

# Square Co-Pay Instructions

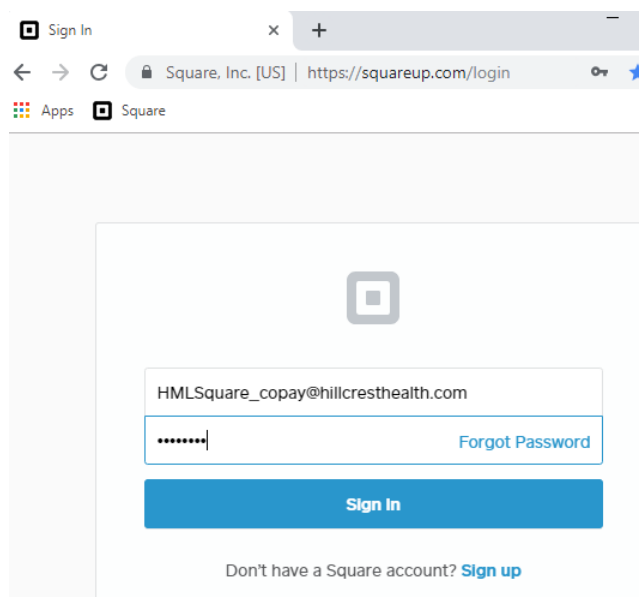
Website: <https://squareup.com/login>  
User Name: HMLSquare\_Copay@Hillcresthealth.com  
Password: HML.2019

Instructions will cover how to take a payment, how to run reports and how to issue a refund.

## \*\*Please note

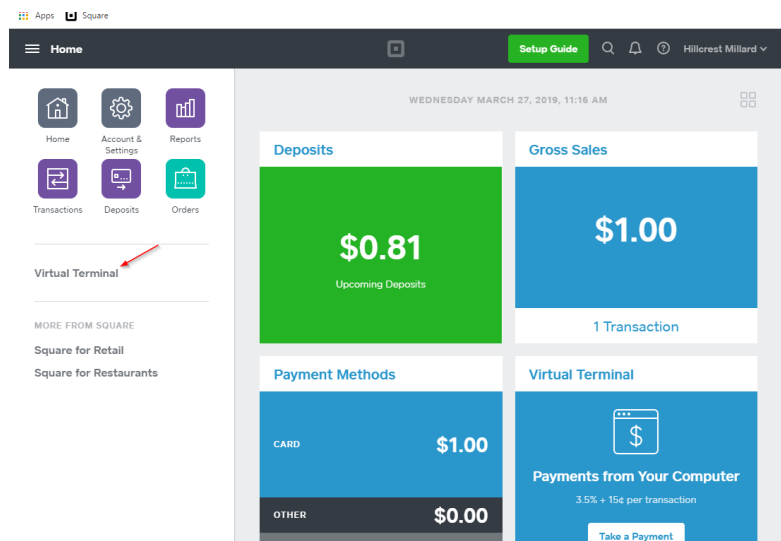
- You will need to have Chrome on your computer to get into Square as your internet browser
- Co-Pays is a generic term but refers to payments for Deductibles or Co-Insurance.
- Refunds are only to be given by the Revenue Cycle Team.

Log into Square using the above information:

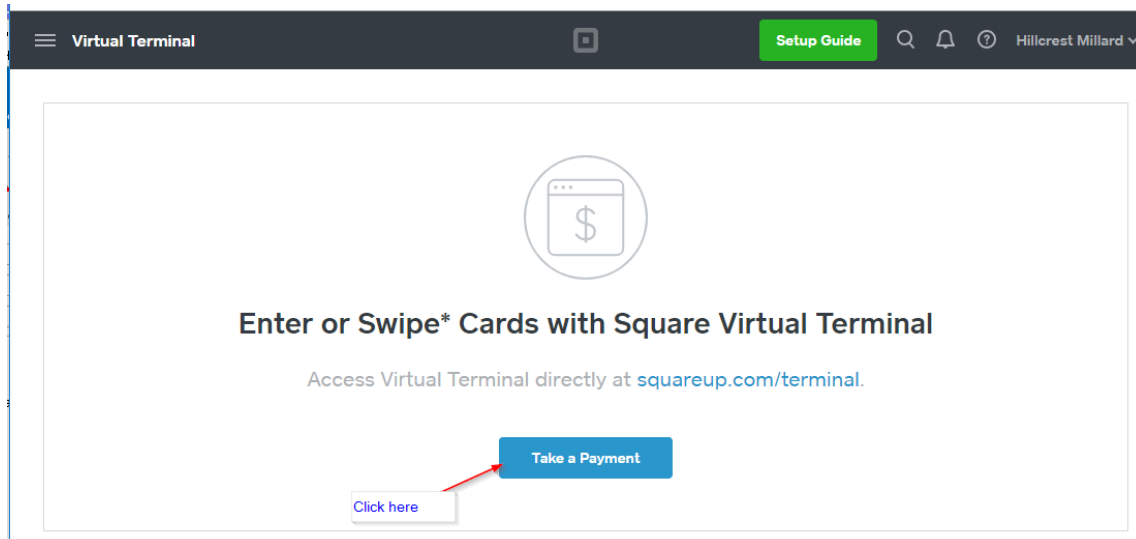


Main Screen once you enter the website will be the dashboard. From here you can get to reports, transaction information and the Virtual Terminal (which is where you will go to take a payment)

Click on Virtual Terminal



Once in Virtual Terminal you will click on Take Payment



In the payment window fill in all of the fields and click charge.

It allows a note to be included in the transaction so include in the note the Patient and “Co-Pay” along with any other information you like to allow for optimal tracking of this information. Keep in mind there cannot be any information that would personally identify the resident/client.

Examples of what can be used:

- Hillcrest Resident/Client ID and date of service
- Resident/Client Initials and date of service

Examples of what CANNOT be used:

- Resident/Client’s Medicare number or social security number
- Resident/Client’s full name
- Resident/Client’s date of birth

**\$25.00**

Fill out all fields include a note for tracking purposes. This can NOT include any personal identifying information. Keep it simple and vague that a Hillcrest Employee would know but outside person would not.

Payment Details

Order Amount	\$25.00		
Note	Patient # or Initials and date of service		
Card Number	4111 1111 1111 1111	Expiration Date	MM / YY
CVV / CVV2	123	Billing ZIP Code	12345

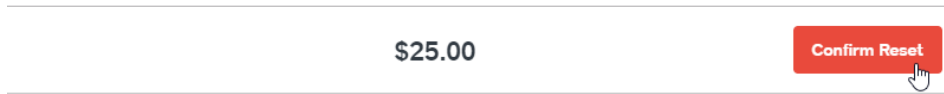
If you didn't type something in correctly you can go back and update as needed, a couple of notes:

- You put the cursor in the box to have items deleted one by one using the backspace button on your keyboard.
- You can highlight part or all of the values/amounts and hit the backspace button.
  - It doesn't work if you hit the “Delete” button
  -

If you want to just start over all together, you can use the Reset button at the top



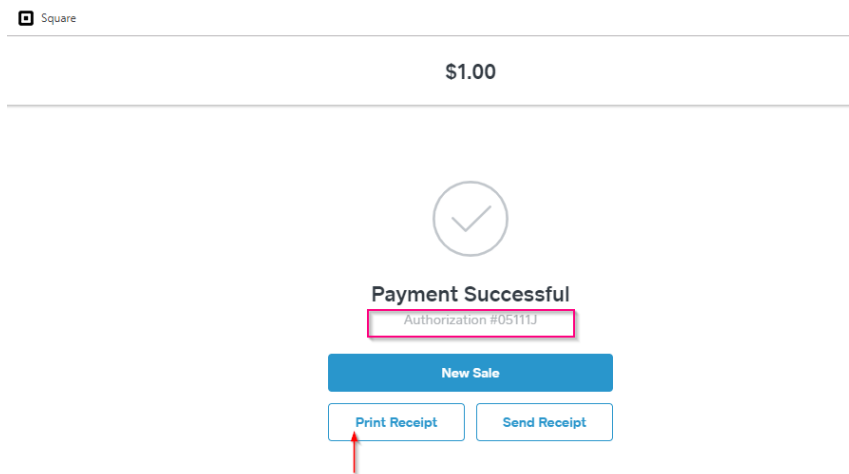
It is ask you to confirm reset. Click on that and the entire page is deleted so you can start all over.



Once you hit Charge:

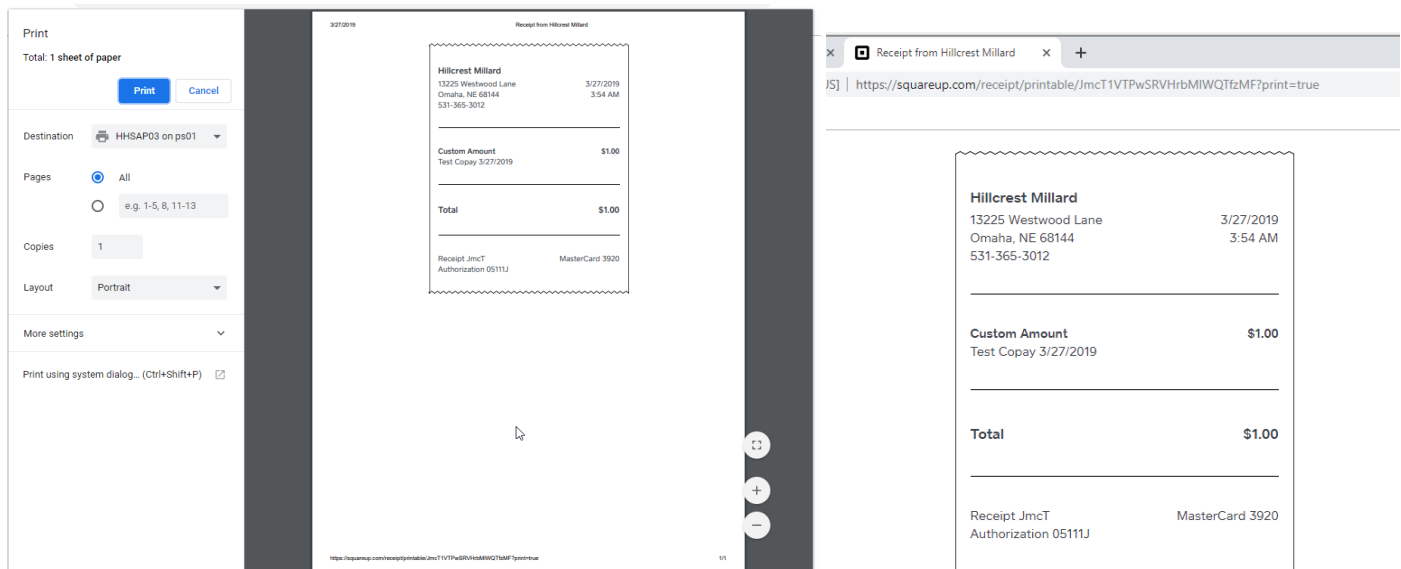
The next screen will pop up that indicates the charge was successful. It will provide an Authorization number.

From here you can print a receipt or send a receipt. This screen will remain open until you click on New Sale so you can print a copy and go back and send a receipt as much as you want as long as you are in the screen.

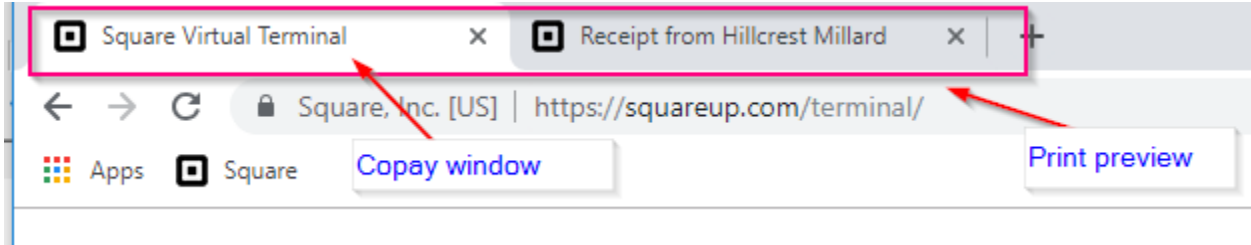


To PRINT – Click Print Receipt:

It will preview it for you. Check your printer and click Print. It will open up a new window that shows you what was printed.

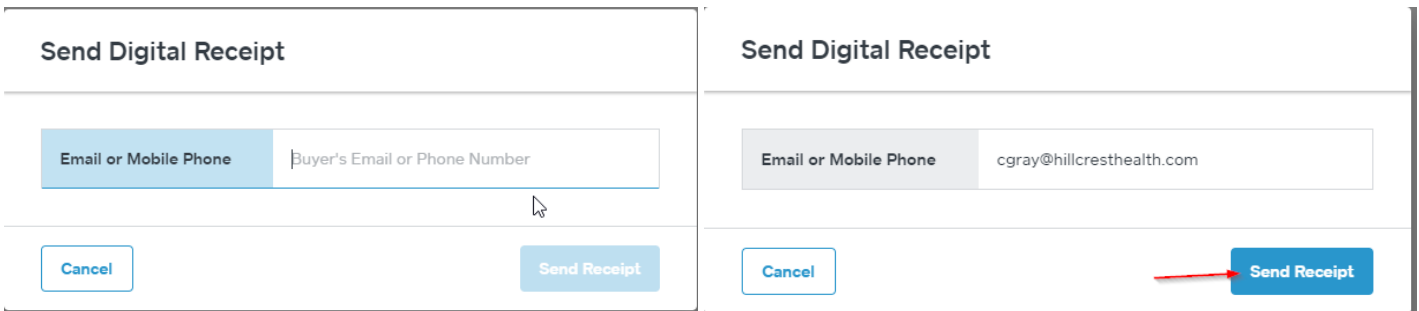


Remember you are in a new window. You can click the X to close out of this window. Click the tab to go back to the copay screen

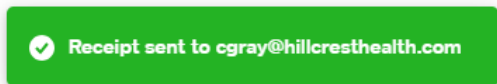


To SEND – Click the Send Receipt

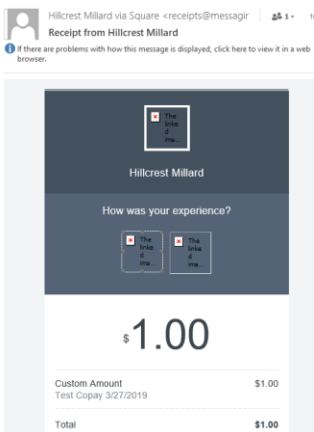
You can send the receipt to an e-mail or a phone that receives text messages. Key in where you would like to send the receipt.



A Screen will pop up quickly and then go indicating it has being sent and then on the screen you will see a notice.



These e-mails generally can end up in the recipients junk mail so please let them know to check there if you choose to e-mail a receipt.



Click on “New Sale” to go back to the “Take a Payment” screen



Click on the Square to go back to the main screen.



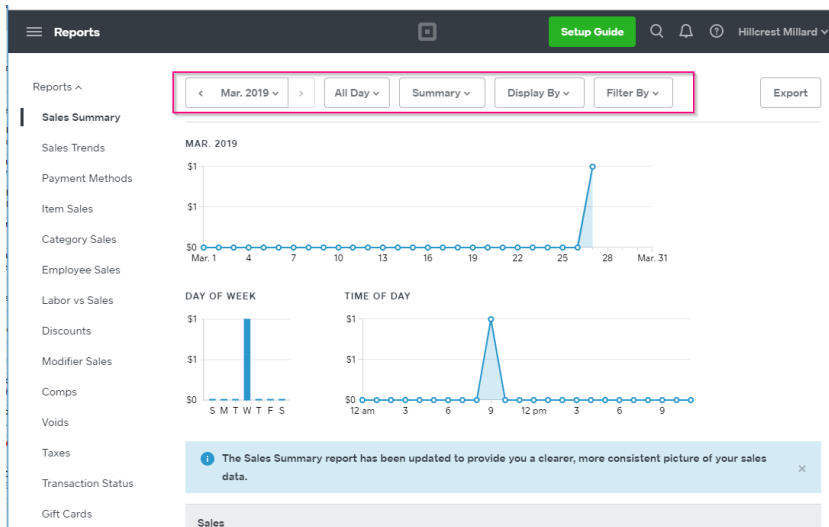
# Reports



The software has the ability to view different reports or transactions.

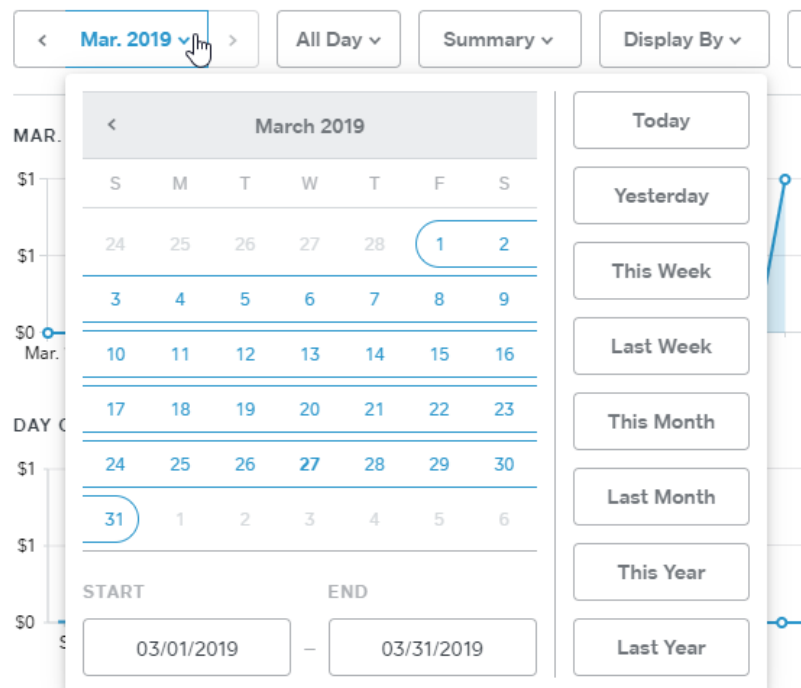
Click on Reports.

The options at the top allow you to view the information in different ways and for different time frames.



The main area you would get into are the Date, as most of the other ones help filter through different locations etc which doesn't apply here because CoPays is the only location that will show.

You can see different date ranges, choose entire months or year, etc.



# Transactions



Click on Transactions

Transactions

This option allows you to view different transactions. You can use the filters at the top similar to before to get to a date range and even time of day.

Transactions Setup Guide Hillcrest Millard

Jan. 2019–Dec. 2019 All Day All Payment Methods All Employees Export

Card # Filter by card (last 4)

**1** TRANSACTION **\$1.00** TOTAL COLLECTED **\$1.00** NET SALES

Wednesday, March 27, 2019 \$1.00

9:54 am Test Copay 3/27/2019– Collected by CoPay Square Co-Pays \$1.00

There is also the ability to search for a payment by the last four digits of their card number. Select your date range first – you could select the whole year to open up the range. Key in the last four digits and hit enter to search.

Transactions Setup Guide Hillcrest Millard

Mar. 2019 All Day All Payment Methods All Employees Export

Card # Filter by card (last 4)

Card #: 3920

Wednesday, March 27, 2019 \$1.00

9:54 am Test Copay 3/27/2019– Collected by CoPay Square Co-Pays \$1.00

The information can also be exported. Select what you want to see and the file will pop up at the bottom of the page.

Export

- Transactions CSV
- Items Summary CSV
- Items Detail CSV

transactions-2019-....csv

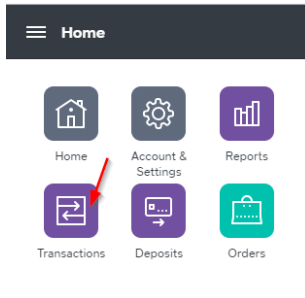
Click on it to open in Excel

Date	Time	Time Zone	Gross Sale	Discounts	Net Sales	Gift Card \$	Tax	Tip	Partial Re	Total Coll	Source	Card	Card Entry	Cash	Sq
3/27/2019	9:54:01	Central Tii	\$1.00	\$0.00	\$1.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.00	Virtual Te	\$1.00	Keyed	\$0.00	

# Issue a Refund

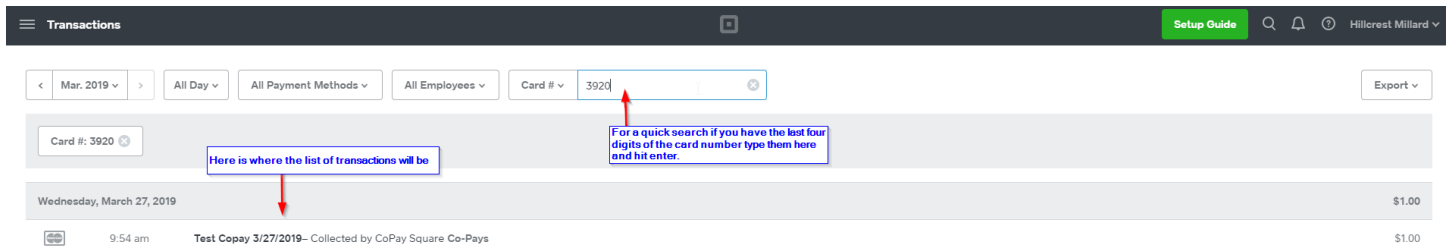
*Refunds are only to be given by the Revenue Cycle Team per policy due to that team having all patient financial information and ability to research the account.*

There may be a time where you need to issue a refund; to do this you need to click on the Transaction button.

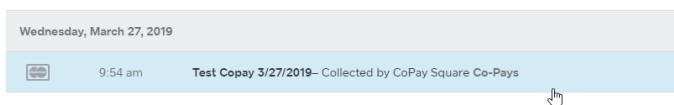


The next screen will show the transactions that have been done previously. You can scroll through the list of there are some options at the top of the screen that can be used to narrow your search.

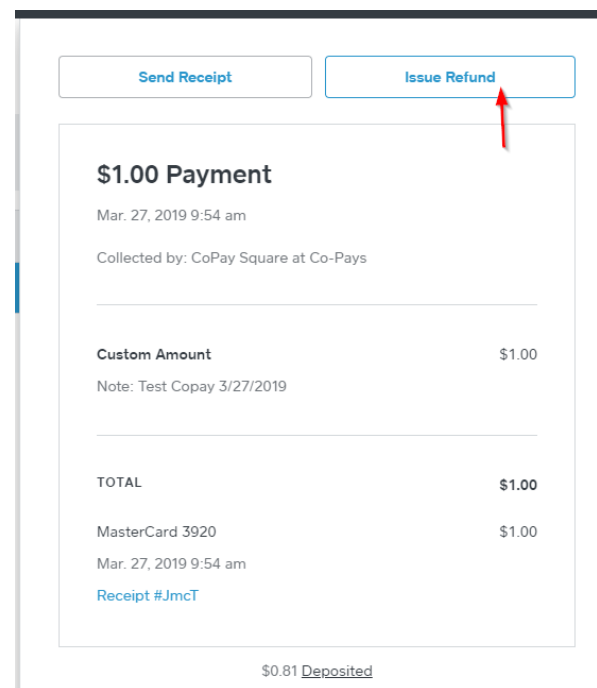
You can use the Card# option if you know that last four digits of the card number.



Click on the transaction where you want to apply a refund.



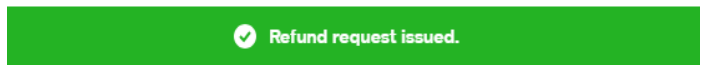
A window will pop up on the right where you have an option to print a receipt or to issue a refund. Click on issue a refund.



In this next screen type in the amount of the refund and then select a reason for it. If you select “other” there is an opportunity to be more specific.

“Other” was selected and the following screen appeared. A new box appears where you can type in a more specific reason of why the refund is being issued. Once done click Issue refund.

On the right hand side of the window you will see the following notice that the Refund request was issued.



At the top click on Send Receipt. .



A window will pop up to enter an e-mail or a phone number. Key is how the receipt will be sent and click send receipt.

### Send Receipt

Enter an email address or phone number.

cgray@hillcresthealth.com

CancelSend Receipt

There will be a message indicating this has been done.



This is what the e-mail receipt looks like.

Reply Reply All Forward IM

Hillcrest Millard via Square <receipts@messagin...> 1

**Receipt from Hillcrest Millard**

If there are problems with how this message is displayed, click here to view it in a web browser.

x The link d ima...

Hillcrest Millard

# \$1.00

REFUND

---

**ORIGINAL PURCHASE**

Custom Amount	\$1.00
Test Copay 3/27/2019	
<b>Total</b>	<b>\$1.00</b>

MasterCard 3920 (Keyed) Mar 27 2019 at 3:54 AM  
Auth code: 05111J

---

**RETURN**

Custom Amount	-\$1.00
Test Copay 3/27/2019	
Reason: Copay Test	
<b>Subtotal</b>	<b>-\$1.00</b>