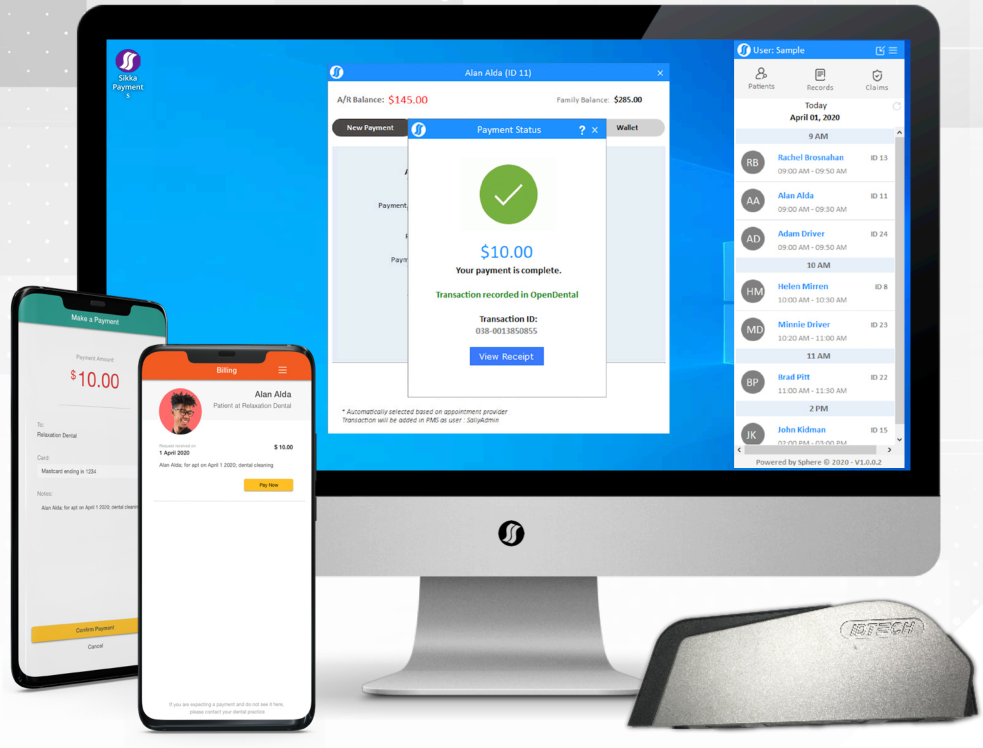


SIKKA PAYMENTS USER GUIDE

PREPARED FOR YOU BY SIKKA SOFTWARE AND SPHERE

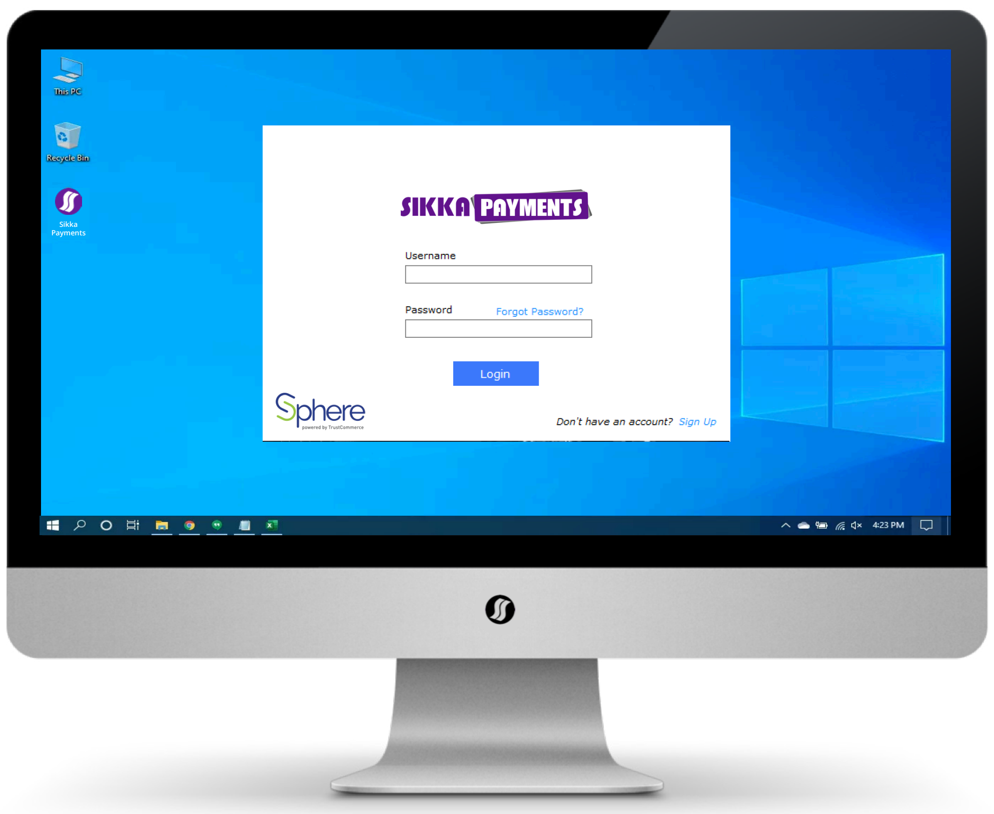
WELCOME!

We're delighted that you're enrolling in Sikka Payments, provided by Sikka and Sphere. In this guide, we will walk you through using Sikka Payments and accepting payments. To get setup with your merchant account and access to your merchant statements, please refer to the Sphere Welcome Kit. If along the way you encounter any issue, please feel free to call us at 1-800-94-SIKKA

Thank you!
-Your Sikka Software Care Team

CONTENTS

1. GETTING STARTED



First, make sure that the Sikka Utility has synchronized with your practice, as described in the Sikka Utility installation guide.

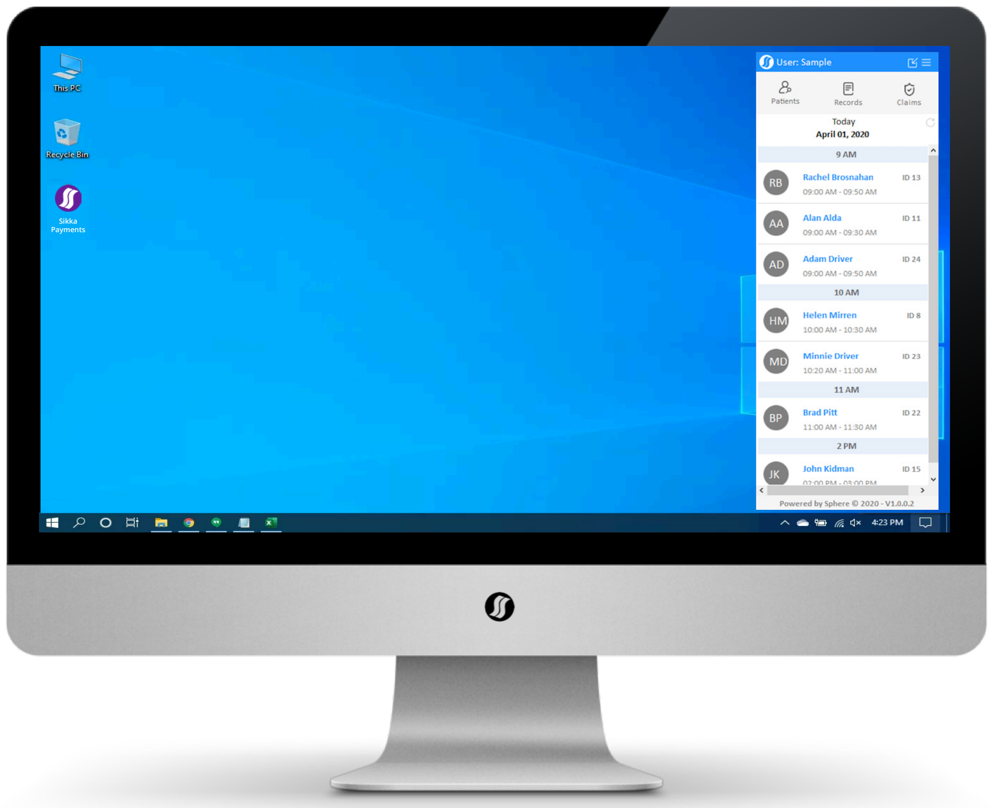
1.A. HOW TO LOG IN

Step 1: Double-click on the Sikka Payments icon on your desktop

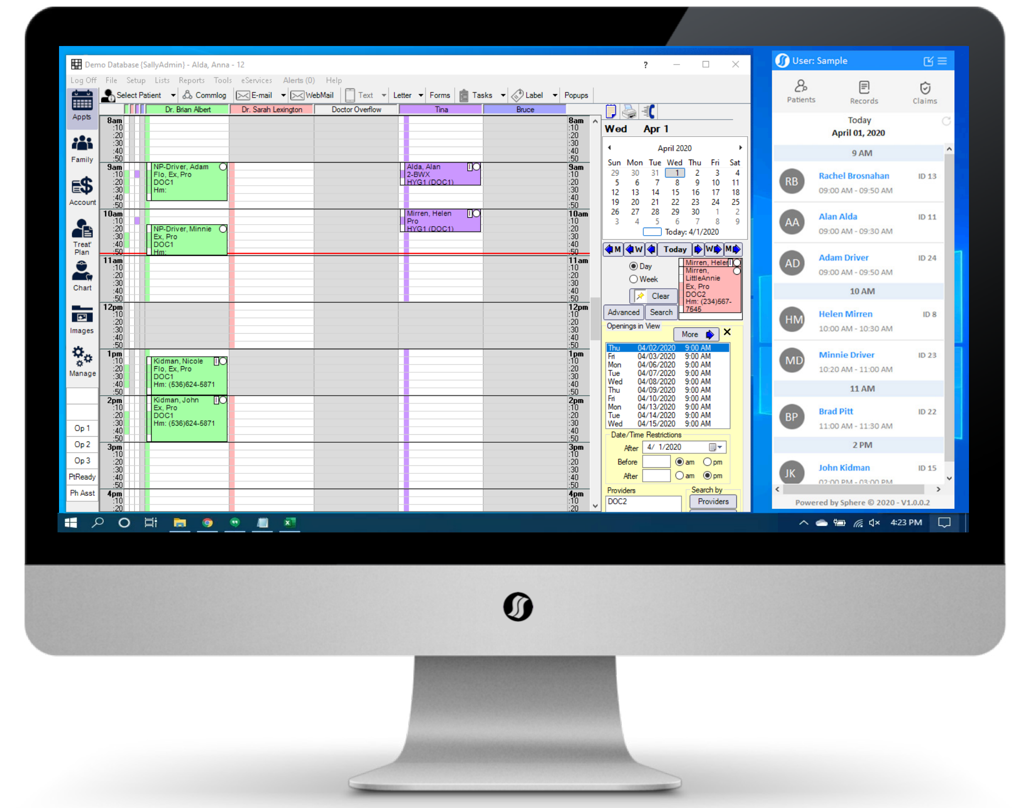
Step 2: A window will open and prompt you to log in

Step 3: Use your Sikka Payment credentials to log in

1.B. MAIN PANEL



After logging in, the Sikka Payments main panel will appear.

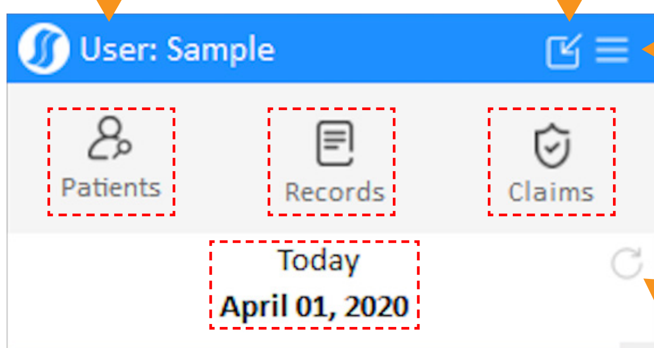


The main panel was designed to be placed next to your Practice Management System's window on your desktop. This can be adjusted in settings.

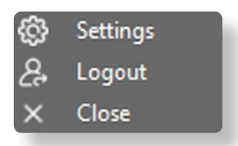
1.c. WORKING WITH THE SCHEDULE

Indicates which user is logged in

Minimize panel

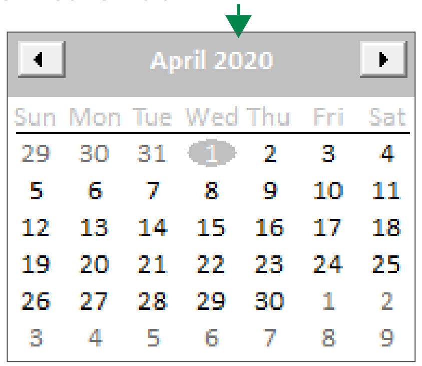


Drop down:

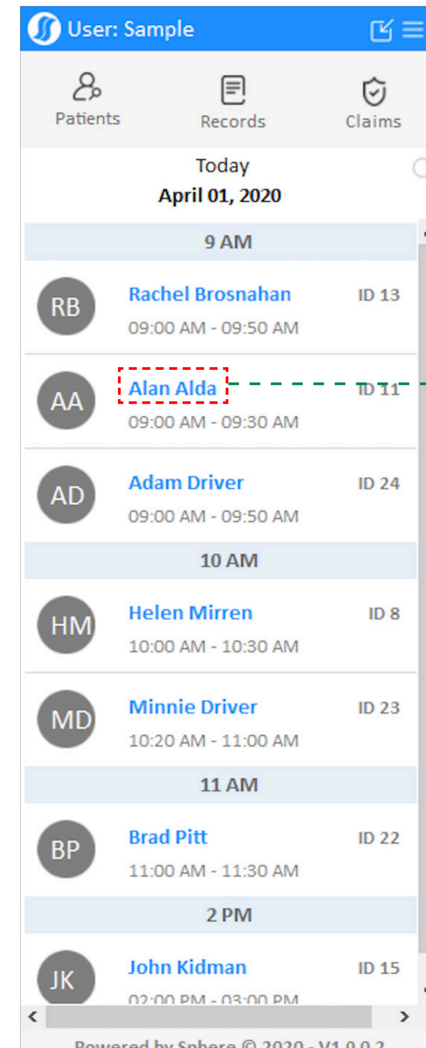


Refresh schedule

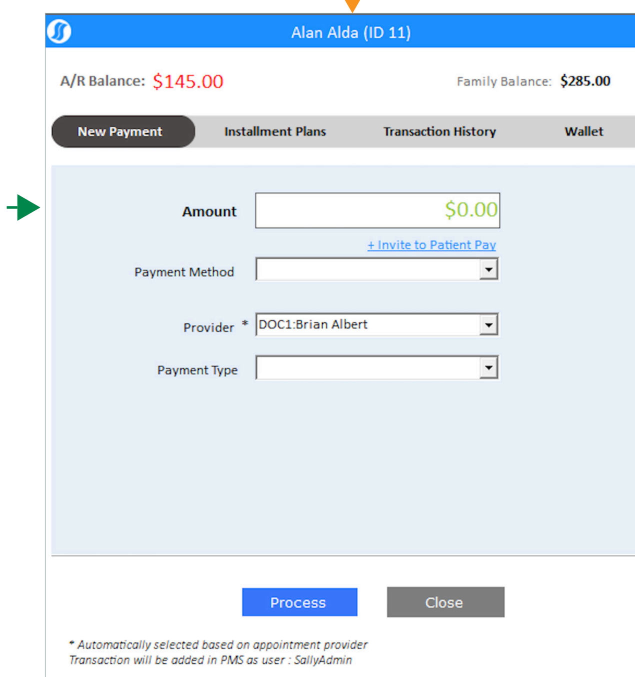
Click date to open calendar



Click new calendar day to change schedule displayed

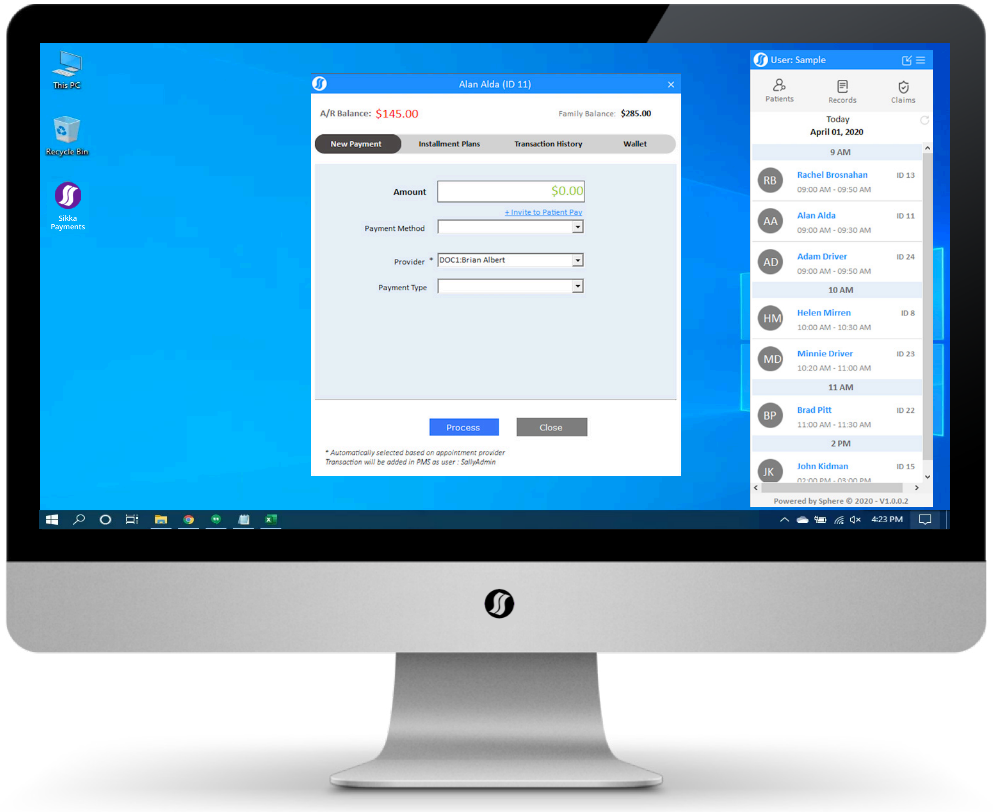


Patient name



Click on a patient name to open the Patient Profile window for that patient.

2. ACCEPTING PAYMENTS



Sikka Payments allows your patients to pay using several methods.

2.A. PAYMENT METHODS

Credit card: Patients can use credit or debit cards. When selecting "Credit card" in the drop down, you will need to select either "Swipe or insert" or "Enter manually" and follow the appropriate prompts.

ACH payment: Automated Clearing House (ACH) payments are electronic payments that pull funds directly from a checking account. In the drop down, select "ACH payment" and follow the prompt to enter the ACH information.

Mobile app: You can send payment requests to your patients to pay via a mobile app. For more information, please reference section 3. Mobile Payments.

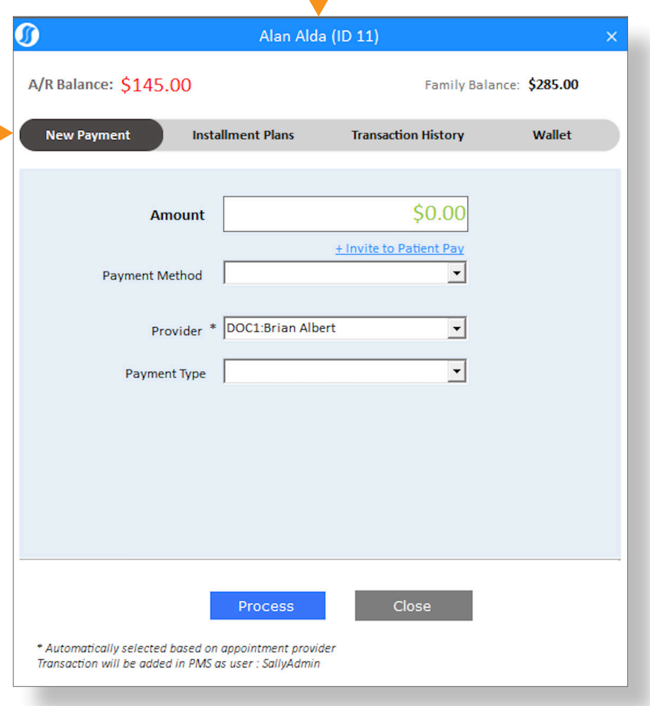
Saved method: Save payment methods for a faster checkout experience. When "Saved method" is selected, another drop down menu will appear to select which specific saved method you would like to use. Saved credit cards are listed in the "Wallet" tab of the Patient Profile.

2.B. THE PATIENT PROFILE

The first step in accepting any type of payment is opening the Patient Profile window. You can do this in 1 of 2 ways.

Patient name

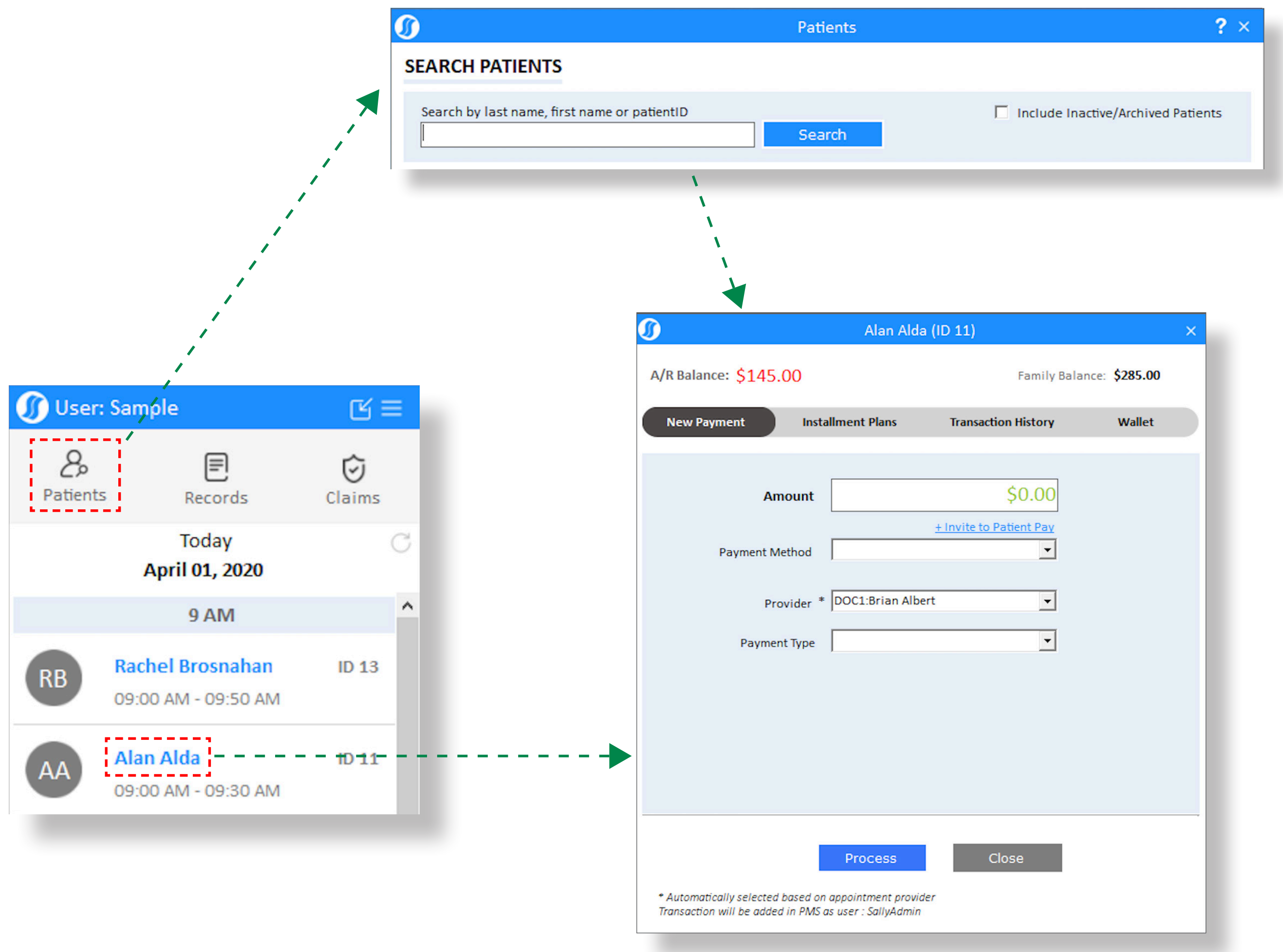
Default tab is **New Payment**; this is the tab for accepting new payments



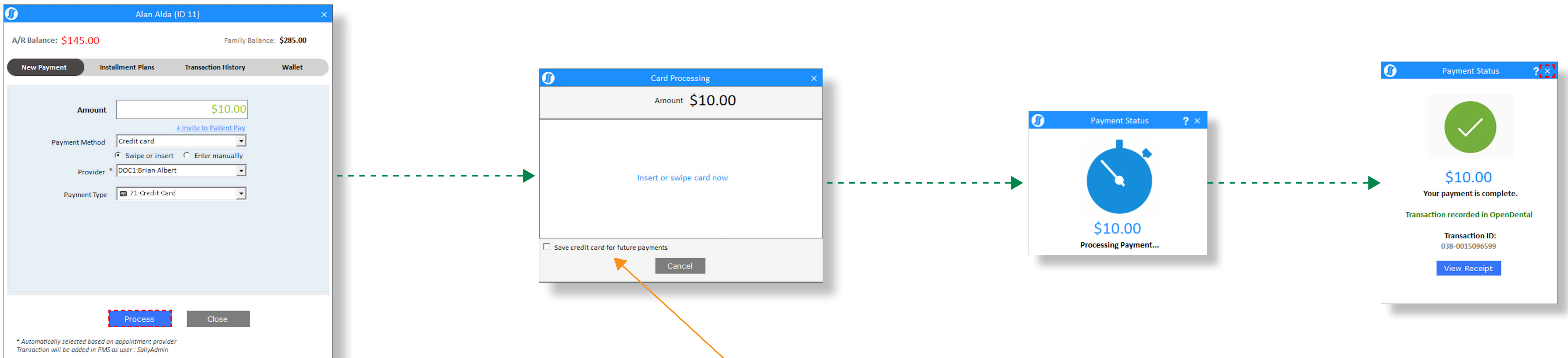
Example: Patient Profile for Alan Alda

Option A: Click on patient name in Schedule panel

Option B: Search for patient in Patient Search



2.c. CARD PRESENT AT FRONT DESK



Step 1: Enter amount to be processed

Step 2: In Payment Method, select “Credit card”

Step 3: Select “Swipe or insert”

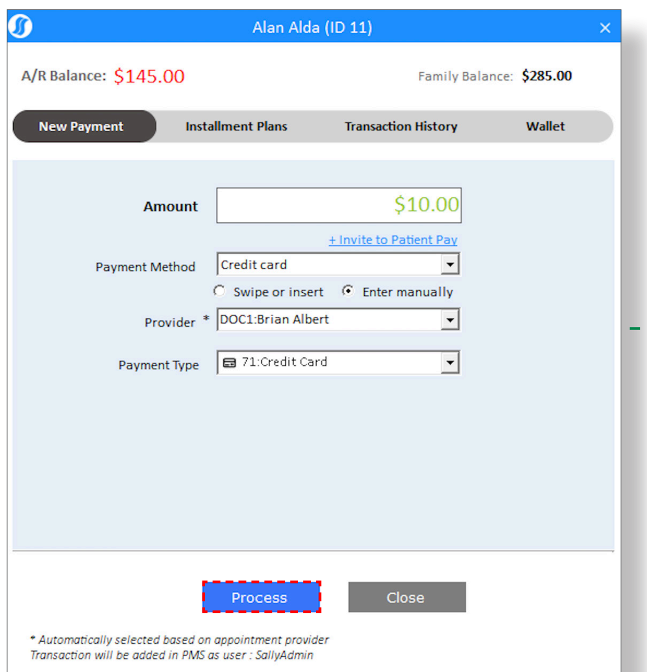
Step 4: Complete fields and click “Process”

Step 5: Swipe or insert card when prompted

Step 6: Payment will begin to process. Wait for payment confirmation screen.

Note: Select “Save for future payments” to save this card to the patient’s Wallet

2.D. MANUALLY KEY ENTER



Step 1: Enter amount to be processed

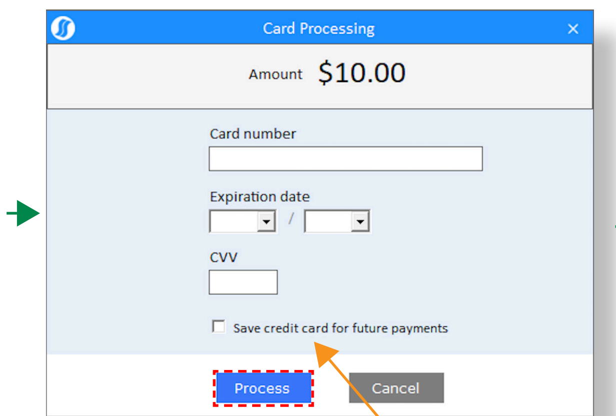
Step 2: In Payment Method, select "Credit card"

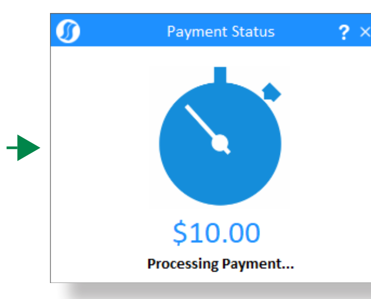
Step 3: Select "Enter manually"

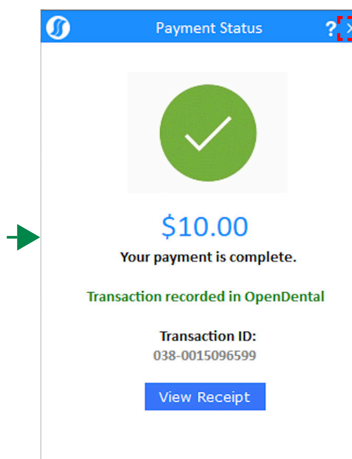
Step 4: Complete fields and click "Process"

Step 5: Enter card information when prompted

Step 6: Click "Process" and wait for payment confirmation screen

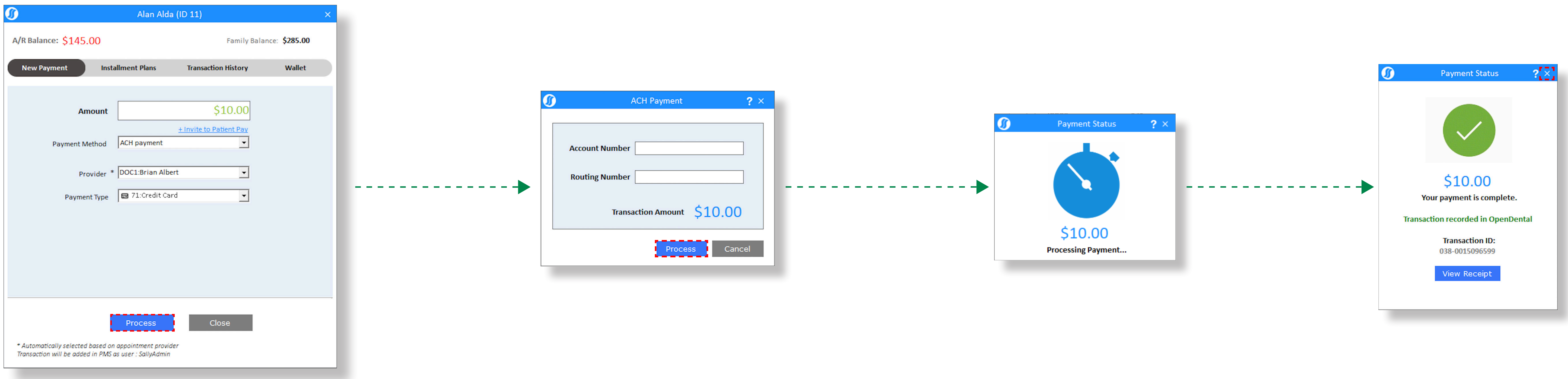






Note: Select "Save for future payments" to save this card to the patient's Wallet

2.E. ACH PAYMENT



Step 1: Enter amount to be processed

Step 2: In Payment Method, select ”ACH payment”

Step 3: Complete fields and click “Process”

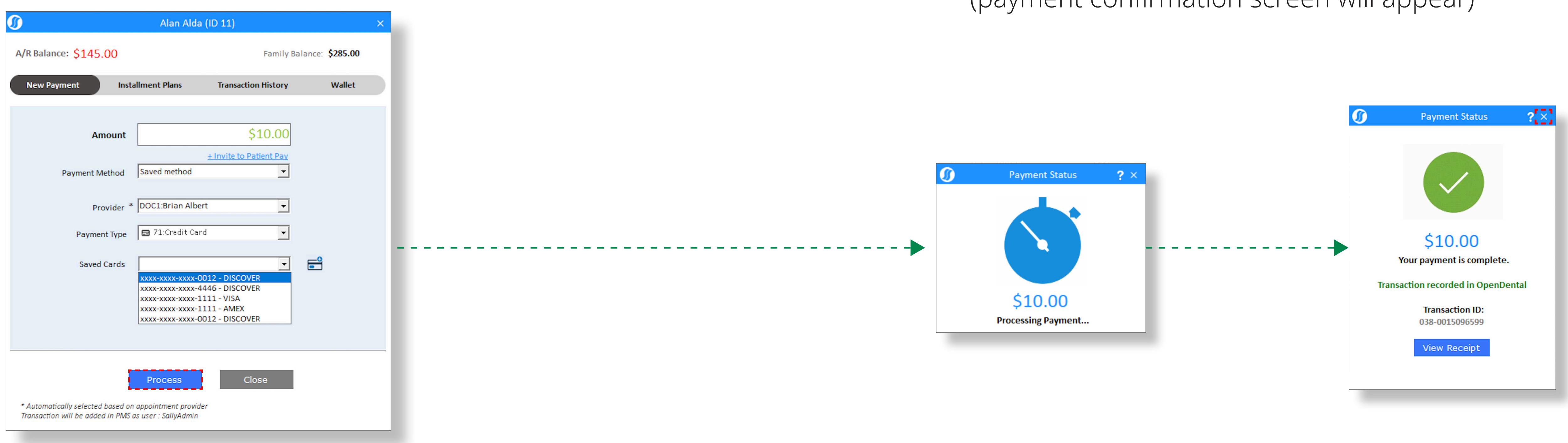
Step 5: Enter ACH payment information when prompted

Step 6: Click “Process” and wait for payment confirmation screen

2.F. SAVED METHOD IN WALLET

Step 3: In Saved Cards, select the desired saved card

Step 4: Complete fields and click “Process”
(payment confirmation screen will appear)



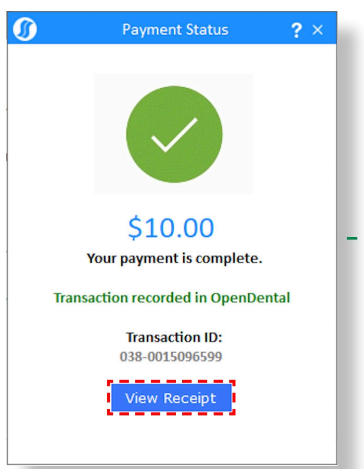
Step 1: Enter amount to be processed

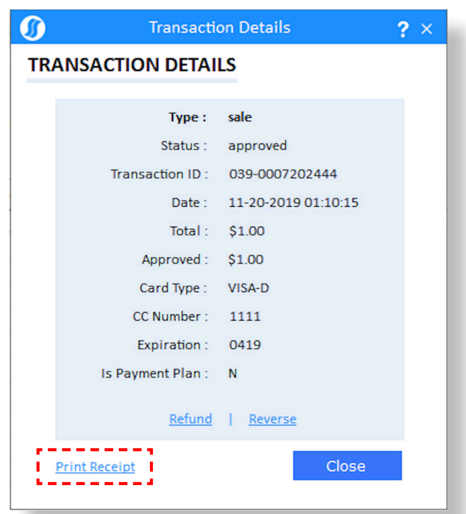
Step 2: In Payment Method, select “Saved method”
(an additional drop down menu, Saved Cards, will appear)

2.G. HOW TO PRINT A RECEIPT

After a payment has been made, you can view the transaction's details and print a receipt in 1 of 2 ways.

Option A: From payment confirmation screen

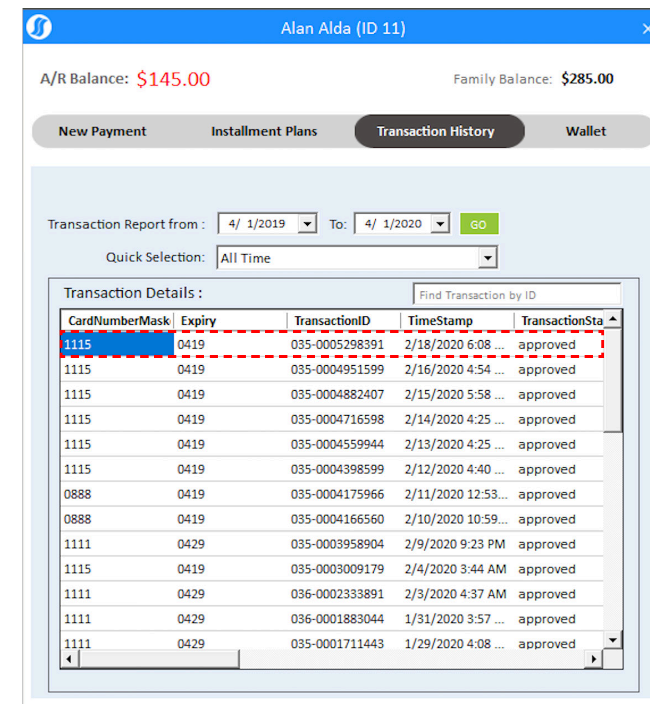


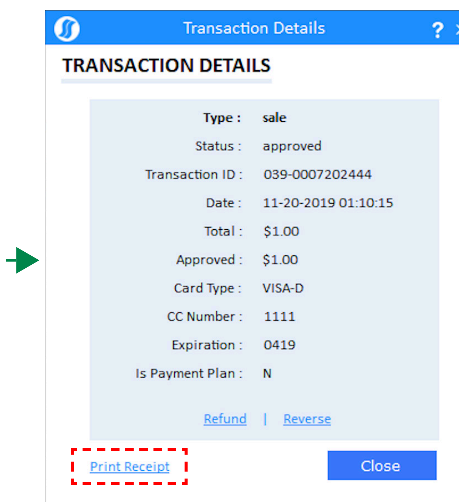


Step 1: Click "View Receipt" to view transaction details

Step 2: Click "Print Receipt" to open a pdf of the receipt

Option B: From transaction history

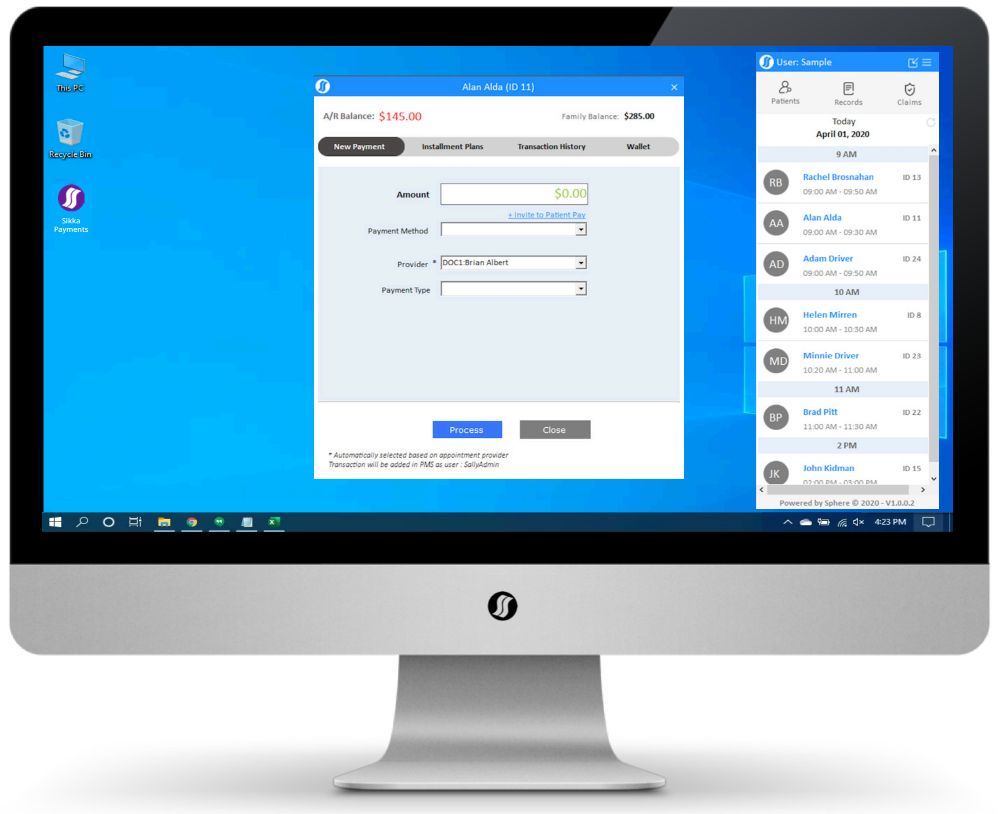




Step 1: Double-click on the payment to view transaction details

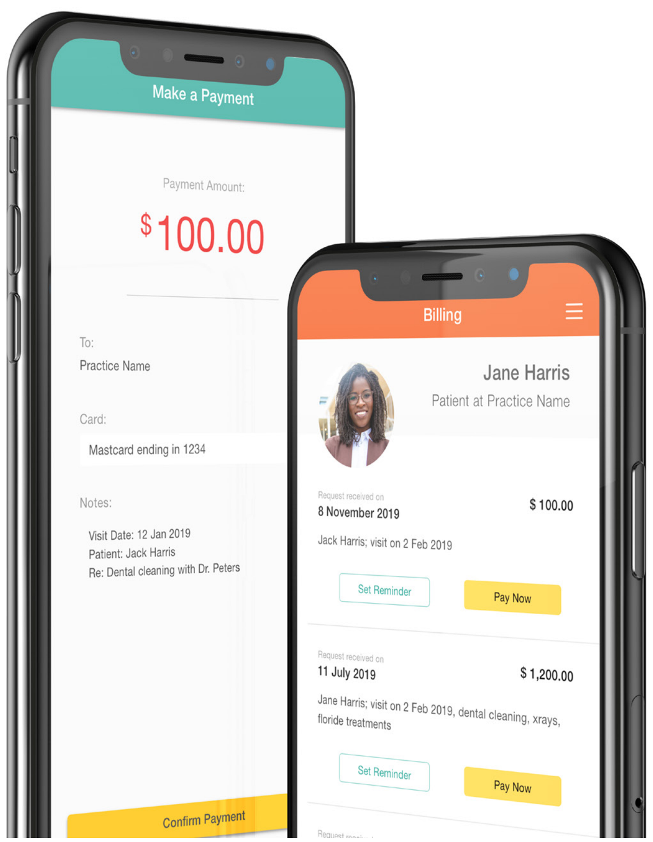
Step 2: Click "Print Receipt" to open a pdf of the receipt

3. MOBILE PAYMENTS



Sikka Payments offers you the ability to have your patients pay via their mobile phone with the PatientPay app.

3.A. PATIENT PAY MOBILE APP



PatientPay

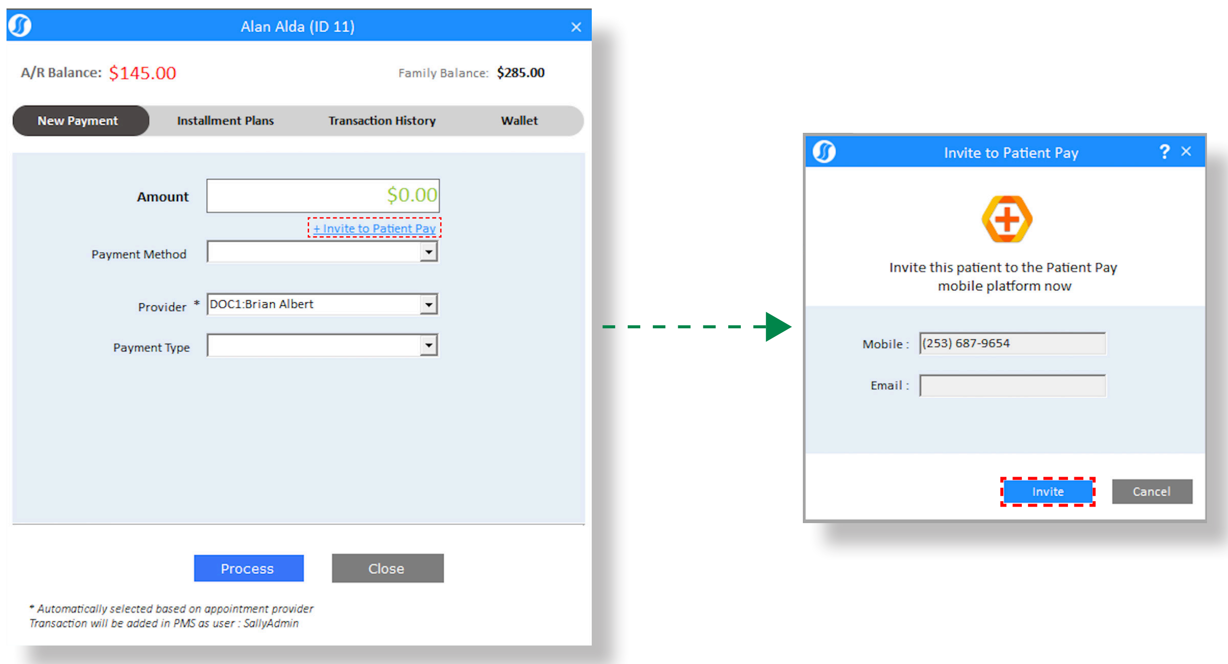
With our PatientPay mobile app for Android and iPhone, patients have the flexibility they expect in a mobile experience, view their upcoming appointments, and pay directly in the app, either in advance of, or on the day of, the appointment.

Your patients can download PatientPay for FREE!

Download on the App Store

GET IT ON Google Play

3.B. INVITE PATIENT TO PATIENT PAY



Step 1: Open Patient Profile

Step 2: Click "+ Invite to Patient Pay" (invite window will appear)

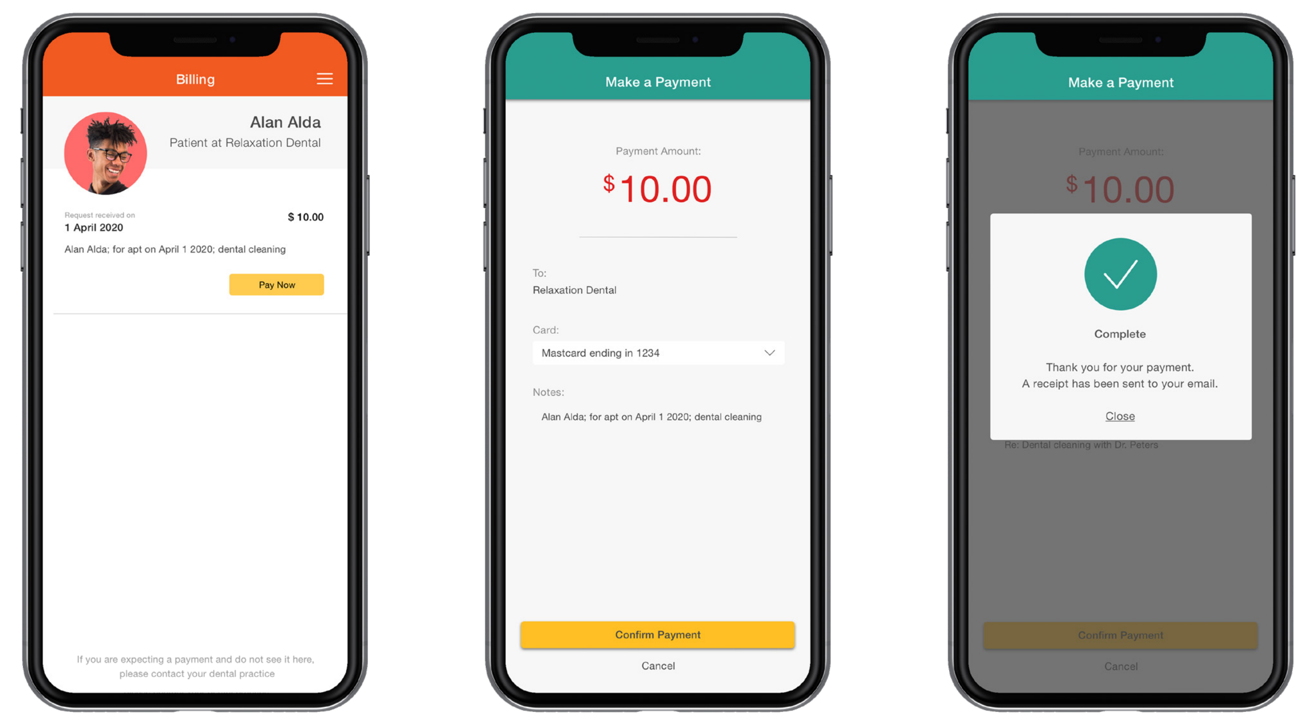
Step 4: Confirmation window will appear

WHAT YOUR PATIENT CAN EXPECT:

Step 1: Patient will receive an email with a link to download the PatientPay app

Step 2: Once downloaded, patient will be prompted to register

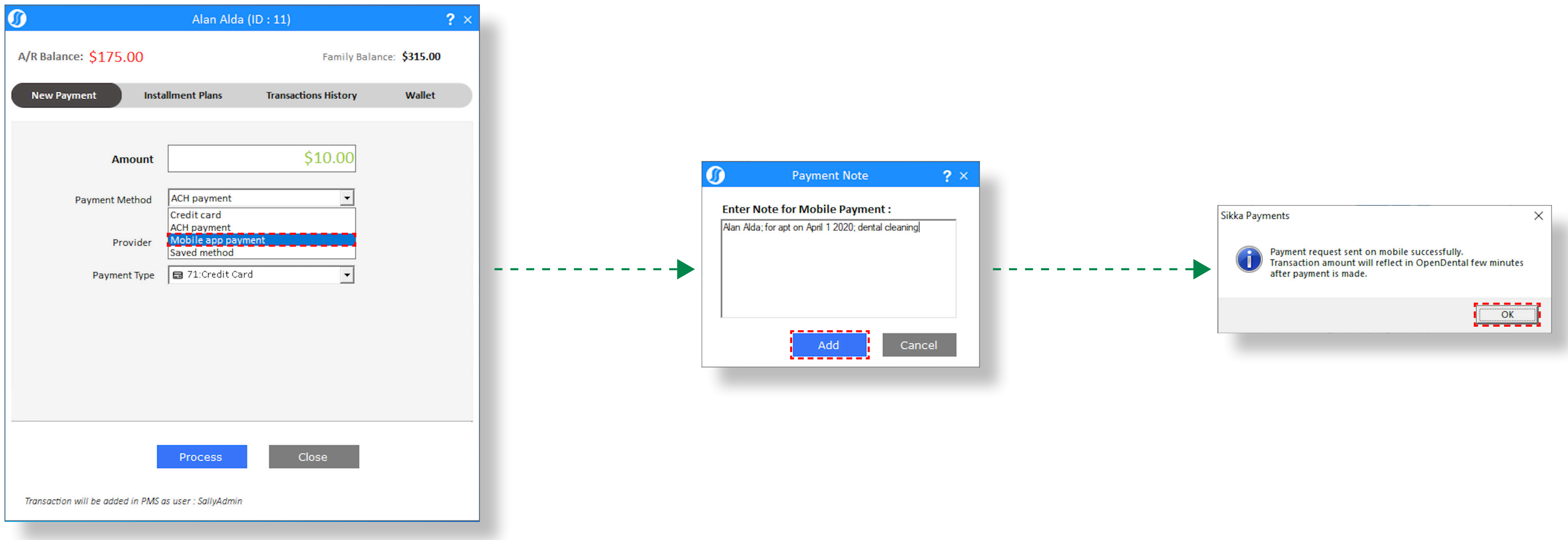
Step 3: Patient can now receive payment request notifications and make payments



 SIKKA

3.c. SEND PAYMENT REQUEST*

*** Patients MUST register for the app before you can start sending them payment requests.**



Step 1: Enter amount to be requested

Step 2: In Payment Method, select "Mobile app payment"

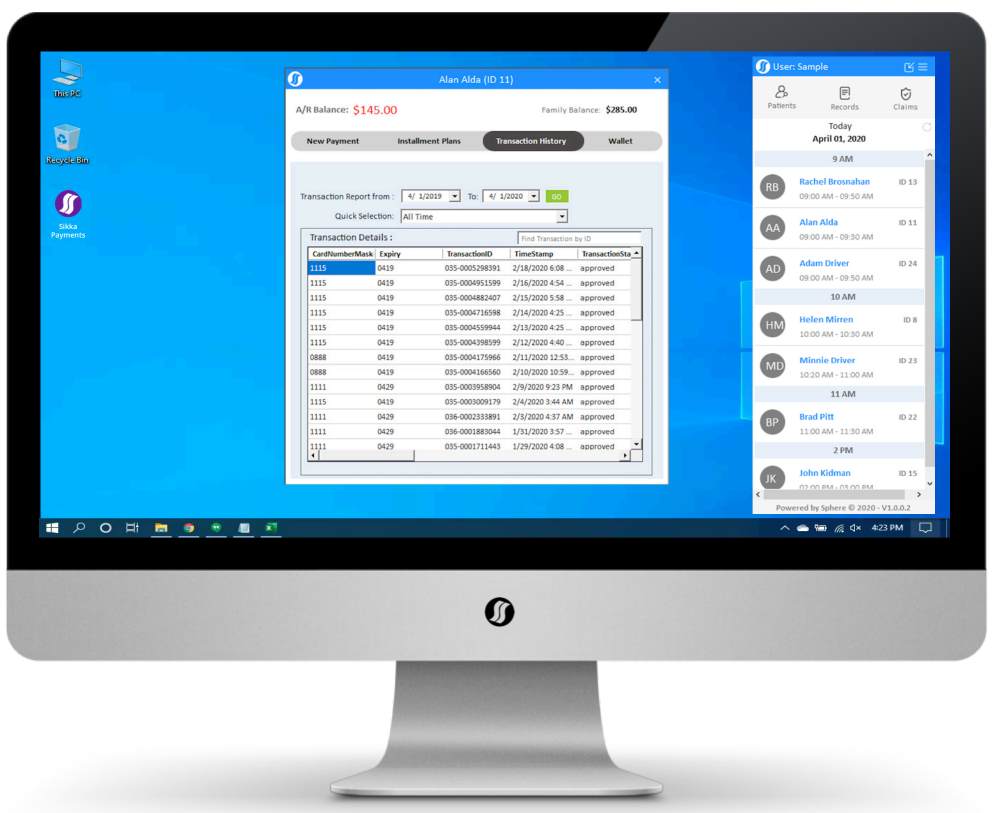
Step 3: Complete fields and click "Process"

Step 4: Enter text for a note (ie. what the payment is for)

Step 5: Click "Add"

Step 6: Request confirmation window will appear, click "OK"

4. TRANSACTION HISTORY

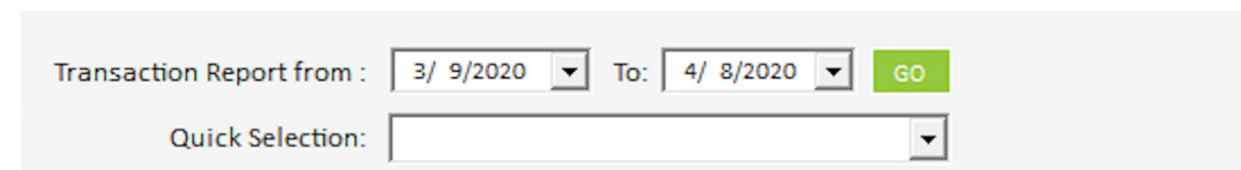


Use transaction history to view past transactions or to void transactions. (Note: only admin users can void transactions)

Depending on the task, you may want to access transaction history by patient or by practice.

Patient Transaction History

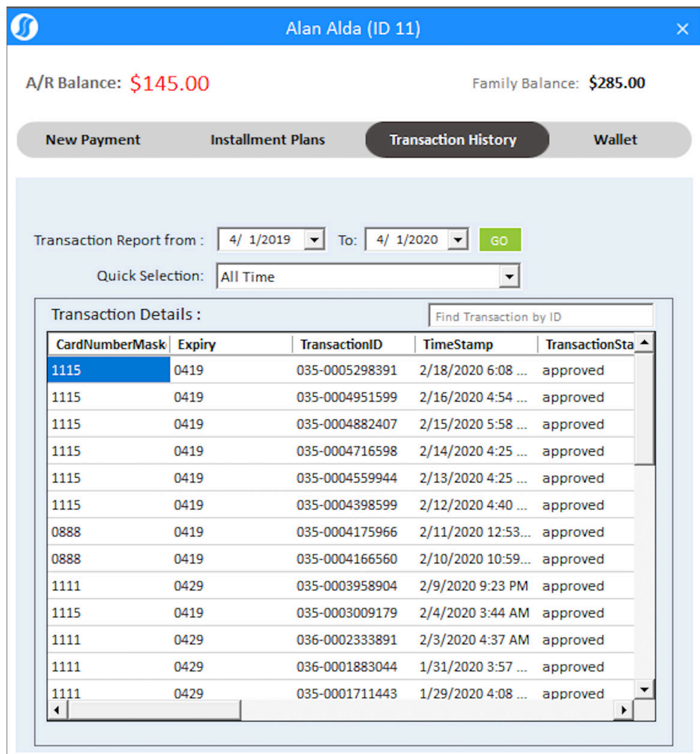
Only lists transactions made by that patient. Find a transaction by filtering by date range.



Practice Transaction History

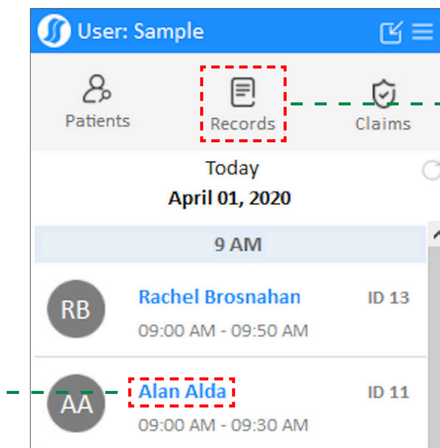
Lists all transactions made in the practice within the selected date range. Find a transaction by searching by Transaction ID.

4.A. PATIENT TRANSACTION HISTORY

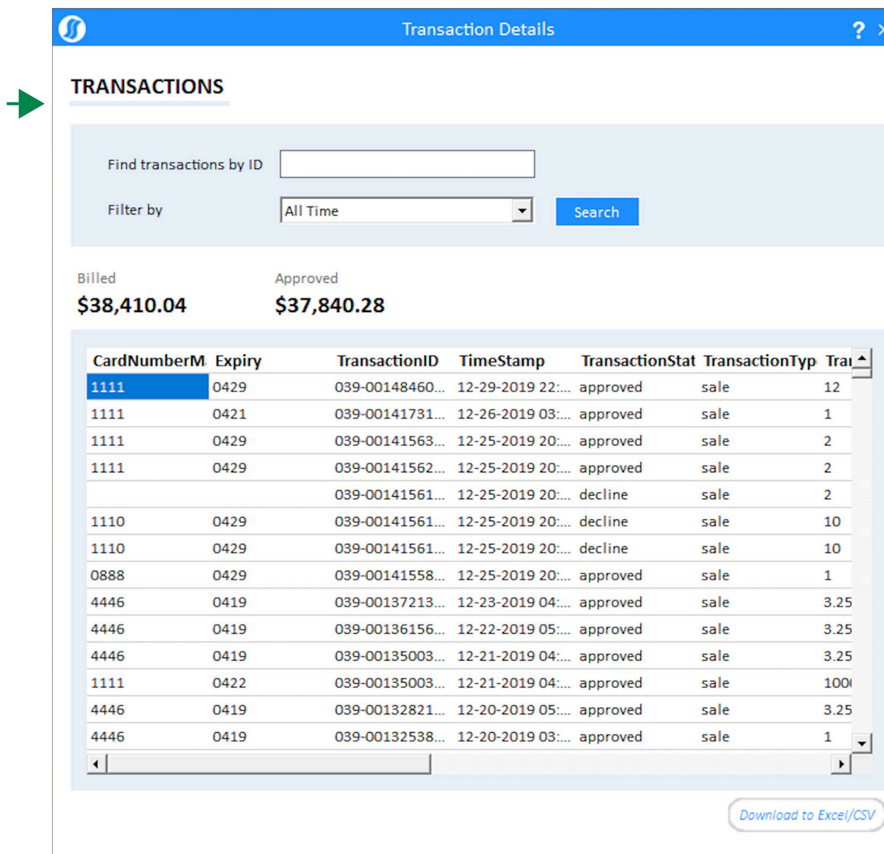


Step 1: Access the a patient's transaction history through their Patient Profile

Step 2: Click the "Transaction History"

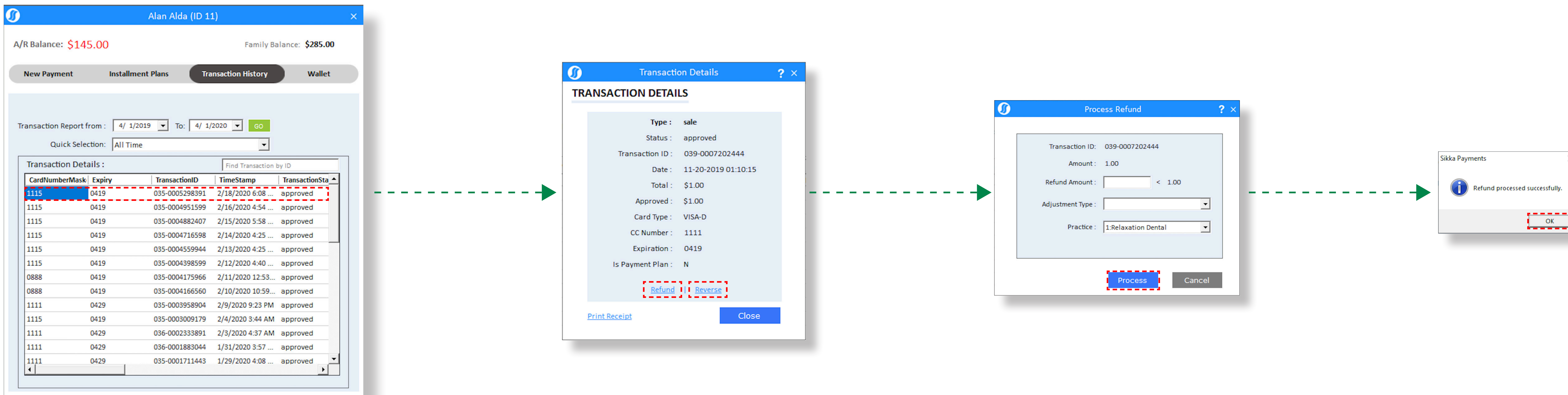


4.B. PRACTICE TRANSACTION HISTORY



Step 1: Access your practice's transaction history through the "Reports" button on the main panel

4.c. HOW TO VOID A TRANSACTION



Step 1: Double-click on the transaction (Transaction Details window will appear)

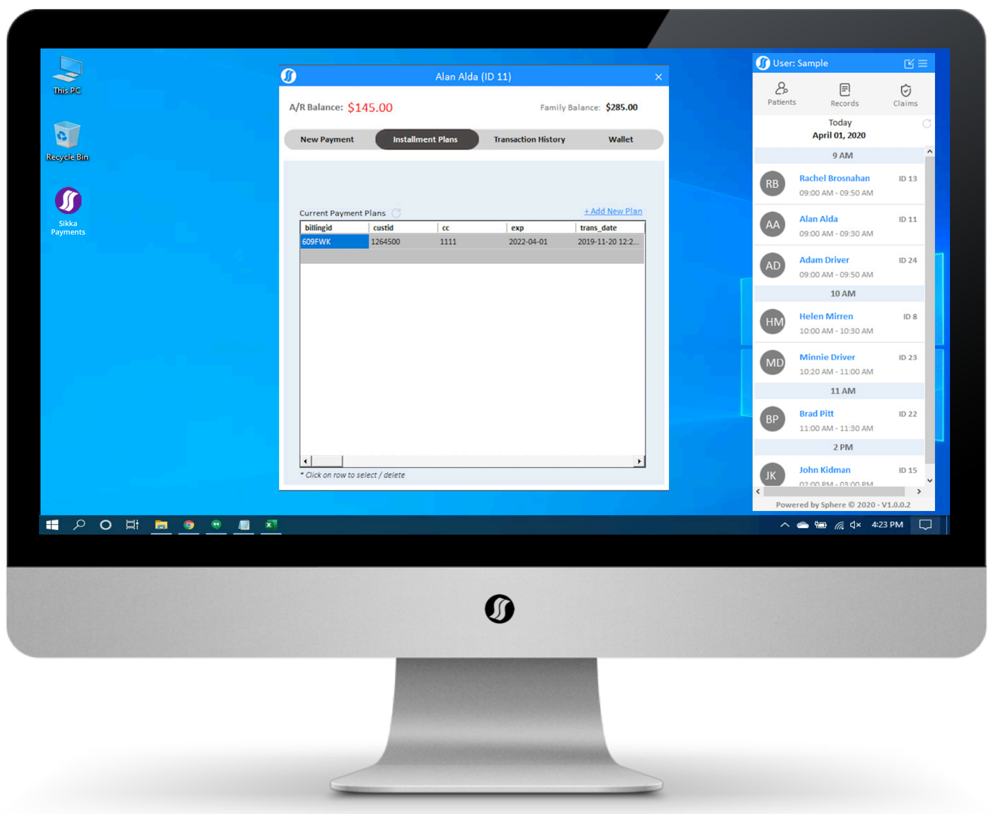
Step 2: Click on the appropriate void, “Reverse” or “Refund”

Step 4: Complete fields and click “Process”

Step 5: Void confirmation window will appear

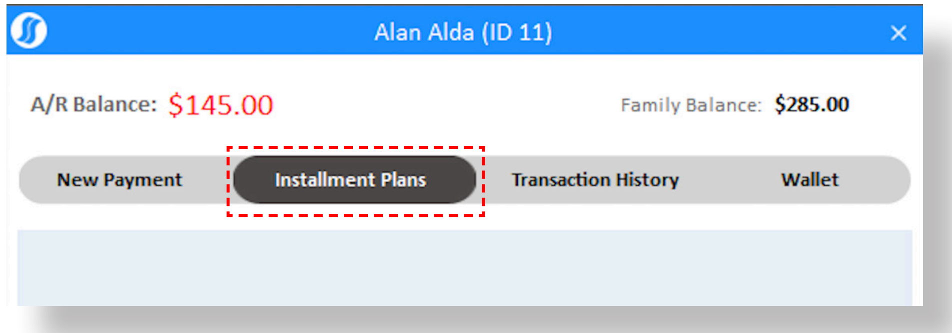
Step 6: Click “OK”

5. INSTALLMENT PLANS

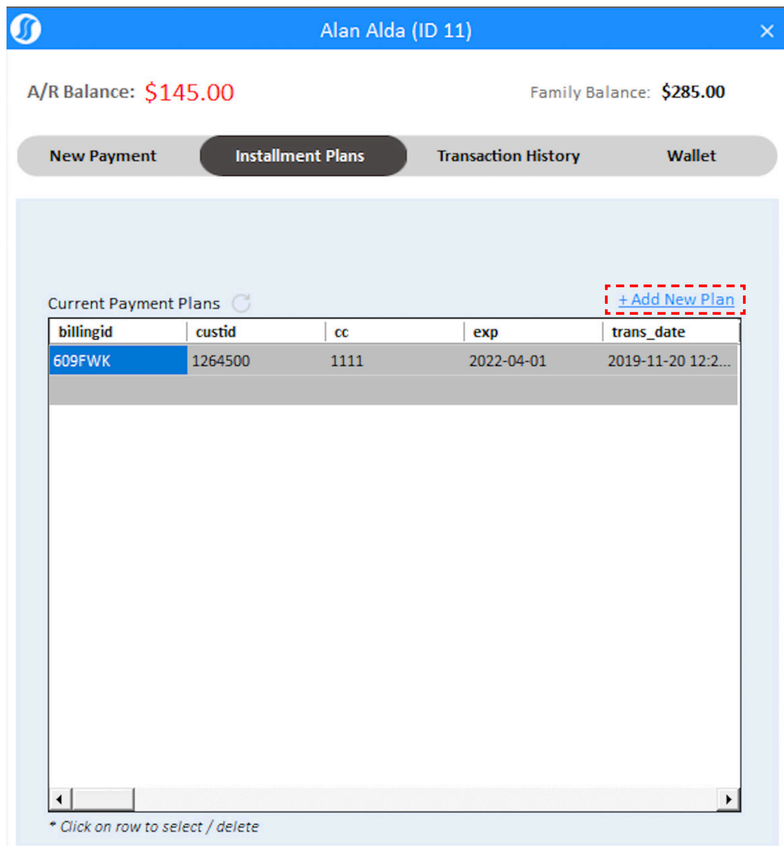


Installment plans can help you get paid by encouraging your patients to make payments on time.

Installment Plans can be accessed by opening the Patient Profile, then clicking on the “Installment Plans” tab.



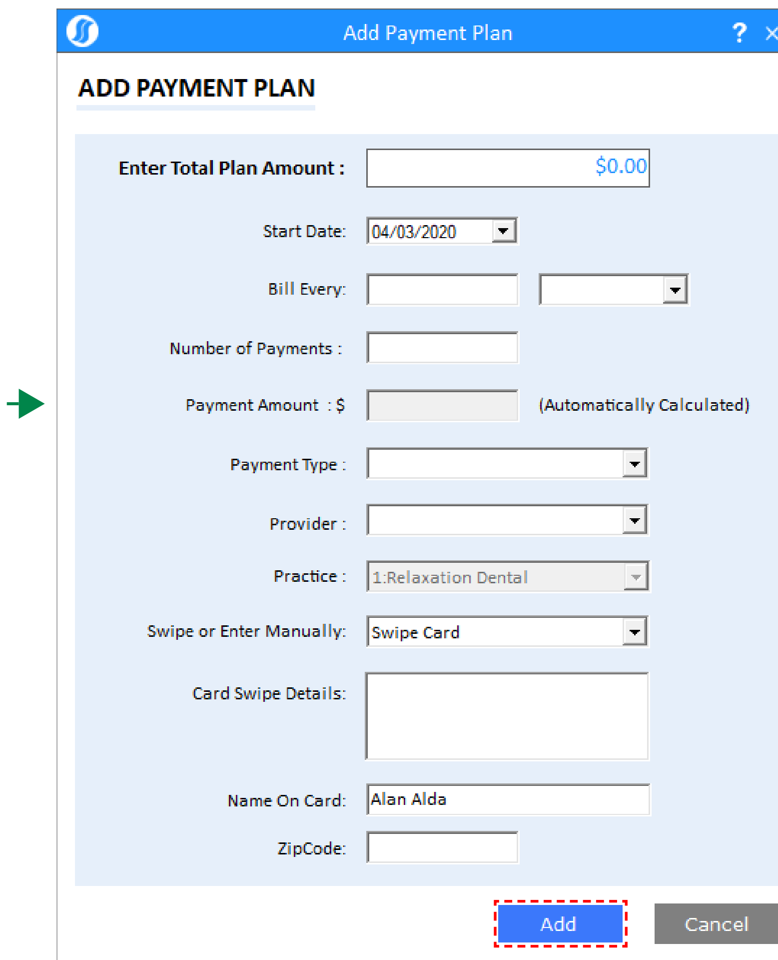
5.A. CREATE A NEW PLAN



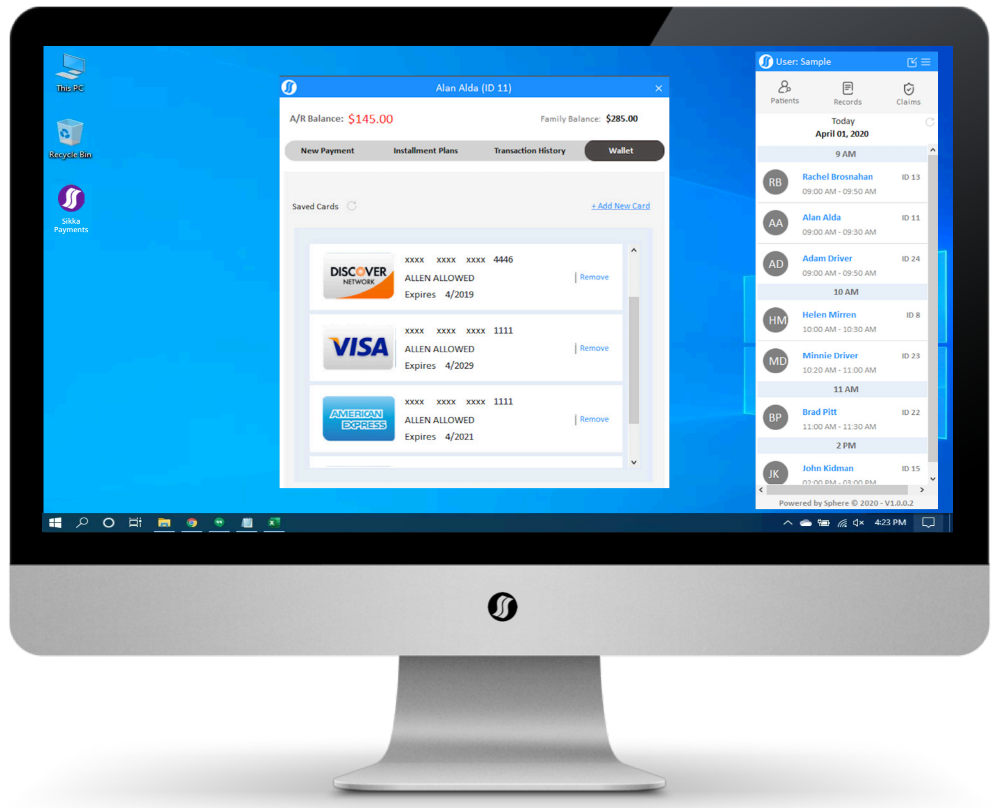
Step 1: Click "<u>+ Add New Plan</u>"
(Add New Plan window will appear)

Step 2: Complete fields

Step 3: Click "Add"

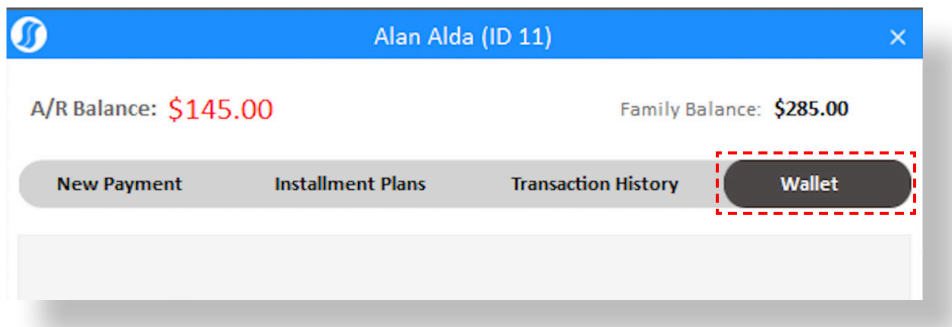


6. PATIENT WALLET

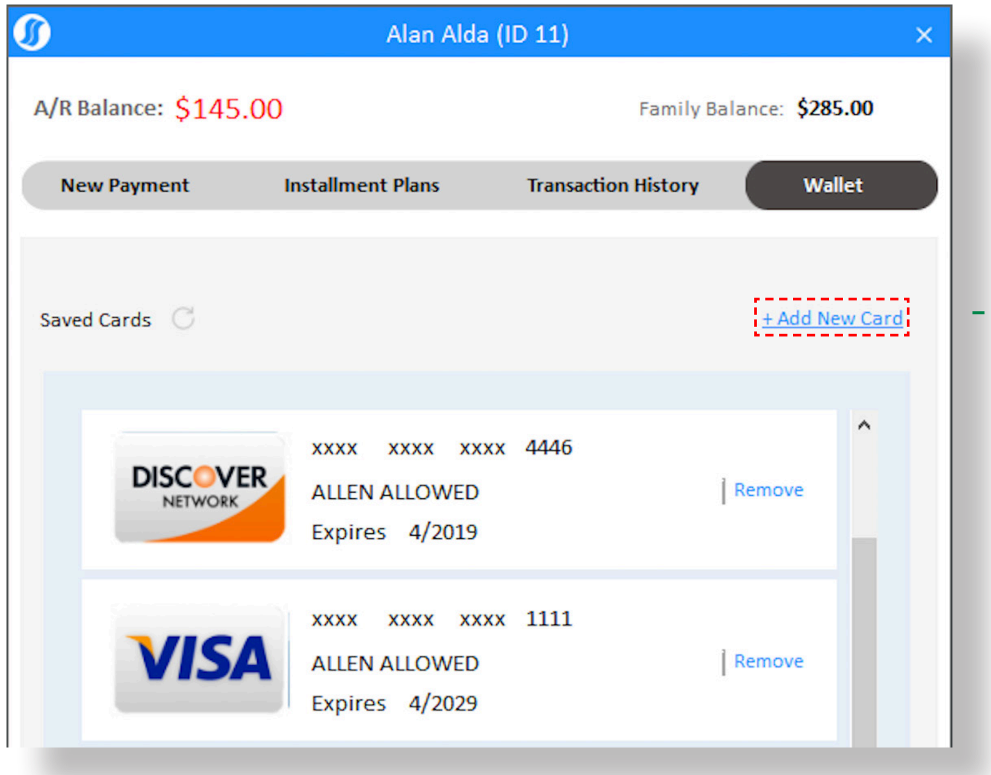


To improve the checkout experience, save a payment method for future payments in the Wallet tab.

The patient Wallet can be accessed by opening the Patient Profile, then clicking on the “Wallet” tab.



6.B. HOW TO SAVE A NEW CARD

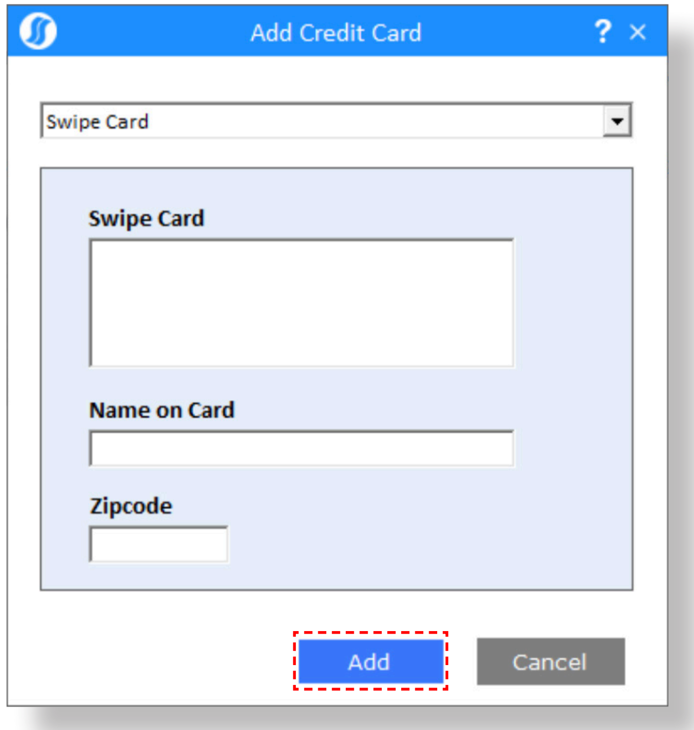


Step 1: Click "+ Add New Card" to save a card to the patient's wallet

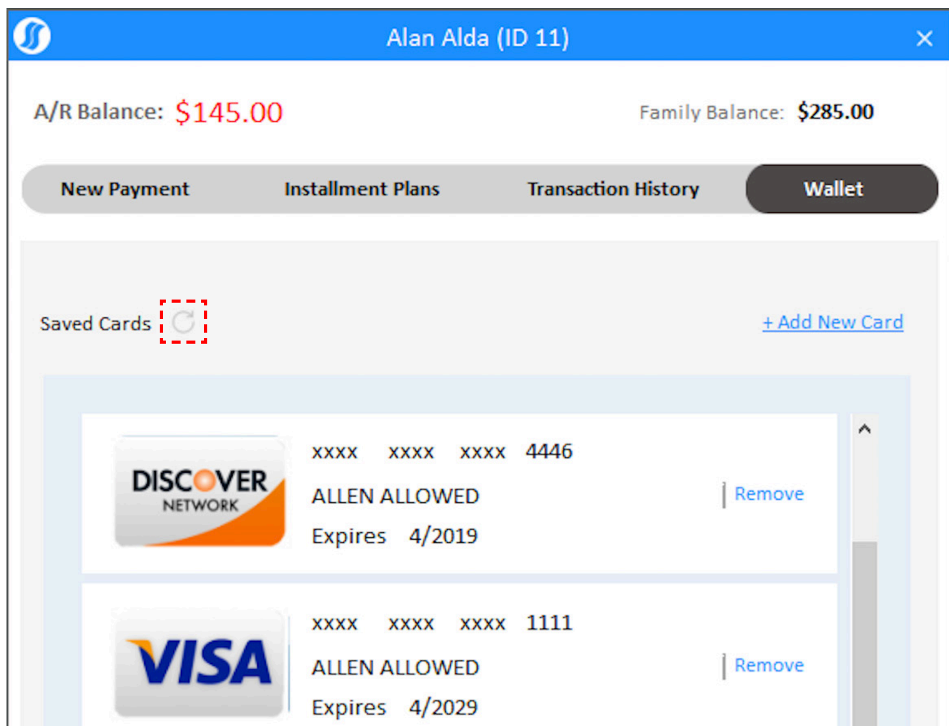
Step 2: Select "Swipe Card" or "Enter Manually" from the drop down menu

Step 3: Follow the prompt

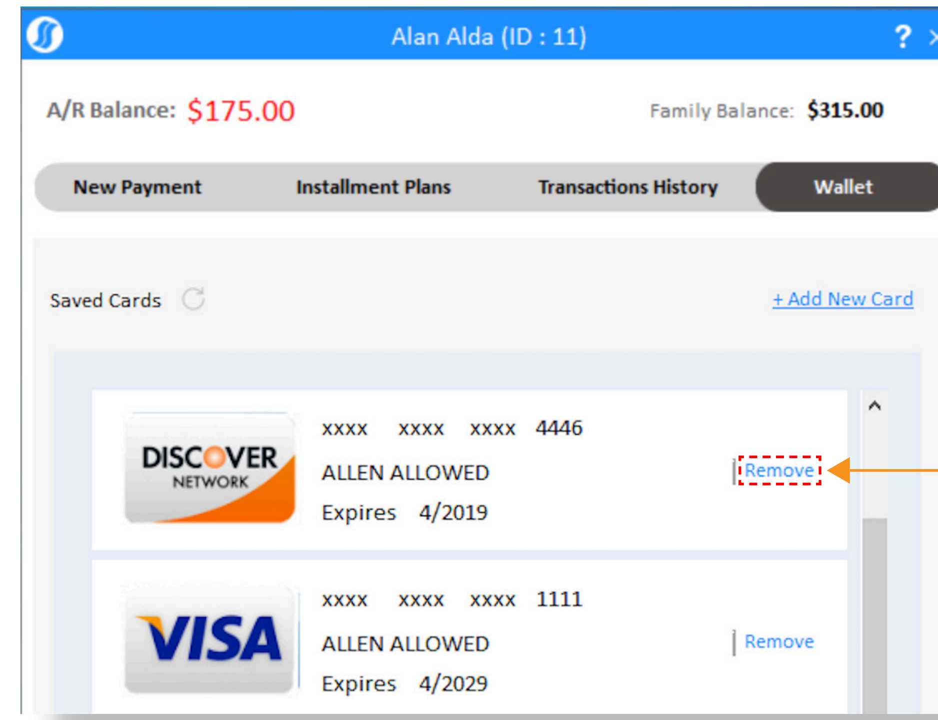
Step 4: Click "Add" to save card information



Note: If the card does not appear at first, please click the **refresh icon**



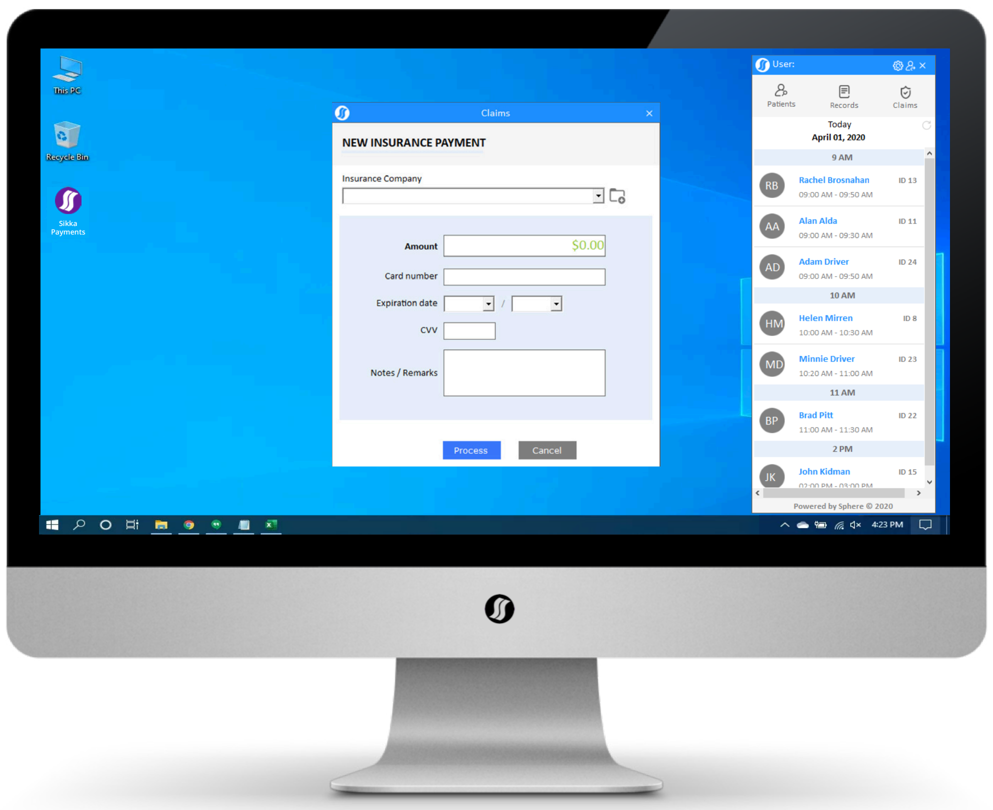
6.B. HOW TO REMOVE A CARD



Step 1: Click "Remove Card" to delete the saved card

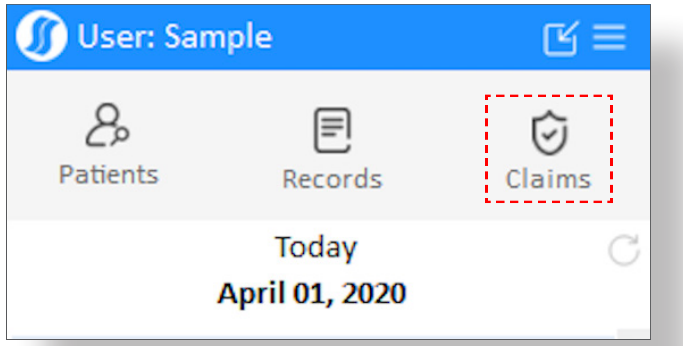
Note: If the card is still listed, please click the refresh icon

7. CLAIMS

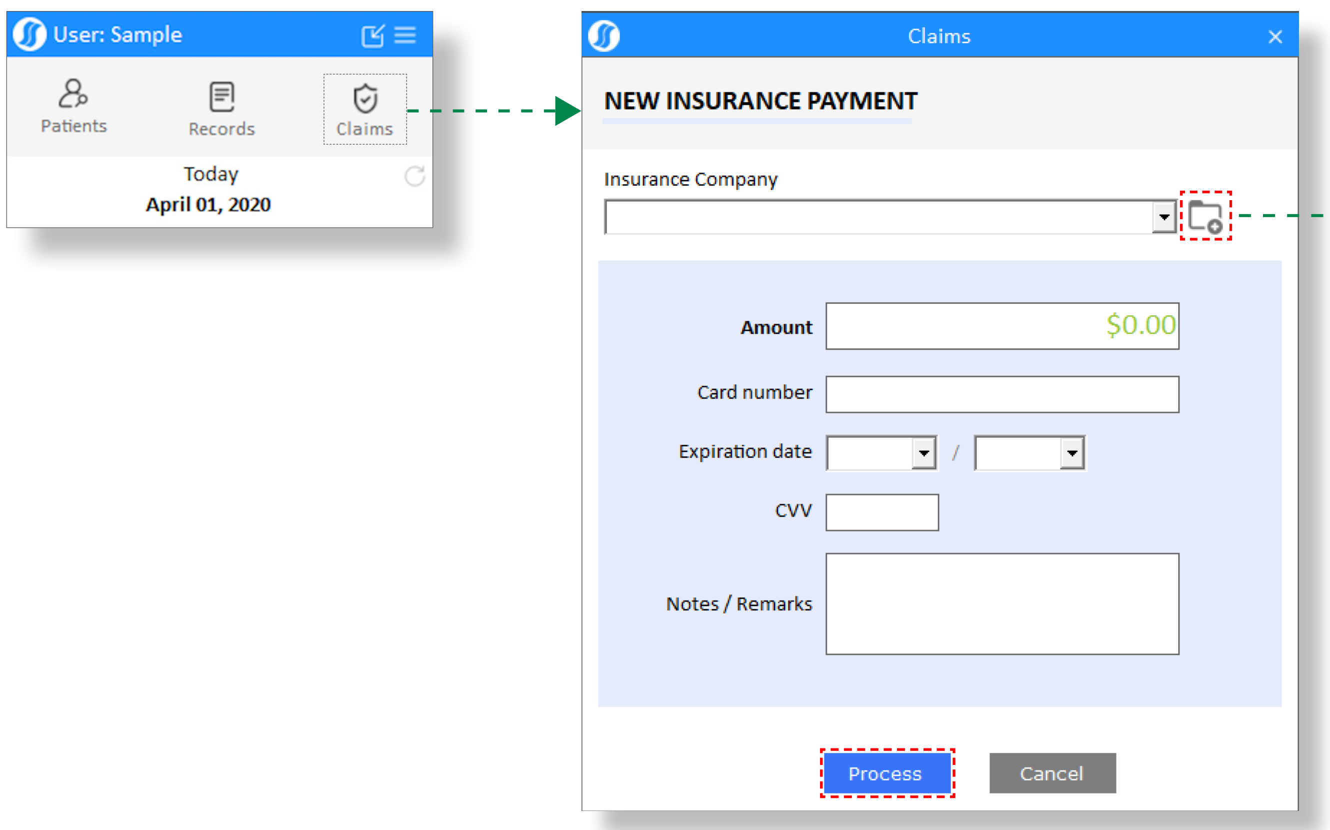


Process a credit card payment from an insurance provider recieved via email, fax or web portal.

The Claims window can be accessed by clicking on the “Claims” button on the appointment panel.

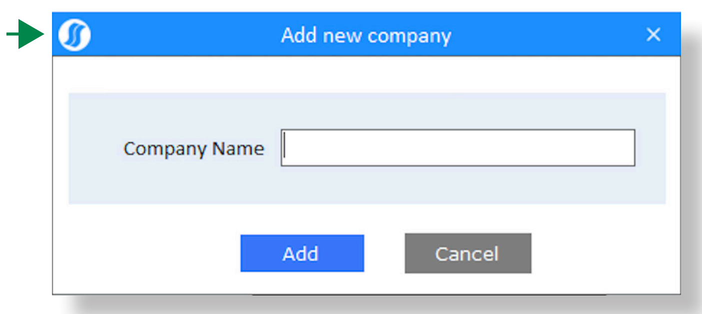


7.A. NEW INSURANCE PAYMENT



Select the insurance company from the drop down menu (the list comes from the PMS). Complete the fields and click “Process.”

7.B. ADD A NEW INSURNCE COMPANY



If the insurance company is not listed or if it is a new insurance company, click the + add icon.

8. CARD READERS

By now, you should have received your Augusta card reader.

Step 1: Plug the reader into your computer USB port

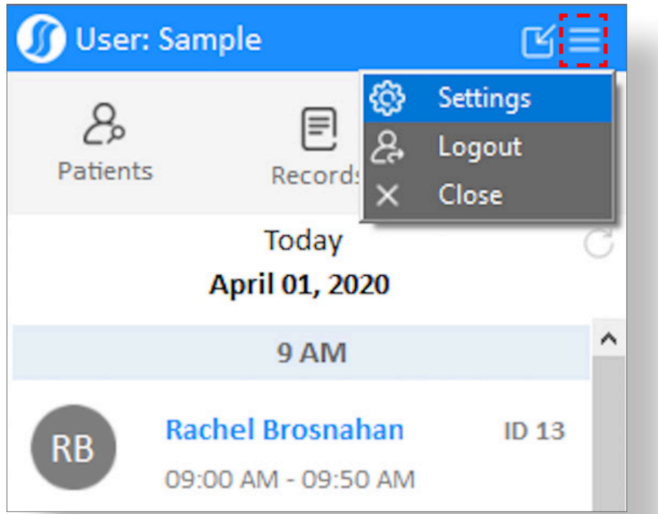
It will begin to work immediately

Note: There is not need to install a driver

The Augusta Reader

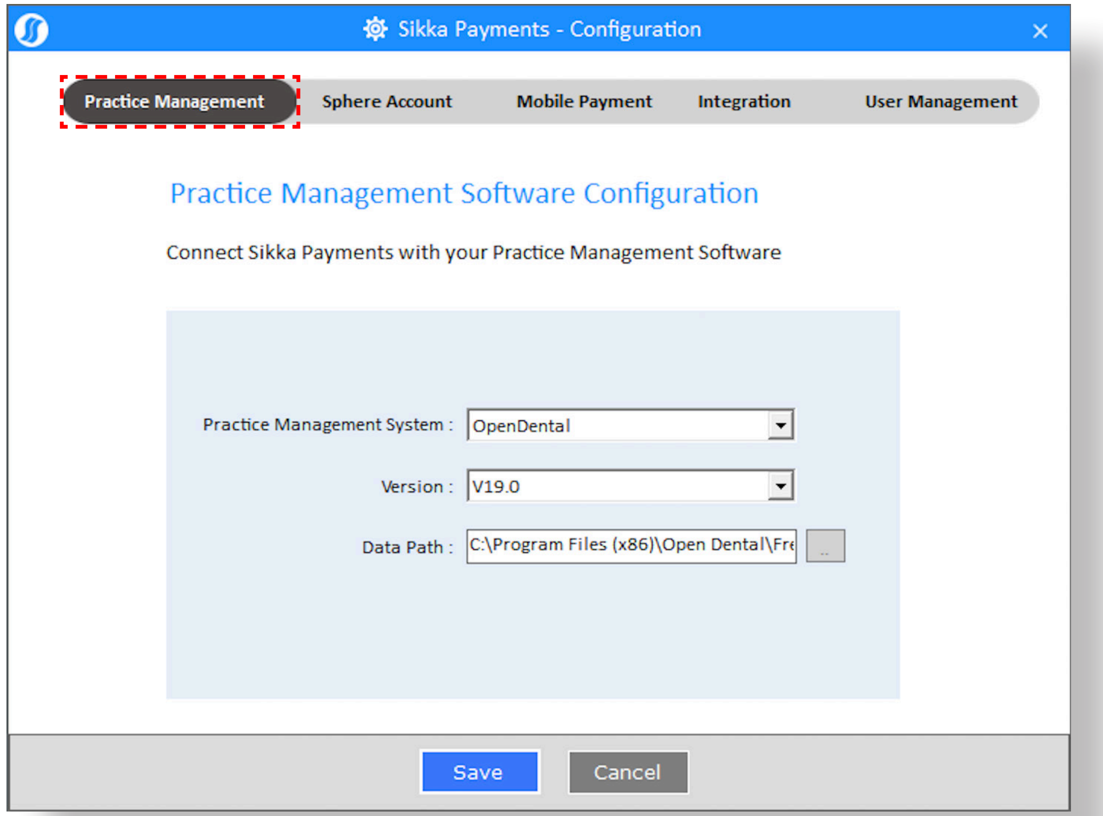
Sikka Payment's preferred card reader features the latest security technology and can swipe both magnetic stripe cards (1) as well as read smart chip cards (2). The reader is compact and lightweight (3).

9. SETTINGS



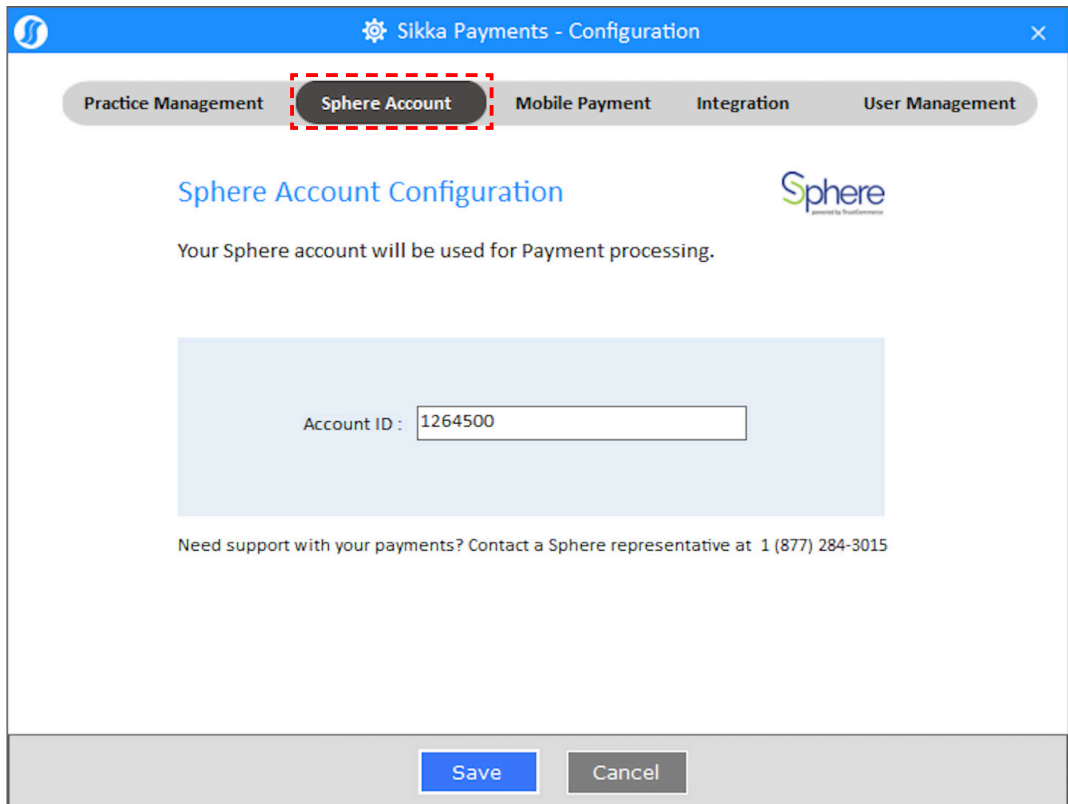
Settings is only available to the Sikka Payments administrator. The settings are generally configured at the time of installation, but can be modified at any time.

9.A. PRACTICE MANAGEMENT



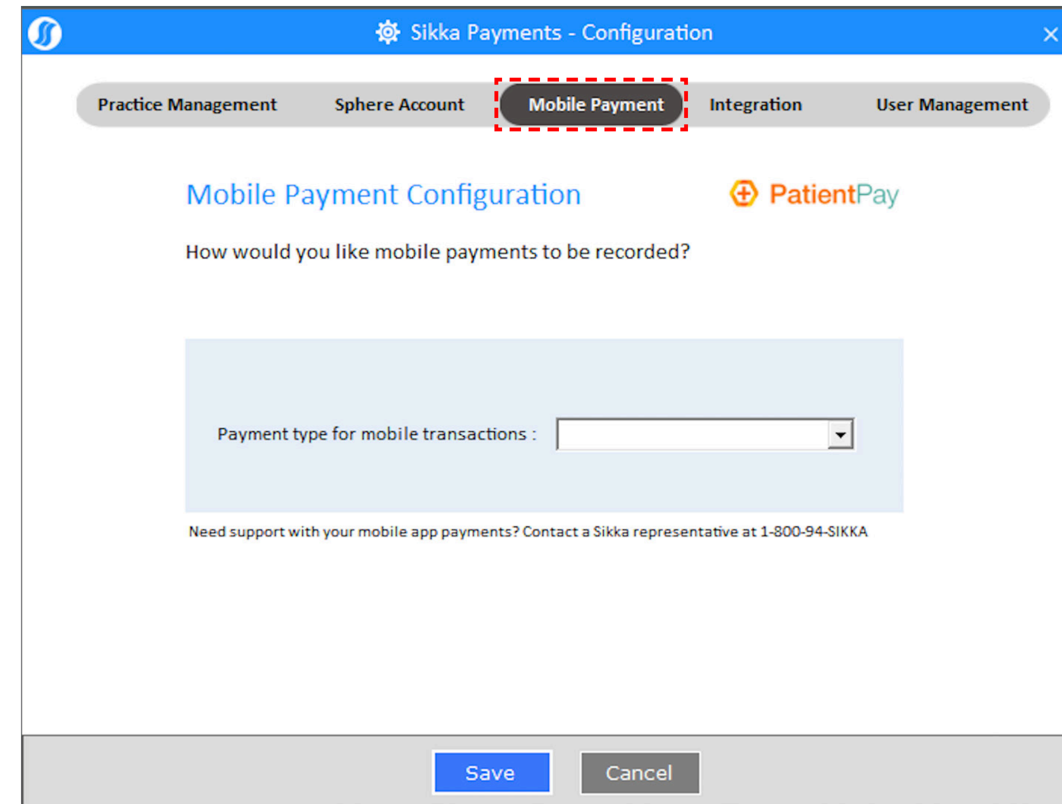
These settings should be detected automatically by the Sikka Practice Utility.

9.B. SPHERE ACCOUNT



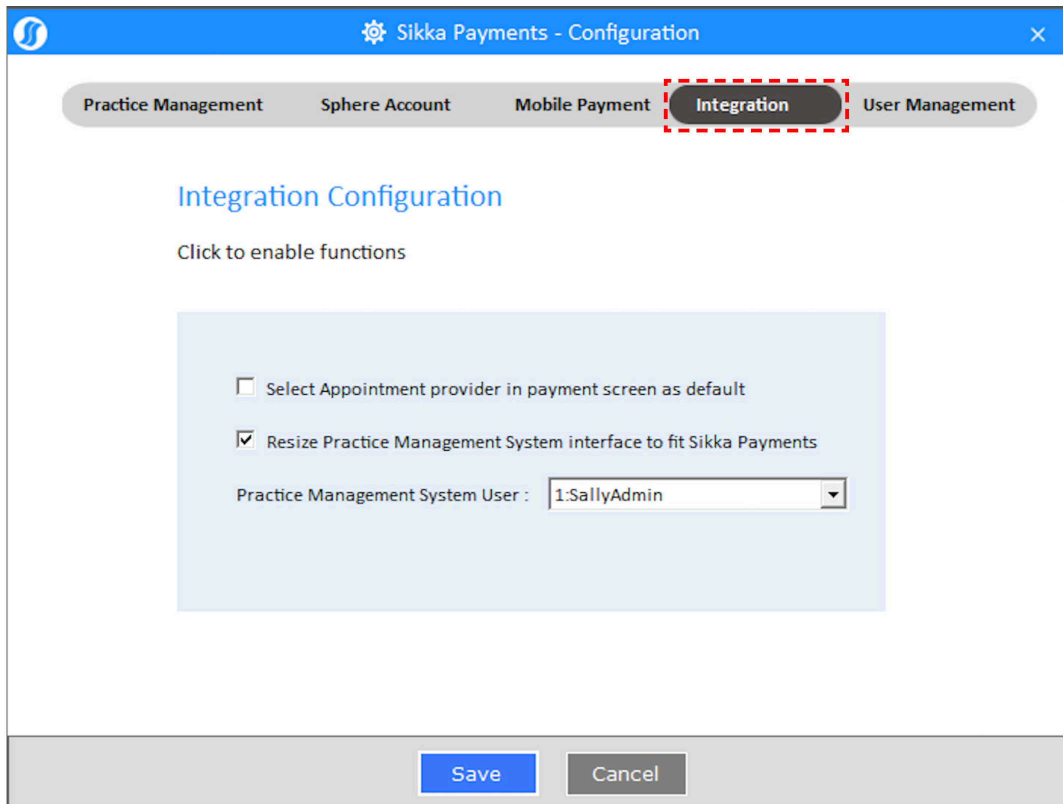
The Sphere Account ID is your Customer ID with Sphere as a merchant service provider.

9.C. MOBILE PAYMENTS



Before accepting mobile payments, you should allocate a corresponding payment type to write back to your practice management system. The available payment types are listed in the drop down menu.

9.D. MISCELLANEOUS



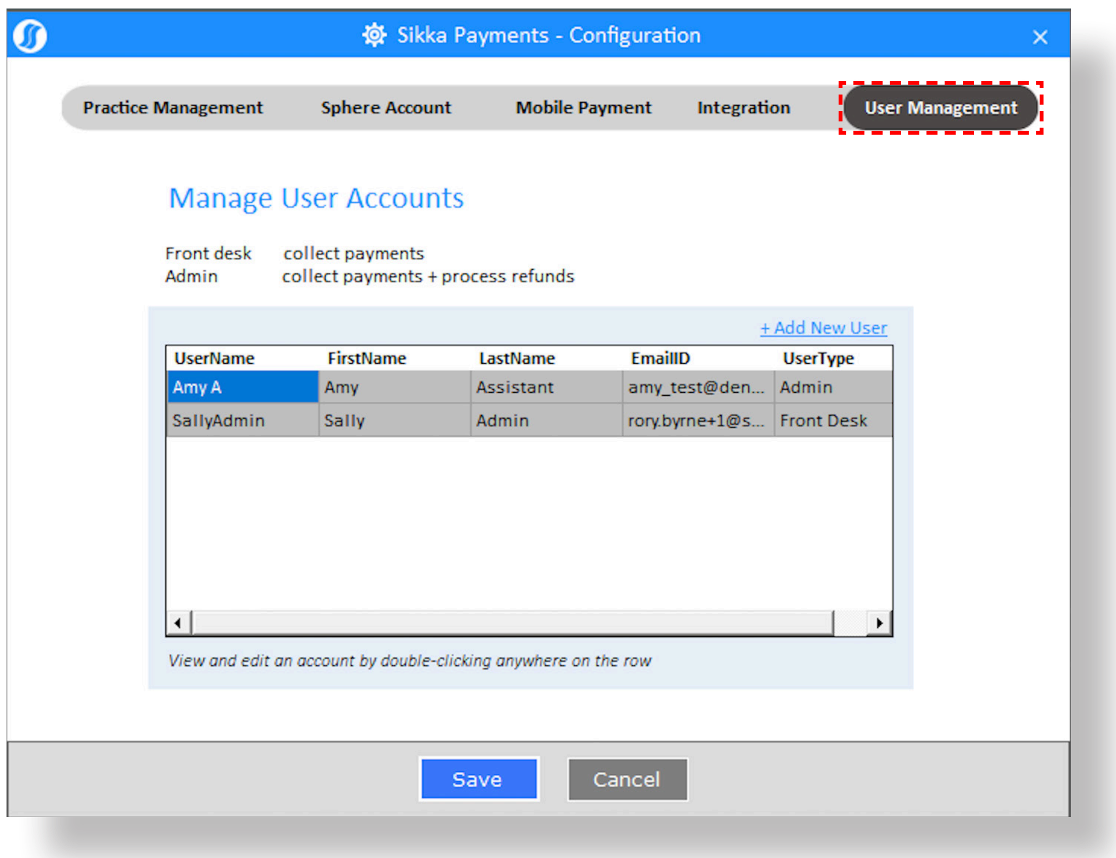
These settings are meant to maximize integration with your PMS to optimize checkout and payment efficiency.

Select Appointment provider in payment screen as default
Check this box to pre-populate the provider from the patient's last appointment into the payment window to write back to the PMS.

Resize PMS UI
Uncheck this box if you DO NOT want your PMS to resize when Sikka Payments is open.

Practice Management System User
Every user of Sikka Payments should be mapped to the corresponding user in the PMS to accurately record which user processed the payment back to the PMS.

9.E. USER MANAGEMENT



Control who can access your practice's Sikka Payment operations.

Add a new user

Click "+ Add New User" and follow prompts. Note the difference in user types. "Front Desk" can accept payments while "Admin" can accept payments *and* void transactions.

Edit an existing user

Double-click on the row of the user to open a window with the user's details. Edit details and click "Save" to make changes.

Note:

Only admin users are able to process refunds and access settings.

Thank you for choosing Sikka Payments!

If you need immediate help, please contact our Customer Success Team at 1-800-94-SIKKA