

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

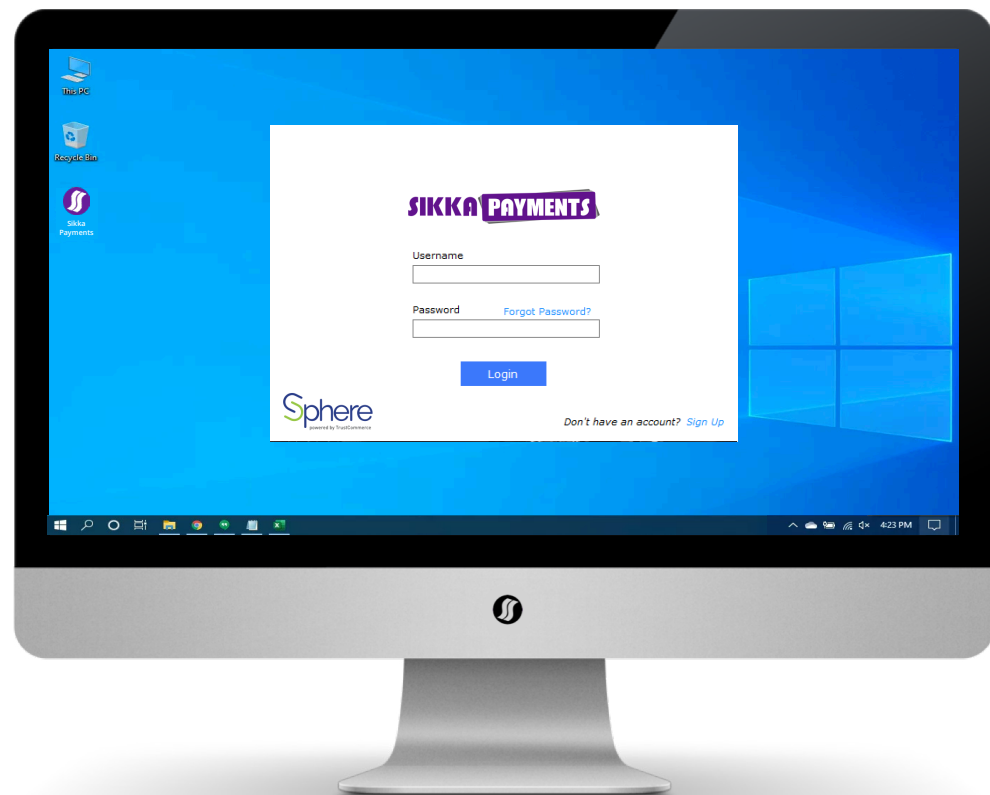
Thank you!

-Your Sikka Software Care Team

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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



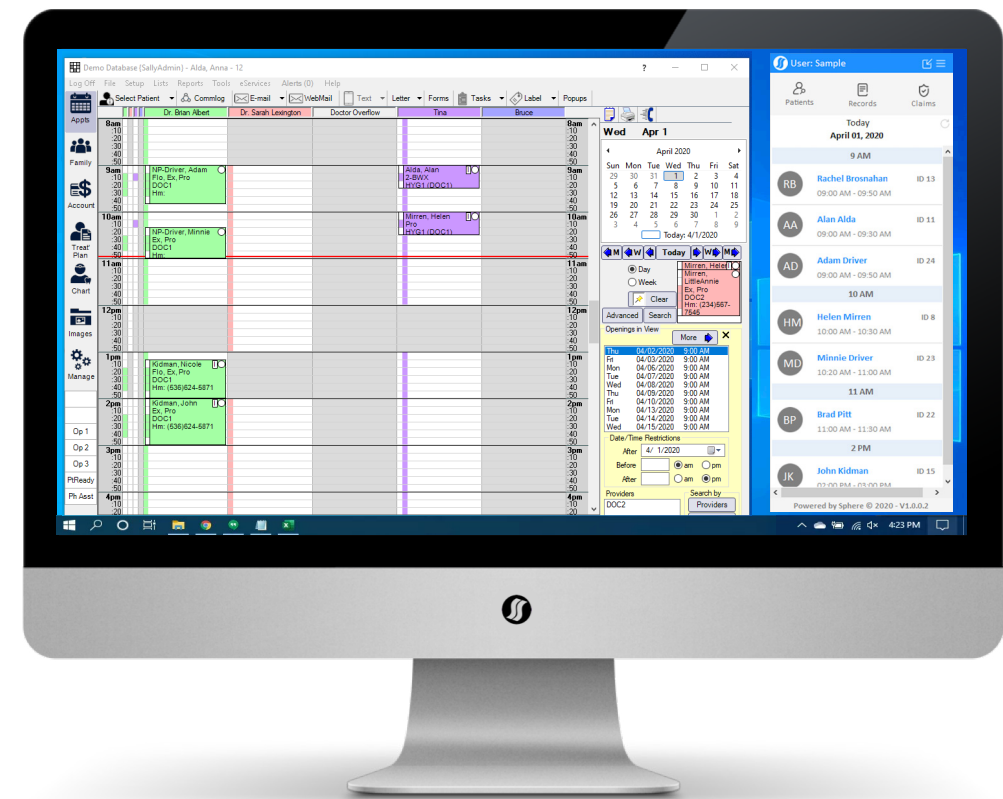
Step 2: A window will open and prompt you to log in

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:

- Settings
- Logout
- Close

Refresh schedule

Click date to open calendar

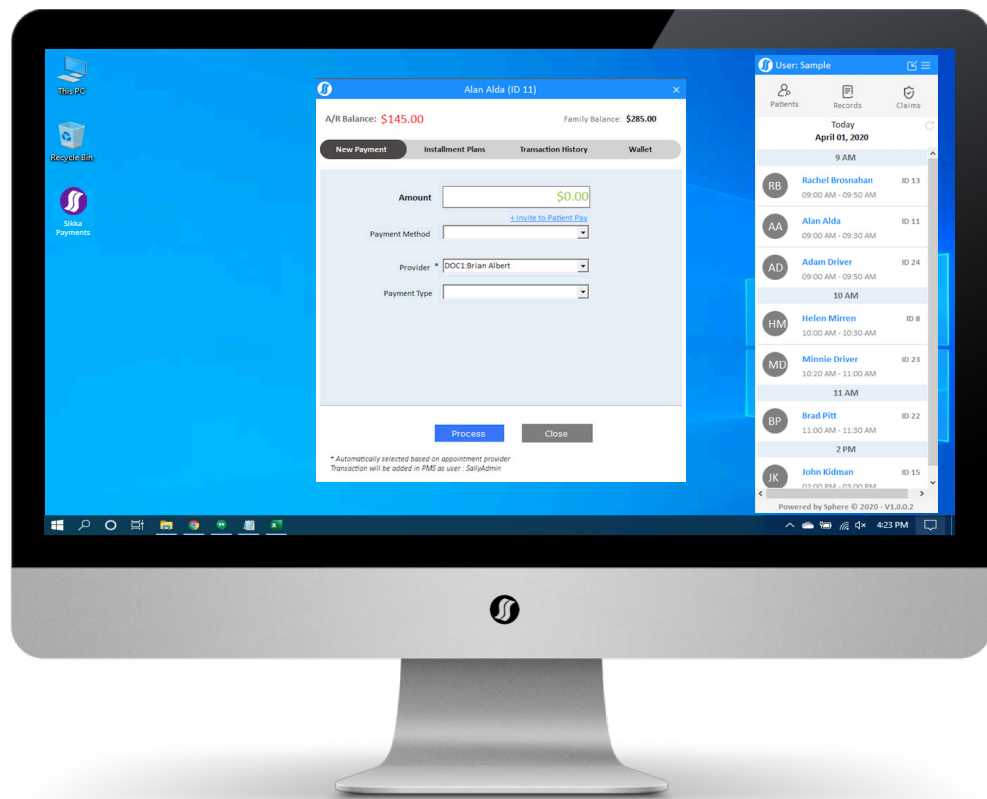
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Click new calendar day to change schedule displayed

The screenshot shows the SIKKA interface. On the left, a schedule for 'Today April 01, 2020' is displayed with time slots from 9 AM to 2 PM. Patients listed include Rachel Brosnahan (ID 13), Alan Alda (ID 11), Adam Driver (ID 24), Helen Mirren (ID 8), Minnie Driver (ID 23), Brad Pitt (ID 22), and John Kidman (ID 15). A dashed green arrow points from 'Alan Alda' in the schedule to a 'Patient Profile' window on the right. The profile window for 'Alan Alda (ID 11)' shows an A/R Balance of \$145.00 and a Family Balance of \$285.00. It includes tabs for 'New Payment', 'Installation Plans', 'Transaction History', and 'Wallet'. The 'New Payment' tab is active, showing a form with fields for 'Amount' (set to \$0.00), 'Payment Method', 'Provider' (DOC1:Brian Albert), and 'Payment Type'. 'Process' and 'Close' buttons are at the bottom.

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

2. ACCEPTING PAYMENTS



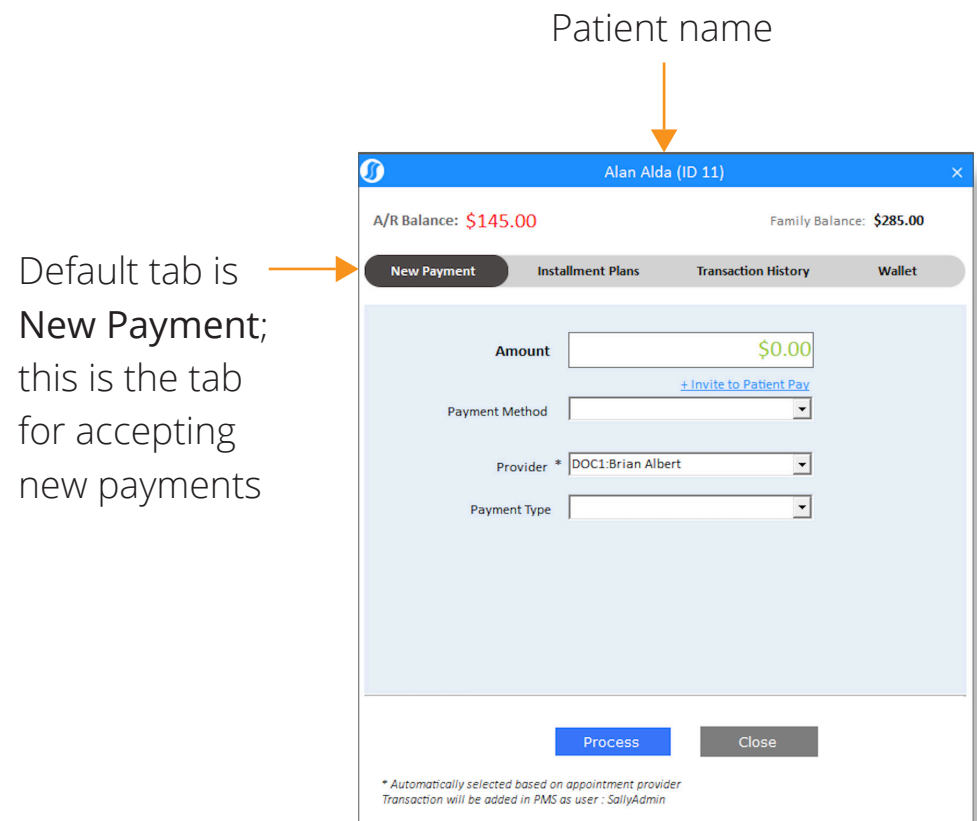
Sikka Payments allows your patients to pay using several methods.

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.



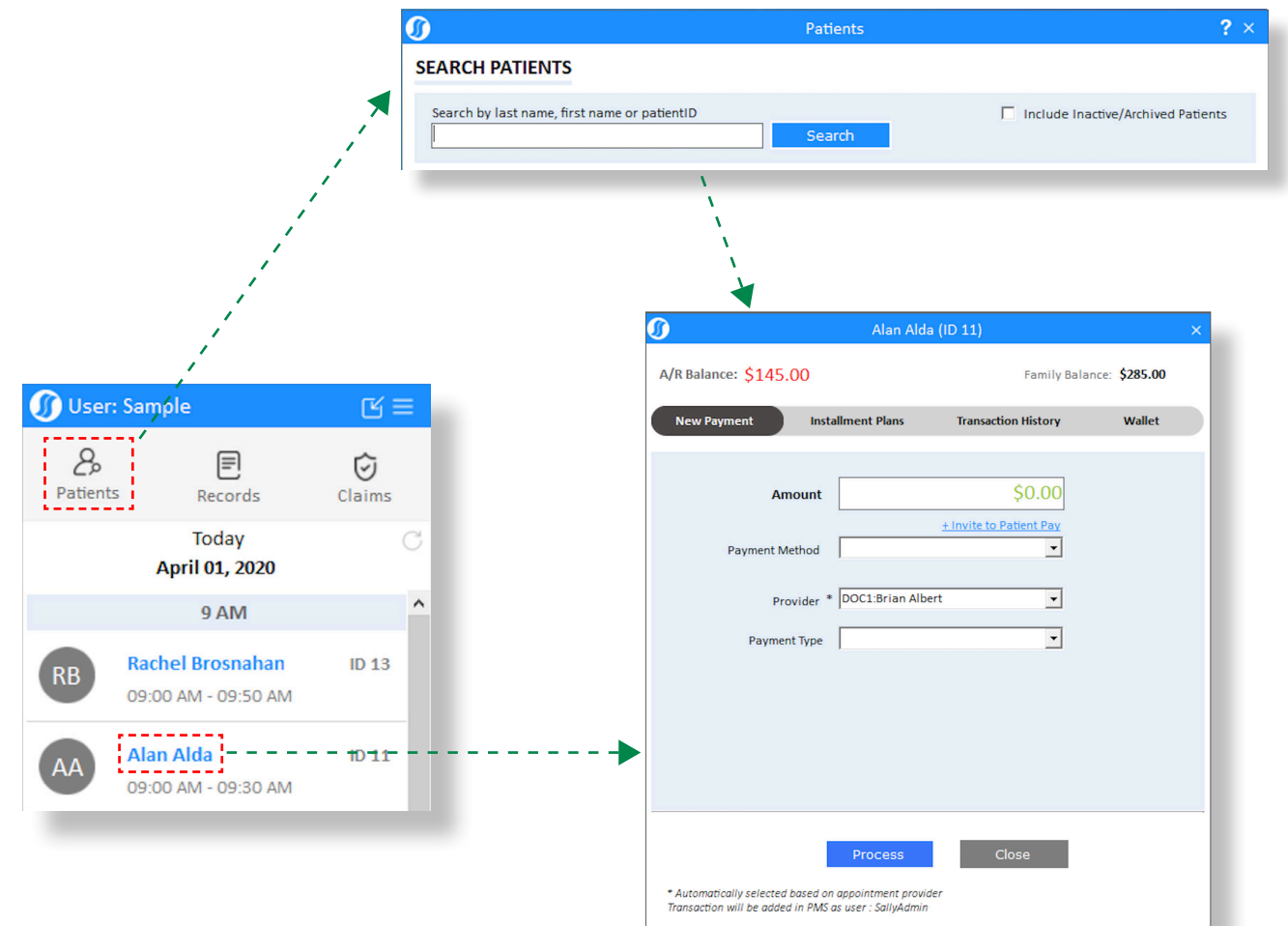
Default tab is **New Payment**; this is the tab for accepting new payments

Patient name

Example: Patient Profile for Alan Alda

Option A: Click on patient name in Schedule panel

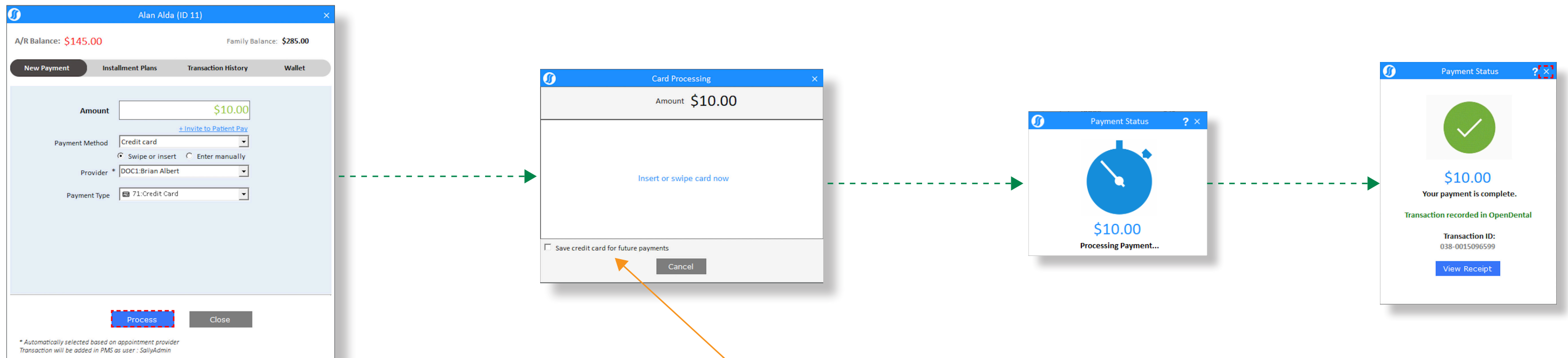
Option B: Search for patient in Patient Search



2.c. CARD PRESENT AT FRONT DESK

Step 5: Swipe or insert card when prompted

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



Step 1: Enter amount to be processed

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

Step 3: Select "Swipe or insert"

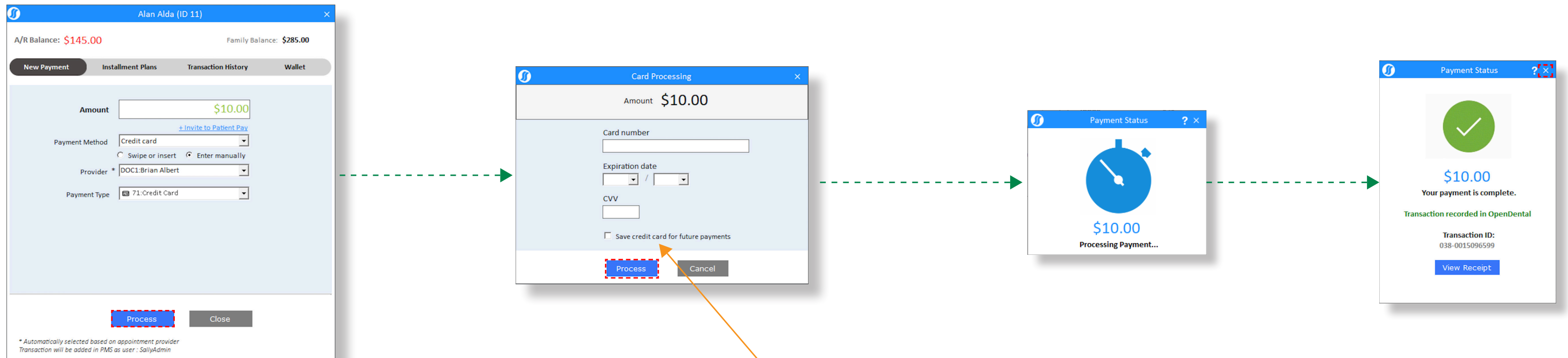
Step 4: Complete fields and click "Process"

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

2.D. MANUALLY KEY ENTER

Step 5: Enter card information when prompted

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



Step 1: Enter amount to be processed

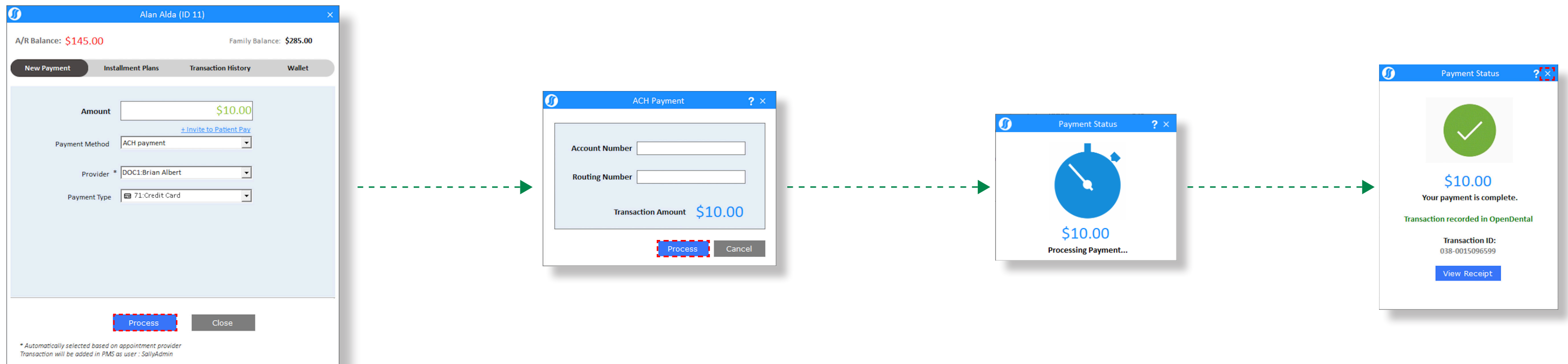
Step 2: In Payment Method, select "Credit card"

Step 3: Select "Enter manually"

Step 4: Complete fields and click "Process"

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

Alan Alda (ID 11)

A/R Balance: \$145.00 Family Balance: \$285.00

New Payment | Installation Plans | Transaction History | **Wallet**

Amount: \$10.00

Payment Method: Saved method

Provider: DOC1:Brian Albert

Payment Type: 71:Credit Card

Saved Cards:

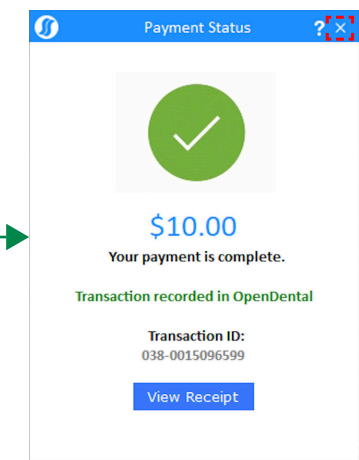
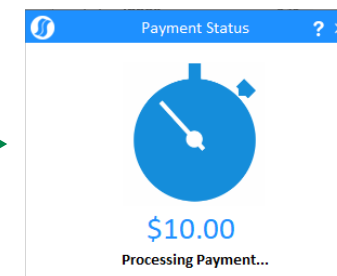
- xxxx-xxxx-xxxx-0012 - DISCOVER
- xxxx-xxxx-xxxx-4446 - DISCOVER
- xxxx-xxxx-xxxx-1111 - VISA
- xxxx-xxxx-xxxx-1111 - AMEX
- xxxx-xxxx-xxxx-0012 - DISCOVER

Process Close

* Automatically selected based on appointment provider
Transaction will be added in PMS as user : SallyAdmin

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

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



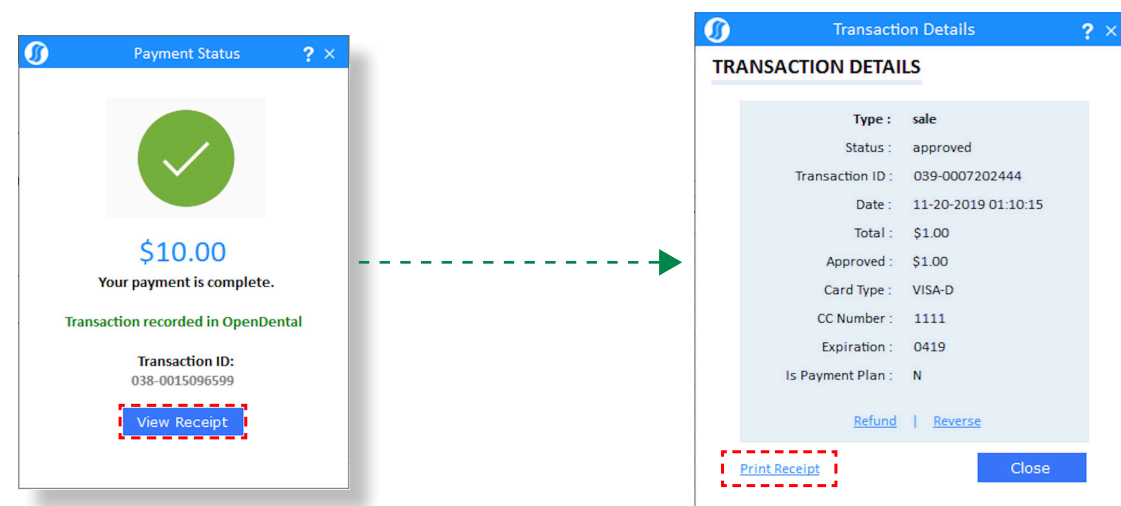
Step 1: Enter amount to be processed

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

2.G. HOW TO PRINT A RECEIPT

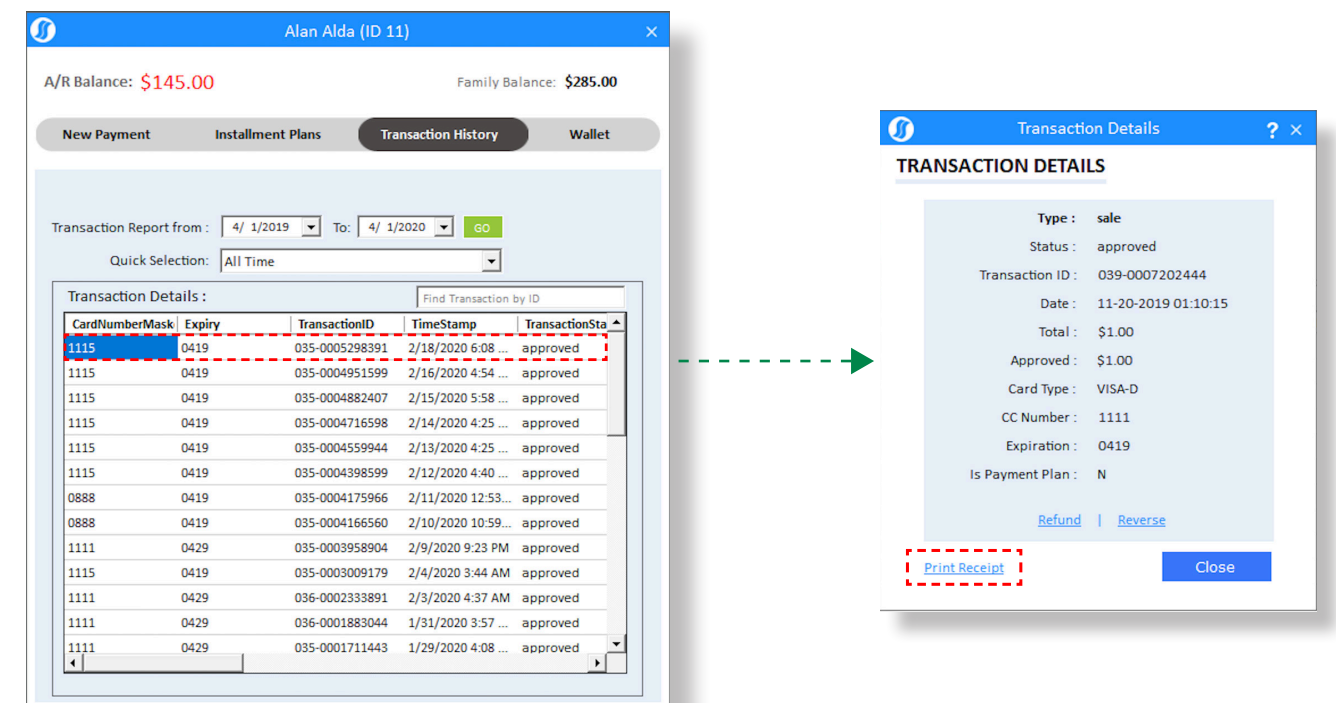
After a payment has been made, you can view the transaction's details and print a receipt in 1 of 2 ways.

Option A: From payment confirmation screen



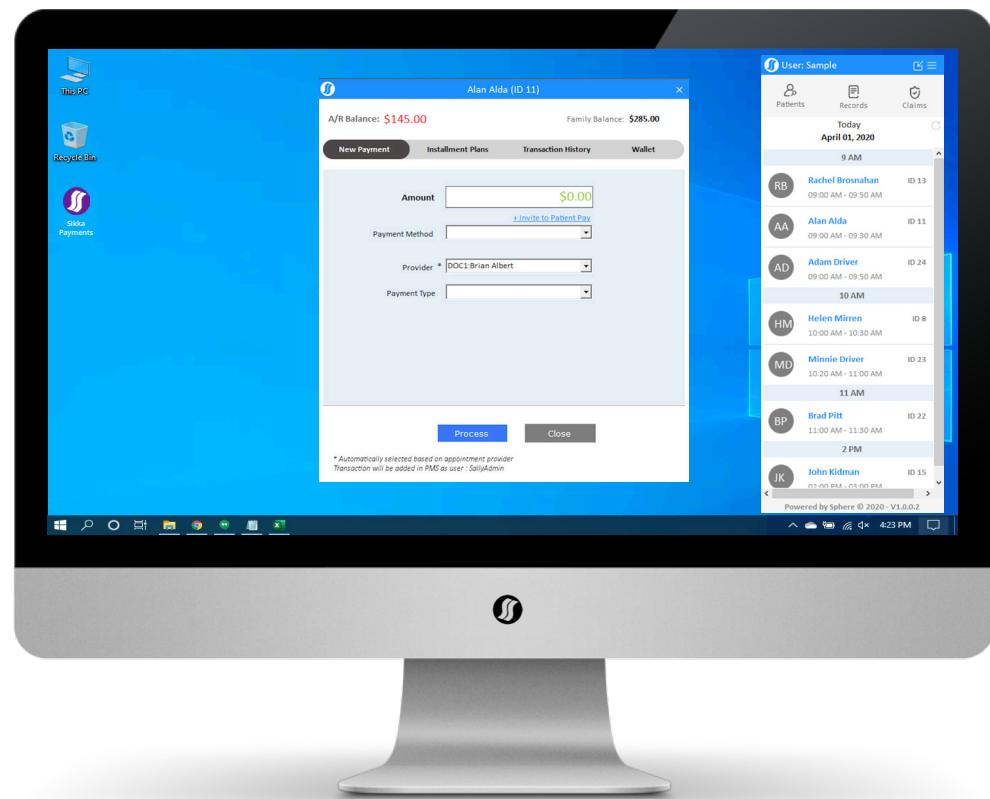
- Step 1: Click "View Receipt" to view transaction details
 Step 2: Click "Print Receipt" to open a pdf of the receipt

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



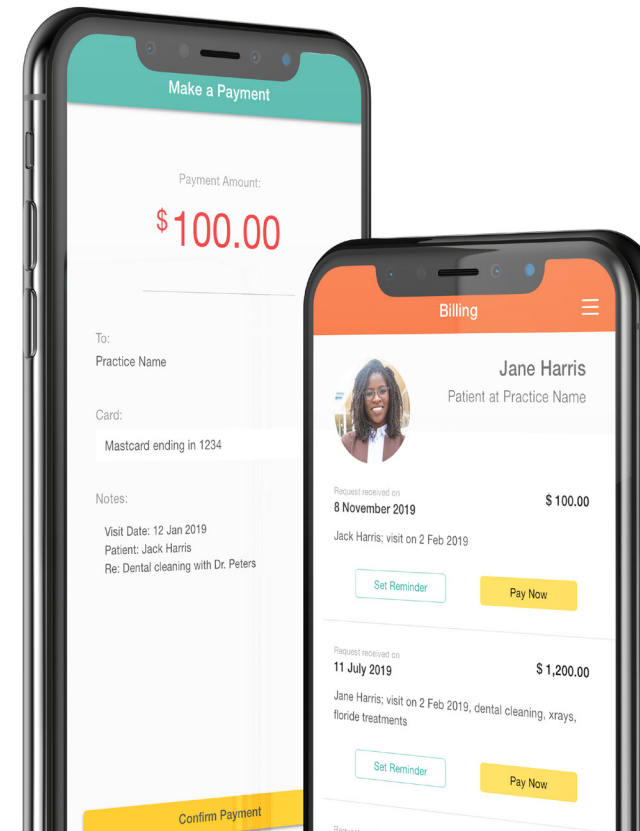
Sikka Payments offers you the ability to have your patients pay via their mobile phone with the PatientPay app.

3.A. PATIENT PAY MOBILE APP



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!



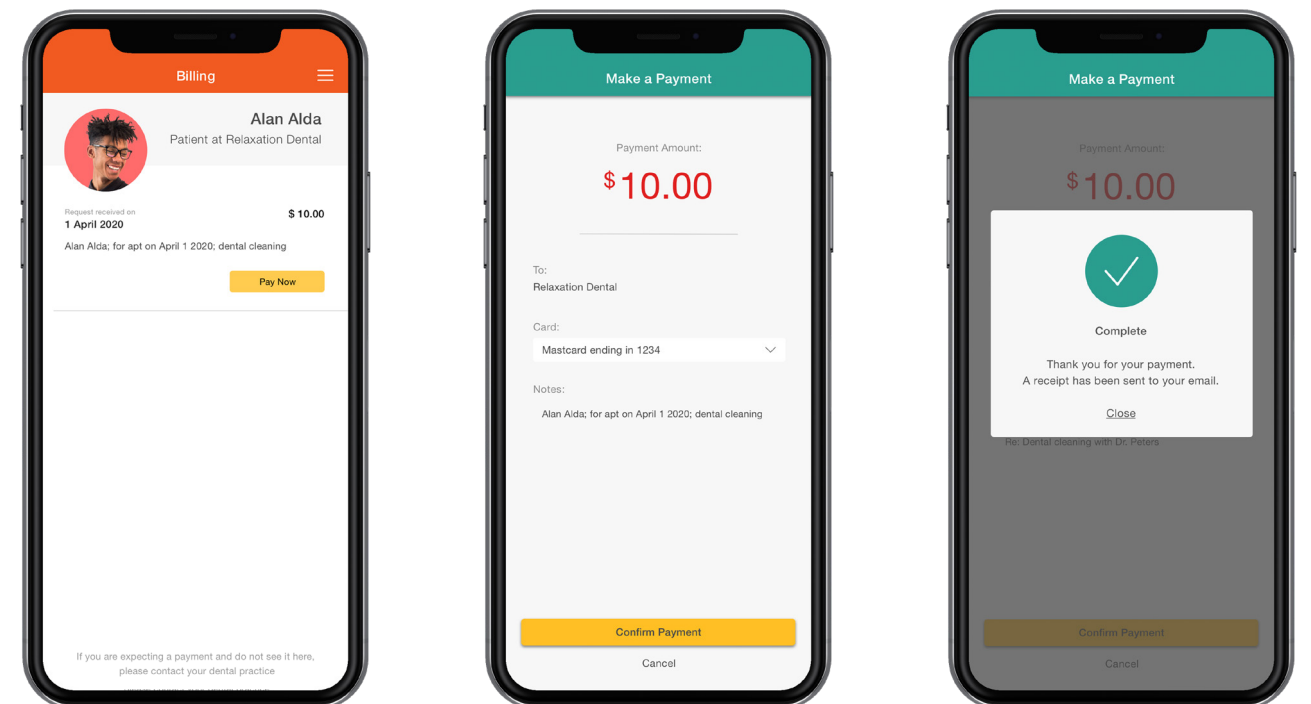
3.B. INVITE PATIENT TO PATIENT PAY

The screenshot shows the 'Patient Profile' page for Alan Alda (ID 11). The page displays 'A/R Balance: \$145.00' and 'Family Balance: \$285.00'. Below the balance information are tabs for 'New Payment', 'Installment Plans', 'Transaction History', and 'Wallet'. The 'New Payment' tab is active, showing a form with fields for 'Amount' (set to \$0.00), 'Payment Method', 'Provider' (DOC1:Brian Albert), and 'Payment Type'. A red dashed box highlights the '+ Invite to Patient Pay' button. A green dashed arrow points from this button to a separate 'Invite to Patient Pay' dialog box. This dialog box contains the text 'Invite this patient to the Patient Pay mobile platform now', a 'Mobile' field with the value '(253) 687-9654', an 'Email' field, and 'Invite' and 'Cancel' buttons. The 'Invite' button is highlighted with a red dashed box.

- Step 1:** Open Patient Profile
- Step 2:** Click “+ Invite to Patient Pay” (invite window will appear)
- Step 4:** Confirmation window will appear

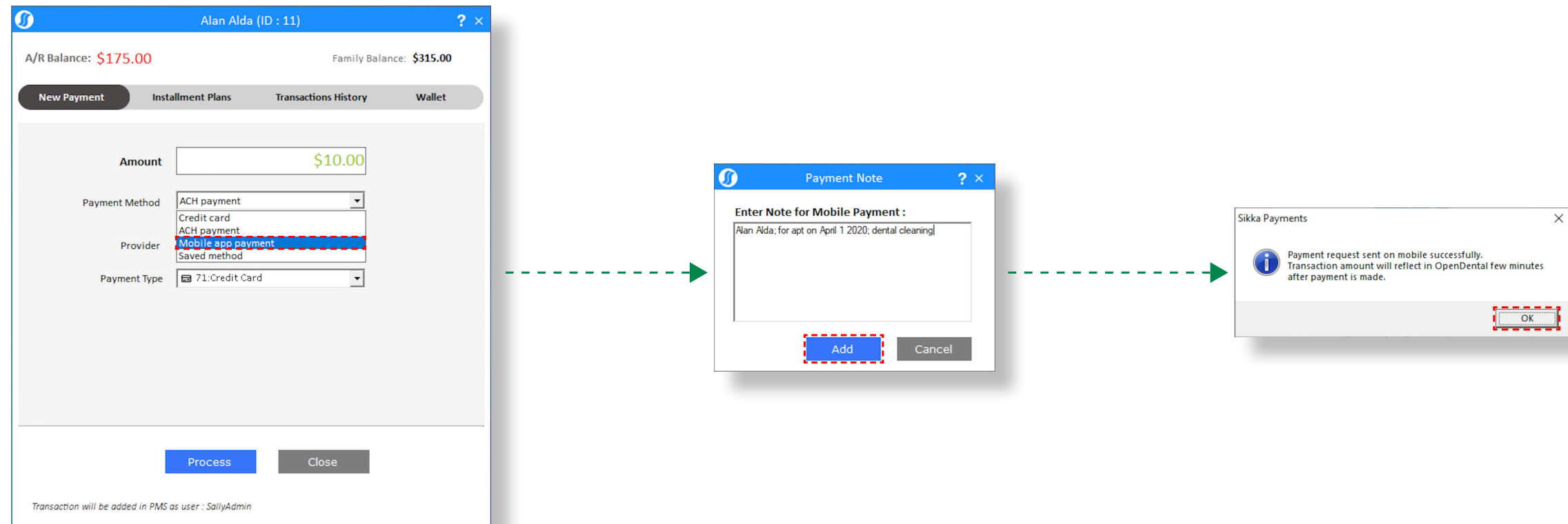
WHAT YOUR PATIENT CAN EXPECT:

- 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



3.c. SEND PAYMENT REQUEST*

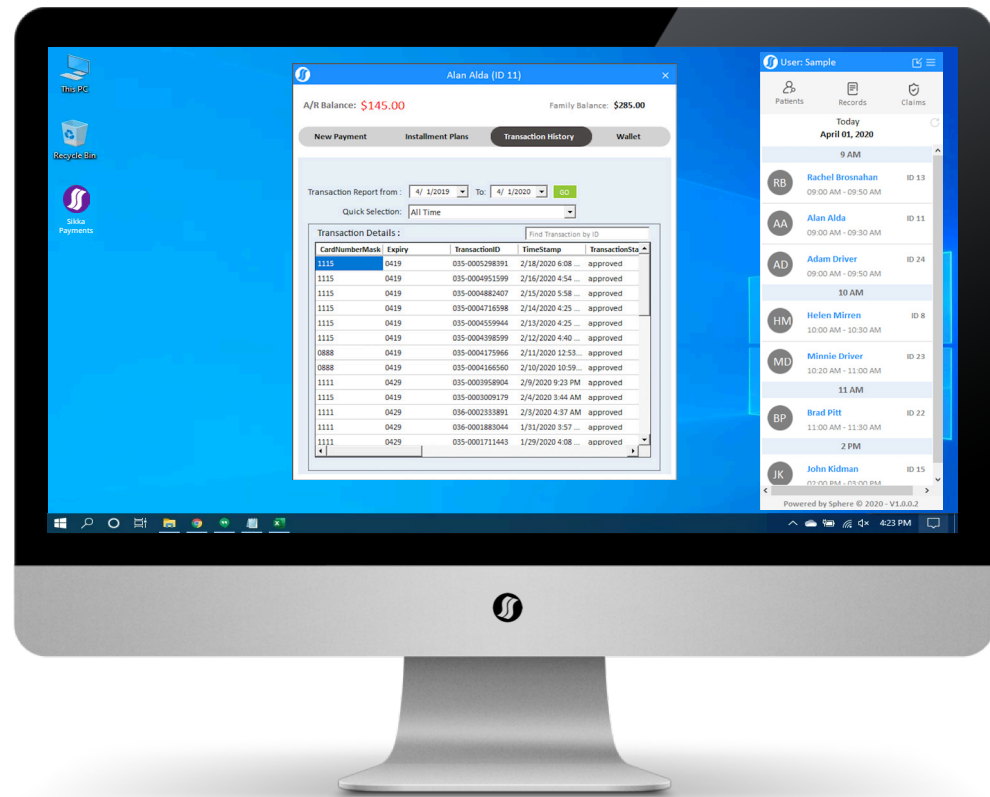
* Patients **MUST** register for the app before you can start sending them payment requests.



- 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.

Transaction Report from : To:

Quick Selection:

Practice Transaction History

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

Find transactions by ID

Filter by

4.A. PATIENT TRANSACTION HISTORY

Alan Alda (ID 11)

A/R Balance: \$145.00 Family Balance: \$285.00

New Payment Installment Plans **Transaction History** Wallet

Transaction Report from: 4/ 1/2019 To: 4/ 1/2020 GO

Quick Selection: All Time

CardNumberMask	Expiry	TransactionID	TimeStamp	TransactionSta
1115	0419	035-0005298391	2/18/2020 6:08 ...	approved
1115	0419	035-0004951599	2/16/2020 4:54 ...	approved
1115	0419	035-0004882407	2/15/2020 5:58 ...	approved
1115	0419	035-0004716598	2/14/2020 4:25 ...	approved
1115	0419	035-0004559944	2/13/2020 4:25 ...	approved
1115	0419	035-0004398599	2/12/2020 4:40 ...	approved
0888	0419	035-0004175966	2/11/2020 12:53...	approved
0888	0419	035-0004166560	2/10/2020 10:59...	approved
1111	0429	035-0003958904	2/9/2020 9:23 PM	approved
1115	0419	035-0003009179	2/4/2020 3:44 AM	approved
1111	0429	036-0002333891	2/3/2020 4:37 AM	approved
1111	0429	036-0001883044	1/31/2020 3:57 ...	approved
1111	0429	035-0001711443	1/29/2020 4:08 ...	approved

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

Step 2: Click the "Transaction History"

4.B. PRACTICE TRANSACTION HISTORY

User: Sample

Patients **Records** Claims

Today
April 01, 2020

9 AM

RB Rachel Brosnahan ID 13
09:00 AM - 09:50 AM

AA Alan Alda ID 11
09:00 AM - 09:30 AM

Transaction Details

TRANSACTIONS

Find transactions by ID

Filter by All Time Search

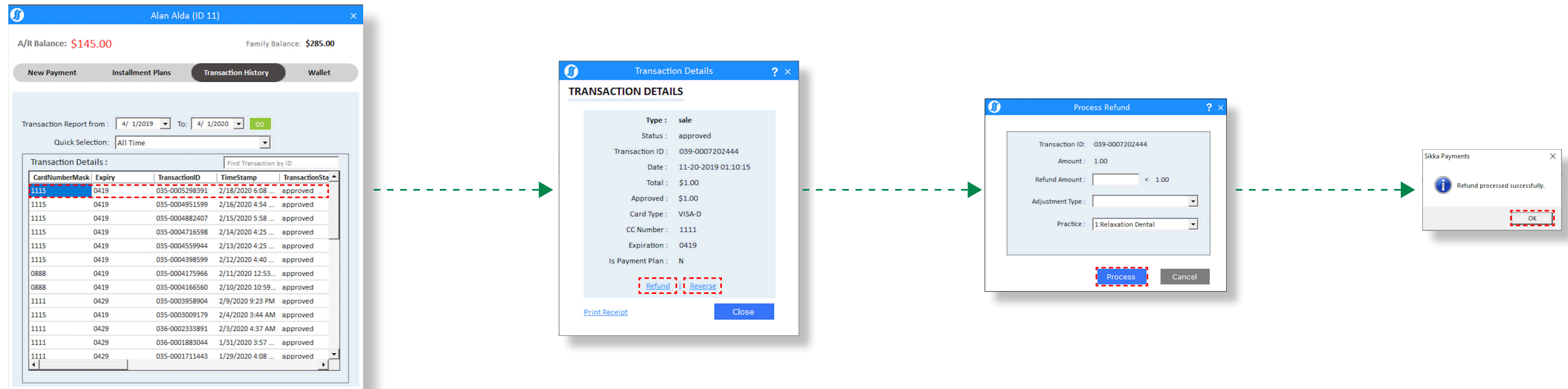
Billed \$38,410.04 Approved \$37,840.28

CardNumberM	Expiry	TransactionID	TimeStamp	TransactionStat	TransactionTyp	Tra
1111	0429	039-00148460...	12-29-2019 22:...	approved	sale	12
1111	0421	039-00141731...	12-26-2019 03:...	approved	sale	1
1111	0429	039-00141563...	12-25-2019 20:...	approved	sale	2
1111	0429	039-00141562...	12-25-2019 20:...	approved	sale	2
		039-00141561...	12-25-2019 20:...	decline	sale	2
1110	0429	039-00141561...	12-25-2019 20:...	decline	sale	10
1110	0429	039-00141561...	12-25-2019 20:...	decline	sale	10
0888	0429	039-00141558...	12-25-2019 20:...	approved	sale	1
4446	0419	039-00137213...	12-23-2019 04:...	approved	sale	3.25
4446	0419	039-00136156...	12-22-2019 05:...	approved	sale	3.25
4446	0419	039-00135003...	12-21-2019 04:...	approved	sale	3.25
1111	0422	039-00135003...	12-21-2019 04:...	approved	sale	100
4446	0419	039-00132821...	12-20-2019 05:...	approved	sale	3.25
4446	0419	039-00132538...	12-20-2019 03:...	approved	sale	1

Download to Excel/CSV

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

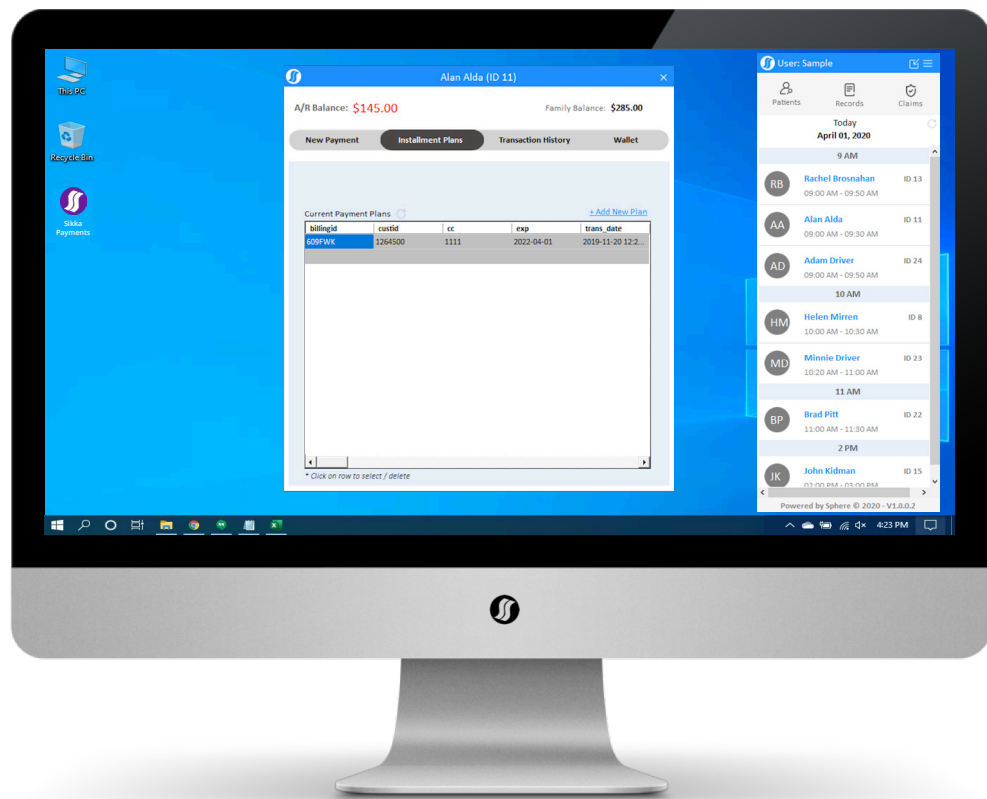
4.c. HOW TO VOID A TRANSACTION



- Step 1:** Double-click on the transaction
(Transaction Details window will appear)
- Step 2:** Click on the appropriate void, "Reverse" or "Refund"

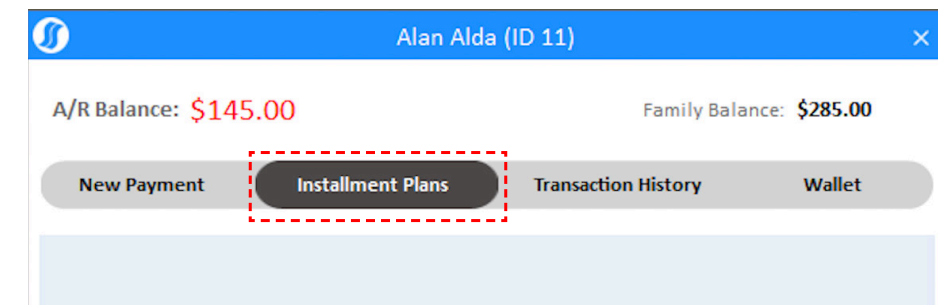
- Step 4:** Complete fields and click "Process"
- Step 5:** Void confirmation window will appear
- Step 6:** Click "OK"

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

Alan Alda (ID 11)

A/R Balance: \$145.00 Family Balance: \$285.00

New Payment **Installment Plans** Transaction History Wallet

Current Payment Plans [+ Add New Plan](#)

billingid	custid	cc	exp	trans_date
609FWK	1264500	1111	2022-04-01	2019-11-20 12:2...

* Click on row to select / delete

Step 1: Click “+ Add New Plan”
(Add New Plan window will appear)

Step 2: Complete fields

Step 3: Click “Add”

Add Payment Plan

ADD PAYMENT PLAN

Enter Total Plan Amount :

Start Date:

Bill Every:

Number of Payments :

Payment Amount : \$ (Automatically Calculated)

Payment Type :

Provider :

Practice :

Swipe or Enter Manually:

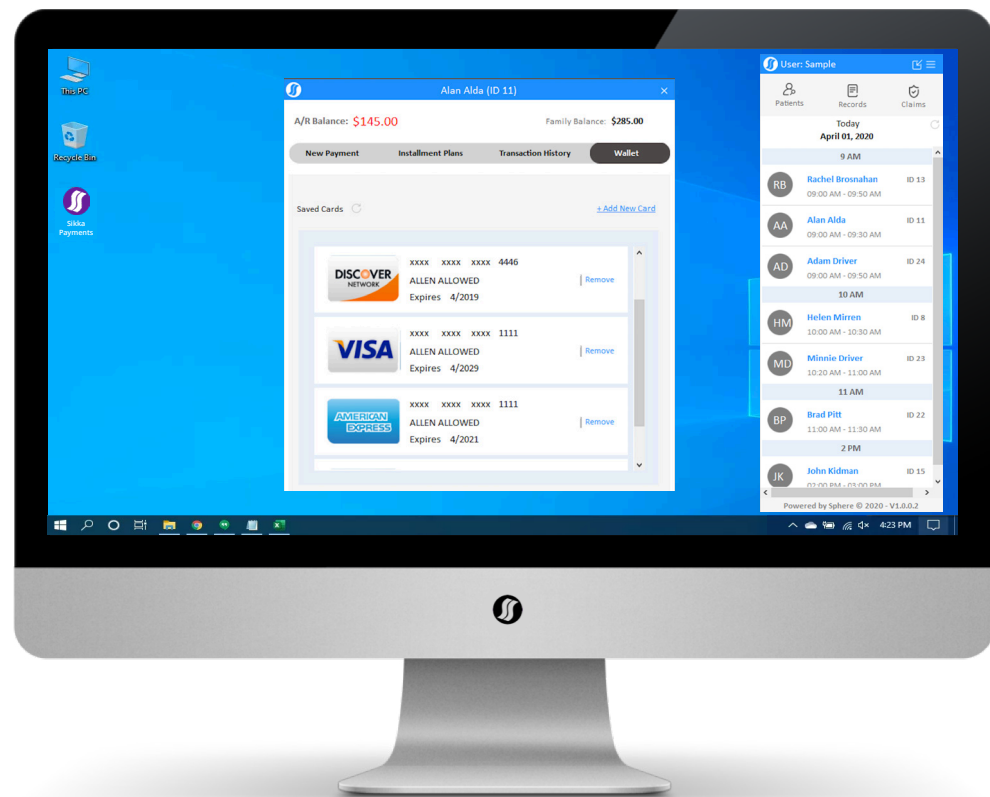
Card Swipe Details:

Name On Card:

ZipCode:

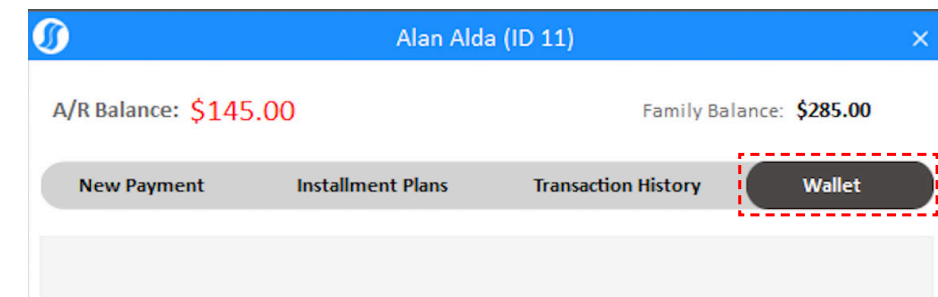
Add Cancel

6. PATIENT WALLET

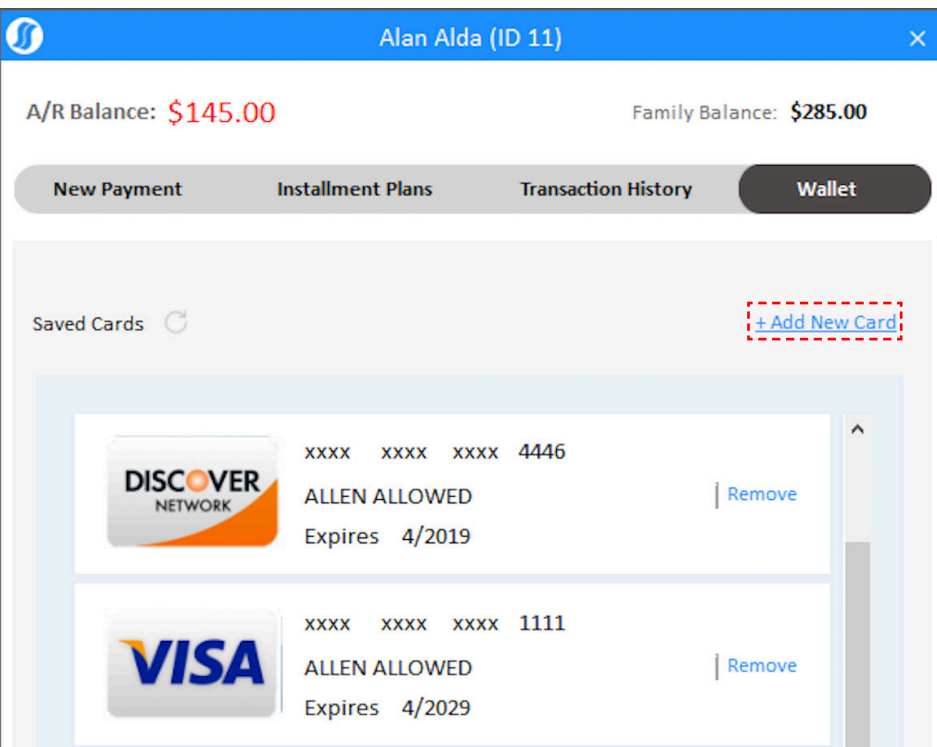


To improve the checkout experience, save a payment method for future payments in the Wallet tab.

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

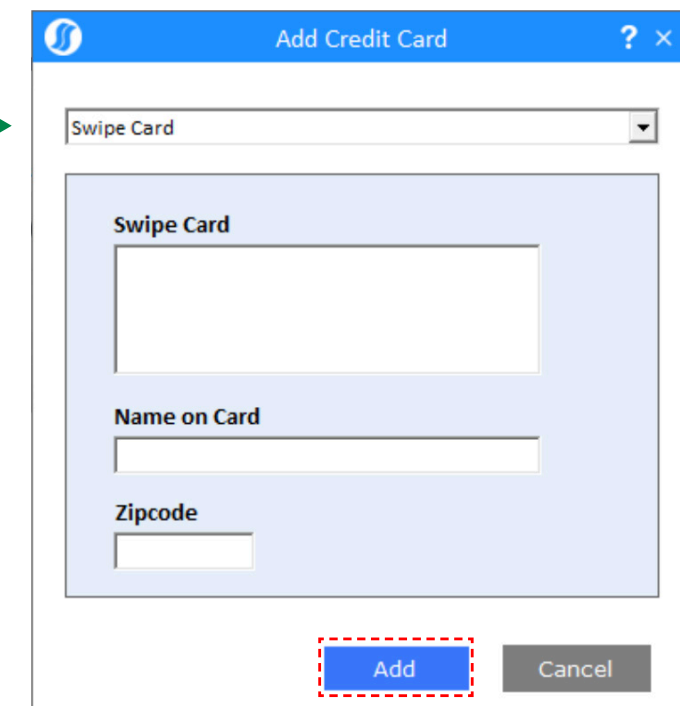


Step 1: Click "+ Add New Card" to save a card to the patient's wallet

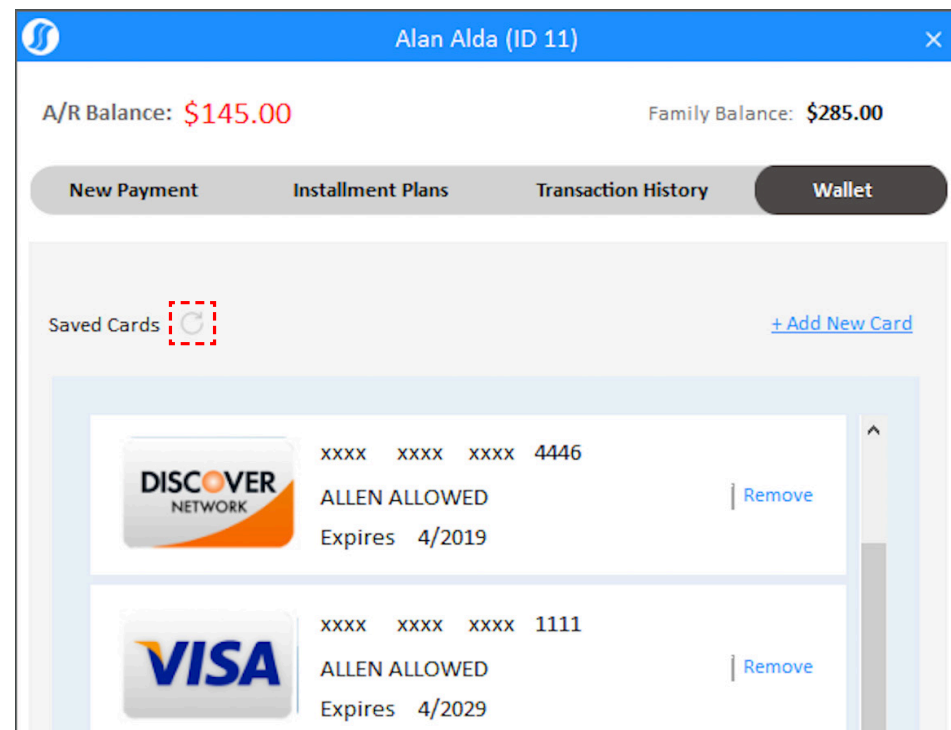
Step 2: Select "Swipe Card" or "Enter Manually" from the drop down menu

Step 3: Follow the prompt

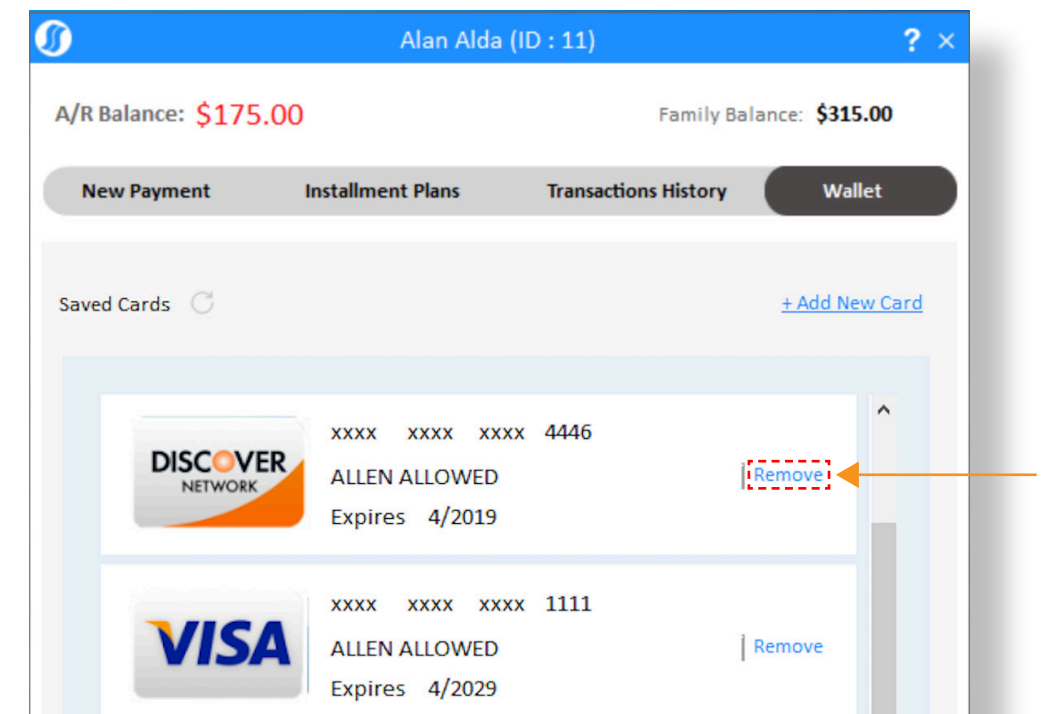
Step 4: Click "Add" to save card information



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



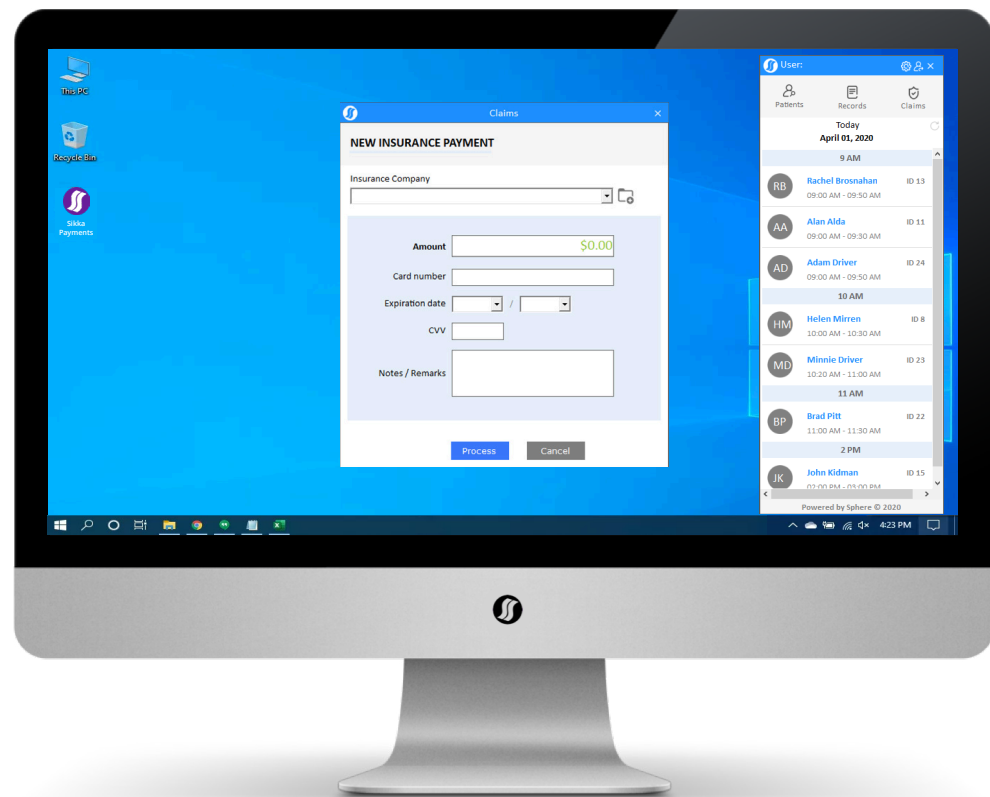
6.B. HOW TO REMOVE A CARD



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

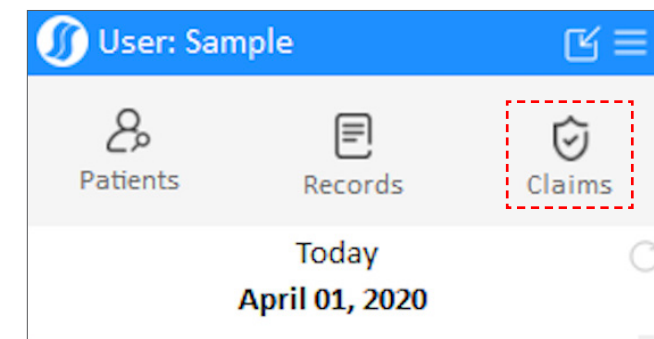
Note: If the card is still listed, please click the refresh icon

7. CLAIMS



Process a credit card payment from an insurance provider received 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

The screenshot shows the 'NEW INSURANCE PAYMENT' form. At the top left, there is a navigation menu with 'Patients', 'Records', and 'Claims' (selected). Below the menu, it says 'Today April 01, 2020'. The main form has a title bar 'Claims' and a close button. The form content includes:

- 'Insurance Company' dropdown menu with a plus icon to its right.
- 'Amount' field with '\$0.00' displayed in green.
- 'Card number' field.
- 'Expiration date' field with two dropdown menus separated by a slash.
- 'CVV' field.
- 'Notes / Remarks' text area.
- 'Process' and 'Cancel' buttons at the bottom.

 A red dashed box highlights the 'Process' button. A green dashed arrow points from the plus icon in the 'Insurance Company' dropdown to the 'Add new company' dialog box on the right.

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 INSURANCE COMPANY

The screenshot shows the 'Add new company' dialog box. It has a title bar with the SIKKA logo and a close button. The main content area contains a 'Company Name' label followed by an input field. At the bottom, there are 'Add' and 'Cancel' buttons.

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

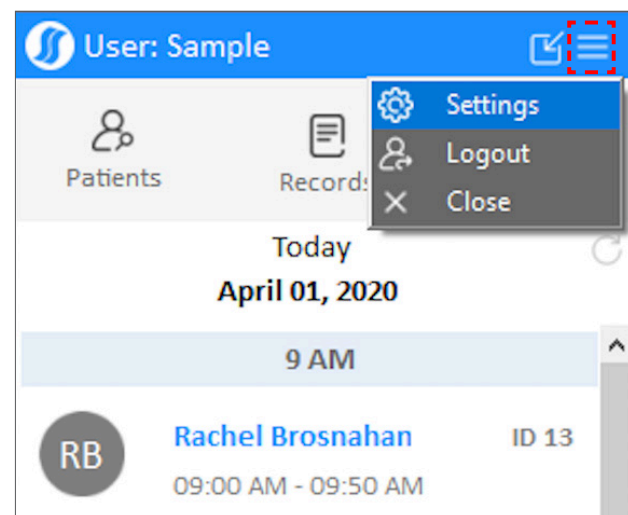
Note: There is not need to install a driver



The Augusta Reader

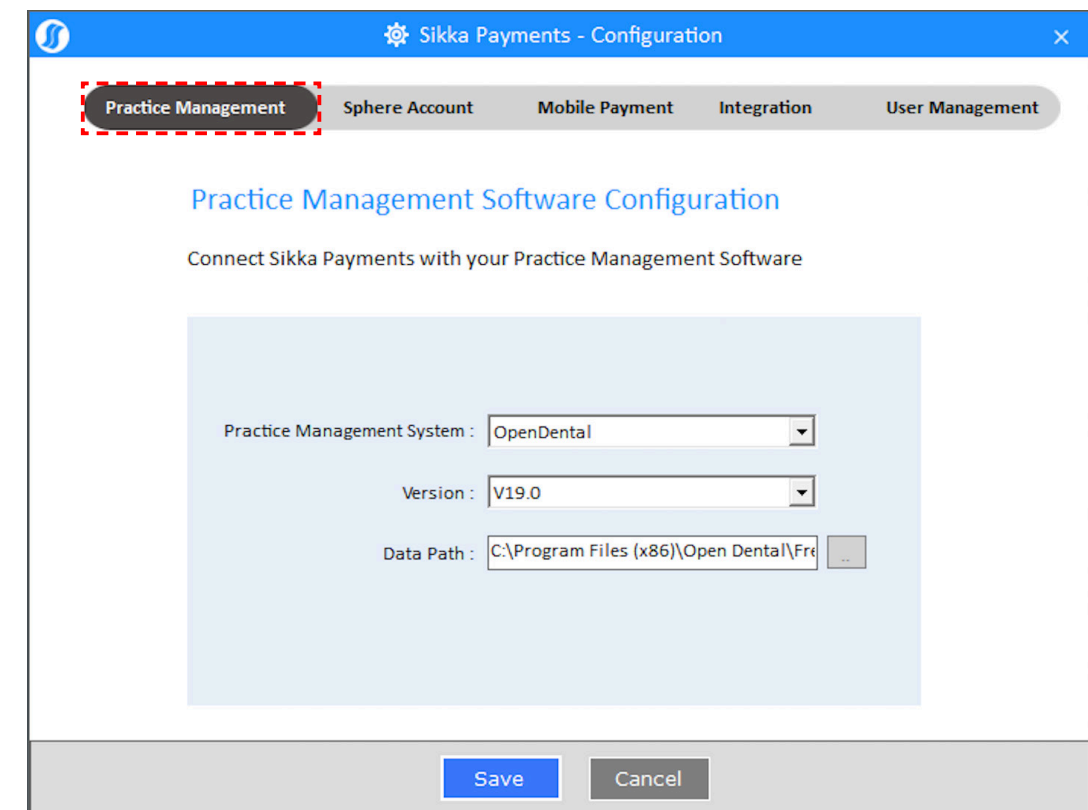
Sikka Payment's preferred card reader features the latest security technology and can swipe both magnetic stripe cards (1) as well as read smart chip cards (2). The reader is compact and lightweight (3).

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

Sikka Payments - Configuration

Practice Management **Sphere Account** Mobile Payment Integration User Management

Sphere Account Configuration 

Your Sphere account will be used for Payment processing.

Account ID :

Need support with your payments? Contact a Sphere representative at 1 (877) 284-3015


Save Cancel

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

9.c. MOBILE PAYMENTS

Sikka Payments - Configuration

Practice Management Sphere Account **Mobile Payment** Integration User Management

Mobile Payment Configuration 

How would you like mobile payments to be recorded?

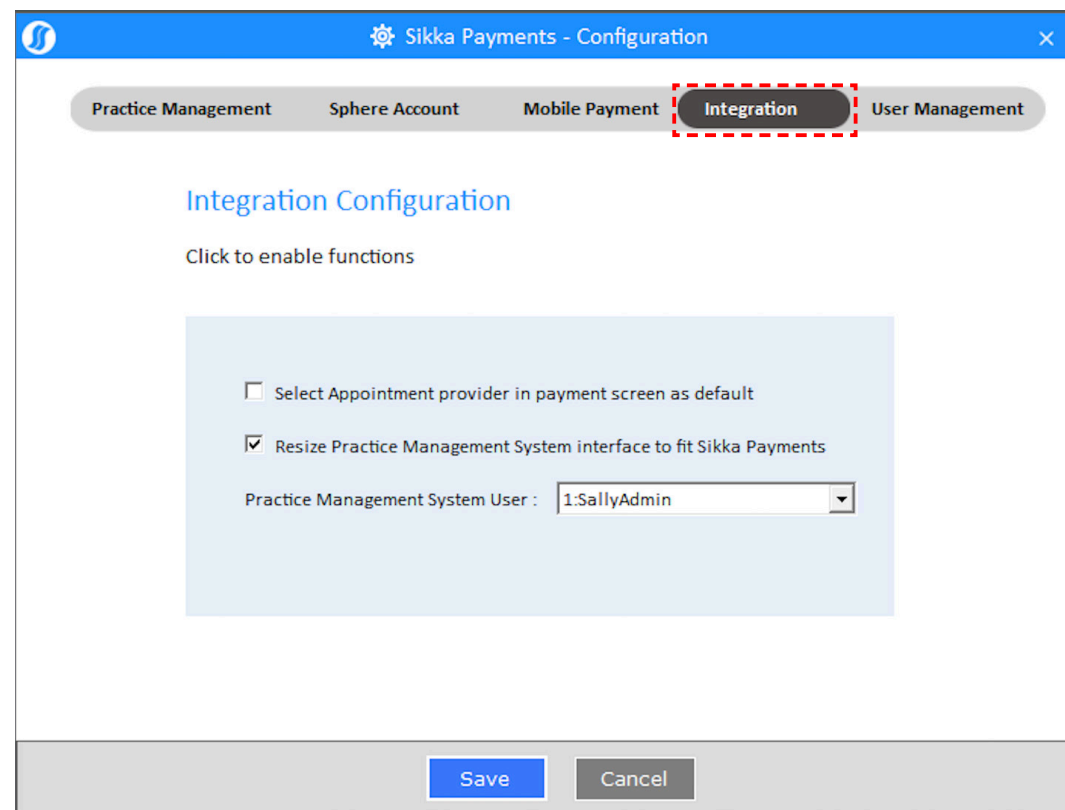
Payment type for mobile transactions :

Need support with your mobile app payments? Contact a Sikka representative at 1-800-94-SIKKA

Save Cancel

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.

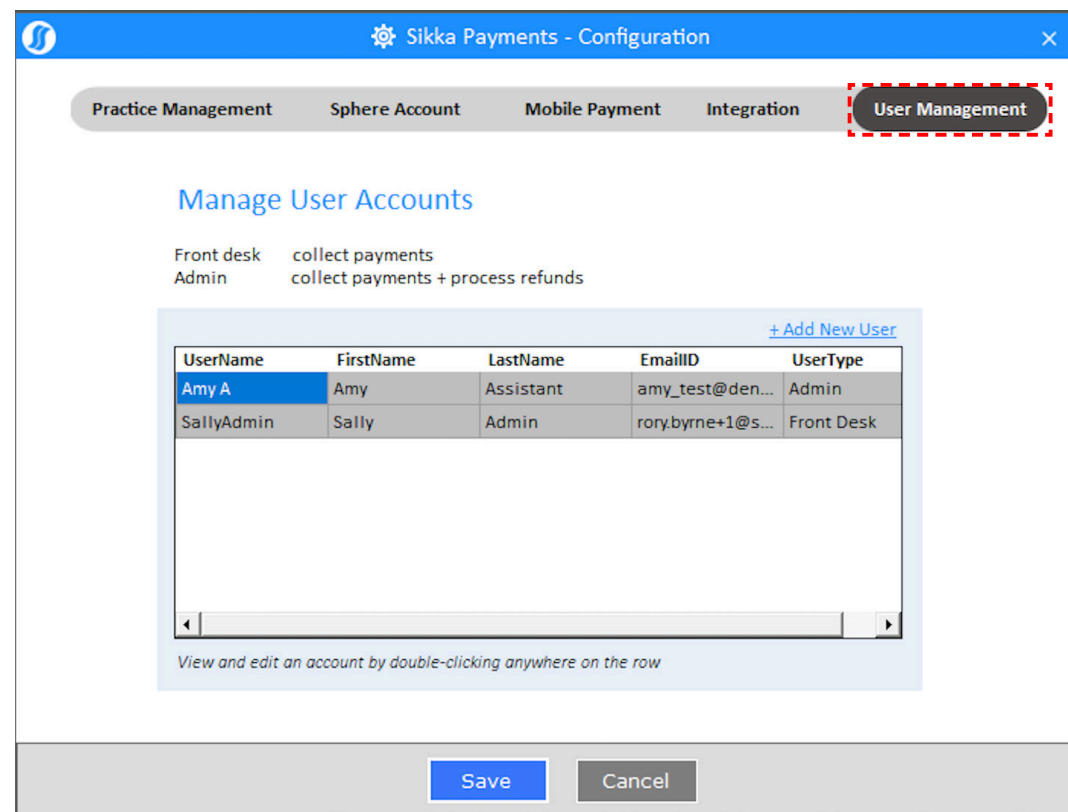
Resize PMS UI

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



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.

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

Thank you for choosing Sikka Payments!

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