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The Exchange > Sensei Cloud > SENSEI CLOUD > CMP Weekly Release 0.0.0.4365



Anon
Not applicable



01-06-2020 12:43 PM

CMP Weekly Release 0.0.0.4365

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4365 | January 6th, 2020

Organizations that want to experience full credit card integration now have access to ePayments. This add on service ties CMP to the credit card processor, translating into simplified payment workflow.

Prerequisite for ePayments in CMP

Prior to setup an office must enroll in the service. To initiate the process, please contact a Carestream Dental representative at 1-800-944-6365. Once enrolled ePayments is enabled in CMP.

[Setting up ePayments in CMP](#)

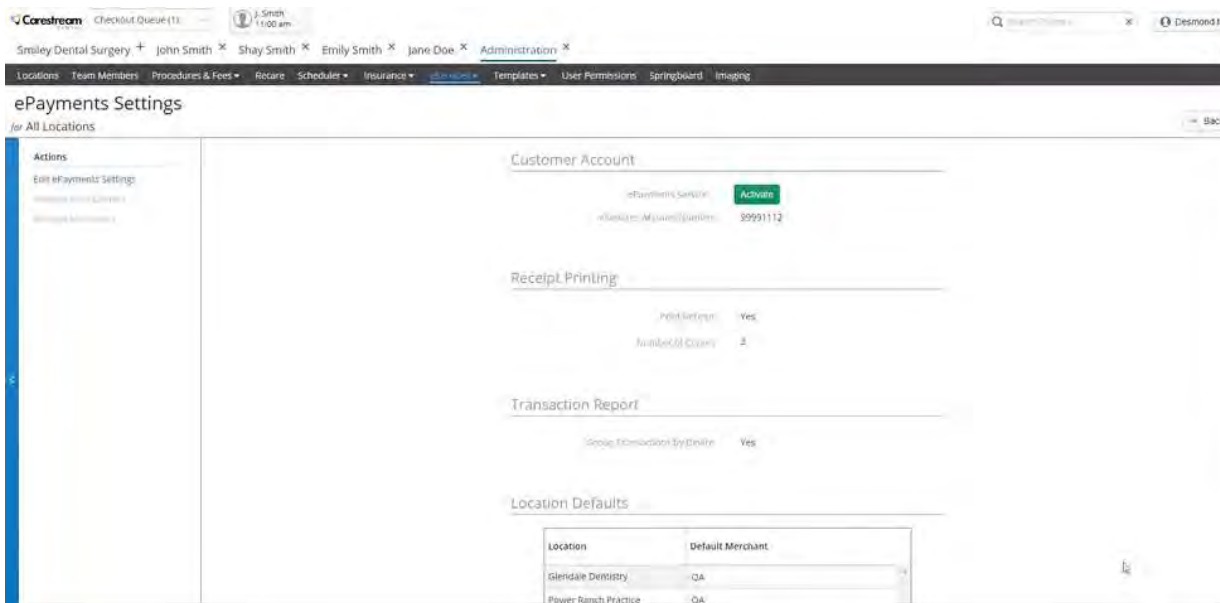
↑ Top

Once enrollment is complete the service will be activated via the green Activate button
Prior to usage, the following configuration options must be set:

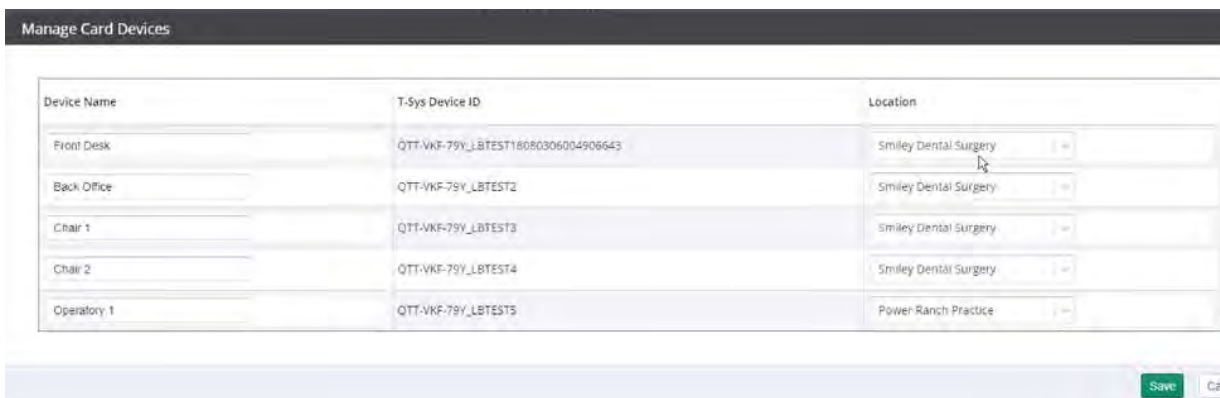
Print Receipt - Select this option to print a receipt after each credit transaction. Select the number of receipts to be printed each time.

Group Transactions by Device - If you have multiple credit card devices and would like transactions grouped by device, check this option. When unchecked all credit card transactions will be grouped together sequentially.

Location Defaults - For offices with multiple merchant ID's a default merchant should be selected per location.



Manage Card Devices - Found under Actions, allows devices to be renamed, typically corresponding to their location within an office. Devices are also assigned a default location.



Using ePayments in CMP

ePayments is accessible anywhere a payment can be posted in CMP. These include the patient mini card (visible from the Patient Search and other locations within CMP), Ledger, Checkout Queue, and Accounts Receivable List. With ePayments activated the Credit Card and Debit Card payment type descriptions are appended with ePay transaction.

John Smith - Post New Payment

Patient Payment and Balances

Patient Name	Amount Paid	Patient Balance	Resulting Balance
John Smith	\$5.00	\$150.00	\$145.00

Search to add additional patients

Payment Information

Location: Smiley Dental Surgery

Acceptance Date: Today

Payment Type: Select a payment type

Reference: Cash, Check, Credit Card (ePay transaction), Debit Card (ePay transaction), Insurance, Bank Transfer

Comment: The form of payment being submitted

Payment Amount

Post Payment

Once the payment is posted the ePayments Transaction window provides confirmation for charge information (card device to use, merchant selection, and transaction method i.e. insert/tap/swipe or manual entry). Selecting Submit sends the charge information to the card reader for completion.

ePayments Transaction

Patient Name: John Smith

Responsible Party Name: [Empty]

Payment Amount: \$5.00

Location: Smiley Dental Surgery

Use Card Device: Front Desk (Smiley Dental Surgery)

Credit To Merchant: LIVE

Transaction Method: Select a transaction method

Submit Cancel

The receipt image appears on screen and can be printed once payment is complete.

Manually keyed payments are entered on screen. Required fields are indicated by an asterisk. The amount of the payment is pulled from the CMP transaction and indicated on the "Pay" button.

Process Credit Card

*First Name

*Last Name

Address

Address (cont)

City

State

Zip

*Credit Card Number

*Security Code

*Expiration Date 10 2019

Cancel Pay \$1.00

With the transaction complete, the payment appears on the patient ledger. Selecting the payment displays the payment details along with an option to print a receipt.

Payment Receipt

ePaymentsDemo
ChangeMe
ChangeMe, GA, 12345

Patient Name John Smith

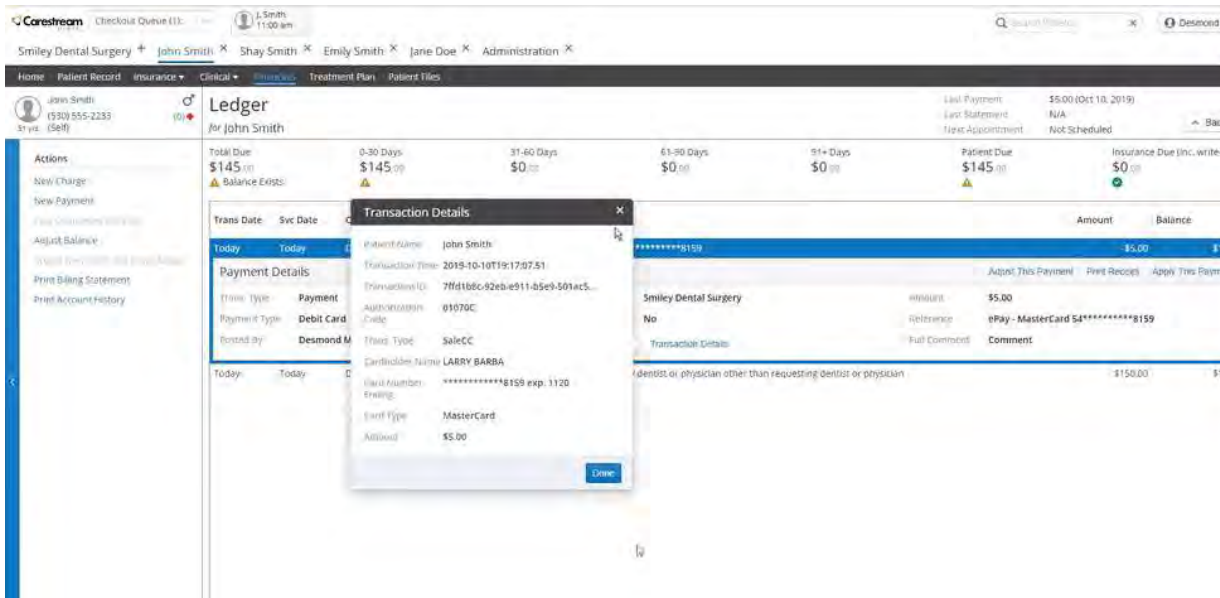
Transaction Time 11/12/2019 12:00:12 PM
Transaction ID 5008337816
Authorization ID 123456

Account Holder Name [REDACTED]
Account Number [REDACTED] 1004
Amount Charged \$52.20

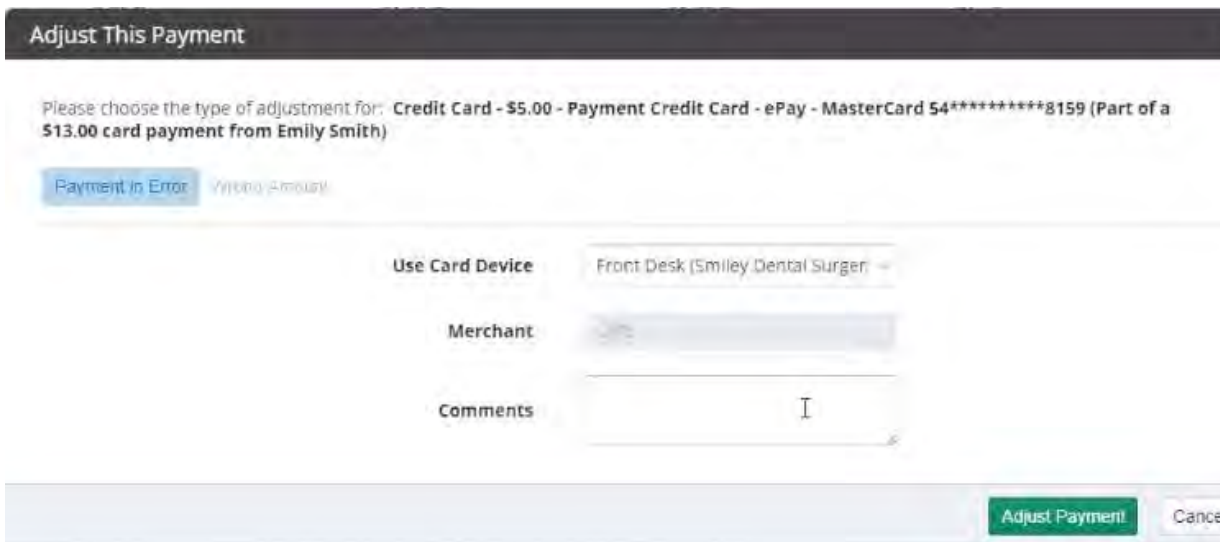
John Land
Signature

Printer HP8D0598 (HP OfficeJet 6950) Print

The payment details are available by clicking “Transaction Details”, located below “Is Split Payment”.



Reversing a payment is accomplished by selecting the transaction and choosing “Adjust This Payment”. With the card device selected and a comment recorded the payment may be adjusted. If the payment was previously settled the funds will be refunded. If the payment was awaiting settlement the charge will be voided.



ePayment Reports

The ePayments report is conveniently available from the Daysheet report. Under Action select “Run ePayments report”. When complete the report appears as a PDF which can be printed or saved.

Corestream | Checklist Queue (1) | J. Smith 11:00 am | Desmond

Smiley Dental Surgery | John Smith | Shay Smith | Emily Smith | Jane Doe | Administration

Home | Schedule | Claims | To Do

Smiley Dental Surgery
1234 Main Street

Financial Days

Filtered by Provider

Summary

Previous AVR

Change

Payments

Adjustments

Current AVR

Deposits

Payment - Credit Card

Payment - Debit Card

PDF

Export PDF

Create PDF

Edit PDF

Comment

Combine Files

Organize Pages

Redact

Protect

Optimize PDF

Fill & Sign

Cancel Use Document

Convert and edit PDFs with Acrobat Pro DC

Start free trial

10/10/19 12:37PM

Transactions

1 of 2

39300982780354 (39300982780354)

Total: \$5.00

Location: Default Location Device: Larry's Device

CardHolder	Time	Auth #	Trans. #	Swipe	Card Info	Auth Amt.
LARRY BARBA	09/26/19 03:36PM	02600C	4927060094	Yes	MC 8159	\$4.00
Ana Ray						
LARRY BARBA	09/26/19 03:36PM		4927061141	No	MC 8159	(\$4.00)
Ana Ray						
LARRY BARBA	10/10/19 12:17PM	01070C	4952195226	Yes	MC 8159	\$5.00
John Smith						

Totals for 39300982780354 (39300982780354)

Location: Default Location Device: Larry's Device

Description	Visa	MC	Discover	Amex	Other	Total
Charge Total	\$0.00	\$9.00	\$0.00	\$0.00	\$0.00	\$9.00
Refund Total	\$0.00	(\$4.00)	\$0.00	\$0.00	\$0.00	(\$4.00)

Close the day for Smiley Dental Surgery

PDF

10/10/19 12:37PM

Transactions

1 of 2

39300982780354 (39300982780354)

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Charge Total	\$0.00	\$9.00	\$0.00	\$0.00	\$0.00	\$9.00
Refund Total	\$0.00	(\$4.00)	\$0.00	\$0.00	\$0.00	(\$4.00)

We are excited to simplify the payment workflow by offering this service. We look forward to hearing stories from our users and ask for feedback on additional functionality to enhance the ePayments experience.

 Add tags

	3 Kudos
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