

Release Notes:

PracticeWorks Version 10.2

Enhancements

The following is a list of enhancements included in PracticeWorks v10.2, a Sensei product.

Payment Manager Integration

PracticeWorks v10.2 integrates with Payment Manager, a secure online resource from Global Payments, Inc. (GPI) for processing credit card payments. When Payment Manager is enabled for your practice, you can use it to accept and process credit, debit, and insurance credit card electronic payments. You can also use Payment Manager to set up and bill automatic payments for payment plans.

The PracticeWorks Payment Manager credit card swipers are chip-enabled, and work with Visa, MasterCard, Discover, American Express, and Diners Club International credit cards, as well as Google Pay, Apple Pay, and EMV technology. Transactions are settled automatically each night.

For instructions on using PracticeWorks Payment Manager, see the [PracticeWorks Payment Manager Getting Started Guide](#).

Payment Manager Setup and Conversions

The Carestream Dental Implementations team is responsible for setting up Payment Manager and performing the necessary data conversions for PracticeWorks customers.

Accepting Patient Payments

When Payment Manager is enabled, use the Credit Card button from the patient's Ledger Card or the Checkout Ledger to initiate the payment process. Prompts are displayed requesting the relevant information, and then the Payment Manager interface is displayed. When the payment is processed, you are prompted to print a receipt and the payment is posted to the Ledger.

Entering Insurance Payments

Use Payment Manager to process Insurance payments that are delivered via credit card number. This method usually involves the manual entry of credit card information provided by the insurance company in their claim response. Enter these payments from the patient's Ledger Card/Add Entry feature. Use IP (for Insurance Payment) as the Description and Credit as the Payment type. Follow the prompts to enter the card information and submit. The payment is posted to the Ledger with the description: IP CR (Srv date).

Voiding or Refunding a Payment

You can void the full amount of a payment after posting it, on the same day, before it is settled through GPI. This removes Ledger Card entry but retains the action in the Audit Log. After the payment has been processed through GPI, you can refund all or part of the payment. To void or refund the payment from the patient's Ledger Card, select the transaction. Right-click and select Void/Refund credit card transaction and follow the prompts. Refunds create a new Ledger entry.

Setting Up Payment Plans

You can set up payment plans that use Payment Manager to process regular charges from a Responsible Party's credit card. Once the plan is activated, the card is charged automatically on the designated dates. When the Office Expert runs each morning, payment plan payments scheduled for that day are forwarded to Payment Manager.

IMPORTANT: PracticeWorks does NOT store credit card numbers. The interface between PracticeWorks and Global Payments, Inc. (GPI) shares a "token" that enables a repeat use of the card stored for the payment plan. The practice cannot access the full card information used by GPI.

To set up a payment plan from the patient's Ledger Card, select Add entry. The Post new entries window is displayed. In the Description field, type payplan and press the tab key. The Payment Plan Setup window is displayed. Enter the Credit balance and Number of installments, along with the frequency and due date.

Managing Failed Payments

When Payment Plans set up through Payment Manager fail to process for any reason, you are notified by the Office Expert with an entry that says: Failed payment plan credit card payments. The notification also provides the total number of failed payments, the number of affected plans, and the total dollar amount. You are prompted to Take action via the Failed Payment Plan Credit Card Payments Contact Expert.

Printing Daily Transaction Reports

You can generate a Credit Card Daily Transactions report for a specific date or date range. The report provides details of all Payment Manager transactions for that location for the selected dates. To generate this report, select File > Print > Accounts and Receivables > Credit Card Daily Transactions.

Customer-Reported Defects Fixed or Not Observed in PracticeWorks v10.2

None.