

How to use Payment Gateway

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This guide explains how to use Payment Gateway to request Credit Card information when booking an appointment and how to Bill a patient using the ePayment option.

Considerations

- Payment Gateway requires Zedmed v37.7.4 or later.
- Credit cards are recorded in Zedmed using a secure token that only contains a card's last 4 digits and expiry date.
- When a patient provides a credit card, its validity is checked before the card is accepted.
- SMS payment information requests require ZedSMS and use SMS credits.
- The Payment Gateway options only display for practices with Payment Gateway enabled.
- If a NOK provides a credit card for a child, that card will be added to the child's profile and can be selected when billing.
- Once a credit card is provided, it will be available for billing until the card expires.
- Credit card information can be added to a patient's record from an SMS or OLA credit card request.

To learn more, see our Payment Gateway FAQ For onboarding and setup, see the PG admin guides.

Online Appointments

With Payment Gateway enabled, Online Appointments (OLA) will request a credit card when the booking is made even if a card has already been added using an SMS request. If the card provided by OLA is the same as an existing card, no change is made, and OLA will not ask again. If a different card is on file, the OLA card will be added and made the preferred of the 2 cards. OLA bookings have a cloud icon and will show the credit card icon in the Appointment Book if the patient already has a credit card via OLA. If a card is requested in OLA, it will charged and then refunded \$1 to verify its validity.

Requesting a credit card

Staff can request credit card information using an SMS and patients can be asked for a credit card when using OLA.

When a patient is using Online Appointments

• See the OLA booking with PG guide.

When staff are booking an appointment

Office staff can send an SMS to the patient requesting credit card information if the patient does not have a card on file. The Appointment Details screen will show a <u>credit card icon if a card is already on file</u> and does not need to be requested.

When the patient provides the credit card, it is verified and a credit card icon will displayed next to their name in the

Appointment Grid, it can then be used for billing future appointments.

To request credit card information:

- 1. From the Appointment Grid, search and make an appointment for a patient.
- 2. In the **Appointment Details** screen, check if there is a credit card icon. If there is no icon, there is no valid credit card on file.
- 3. When no credit card is on file, select the arrow beside Close and select Close & Request Payment Card.

The appointment will be created, and the patient will receive an SMS asking them to enter credit card information.

If the patient does not have a mobile phone in their patient record, a warning will advise the request cannot be sent.

Appointme	ent Details						
Date	Tuesday	, 19 M	lovembe	er 2024			
Created by Doctor	Office A Phillip D	dmin avis		on 19/11,	/24 at 11:32	Black, Emma	
Resource Start Time	11:15		Clinic	Branch 1	~	File Nº 62	A credit card icon means
Duration	00:10	\$	Status	Current	~	First in	a card is on file.
End Time	11:25	\$	Type	Std Consultation	~	Phone (H)	Work (W)
Notes					*	Mobile Address 30 3rd St	treet, ELLEN GROVE 4078
					v	Other Details Expiry MC Referral	HCC
Reason for o	chosen dat	e	-		~	Clinical Warn	ings
Hide Notes Account Pa	ivalong Pr (ivers		Allow SMS	5 Send Confirmation S	MS 🗆		
Black, Emi	ma			P1 \$.00			If there is no credit card icon, send a card request.
Repeated bo Print Label	ooking Book	ing rule	es Pri	nt Letter 🛛 🕞 Find Patient	Print S	lip	Close 🖌 Caqcel Help
						15	Close & Request Payment Card

You can also send a payment card request to an existing appointment:

1. Confirm there is <u>NO credit card icon</u> to the right of the appointment. The example shows where the icon will display.

C82 Smith, Henry Std Co

2. Right-click the appointment and select Request Payment Card.

15	62 Black, Emma	Std Consultation (11:15 11:35)
30		Add (Patient)
		Add (Non-Patient)
45		Add (From Cancellation Waiting List) Ctrl+
0		Details
		Edit
		Delete
		Request Payment Card

Billing a patient

To bill a patient, follow the **private patient billing process** and select **ePayment** for the payment type as shown below. This will use credit card information that will have been added to the patient record via an SMS card request or an OLA booking.

- For Payment Gateway, the **patient** is always the payer.
- Billing will use QuickPay however MA Online is also supported if a rebate is required.
- The invoice must have the correct treating practitioner so the correct Bank List receives the payment.

To bill the patient:

- 1. Follow the private patient billing process ensuring that the patient is the payer.
- 2. Important: Check the correct treating practitioner is selected.

Tryo sends the payment to the bank account linked to the treating doctor. This could be the practice or the doctor's account.

- 3. Select QuickPay.
- 4. Select ePayment.

The ePayment dialog will display the cards recorded for the patient and the patient's email address.

Email considerations:

- By default, the receipt will be sent to the patient's email address. You can untick this option in the dialog.
- You can add email recipients using a comma separator, for example, the payer's email address.
- If you select **Update patient email**, it will use the email entered to update the patient's record.
- 5. Select the card to use.

If there is only one card, it will be selected by default.

Card considerations:

- Credit cards are ordered by the last card added.
- The selected card will have a dark grey highlight.
- If the appointment was booked in OLA, the card provided will be selected by default and have a card icon next to it.

Payment Cards				
Account Payer	Card Type	Card Number	Expiry	Valid
Gilmour, David	MONSTERC	X000X X000X X000X 9876	06/27	1

- A child with no credit card on file will show the parent's credit card/s if the parent is listed as a payer.
- All credit cards on file will be listed in the patient's record and show the payer's name.
- The credit card's last 4 digits are shown so you can confirm the card with the payer.
- 6. Select Bill.

IVC	pice									
5	Quick Pay									
12	62 E	mma Black		Patient	Family	Patient	Family	Credits		
ľ	Payer Black, Emma		Due	0.00	0.00 Deferred	0.00	0.00	0.00		
	Allocate	O Value 71.30	0	Discounted val	ue 71.30	Gap 35.00				
-	Payments Format	Name	Bank	Brand	th Detail	Be	nklist Amount			
	~				_	P	D 4			
	1. Cash	2. Cheque	3. MC Cheque	Tyro E	ftpos ePaymer	nt			Add	Change
	4. Card	<u>5</u> . Eftpos	6. Direct Depos	sit <u>7</u> . Cre	dits Tyro Eas	him				
				ePaj You	yment u are about to bill the pati	ent's credit card with	h the amount of Si	71.30		
				ePay You A r P	yment u are about to bill the pati eccipt can be sent to the p ayment Cards	ent's credit card with patient at the email a	n the amount of Si address below if er	71.30 ntered.		
				ePay You A r P	yment u are about to bill the pati eccipt can be sent to the p ayment Cards Account Payer	ent's credit card with patient at the email of Card Type	n the amount of S address below if er Card Number	71.30 ntered.	Expiry	Valid
				ePaj You A r P	yment u are about to bill the pati eccipt can be sent to the p ayment Cards Account Payer Black, Emma	ent's credit card with patient at the email of Card Type MASTERCARD	h the amount of Si ddress below if er Card Number 3000X X00X X000	71.30 htered. K 0008	Expiry 01/39	Valid Valid
	⊖ Famil	y Due & Invoice	O Patient Du	ePaj You A r P	yment u are about to bill the pati eccipt can be sent to the p ayment Cards Account Payer Black, Emma	ent's credit card with patient at the email a Card Type MASTERCARD	h the amount of Si Indiress below if er Card Number XXXX XXXX XXXX	71.30 ntered. K 0008	Expiry 01/39	Valid
[) Famil	ly Due & Invoice	O Patient Du	ePaj You A r P Le & Invoi	yment u are about to bill the pati eccipt can be sent to the p ayment Cards Account Payer Black, Emma ail Address: <u>redmedte</u>	ent's credit card with batient at the email a Card Type MASTERCARD	h the amount of Si address below if er Card Number XXXX XXXX XXXX XXXX XXXX XXXX	71.30 ntered. K 0008	Expiry 01/39	Valid V
) Famil	ly Due & Invoice	O Patient Du	e Pag You A r P Le & Invoi Em	yment u are about to bill the pati- eceipt can be sent to the p ayment Cards Account Payer Black, Emma ail Address: <u>tedmedte</u> Email receipt to patient Update patient's email	ent's credit card with patient at the email a Card Type MASTERCARD	h the amount of Si Iddress below if er Card Number 2000 XXXX XXXX XXXX XXXX	71.30 htered.	Expiry 01/39	Valid V

The ePayment dialog will close and a confirmation message will appear on the Quickpay screen.

Payments Format	Name	Bai	nk	Branch	Number		Banklist Amou	nt		
	·			·]		_	PD 🗸			
<u>1</u> . Cash	2. Cheque	3. MC Che	que	formation	- · · ×	0			Add	Change
4. Card	5. Eftpos	6. Direct D	eposit							
ePayment				Payme Receip jsmith	ent successful ot successfully sent to: @zedmed.com.au		PD	95.00		
					Скок					

You can now process MA Online or ECLIPSE as required.

Claiming a rebate (MA Online)

When a patient pays using Payment Gateway, a claim can be submitted using MA Online.

- 1. Follow the standard private patient billing process but use ePayment as the payment method (not EasyClaim).
- 2. Then select **MA Online** and complete the **Interactive claim** screen then select **Send** to transmit the request to Medicare.

The MA Online steps are outlined in the Private Patient invoicing guide, starting from step 10.

Taking a pre-payment

Step 1 - Take the prepayment

- 1. Open the patient's record.
- 2. Select Receipt.

Opens the Receipt Payment screen.

- 3. Select ePayment.
- 4. Check the correct bank list is selected.
- 5. Enter the payment amount **Amount**, select Tab on your keyboard.
- 6. Select Add.
- 7. Select Allocate.

The Allocation screen will open.

8. Select **Cancel** as there is no invoice to allocate the payment to.

Patient Details	Family Name	Jones			File#	22		Pull File 🔽
Further Details Recalls	Given Name	Нарру		Initial	Hosp. UR No			Clinical Warnings
Notepad	Preferred Name			Former	Usual Branch	Branch 1 (22)		~
Receipt Payment								
22	Mr Happy Jones	P	atient Family		Patient	Family	Credits	
Payer Jones, Ha	арру ~	Due	0.00 0.00	Deferred	0.00	0.00	20.00	
Payments ormat	Name	Bank	Branch	Detail	ſ	anklist Amour	nt	
	×				U	×D <u>×</u>	20.00	
L. Cash	2. Cheque 3.	MC Cheque	Tyro Eftpos	ePayment				Add Chang
L. Card	<u>5. Eftpos</u>	Direct Deposit	7. Credits	Tyro EasyC	laim			
					-			
					Paymen	t Total	0.00	
	() Family Due	0	Patient Due	Amount	Due	0.00	
					Balance		0.00	

The patient's Acct Enquiry will show the total credits available to the patient.

Accou	Int Enquiry															-	0 X
Patient	Jones, Happ	y .											Display Ingoices	Outstanding	~ O inv	oice Only	O Full Details
Payer	Jones, Hap	ру		× (Recalculate								Account Pa	ayer Credits	40.00		Allocation
Curr	0.00	30+	0.00	60+	0.00	90+	0.	00					_	Total	0.00	Deferred	0.00
Transactio	on																
1	nvoice#	Date	Patien	t			HIC	CLM#	Br	Dr	Value	Outstanding					

Step 2- Apply the credit when billing

When you bill the patient:

1. Select Credits then select Add.

The recorded deposit will be added as a credit and reduce the Amount Due and the Balance due.

22	Mr Happy Jones								
		Pi	atient Fam	ily	Patient	Family	Credits		
Payer Jone	es, Happy	Due	0.00	0.00 Deferred	0.00	0.00	0.00		
Current Invo	ice(s)								
9	Allocate O Value 71.30	ODisco	ounted value 71.30) OG	ap 35.00				
Payments									
format	Name	Bank	Branch	Number		Banklist Amor	unt		
	~					PD v	31.30		
1. Cash	2. Cheque	3. MC Cheque	Tyro Eftpos	ePayment				Add	Change
4. Card	5. Eftpos	6. Direct Deposit	7. Credits	Tyro EasyClai	im				
redits						PD	40.00		
			10						
					Davena	et Total	40.00		
					Payme	ine rotai	40.00		
	O Family Due & Invoice	O Patient Due &	Invoice	Invoice(s) Only	Amou	nt Due	71.30		
					Balan	ce	31.30		

2. Important: Check the correct Banklist is selected. It will show the one linked to the treating doctor.

3. Select ePayment.

The **ePayment** screen will show the credit card to be used, and the email address the receipt will be sent to. 4. Select **Bill**.

A confirmation message will appear.

22 Mr Payer Jones, Happy Current Invoice(s) Allocate	Happy Jones ePayment You are about to bill th A receipt can be sent t	Patient	Family 0.00 Deferred the amount of \$31.30 ddress below if entered.	Patient	Family 0.00	Credits 0.00
Payments Format N	Payment Cards				A	mount
~	Account Payer	Card Type	Card Number	Expiry	Valid	31.30
	Jones, Happy	VISA	XXXXX XXXXX XXXXX 1019	01/39	1	
1. Cash 4. Card	Jones, Happy	MASTERCARD	30000 30000 30000 0008	01/39	1	Add Change
	Email Address: zed	imedtesting+hJones@gmai	il.com			
	Email receipt to pat	ient nail				40.00
O Family	- oponie policiti y ci		6			71.30
			L	Bill	Cancel	31.30
Eclipse MA O	njine Suppress	Combo Inv. Send to Pa	atient -	Bill	Cancel	31.30 Print Cancel

Managing credit cards and card requests

Message manager

The Message Manager shows SMS payment card requests as **Payment Details link.** There is a **Message Category** filter for Payment Details requests.

💋 Message Manager										×
	ncel Appointment									
Date	Date/Time	Patient	To/From	Status	Category	Response	Error	Action Status	Actioned On	Acti
Today O Vartarday	19/11/2024 11:34 AM	Emma Black	0491 575 789	Sent	Payment Details Link			No Action Regul		
Olect 7 Dem	19/11/2024 11:09 AM	Cor'Nelius Andrews	0491 578 148	Failed	Payment Details Link		Serve	No Action Requi		
O Last / Days	19/11/2024 09:22 AM	Talia Simkins	zedmedtesting	Sent	Clinical Document			No Action Requi		
ORange	19/11/2024 08:20 AM	Talia Simkins	0491 578 888	Sent	Medicare Consent			No Action Regui		
From 19/11/2024 🗘 🛅	19/11/2024 08:14 AM	Herb Lamb	0491 572 665	Sent	Payment Details Link			No Action Requi		
To 19/11/2024	19/11/2024 08:11 AM	Herb Lamb	0491 572 665	Sent	Payment Details Link			No Action Requi		
	19/11/2024 08:08 AM	Marrianna-Louise Jones	0406 991 730	Sent	Confirmation			No Action Regul		
mly Range	19/11/2024 07:50		0491 577 644	-Carlos					States of Concession, Name	

Action Status	Massana Details
Patient < All >	Please add credit card details for Branch 1 https://stage.paymentgateway.systems/card-details/ec4d080c-95e7-4682-b4e6-fa0016b06084
Find Patient Clear	
	Refresh Close

Patient Record

In the patient's record, the **Payment Cards** menu displays all cards on record. Only the card type, last 4 digits and expiry date are recorded.

The Valid field

This is based on the expiry date and will have a tick if the card has not expired. If the payment does not have a valid card, a credit card icon will not appear on the appointment screens.

The Remove button

This button removes the highlighted card. To Remove a card, a user must have the **Administrator** role or the security Function 'Patient Records' > 'Patient Details- Payment Cards (Edit)'. If you add this Function, please wait an hour for the API to update or contact Zedmed Support for an API restart.

tient Details	Payment Cards			-		
rther Details	Card Type	Card Number	Expiry	Valid		
calls	MASTERCARD	X000X X000X X000X 0008	01/39	~		
tepad				_		
eHealth						
essages	<i>a</i>					
yment Cards						
		4	-			
						Remove

If the card was provided via Online appointments, there will be a credit card icon next to the Card Type in the Quick

Pay > Card selection screen. The card will be selected by default for the OLA appointment even if there is an existing card.

Payment Cards				
Account Payer	Card Type	Card Number	Expiry	Valid
Gilmour, David	MONSTERC	XXXXX XXXXX XXXXX 9876	06/27	1

The patients' workflow

Patients can be prompted to provide credit card information when reception sends an SMS request or when making an Online Appointment. In both cases, a secure token for the card will be sent to Zedmed. This token does not contain the credit card information. Zedmed uses the token to integrate with Tryo, which manages the payment transfers.

For Online Appointments

• See the OLA booking with PG guide.

For SMS card requests

- 1. The patient receives an SMS with the text 'Please add credit card details for <name of branch> and a URL.
- 2. Tap the URL to open the online credit card information screen.



- 3. Enter their credit card information.
- 4. Tap Add Payment Information.

A confirmation message will display.

This link cannot be used again.

Once the card is verified, Tyro will send Zedmed a secure token, and the patient's appointment will display a credit

card icon.

Additional Resources

- Payment Gateway reconciliation report.
- How to process an ePayment refund
- How patients provide a payment card in OLA.