



## How to: Use Updox Payments (Beta)

### What is Updox Payments?

Updox Payments is a new product that provides a simple, quick way for Updox users to request payments from patients via SMS text message. Patients will be able to click a link received via SMS, verify their identity, and make an immediate payment, all from their mobile device.

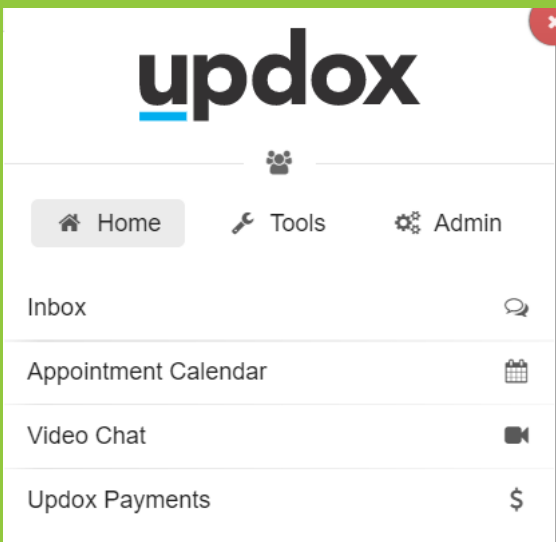
Updox users are able to manage payment requests from an easy-to-use dashboard, resending or cancelling requests and performing voids or refunds, all from one interface.

All core features are available during Updox Payments' beta stage, but the product will become more feature-rich as the beta period progresses.

### How do I use Updox Payments?

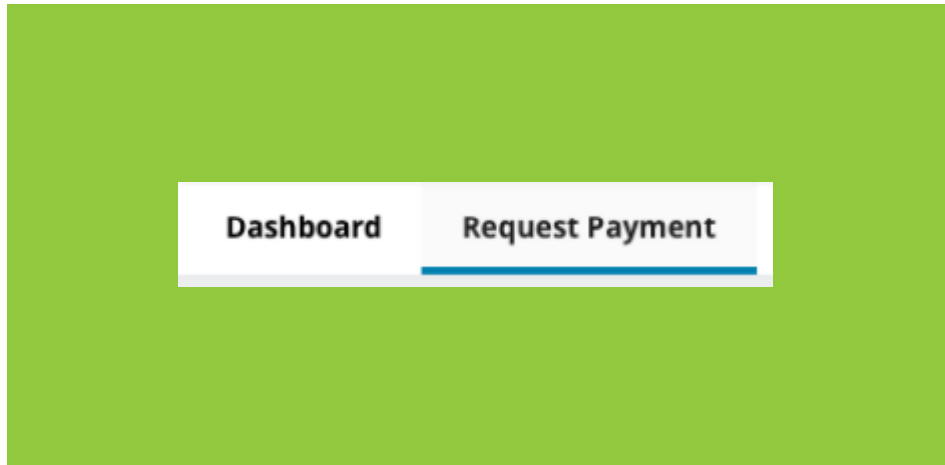
Follow these step-by-step instructions:

#### Accessing Payments



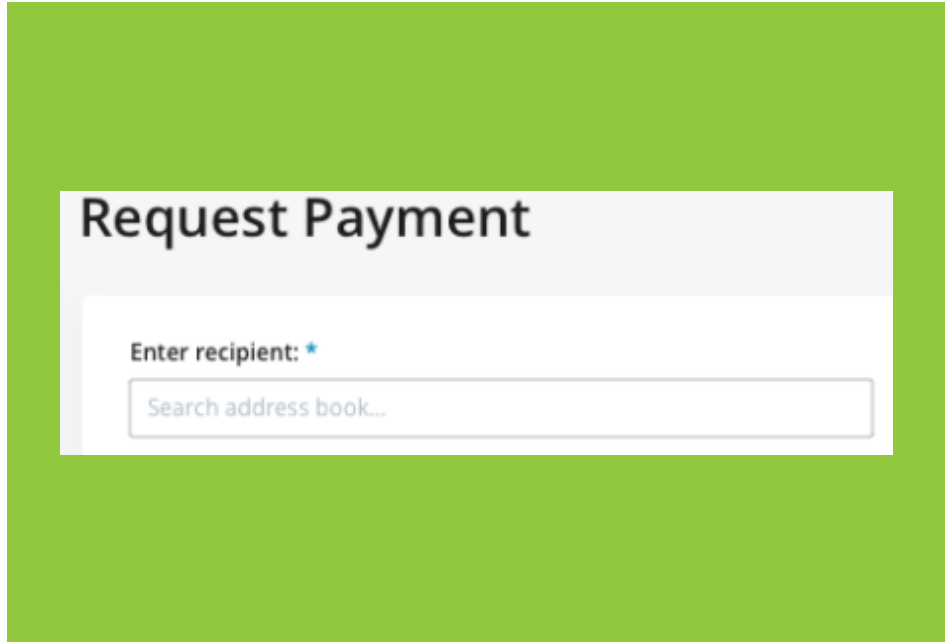
The screenshot shows the Updox dashboard home menu. At the top is the Updox logo. Below it are three main navigation buttons: Home (with a house icon), Tools (with a wrench icon), and Admin (with a gear icon). Underneath these are four menu items: Inbox (with a speech bubble icon), Appointment Calendar (with a calendar icon), Video Chat (with a video camera icon), and Updox Payments (with a dollar sign icon). A red 'x' icon is visible in the top right corner of the menu overlay.

Clicking the Updox Payments button in the Home Menu will open the Updox Payments request page.

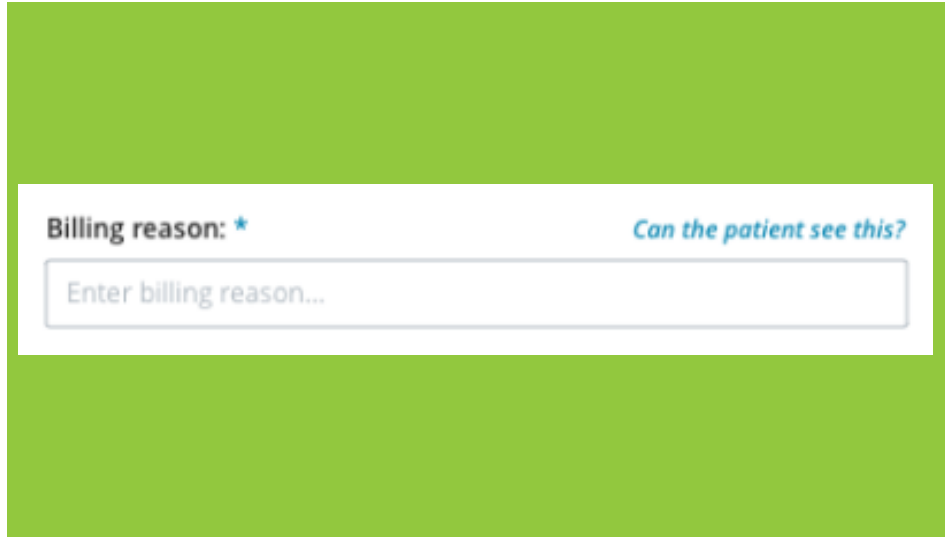


Use the navigation bar at the top of the page to toggle between the Request Payment page and the Payments Dashboard.

### Requesting a Payment



On the Request Payment screen, search for a patient in the “Enter Recipient” field.  
NOTE: Patients with no DOB or Cell Phone number in your Address Book will not be selectable. Please update your data to select these patients.



Enter a Billing Reason in the Billing Reason field.  
This information will not be included in the initial message sent to patients. Once logged in, the patient will be able to see the Billing Reason.

 <p>Amount requested: *</p> <p>\$ <input type="text" value="Enter amount..."/></p> <p><i>Note: The recipient will have the option to pay less than the amount requested (but not more).</i></p>	<p>Enter an amount requested in the Amount Requested field. The recipient will have the option to pay less than the amount requested, but not more.</p>
 <p>Request Payment</p>	<p>Click the Request Payment button to send the request to your patient.</p>
<h3>Patient Experience</h3>	
 <p>Hi Samantha. Please follow this link to make a payment to Updox Family Practice. Thank you! <a href="http://myupdox.com/payments/1462095784">http://myupdox.com/payments/1462095784</a></p>	<p>Your patient will receive a text message alerting them to the payment request, with a link to the payment interface.</p>

Payment requested on August 18th, 2021

### Verify identity

Please confirm your date of birth and name to view your secure medical information.

**Date of Birth \***

<input type="text" value="MM"/>	<input type="text" value="DD"/>	<input type="text" value="YYYY"/>
<i>Month</i>	<i>Day</i>	<i>Year</i>

**First Name \***

**Last Name \***



Clicking the link will take the patient to an identity confirmation screen, which will require the patient to enter first name, last name, and date of birth.

<b>2021-08-18</b> <i>Date requested</i>	<b>\$1.00</b> <i>Balance due</i>
<b>Billing reason:</b> Co-pay	
Accepted payments:	

**Amount \***

**Cardholder Name \***

**Credit Card \***

**Expiration \***

**Security Code \***

**Zip/Postal Code \***

Once logged in, the patient will see the practice name and telephone number, the date of the request, the amount requested, and the billing reason.

Patients will be able to indicate the amount they want to pay.

**NOTE:** Though patients will be able to make a partial payment, they will only have one opportunity to pay per request. If a partial payment is made, you will have to send an additional payment request to collect the balance.

Patients will enter their credit card information, and click the Submit Payment button.

## Simple Payments Test Practice

614-294-9798

**Payment successful**

**08/18/2021**

*Date paid*

**\$1.00**

*Amount paid*

**Auth code: 000042**

Thank you for your payment!

[Download Receipt](#)

The patient is then shown a verification screen. By clicking the “Download Receipt” button, the patient can download a receipt to their device for their records.

## Using the Updox Payments Dashboard

**Dashboard**

**Request Payment**

Navigate to the Updox Payments Dashboard by clicking “Dashboard” on the navigation bar at the top of the screen

Payments Dashboard [Request Payment](#)

Dashboard

Payment Requests

Filter results

Patient	Amount	Status	Requested	Paid	Actions
Eric Hauter DOB: 7/19/1972	\$1.00	Paid	8/18/2021 7:36 AM by Jacob Waller	8/18/2021 7:36 AM 1111	...
Jacob Waller DOB: 1/12/2000	— requested \$5.00	Locked	8/17/2021 11:32 PM by Jacob Waller		...
Jacob Waller DOB: 1/12/2000	\$5.00	Paid	8/17/2021 10:52 PM by Jacob Waller	8/17/2021 10:52 PM 1111	...
Jacob Waller DOB: 1/12/2000	— requested \$5.00	Cancelled	8/17/2021 10:38 PM by Jacob Waller		...
Eric Hauter DOB: 7/19/1972	\$1.00	Paid	8/17/2021 9:33 AM by Jacob Waller	8/17/2021 9:33 AM 1111	...
Eric Hauter DOB: 7/19/1972	— requested \$25.00	Requested	8/17/2021 8:54 AM by Jacob Waller		...
Mike Carlson DOB: 1/11/1988	— paid \$1.00 requested \$1.00	Voided	8/16/2021 4:30 PM by Jacob Waller	8/16/2021 4:34 PM 1111	...
Mickey Berry DOB: 1/12/2000	-\$1.00	Returned	8/16/2021 4:28 PM by Jacob Waller	8/16/2021 4:28 PM 1054	...
Adam Portyka DOB: 1/20/1983	— requested \$4.00	Requested	8/16/2021 3:33 PM by Jacob Waller		...
Mike Carlson DOB: 1/11/1988	\$1.00 requested \$10.00	Partially Paid	8/16/2021 2:18 PM by Jacob Waller	8/16/2021 2:18 PM 1111	...

The Updox Payments Dashboard is an overview of all payment requests (and their statuses) past and present.

Dashboard

Payment Requests

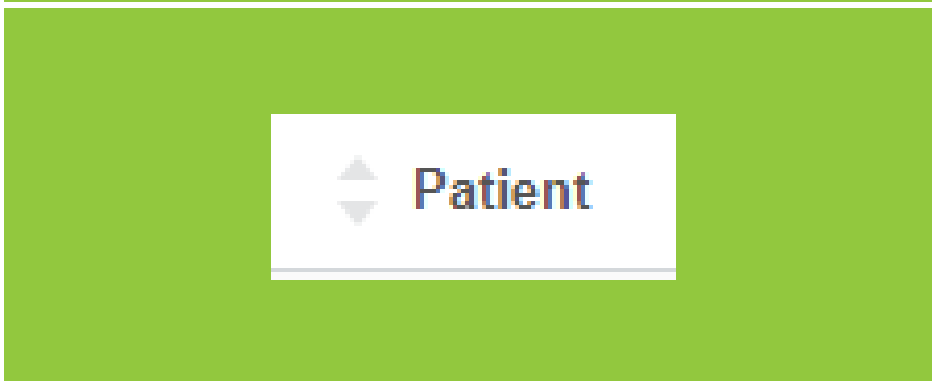
Eric

Patient	Amount
Eric Hauter DOB: 7/19/1972	\$1.00
Eric Hauter DOB: 7/19/1972	\$1.00
Eric Hauter DOB: 7/19/1972	— requested \$25.00

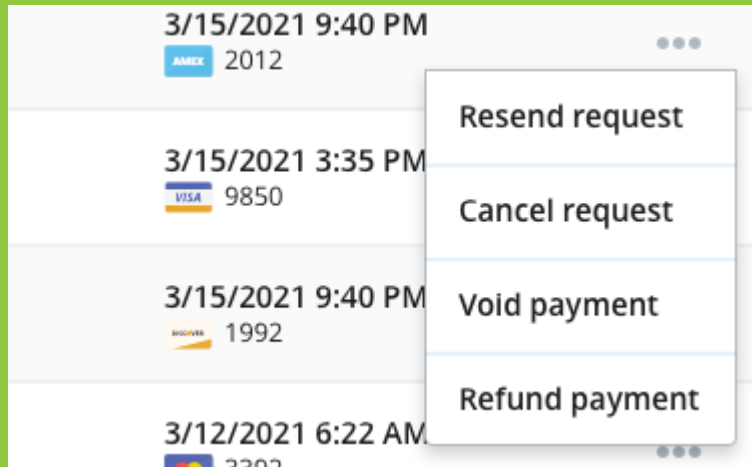
Search for transactions involving a specific patient, dollar amount, requester or date by typing in the search field.

Eric Hauter DOB: 7/19/1972	\$1.00	Paid	8/18/2021 7:36 AM by Jacob Waller	8/18/2021 7:36 AM 1111
<b>Details</b>	<b>Activity</b>		<b>Actions</b>	
Payment Reason: Co-pay  Cardholder Name: Eric Hauter Batch ID: 186 Transaction ID: 3c_611c10007548624441567e Authorization Code: 000042 Acquirer Message: 00004P	Payment Requested 8/18/2021 7:36 AM  Payment Paid 8/18/2021 7:36 AM		No further actions can be taken on this item.	

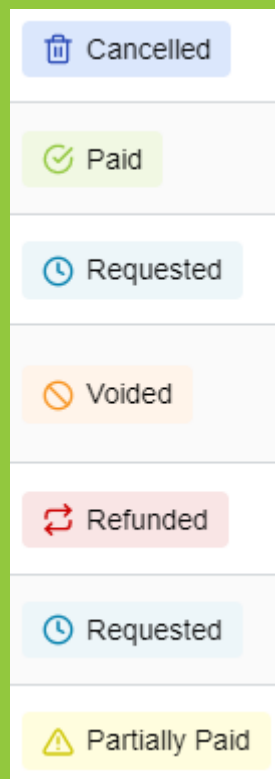
Click on any transaction to expand the view for more details.



Click on column headers to sort the view.



Click on the ellipsis on the right to take action on an item. **Note:** If your nightly reconciliation batch has not run, you will void a transaction. If it has run, you will refund the transaction. Though this image shows both options, Updox will automatically determine the best path.



Statuses tell the status of the items.  
**Requested** - an item that has been requested but has not been paid  
**Cancelled** - a request that has been cancelled by the practice  
**Paid** - a paid item  
**Partially Paid** - the patient paid less than the amount requested  
**Refund** - a refunded item  
**Void** - a voided item



Patient	Amount	Paid
Eric Hauter	\$1.00	8/18/2021 7:36 AM

The patient has paid the request, but the payment has not yet been processed. You may void this payment now prior to it being processed.

Cancel Void Payment

Taking actions on items will open a window, asking you to confirm the action. Once confirmation is made, the action will be taken and the item's status will change.

### Frequently Asked Questions

**Q:** Can patients store cards on file for later payments?

**A:** No, to keep all patient information secure, Updox Payments does not store any patient card data.

**Q:** Can I set up automated payment plans?

**A:** No, Updox Payments is intended to be used for one-time, ad hoc payments, like co-pays or fees.

**Q:** Can a patient pay on the same request more than once?

**A:** No, once a payment of any amount is made, the practice will need to send a separate payment request for the remaining balance due.

For more information, contact Updox at:

Sales@updox.com  
614-798-8170 x1

Support@updox.com  
614-798-8170 x2

Updox Learning Center  
<http://help.myupdox.com>