TRANSACTION EXPRESS PROCESS

TeamVision
Eye care, together.

There are some instances that result in a balance on the patient account within the E.H.R. Often patients walk in your office to pay and we re-direct them to the URL on their statement.

When a patient is using a debit/credit card- which is the preferred form of payment- you will be able to process these balances in office via the **Ciao! Toolkit** > **Transaction Express.**

Your billing team will set up appropriate team members or leaders in each location access to process payments in Transaction Express. New locations will complete this set up as part of Conversion Week activities.

Additional notes:

- This is for balances issued via Patient Statements (not same day payments).
- These payments will NOT be processed through Ciao! Optical.
- Not all team members require access.
- Billers will manage access going forward as we hire/retire, etc..
- Patients can also continue to pay via the URL listed on their statement.

Actions based on payment type:

Payment Method	Process

Debit/Credit Card
Preferred Payment
	• Staff will process via Transaction Express and provide receipt to patient
	• Staff will update E.H.R. to reflect payment
	• **Staff will email the biller the patient's name and the charge they processed**
	OR
	• Staff processes via URL on remittance form, if available
	    • Provider receipt to patient
	• Biller will continue with daily process of checking Persona Pay and updating EHR accordingly
	    • Same process if patient paid remotely

Check
Less Preferred
	• Combine check with statement and hold for biller
	• Biller will deposit/process payment and update E.H.R
	• **Off-Site Biller:** arrangements are made for staff to deposit into NCNO account
	    • Not comingled with CNO account or Ciao! Deposit
	    • Update E.H.R

Cash
Not Preferred
	• Very rare- Must be exact change or changed via drawer to give exact change
	• Hold in safe for biller to deposit
	• Update E.H.R.
	OR
	• Deposit into NCNO account and update Biller
	    • **Do not use site deposit slip**
	    • Needs to be deposited into NCNO account in a separate deposit
	• Update E.H.R.

HOW TO PROCESS A TRANSACTION

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1

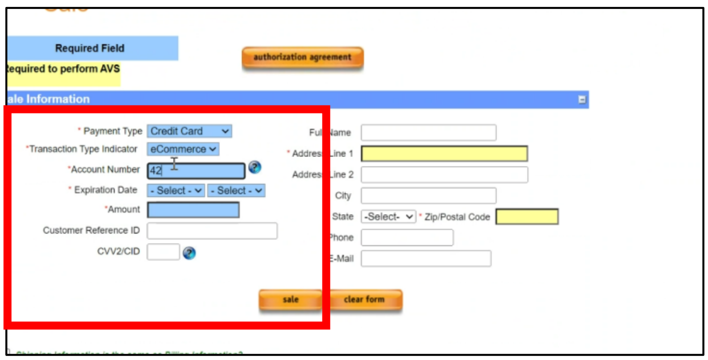
- Click the link to be redirected to [Transaction Express]
- When logging in for the first time, it will ask you to set up **2-Step Authentication**
  - This will be your own cell phone number (You will receive a code to your cell phone every time you log in)

2

- Once logged in, click on **Sale**

3

- **Complete** required drop-down bars
- Then press **Sale** and the transaction will process



- **Payment Type** -Credit Card
- **E Transaction Type Indictor** – Ecommerce
- **Account Number** (credit card number) & **Expiration Date**
- **Amount, Name, Address and Zip Code.**

4

- After the transaction is complete, you will receive **Approval** confirmation
- If card **Declined**, Auth Response Message will be **Declined** or **Insufficient Funds**
- To print the receipt, click **Print Receipt**