Payments and checkout

Money from start to finish: the deposit when a visit is booked, the charge at the visit, the receipt, a refund if one is needed, and where it all shows up.

Feature manual · For Owners, Managers, Front desk, Billing staff · aminova.health/university/payments-and-checkout

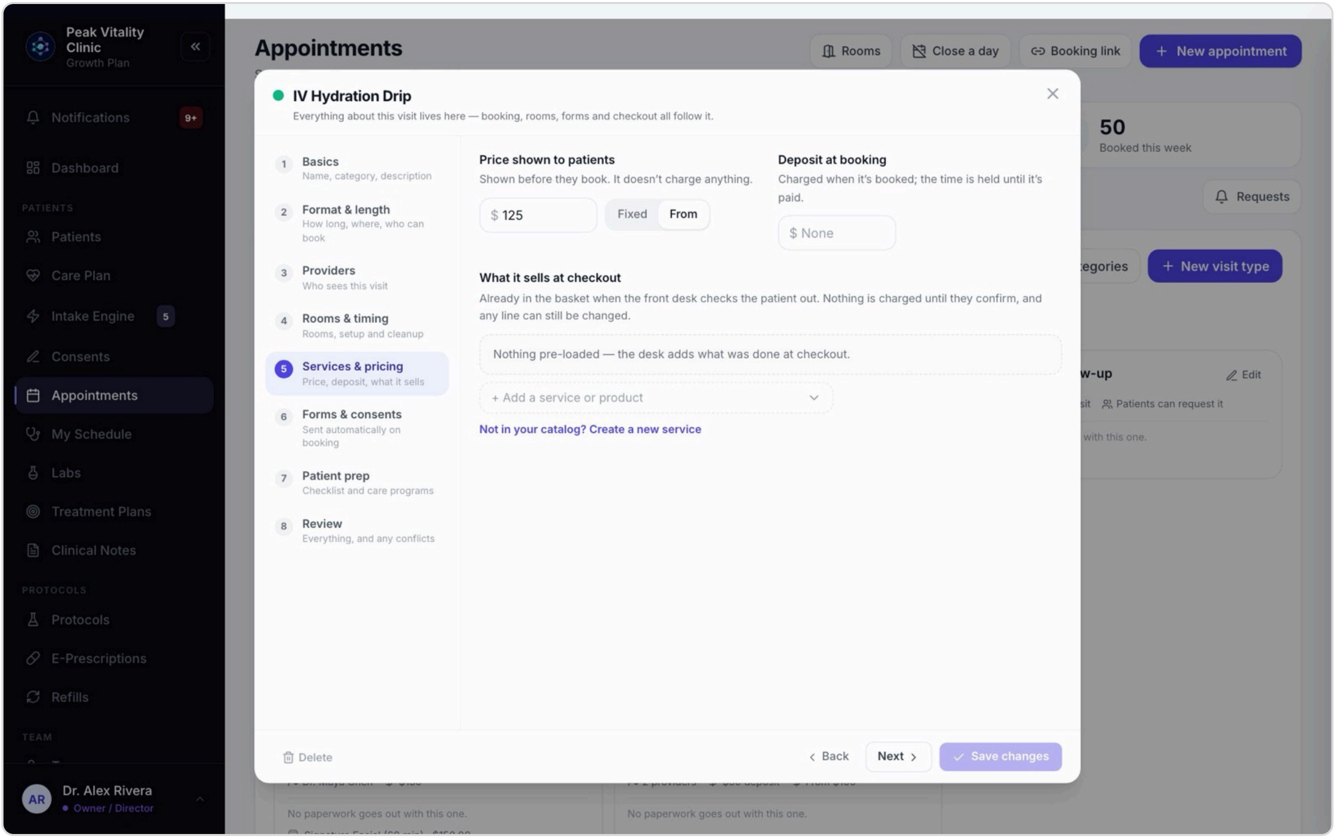
1. HOW MONEY MOVES

Money comes in at three moments: a deposit when a visit is booked, the charge at the visit, and bills you send to be paid later.

The patient is offered a receipt, and every payment lands on their account. It shows in Billing and in Analytics.

2. DEPOSITS AT BOOKING

1. Turn deposits on for everything in **Settings → Payments & Plans** (**Require a deposit to book**), or give one visit type its own **Deposit at booking**.
2. A patient booking online pays the deposit before the time is theirs.
3. The visit shows the deposit: paid, still owed, or waived.
4. At checkout, a paid deposit comes off the bill on its own, as **Deposit already paid**.
5. If the deposit is more than the bill, the checkout shows **Deposit not used — refund or credit**, so you know to give the rest back.



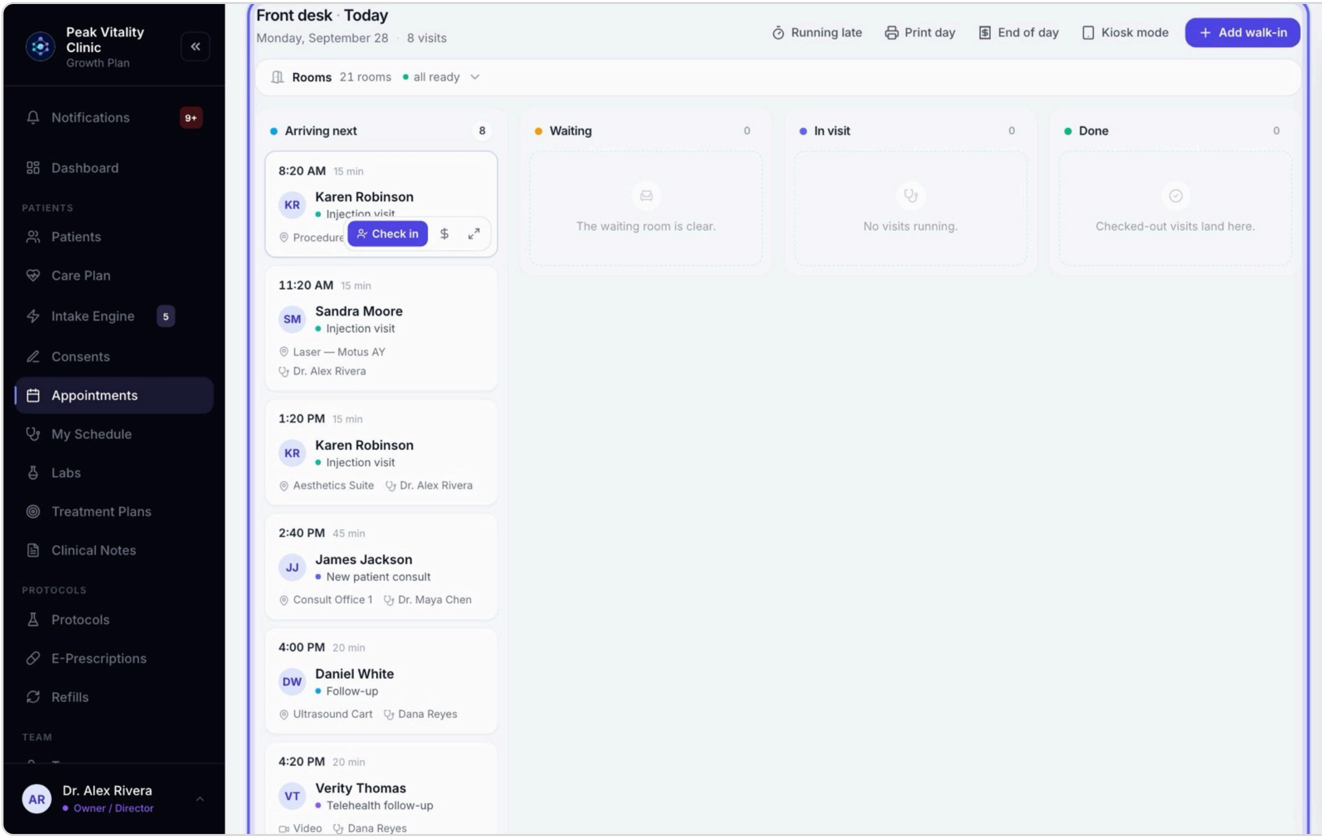
A visit type's price, its deposit at booking, and what it sells at checkout.

3. NO-SHOWS

1. Mark a visit **No-show** from its **…** menu.
2. Your no-show rule then runs: it keeps the deposit as the fee, or charges a no-show fee to the card on file. You set the rule in **Settings → Payments & Plans**.
3. A fee is only charged to patients who accepted your policy when they booked online.
4. Marked by mistake? Press **Undo no-show**. The visit goes back on, and what the rule did is reversed where it can be.

4. OPEN THE CHECKOUT

1. Open the visit on **Appointments** and press **Charge**. It's on the visit once the patient is checked in. Before that, it's in the **…** menu.
2. Or, on the **Front desk** tab, use the $ button on the patient's row. After check-out, the row shows **Collect**.
3. The visit's own services and products are already in the basket, from its visit type.



The front desk. Each patient's row has a button to collect payment.

5. BUILD THE BILL

1. Change or remove any line. Press **+ Add another item** to add more.
2. Add a **Note** if you like, such as something given for free. It shows on the receipt.
3. Click a saved discount, type a **Discount code**, or add a **+ One-off discount** with a reason.
4. When paying by card, press **Apply** to use the patient's credit or treatment bank money.
5. The big number at the bottom is what's due now.

6. CHOOSE HOW THEY PAY

1. **Card on file** charges a saved card. Pick one, or press **Add new card**.
2. **Terminal** sends the amount to your card terminal, and the patient taps or inserts their card. It shows once a terminal is set up.
3. **Something else…** records money that reached you another way: cash, a check, an HSA or FSA card, financing, a bank transfer, a gift card and more. Nothing is charged. It's written down so your books match.
4. For a check or a transfer, type the reference number. It helps you match the payment to your bank statement.
5. If you offer a cash price, the bill shows the card price and the cash price, and marks the one being paid.

7. SPLIT A PAYMENT

1. When paying by card or terminal, tick **Split the payment**.

2. Type the part paid another way, like cash, and choose how it was paid.
3. The rest goes on the card or the terminal.
4. The other part is written down only after the card goes through. A declined card never leaves a cash payment behind.

8. TIPS

1. Under **Tip**, pick **15%**, **18%**, **20%** or **Custom**.
2. Choose **Who is the tip for?** It starts as the visit's provider.
3. The tip is added to the same payment. It's only saved once the payment goes through.
4. Owners and managers see each person's tips for the week on **Time Clock**.

9. TAKE THE PAYMENT

1. The green button says what it will do, and how much: **Charge**, **Send … to terminal**, or **Record**.
2. If the deposit already covers the whole visit, nothing is charged. You're told there's nothing to collect.
3. If only part of a card is approved, you're told how much was taken and that the rest is still owed.
4. If the connection drops, you're told to check before trying again, so nobody is charged twice.

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

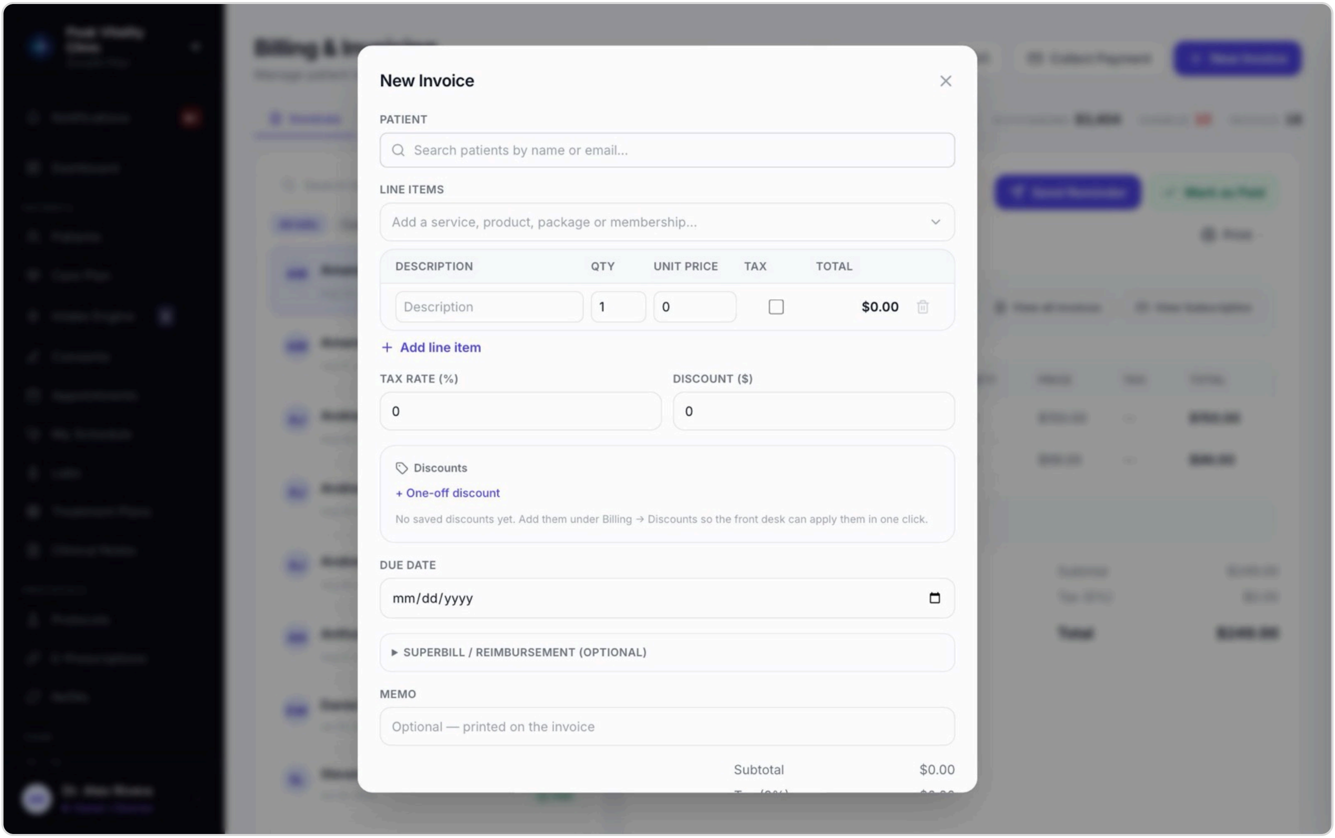
10. RECEIPTS

1. Right after a payment, you're asked: **Print**, **Email**, **Print & email**, or **Skip — no receipt needed**.
2. Most receipts email themselves and show up in the patient's app. If one already went out, the button says **Email again**.
3. To stop automatic receipt emails, turn off the **Email** switch for **Payment receipt** in **Settings → Notifications**.
4. For a payment on an invoice, reprint or resend the receipt later from **Print** in **Billing**.

Tip. Practice patients never get emails, texts or bills.

11. BILLS TO PAY LATER

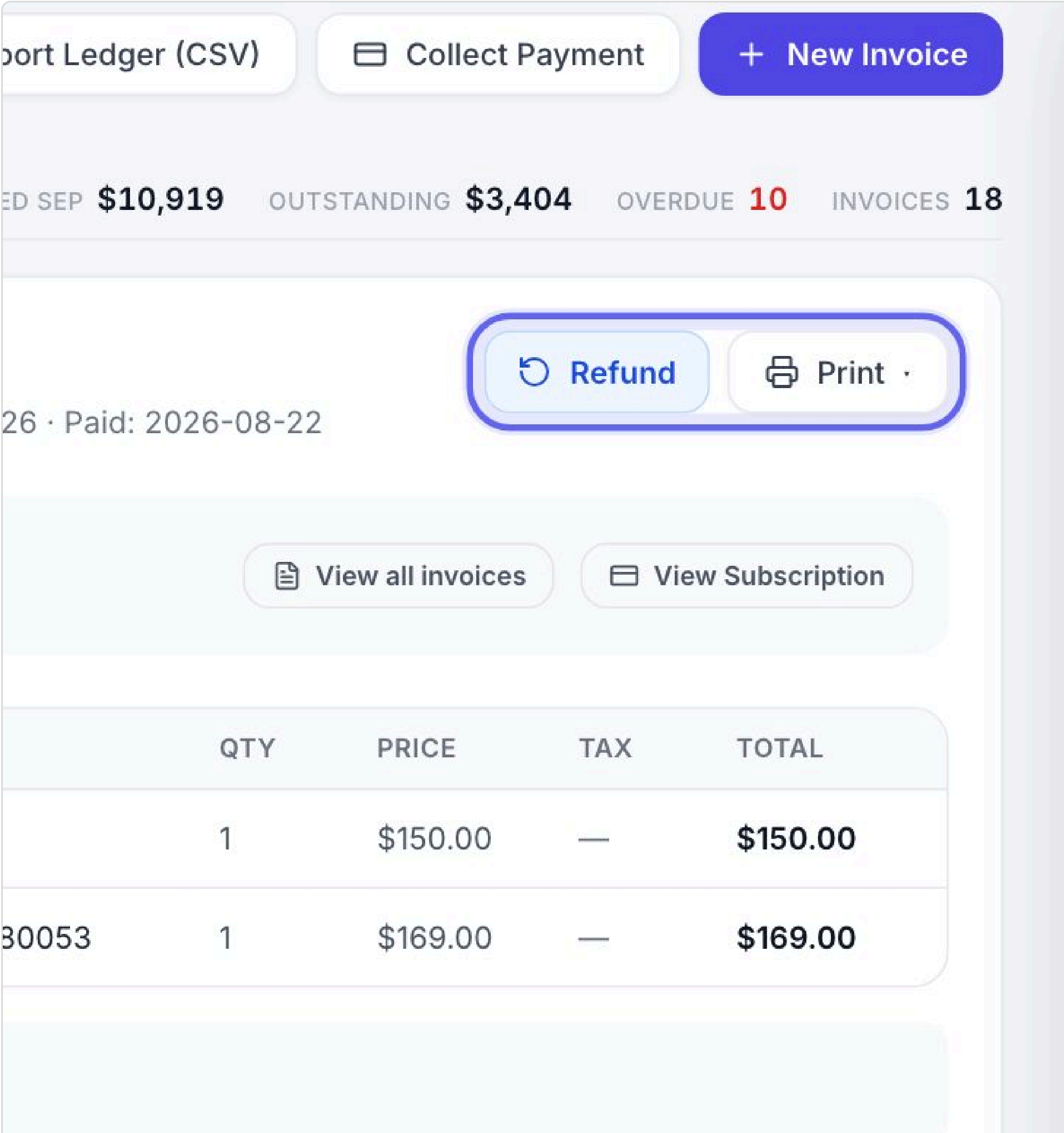
1. In **Billing**, press **New Invoice**, add the lines, then press **Create & send**. The patient gets an email with a pay link, and the bill is in their app.
2. Or use **Collect Payment**, then **Email a bill**, to send a bill for one of your plans.
3. Still owed? Open the invoice and press **Send Reminder**.
4. Paid some other way? Press **Mark as Paid** and choose how.



A new invoice, ready to send with a pay link.

12. REFUNDS

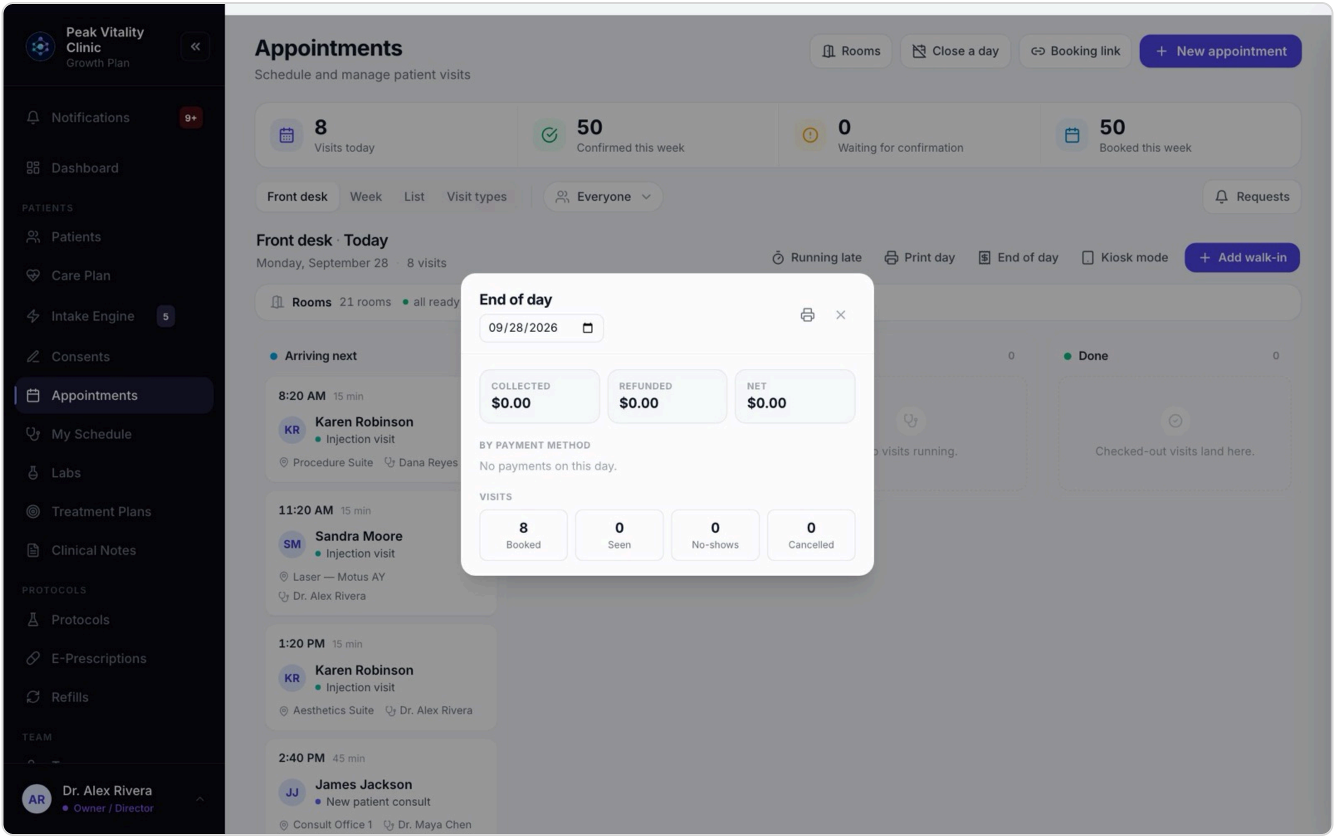
1. In **Billing**, open the paid invoice and press **Refund**.
2. Before you press anything, it shows where the money goes back. A card payment goes back to the card. Cash or another recorded payment is written down as a refund.
3. Refund all of it, or type a smaller amount and a reason. Then press **Issue Refund**.
4. If Aminova can't tell how the bill was paid, it refunds nothing and tells you why.



An invoice's buttons. A paid one has Refund.

13. END OF DAY

1. On **Appointments**, open the **Front desk** tab and press **End of day**. It's there for people who can see the clinic's money.
2. See what was collected, what was refunded, and the net, split by how people paid.
3. Tips taken and the day's visits (booked, seen, no-shows and canceled) are below.
4. Pick any date, and print it.

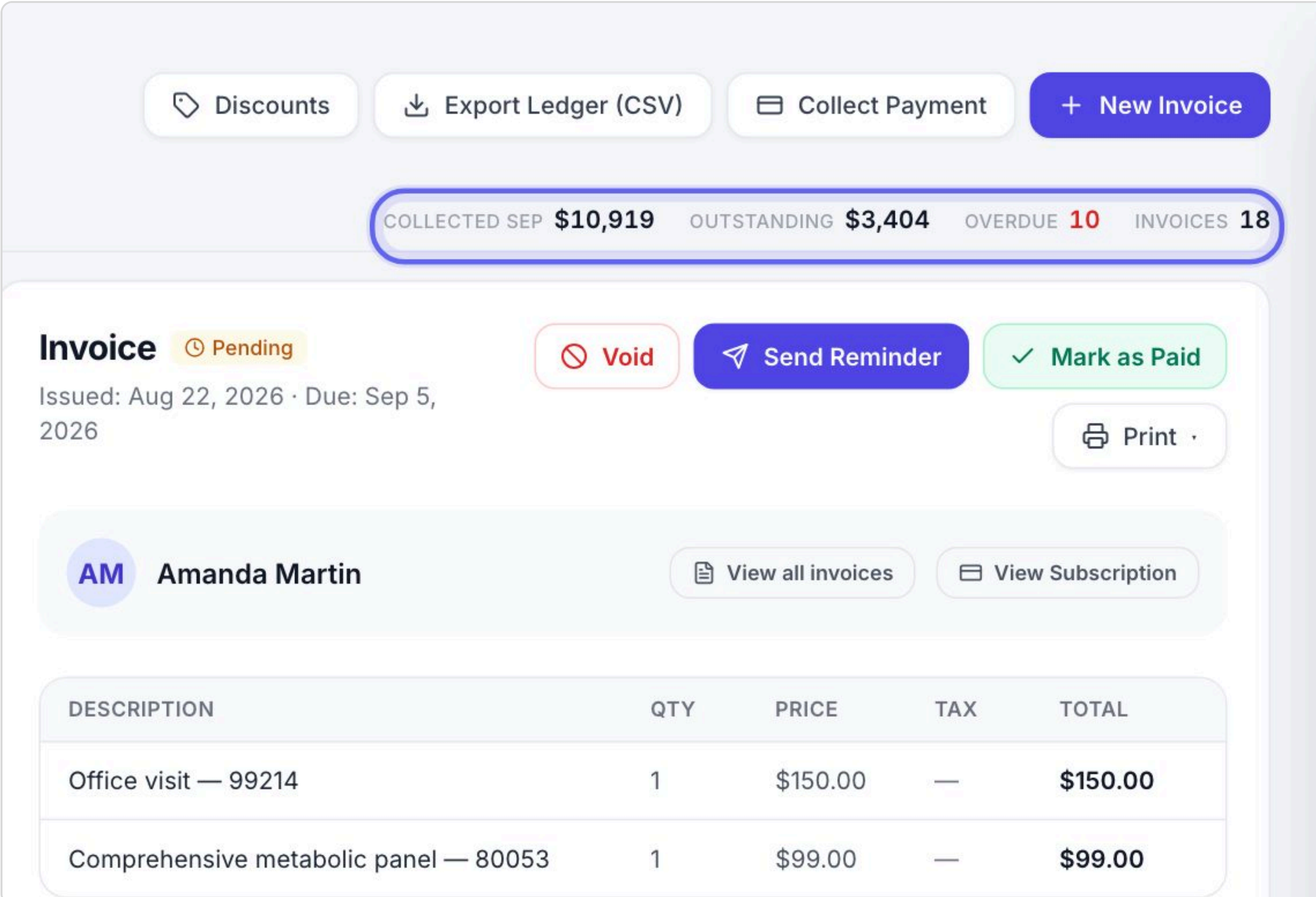


End of day: the day's money by payment method, and its visits.

14. WHERE IT SHOWS UP

On the patient's chart, the **Billing** tab shows what they owe, what they've paid, their credit, and every transaction. Card payments also show in Billing's invoice list as paid.

Every payment counts toward **Collected** at the top of **Billing** and on **Analytics**. Practice patients are left out of those numbers.



Billing’s numbers: collected this month, outstanding and overdue.