Patient Payments

This guide will show you how to process payments, view and email receipts, and void and refund payments.

View the video tutorial: Patient Payments (Password: PPTraining)

1. Process Credit/Debit Card Payments
   a. Log in to InstaMed Online
   b. In the main menu on the left side, click Payment
   c. At the top of the page, click Patient Payments
   d. In the Outlet dropdown menu, select the origin of the payment
   e. Select the payment Type
   f. Enter the Patient ID or other patient information
   g. To find a saved patient, click the icon
   h. Enter Account Holder Information
   i. Enter the Amount
   j. If working with a swipe device, click Swipe to swipe the card
   k. If not working with a swipe device, enter the card information
   l. To process the payment, click Submit under the Credit Card Information section if processing a payment card
      • Note: When accepting checks, enter the payment information and click Submit under the Check Information section
   m. To launch a payment plan, click Payment Plan
   n. To clear all fields, click Clear
2. **Viewing, Printing and Emailing Receipts**

Once you have processed a payment, the receipt displays automatically when authorization is complete.

- **A.** To email a receipt, enter an email address here and click **Send**.
- **B.** Payment status.
- **C.** To obtain a signed copy for your records, click **Print**. To download a copy of the receipt, click **Download**. To close the receipt, click **Close**.

3. **Voiding and Refunding Payments**

**Void:** Cancels the transaction and prevents funds from being debited from the patient. Voids must be performed on the same day as the original transaction.

- **a.** [Log in](#) to InstaMed Online
- **b.** In the main menu on the left side, click **Payment**
- **c.** At the top of the page, click **Payment History**, then click **Quick Search**
- **d.** Enter patient information in the fields, then click **Search** and click on the patient’s receipt

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Refund: Credits funds to the patient after a payment has been processed.

a. Log in to InstaMed Online
b. In the main menu on the left side, click Payment
c. At the top of the page, click Payment History, then click Quick Search
d. Enter patient information in the fields, then click Search and click on the patient's receipt
e. At the bottom of the receipt, click Refund
f. When the Refund window pops up, enter the amount you wish to refund the patient
   • Note: The amount must not be more than the original payment amount
g. Click Refund, and a new receipt will appear to confirm the refund
Learn more!
Helpful guides and videos about your InstaMed solutions.

Getting Started

Payer Payments
- Video: Payer Payments (Password: ERAEFTTraining)
- Video: EDI Enrollment (Password: EDITraining)
- Quick Reference Guide: EDI Enrollment

Patient Payments
- Reporting guide
- Device Installation guide
- Quick Reference Guide: Patient Payments
- Video: Patient Payments (Password: PPTraining)
- Video: Void & Refund (Password: VRTraining)
- Video: Reporting (Password: REPTraining)

Healthcare Bill Payments
For Healthcare Bill Payments, you don’t have to do anything to get paid!
- For tips on payment reports, view the reporting guide
- Video: Reporting (Password: REPTraining)

Patient Portal
Encourage patients to pay online by sharing the Patient Portal URL included in your “Welcome to the InstaMed Network” email.
- For tips on payment reports, view the reporting guide
- Video: Reporting (Password: REPTraining)

Return to the Training Tools page

Log in to InstaMed Online

Frequently Asked Questions