

## Kareo Platform

**Entering Patient Payments**

- 1.) Login to the Kareo Platform and find the patient account by typing the patient name into the search field ... then click the “Collect Payment” link.

Walking on Sunshine

Start typing a patient name on

**Feelin Sad**  
MRN: TEST  
01 Jan 1900 (122 yo)  
Male, (541) 941 - 7792  
Aetna

Collect Payment

Demographics

Profile | Contacts | Upcoming Appointments | Past Appointments | Patient Portal

**Feelin Sad**  
Active  
DOB: 01 Jan 1900 (122 yo)  
Marital Status:  
Sex: Male

MRN: TEST  
Previous Full Name:  
Maiden Last:  
SSN:  
Driver's License:

2.)

- 3.) Enter the payment amount received, and click “Add payment note” directly below:

Back Collect a payment

**Feelin Sad**  
01/01/1900  
(541) 941-7792  
123 Somewhere Street, Anywhere, Or, 97504

Total Account Balance \$0.00

Payment Amount  
\$20.00

Add Payment Note

Payment Method  
 Credit Card  Cash  Check  
 Do not charge credit card. For recording purposes only.

Enter a Card  
Cardholder Name: John Doe Card Number: 1234 1234 1234 1234  
Expiration Date: MM / YY CVC: CVC  
 Billing address is same as patient address  
 Save this card on file  
This requires the Credit Card Authorization Form. For Engage customers, this form will be emailed to patients with valid email on file via Patient Intake. All other customers can download the form.

Finalize Payment of \$20.00

4.)

- 5.) Type in the check or other reference number, and the check or payment date if the check or payment date is a date other than today, and select “check” or “cash” from the radial buttons to indicate the payment method... Click the [Finalize Payment...] button.

The screenshot shows a web form titled "Collect a payment" with a "Back" button. On the left, there is a patient information card for "Feelin Sad" with details: 01/01/1900, (541) 941-7792, and 123 Somewhere Street, Anywhere, Or, 97504. Below this is a "Total Account Balance" of \$0.00 with a "Print" icon. The main form area includes a "Payment Amount" field set to "\$20.00". Below that is a "Payment Notes" section with a "Remove Note" link and a text area containing "Check 654 Dated 1/14/22". A note below the text area states "This note is only visible to the practice." The "Payment Method" section has three radio buttons: "Credit Card", "Cash", and "Check", with "Check" selected. At the bottom of the form is a blue button labeled "Finalize Payment of \$20.00". An orange arrow points to this button. At the bottom right of the page are logos for "HITRUST" and "VERACODE VERIFIED STANDARD".

- 6.)
- 7.) You'll see a screen confirming the payment information. Click the [Submit Payment] button if all the information is correct.

The screenshot shows a confirmation screen titled "Collect a payment" with a "Back" button. The main message reads: "You are about to charge **Feelin Sad** a total of **\$20.00** for the following encounters:". Below this is a list of encounters: "Encounter on 05/20/2021". There is a checkbox labeled "Create itemized receipt (Use if FSA/HSA Patient)" which is currently unchecked. At the bottom left is a blue button labeled "Submit Payment" with an orange arrow pointing to it. At the bottom right is a link that says "Where does this payment go?".

- 8.)
- 9.) You'll see a confirmation screen showing payment details and options to print a receipt or email a receipt directly to the email on file (with the option to enter a different email address if needed).



\*\*\* Please use the following step-by-step instructions for processing a credit card payment from a patient received in the office.

## Collect Copay or Payment

The *Collect Payment* feature provides an easy way to record or swipe a card to post patient payments for copays and outstanding account balances.

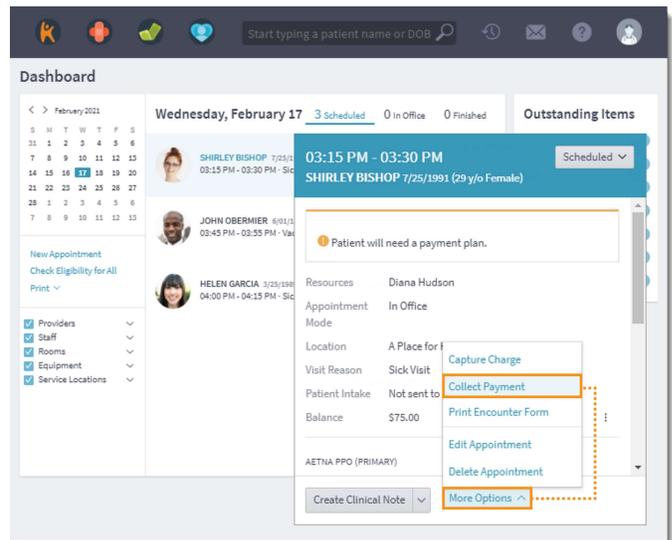
To collect patient payments via a [Stripe Terminal](#), review [Stripe Terminal: Collect Patient Payment](#).

### Important Notes:

- *Collect Payment* is only available for [Kareo Billing subscribers](#).
- Credit/debit card payments can only be processed if [Kareo Patient Collect](#) has been activated on your account.
- A payment processed through Kareo's Platform shows as an [Unapplied Payment](#) until it's applied to the patient's account in the Kareo Desktop Application.

## Initiate Payment

1. Hover over the *Platform* icon and click on **Dashboard**. The *Dashboard* opens.
2. Click on the appointment to view the appointment card.
3. Click **More Options** > **Collect Payment**. The *Collect a Payment* page opens.



## Collect Payment

1. Verify patient details, review outstanding charges and unapplied payments.
  - Click **Total Account Balance** to see an overview of charges and unapplied payments.
  - To view or print the *Balance Details*, click **Print**.
2. By default, the *Payment Amount* field is populated with the *Total Account Balance*. If necessary, enter a different payment amount.
  - To enter additional details about the payment (e.g., date of service), click **Add Payment Note**. This note is only visible to the practice and does not print on the patient receipt.
3. Select *Payment Method* of "Credit Card", "Cash", or "Check".
4. If *Credit Card* is selected, select how to process the payment:
  - To record a credit card payment that has already been processed, click to select "Do not charge credit card. For recording purposes only."  
*Note:* If this option is selected, the payment will not be processed through Stripe.
  - To use a [saved patient payment card](#), click to select the card.
    - An authorized card indicates the patient signed and submitted the [Credit Card Authorization form](#) through patient intake or the practice [manually authorized the card](#).
    - An unauthorized card indicates the patient has not completed the [Credit Card Authorization form](#) or the practice has not [manually authorized the card](#) after the agreement was completed via paper.
    - The *Card Nickname* displays next to the card logo if it was entered by the patient when completing the [Credit Card Authorization form](#) through patient intake (Engage subscribers), or entered by the practice under the patient's [Payment Cards](#).

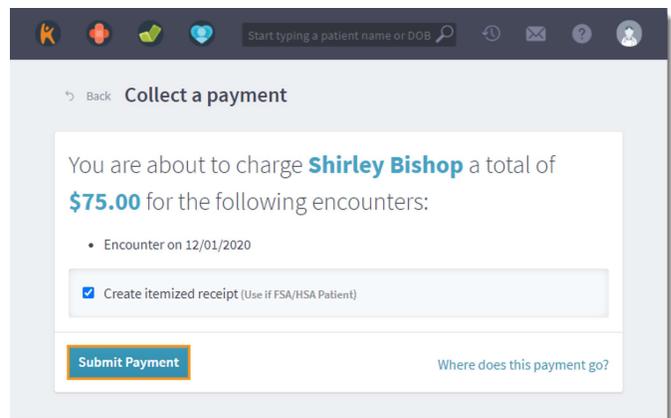
The screenshot displays the 'Collect a payment' screen. At the top, there's a search bar and navigation icons. The main content area is divided into several sections:

- Patient Information:** Shirley Bishop, 07/25/1991, (888) 775-2736, 68 Bluebird Lane, Irvine, Ca, 92612.
- Total Account Balance:** \$175.00. Includes a table with columns for Encounter, Amount, and Total. The total is \$175.00.
- Payment Amount:** \$75.00. Includes an 'Add Payment Note' button.
- Payment Method:** Radio buttons for Credit Card (selected), Cash, and Check. A checkbox for 'Do not charge credit card. For recording purposes only.' is present.
- Select card on file or enter new card:** A list of saved cards. The first is a Visa card (8880, Exp 01/26) marked as 'Authorized'. The second is a Discover card (5864, Exp 10/24) marked as 'Unauthorized'. There is a '+ Manually Enter New Card' link.
- Finalize Payment:** A blue button labeled 'Finalize Payment of \$75.00'.
- Enter a Card:** A section for entering a new card. Fields include Cardholder Name (John Doe), Card Number (1234 1234 1234 1234), Expiration Date (MM / YY), and CVC. There are checkboxes for 'Billing address is same as patient address' and 'Save this card on file'. A note states: 'This requires the Credit Card Authorization Form. For Engage customers, this form will be emailed to patients with a valid email on file via Patient Intake. All other customers can download the form.' There are also fields for 'Card Nickname (optional)' (e.g., John Doe's HSA Card) and 'Comments for practice (optional)' (e.g., Charge this card first).



- Any *Comments/Instructions for Practice* entered by the patient when completing the [Credit Card Authorization form](#) through patient intake (Engage subscribers), or entered by the practice under the patient's [Payment Cards](#), display as a *Note*.
- To manually enter, click **+ Manually Enter New Card**. Then, populate the *Cardholder Name*, *Card Number*, *Expiration Date*, and three-digit CVC code.
  - By default, "Billing address is same as patient address" is selected. If necessary, click to clear to enter a different billing address.
  - To simultaneously save the new [credit card on file](#) and email the [Credit Card Authorization form](#) to the patient for authorization (Engage subscribers only), click to select "Save this card on file". Otherwise, the patient agreement needs to be completed via paper.  
*Note:* For convenience and optional use, click **Download the form** for a template.
    - Optionally, enter a *Card Nickname* or notes (up to 500 characters) into the *Comments for Practice* field.
- 5. Click **Finalize Payment**. The *Collect a Payment* confirmation page opens.

- 6. Review the details in the confirmation window. If applicable, click **Back** to return to the previous window and make changes.
  - To generate a detailed receipt (e.g., for FSA/HSA patients), click to select "Create itemized receipt". Otherwise, a non-itemized receipt displays once the payment is submitted.
- 7. Click **Submit Payment**. The *Receipt* page opens.



## Payment Receipts

If "Create an itemized receipt" was selected when the payment was submitted, a detailed receipt displays. Otherwise, a non-itemized payment receipt displays.

- To print the receipt for the patient, click **Print** at the bottom of the window.
- To enter the patient's email address to receive a modified email receipt that only contains general information (e.g., payment confirmation number, date payment was processed, amount paid), click **Email** at the bottom of the window. *Note:* The full details of itemized and non-itemized receipts can only be printed and will not be sent via email.

Receipt for Shirley Bishop

**A Place For Healing**  
Billing Questions: (800) 555-1212  
Address: 3323 Michelson Dr, Irvine, Ca, 926123230

Thank you for your payment

Amount Paid: \$75.00  
Payment Method: Credit Card  
Payment Date: 02/17/2021  
Confirmation #: 423b9f1d-240b-48d1-b80e-9755e128c003

Services Breakdown

Encounter on 12/01/2020 \$100.00

Service	Rendering Provider	Cost	Prev Ins Pmt.	Prev Pat Pmt.	Adj.	Amt.
Office Or Other Outpatient Visit For The Evaluation And Management Of A New Patient, Which Requires A Medically Appropriate History And/Or Examination And Straightforward Medical Decision Making-When Using Time For Code Selection, 15-29 Minutes Of Total Time Is Spent On The Date Of The Encounter.	Diana Hudson	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00

Unapplied Payments: \$100.00

Total Account Balance: \$0.00

Print (a) Email (b) Back

