

Take card payments

Connect your card processor, add your card terminals, then set your payment rules: deposits, no-show fees, cash prices and your own payment types.

Setup guide · For Owners, Managers · aminova.health/university/card-payments

1. WHAT YOU'RE SETTING UP

To take cards in Aminova, you connect the card processor your clinic already uses. The money goes straight to your bank. Aminova never holds it.

Then you add any card terminals you have, and choose your payment rules. Everything here lives in one place:

Settings → Payments & Plans.

2. OPEN PAYMENTS & PLANS

1. Go to **Settings** in the sidebar.
2. Click **Payments & Plans** in the list on the left.
3. Your card processor is at the top, under **Payment processor**. Your rules are below it.

Peak Vitality Clinic
Growth Plan

Notifications 9+

Dashboard

NTS

Patients

Care Plan

Intake Engine 5

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My Schedule

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Protocols

E-Prescriptions

Refills

Dr. Alex Rivera
Owner / Director

Settings

Manage clinic configuration, security, and integrations

CONFIGURATION

- Clinic Profile
- Payments & Plans
- Notifications
- Emails
- Patient Portal
- Security
- Integrations
- HIPAA & Compliance
- Data & Privacy
- Roles & Permissions
- AI Scribe

Clinic Profile

Basic information about your practice displayed across the platform

Clinic Name: Peak Vitality Clinic

Tagline: Longevi...

Phone: (312) 555-0142

Contact Em: hello@p...

Website: peakvitality.example

Clinic NPI: 1356789042

Legal entity: Peak Vi...

National Provider Identifier for the organization. Per-provider NPIs are managed on the Team page. The register...

Tax ID / EIN: 88-1234567

Employer Identification Number

Individual provider NPIs are set per staff member. [Manage providers on the Team](#)

Street Address: 500 N Michigan Ave, Suite 1200, Chicago, IL 60611

City: Chicago

State: IL

Settings lists every topic on the left. Payments & Plans is the second one.

3. CONNECT YOUR CARD PROCESSOR

1. Press the connect button on your card processor's card.
2. Depending on your processor, you either sign in to your account with them, or paste in keys from it.
3. If you paste keys: put the API key in **Source Key**. Add the **PIN** only if your key has one.
4. Add the **Tokenization Key** too if you want to type cards into Aminova. Without it, you can only take cards on a terminal.
5. Tick **These are live production credentials** once you're using your real keys, not test ones. Then connect. Aminova checks the keys with your processor before it saves them.
6. The card now says **Connected**. Press **Manage**, then **Test connection**, any time you want to check it still works.

Tip. You may be asked for a code from your sign-in app before the keys are saved. That keeps your payment account safe.

4. ADD YOUR CARD TERMINALS

1. On your processor's card, press **Manage**.
2. Under **Card terminals**, type a name, like "Front desk", and the terminal's **Serial number**. It's printed on the underside.
3. Press **Add**. Do the same for each terminal you have.
4. Now **Terminal** shows up when you charge a visit, and **Card (in person)** works in Billing. The amount goes straight to the terminal and the patient taps or inserts their card.

Tip. In-person card payments on a terminal can include prescription items.

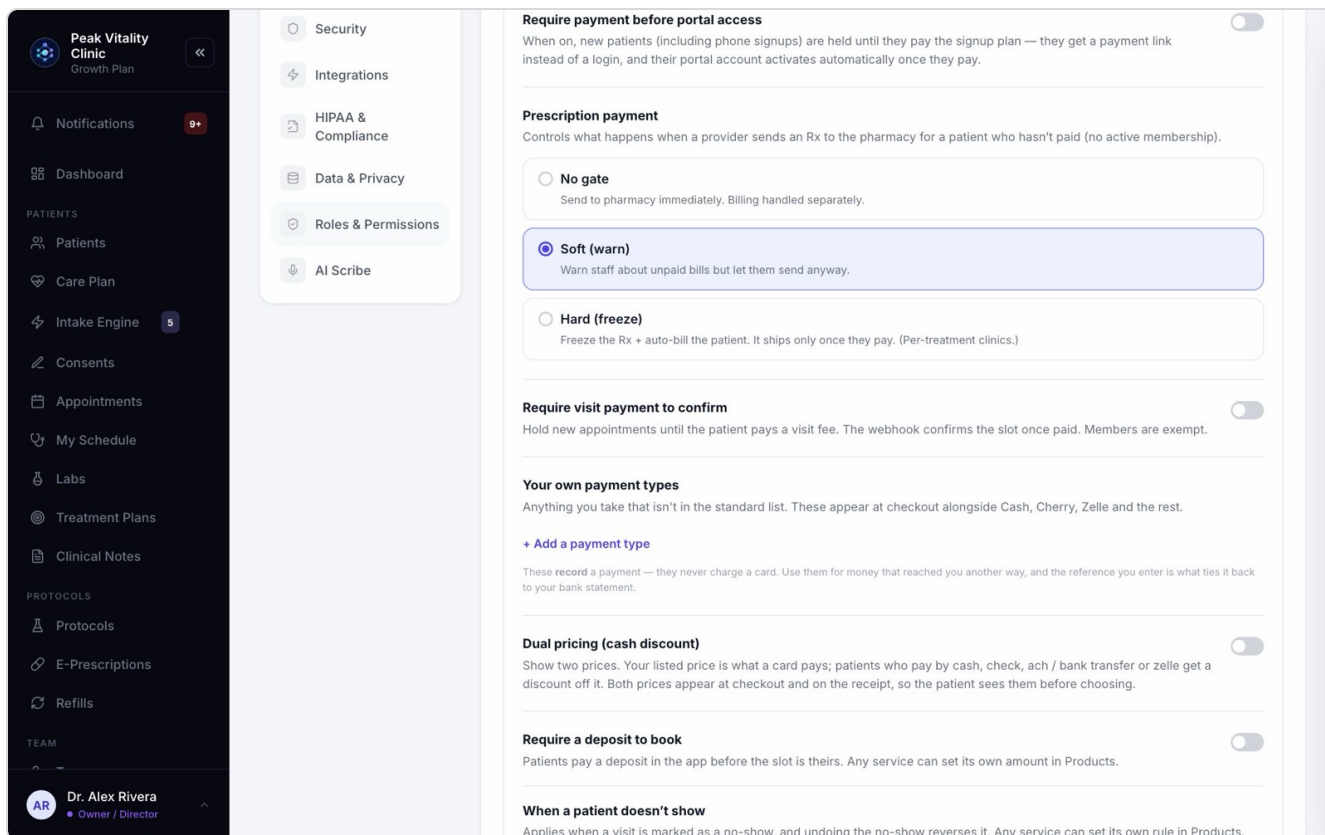
5. TURN ON LIVE UPDATES

1. In the same popup, under **Live updates**, press **Create webhook address**.
2. Press **Copy**, then paste the address into your card processor's own account, where it asks for a webhook.
3. Your processor gives you a signature key. Paste it back into Aminova and press **Save**.

Tip. Without this, a payment that takes a while to go through can stay "pending" in Aminova until someone checks.

6. DECIDE WHAT PATIENTS PAY UP FRONT

1. **Require payment before portal access:** new patients get a payment link instead of a login, and their account opens once they pay. Pick the **Signup plan** they pay.
2. **Prescription payment:** what happens when a prescription is sent for a patient with no active membership. **No gate** sends it, **Soft (warn)** warns your staff, and **Hard (freeze)** holds it and bills the patient until they pay.
3. **Require visit payment to confirm:** new appointments wait until the patient pays a **Visit fee**. Members don't pay it.



Your payment rules, starting with what patients pay up front.

7. ASK FOR A DEPOSIT TO BOOK

1. Switch on **Require a deposit to book**.
2. Choose **A set amount** or **A percentage** of the service's price, and type it in.
3. Patients booking online pay it in the app before the time is theirs.
4. Leave **Hold the slot before the money clears off**, so a booking only goes through once the deposit is paid.

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Require a deposit to book
Patients pay a deposit in the app before the slot is theirs. Any service can set its own amount in Products.

When a patient doesn't show
Applies when a visit is marked as a no-show, and undoing the no-show reverses it. Any service can set its own rule in Products.

Keep the deposit as a no-show fee
The paid deposit is recorded as the no-show fee, and the patient gets a receipt.

Charge a no-show fee to the card on file
Only for patients who accepted your no-show policy when they booked, and never for a prescription visit or while the clinic is in training mode.

INVOICES & CLAIMS

Billing identity
The pay-to identity on superbills and insurance claims, and the tax rate new invoices start with.

Billing name
Peak Vitality Clinic

Billing NPI 10 digits Tax ID (EIN) 9 digits

Pay-to address
500 N Michigan Ave, Suite 1200, Chicago, IL 60611

City State

ZIP Place of service code
11 (office)

Default tax rate (%)
0 — applied to taxable lines only

Save billing identity

Statement footer

Require a deposit to book. Switch it on to choose a set amount or a percentage of the price.

Tip. A single visit type can have its own deposit. Set it under **Deposit at booking** in the visit type.

8. CHOOSE WHAT HAPPENS ON A NO-SHOW

1. Under **When a patient doesn't show**, turn on **Keep the deposit as a no-show fee**, or **Charge a no-show fee to the card on file** and type the fee.
2. Write the **Policy patients accept when booking**. Patients booking online see it with the amount and tick to accept it.
3. A fee is only charged to patients who accepted it. Visits your team books don't ask, so no fee is charged for them.

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Statement footer
Printed at the foot of every invoice, receipt and statement — your billing policy. Leave blank to print nothing.
e.g. Balances unpaid after 90 days become the patient's responsibility.

No-show rules: keep the deposit, or charge a fee.

Tip. Undoing a no-show on the visit reverses what the rule did, where it can.

9. OFFER A CASH PRICE (OPTIONAL)

1. Switch on **Dual pricing (cash discount)**.
2. Choose **Percent off** or **Dollars off**, and the amount. Name the line the receipt shows, like “Cash discount”.
3. Your listed price is what a card pays. Cash, a check or a bank transfer pays the lower cash price. Nothing is ever added to a card payment.
4. Both prices show at checkout and on the receipt, so the patient sees them before they choose.

The screenshot shows the Peak Vitality Clinic app interface. On the left is a dark sidebar with navigation options: Notifications (9+), Dashboard, PATIENTS (Patients, Care Plan, Intake Engine (5), Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes), PROTOCOLS (Protocols, E-Prescriptions, Refills), and TEAM (Dr. Alex Rivera, Owner / Director). The main content area is divided into two sections. The top section, 'Dual pricing (cash discount)', has four toggle switches: 'Dual pricing (cash discount)' (on), 'Require a deposit to book' (on), 'When a patient doesn't show' (on), 'Keep the deposit as a no-show fee' (on), and 'Charge a no-show fee to the card on file' (on). The bottom section, 'INVOICES & CLAIMS', contains a 'Billing identity' form with fields for 'Billing name' (Peak Vitality Clinic), 'Billing NPI' (10 digits), 'Tax ID (EIN)' (9 digits), 'Pay-to address' (500 N Michigan Ave, Suite 1200, Chicago, IL 60611), 'City', 'State', 'ZIP', 'Place of service code' (11 (office)), and 'Default tax rate (%)' (0 — applied to taxable lines only).

Dual pricing: a card price and a lower cash price.

Tip. Tell us before you switch this on, so we can check your merchant account is set up for it.

10. ADD YOUR OWN PAYMENT TYPES (OPTIONAL)

1. Under **Your own payment types**, press **+ Add a payment type**.
2. Give it a name, and what to ask for, like a reference number.
3. It shows under **How are they paying?** in Billing's **Collect Payment**, beside cash, check and the rest. It only records a payment. It never charges a card.

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Your own payment types, for money that reaches you another way.

11. ADD YOUR BILLING DETAILS

1. Under **Billing identity**, fill in your billing name, NPI, tax ID and pay-to address. They go on superbills and insurance claims.
2. Set your **Default tax rate (%)**. New invoices start with it, on taxed lines only.
3. Press **Save billing identity**.
4. Add a **Statement footer** if you like: your billing policy, printed on every invoice, receipt and statement.

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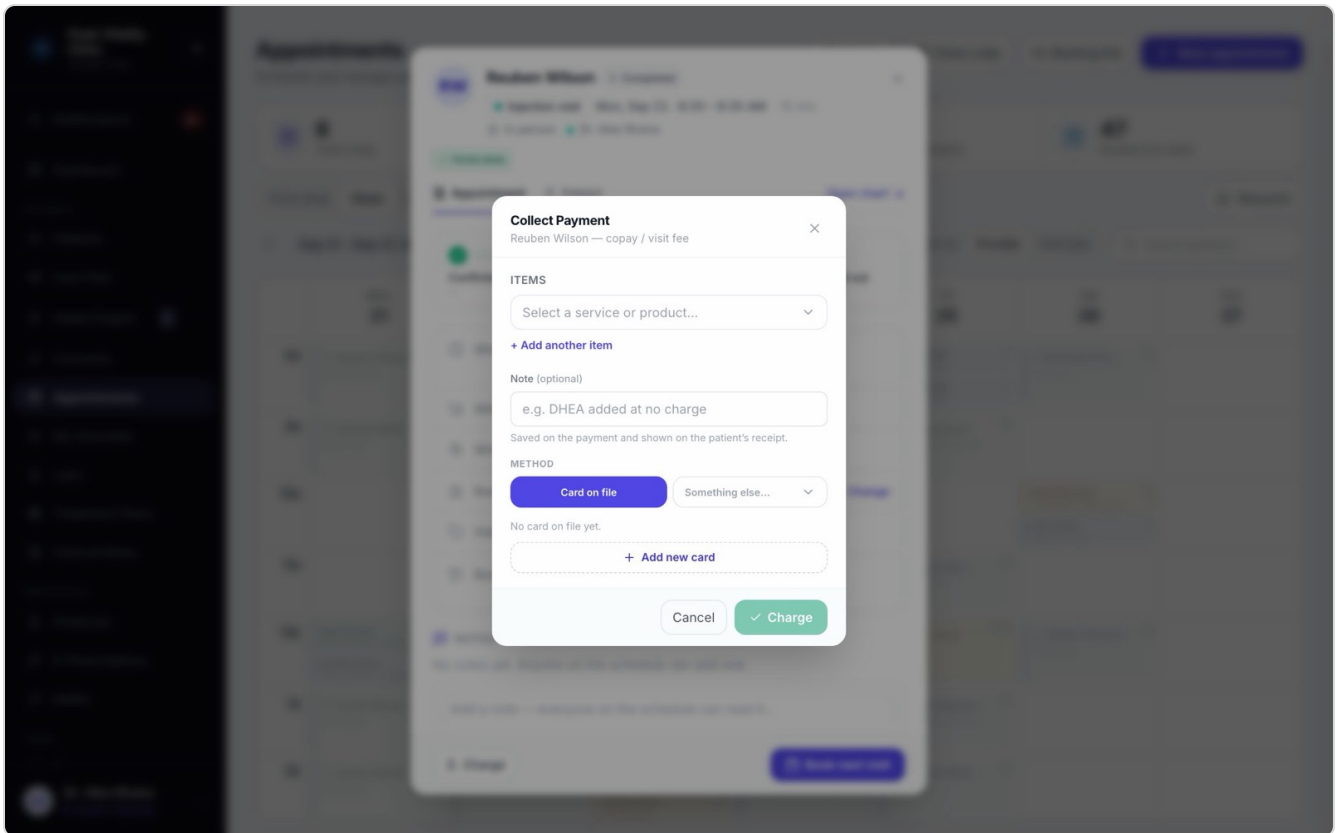
e.g. Balances unpaid after 90 days become the patient's responsibility.

Save footer

Billing identity: the details on your invoices and claims.

12. TRY A CHECKOUT

1. Open your practice patient's visit on **Appointments** and press **Charge**.
2. Pick **Something else....**, choose **Cash**, type any amount and record it.
3. That's the same screen you use for real patients. Cards are never charged to a practice patient.



The checkout: what they're buying, a note for the receipt, and how they're paying.