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RevolutionEHR introduces **RevPayments**, an **integrated payment processor**

Receive Payment Processing

▸ There are **no changes** to the current receive payment workflow. If RevPayments is enabled at the Location selected in the Receive Payments screen and Credit Card is selected as the Payment Method, there will potentially be **three options**:
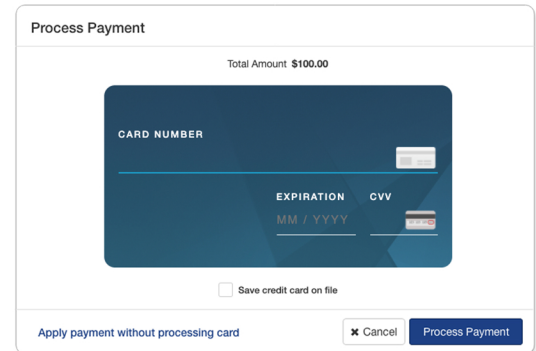
1. **Reader** – card is present | Reader | Manual | On File |
   Select a reader from the dropdown and the Process Payment modal will prompt the user to **swipe/insert card** to continue

2. **Manual** – card is not present | Reader | Manual | On File |
   The Process Payment modal will prompt the user to **enter card information** and **select 'Process Payment'** to continue

   Note: If a credit card has already been processed thru the terminal, selecting **'Apply payment without processing card'** will only post the payment in RevolutionEHR and not charge the credit card

3. **On File** – card is saved on file | Reader | Manual | On File |
   This payment option only displays if there is a saved card on file
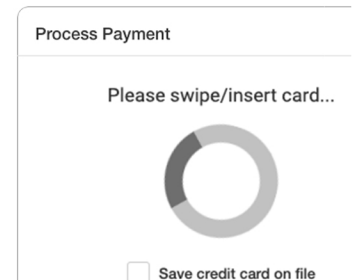
Save Card on File

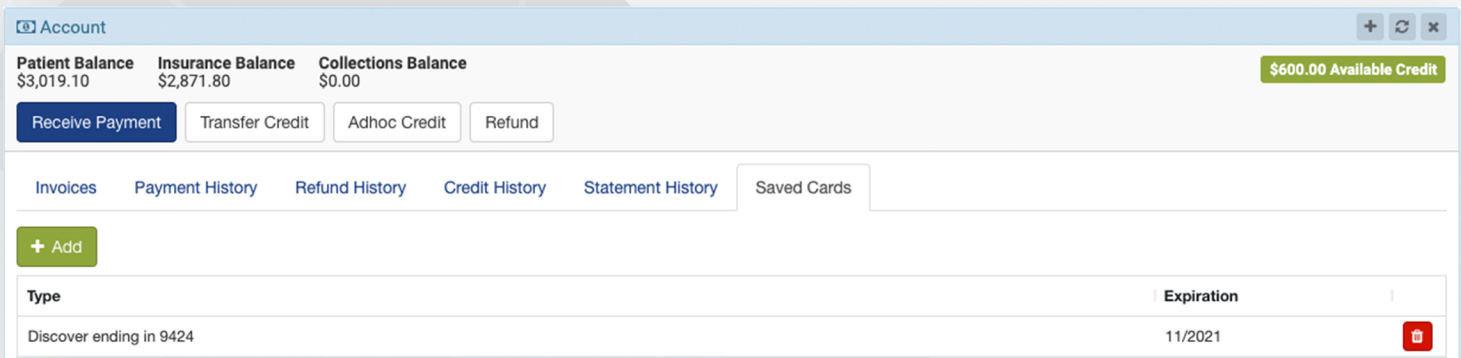▸ There are **two methods to save credit cards on file.**

1. Select the **'Save credit card on file' check box** in the Process Payment modal

2. **Add a credit card** in patient file under **'Account.'** See below

▸ **Permissions** to save and manage credit cards is located in **Admin** under **Employee/Roles > User Roles > Patient Module**
   ✔ View Saved Cards
   ✔ Manage Saved Cards

▸ The **'Saved Cards'** tab is located in the **patient file under 'Account'**

▸ **Add** and **delete** credit cards on file

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Permissions

▸ Permissions to refund and void payments via RevPayments is **located** under **Admin** > **Employee/Roles** > **User Roles** > **Accounting Module**

✔ Void Credit Card Payment via Payment Processor
✔ Refund Credit Card via Payment Processor

Refunds thru RevPayments can ONLY be processed in the patient file under 'Account'

Process Refund

▸ **Process Refund** thru **Reader**

▸ **Process Refund Manually**
There is **NO option to manually enter** credit card information

  Note: If the refund has **already applied to the credit card outside of RevPayments**, Manual allows the user to **apply the refund in RevolutionEHR without processing the credit card**

▸ **Process Refund** with a **Saved Card on File**

Void Payment

▸ To **void a payment**, navigate to the Invoice > Payment History tab (see below)

Select the 'Void' icon button to open the 'Void Payment' modal

▸ If the **payment was a RevPayment transaction**, the **void will be processed thru the integration** and the card holders' account will be updated

If the transaction has already been voided outside of RevPayments, **'Void Manually'** will **allow the user to void the payment in RevolutionEHR without processing the card**