Vanco

Integration Instructions for Edge Cloud

ORTHO2

The Edge Cloud integration with Vanco allows you to easily process credit card and eCheck AutoReceipts through right from Edge Cloud. Vanco Payment Solutions is a PCI (Payment Card Industry) Level 1 Compliant Service Provider. Then, payment information is posted directly into patient ledgers. No additional Edge Cloud module is required.

Setup

Before you begin, please fill out the form provided by Vanco and fax it back to them at the number on the form. If your office separates finances (e.g., separate bank accounts) by orthodontist or by office location, you will need to request separate Vanco accounts. Vanco will then contact you with the following information. (Note that this is not the same as the login information for the Vanco website.)

Encryption Key – Card Swipe/Virtual Terminal: _____

Vanco iFrame ID – Recurring Charges: _____

Vanco iFrame ID – Card Swipe/Virtual Terminal: _____

Vanco Client ID: _____

Vanco User ID: _____

Vanco Password: _____

If you will be processing credit cards, it is necessary to have the appropriate credit card fields (Cardholder, Credit Card #, and Expiration Date) completed in the Payments on File section of the appropriate Responsible Party tab of each patient with an AutoReceipt agreement

If you will be processing ACH electronic transfers, it is necessary to have the ACH Information fields completed in each Payment on File.

Setting up Edge Cloud Client Information for Each Orthodontist or Office

1   From the Edge Cloud ribbon bar, click **Editors** in the Tools tab and then **Payment Accounts** under Financial.

2   Type an **Account Name**, select a **Receipt Type** (e.g., credit card or elec. transfer), and select Vanco from the **Provider** list.

Create a payment account for Vanco. Complete each **Vanco** field with the information provided by Vanco. If you have multiple doctors, be sure to complete these fields for each orthodontist and office. Typically, this will be the same information for each orthodontist, but you will have requested and received unique IDs if your practice separates bookkeeping by orthodontist or office.

July 22, 2019

Using the Integration

The AutoReceipt feature allows you to set up regular automatic payments for your patients' contracts. This allows you to save time posting payments when you have set up an agreement to charge their credit card every month or make regular withdrawals from their bank account. You always have the opportunity to review and cancel any payments before posting them to Edge Cloud.

A contract with an AutoReceipt contract is indicated on the Responsible Party tab.

Creating AutoReceipts

AutoReceipts are created in the Responsible Party tab.

1 Click Add under AutoReceipts.

2 Select the mode of AutoReceipt.

    a Auto Payment: Auto payment agreements process payments for the current amount due from all contracts for this responsible party. You enter the *start* (and optionally end) dates, the *payment on file* to use for processing the payments, *day of the month* the payment should be withdrawn, and the *payment interval* (e.g., monthly, quarterly).

    b Contract Based: Contract based agreements process payments as the fees for a specific contract fall due. You first specify the *contract* to work with, then enter the *start* (and optionally end) dates, and the *payment on file* to use for processing the payments.

    c Manual: *(Use sparingly)* Manual agreements process payments according to a schedule you specify. Neither the actual amount due nor the associated contract affect this agreement.

3 Fill out the following information as appropriate for each mode:

    Start Date: Set the date the contract starts.

    End Date: Optionally set the date the contract ends.

    Payment on File: Select the appropriate payment on file.

    Due Date: This is the date on which the payments fall due.

    Payment Interval: This is the frequency with which your payment should post.

4 Click **Finish.**

Editing AutoReceipts

To edit an AutoReceipt contract, access the AutoReceipt feature just as you would when creating an AutoReceipt on the Responsible Party tab.

Select the AutoReceipt contract you wish to modify, make the necessary changes, and click **Save**.

To delete an AutoReceipt contract, select it and click the red X.

Posting AutoReceipts

Once a month, or as often as you have AutoReceipts set to be paid, you should review and post the payments.

Access the AutoReceipt Review in this way:

- From the ribbon bar, click **AutoReceipts** from the Financial tab.

The *Post AutoReceipts* window details each transaction that is scheduled to be posted.

Each transaction contains two lines of information.

The first line of information contains the **Next Date** that the transaction is due, the **Balance**, the **Description** for the transaction that will be posted, and the **Amount** of the transaction.

The second line of information contains the **Patient Name**, the **Billing Name**, the **Treatment**, and the **Expiration Date** for their payment method.

For security reasons and to remain compliant with PCI standards, complete credit card information will not appear on the responsible party tab. Tokens are stored inside of Edge Cloud rather than the actual credit card information. The last four digits of credit cards numbers appear, in addition to the expiration date, instead of the entire number.
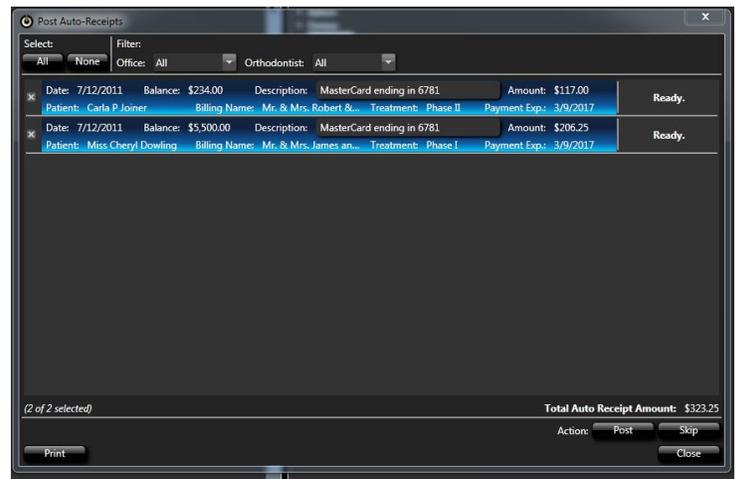
5 Review the pending receipts list. Limit this list, if you choose, by selecting a particular **Office** or **Orthodontist**.

You may want to only process office one's receipts at office one and office two's receipts at office two. You may want to process Dr. Smith's receipts and Dr. Jones receipts separately.

6 Select the transactions you wish to post. You may click the box beside a transaction to select/clear it, or click the **Select All** or **Select None** buttons to select/clear all transactions. Notice the total amount of money to be posted from the selected transactions appears at the bottom of the list.

7 If there are any transactions you do not wish to post at this time, you can leave them pending or skip them. Skip any transactions you will not want to post by checking the box beside the transaction to select it, then clicking the **Skip** button. The selected payment is skipped, but the AutoReceipt cycle in the patient folder remains intact. To permanently alter an AutoReceipt cycle, follow the instructions for Editing AutoReceipts above.

8 Click **Print** if you wish to generate a report of the transactions.

9 Click **Post**. The message "All receipts posted successfully" (or a message indicating errors) will appear. In either case, you will have the option to view the log.

Because your client has an opportunity to deny the transaction, be sure to use the reports provided by Vanco to follow up. Any canceled transactions need to be manually reversed in the patients' ledgers.

Contact

Vanco
Vanco
400 Northridge Road, Suite 1200
Atlanta, GA 30350
www.vancopayments.com
800.675.7430

Edge Cloud
Ortho2
1107 Buckeye Avenue
Ames, IA 50010
www.ortho2.com
800.346.4504 or 515.233.1026