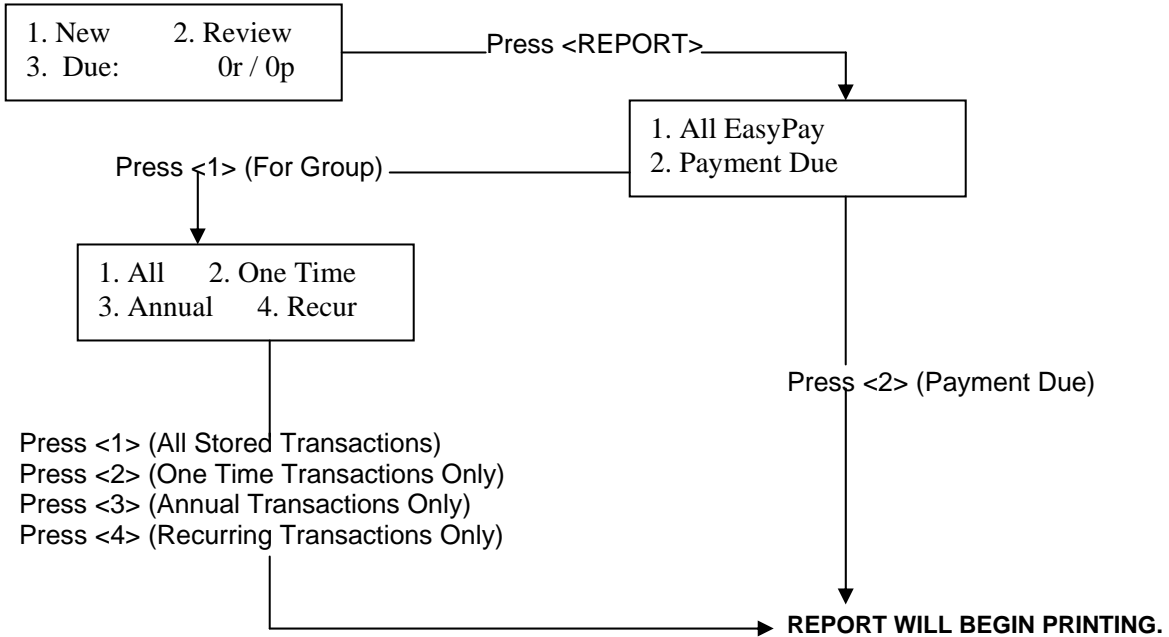
*To cancel or exit any screen press Cancel (F1) or <MENU/ESC> then F1

EasyPay Reports

The <REPORT> function key prints individual transaction reports. It will print by groups (One Time, Annual, Recurring, or Due), or all stored EasyPay transactions.

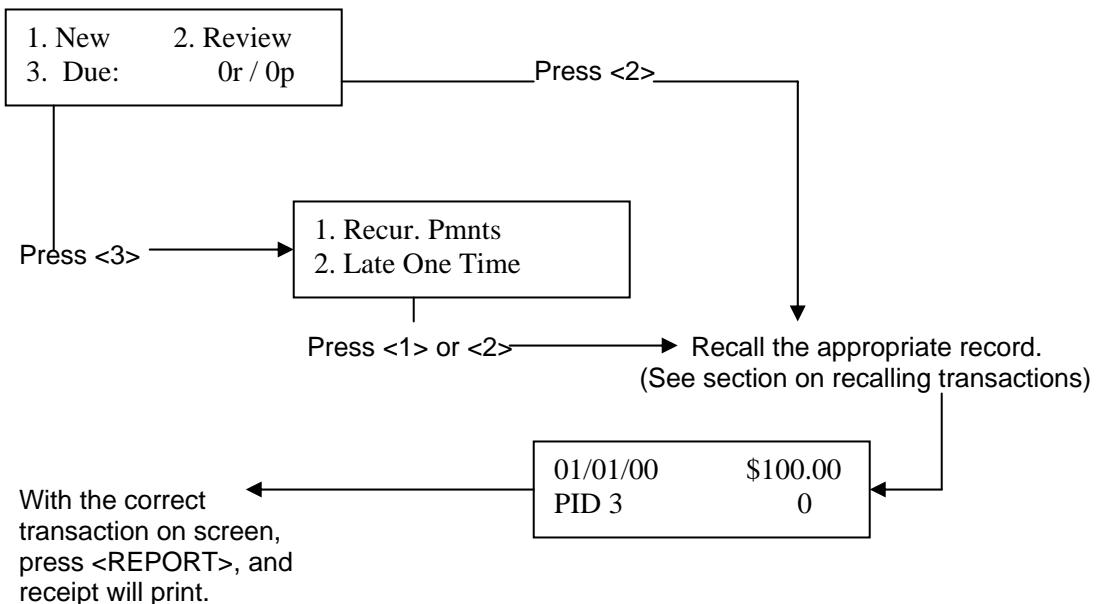
➤ PRINT TRANSACTION BY ALL OR GROUP

At the EasyPay Screen



➤ PRINT AN INDIVIDUAL TRANSACTION

From the EasyPay screen



Tips & Questions

Check the standard USER MANUAL for basic trouble shooting information.

➤ **KEYBOARD TIPS**

First Name A

First Name #

- When alpha response is required, keyboard switches to alpha mode. Notice the A or # on the top right hand side of the screen.
- Use the <MENU/ESC> key to shift between alpha and numeric mode.
- When in alpha mode and an error is made, press the <MENU/ESC> key then press the <REVIEW> key to backspace. Press <MENU/ESC> again to resume alpha typing.

