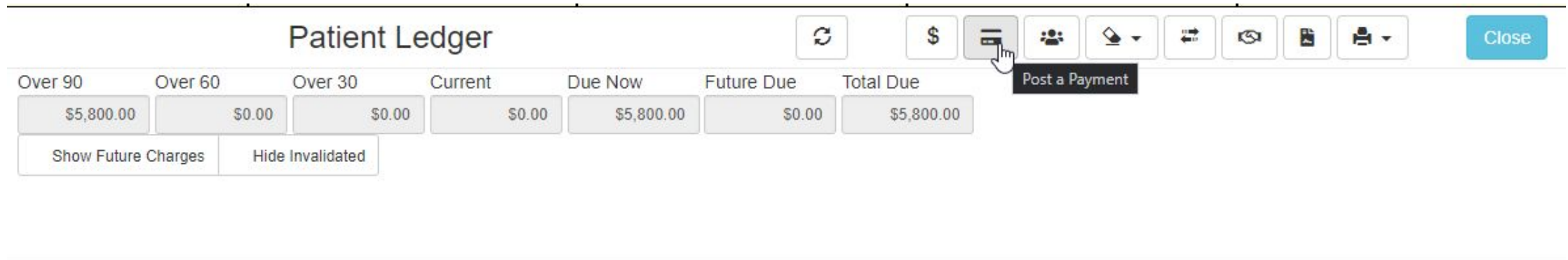


# Cloud 9 Pay

How to use Cloud 9 Pay to process Point of Sale transactions and Autopayments.

# MAKING A SINGLE PAYMENT

- Click the Post a Payment button in the ledger.



The screenshot displays a 'Patient Ledger' interface. At the top, there is a title 'Patient Ledger' and a toolbar with several icons: a refresh icon, a dollar sign, a 'Post a Payment' button (highlighted with a tooltip), a user icon, a dropdown menu, a double-headed arrow, a refresh icon, a document icon, and another dropdown menu. A 'Close' button is located on the far right. Below the toolbar is a table with columns for 'Over 90', 'Over 60', 'Over 30', 'Current', 'Due Now', 'Future Due', and 'Total Due'. The values in the table are: Over 90: \$5,800.00; Over 60: \$0.00; Over 30: \$0.00; Current: \$0.00; Due Now: \$5,800.00; Future Due: \$0.00; Total Due: \$5,800.00. Below the table are two buttons: 'Show Future Charges' and 'Hide Invalidated'.

Over 90	Over 60	Over 30	Current	Due Now	Future Due	Total Due
\$5,800.00	\$0.00	\$0.00	\$0.00	\$5,800.00	\$0.00	\$5,800.00

Show Future Charges    Hide Invalidated

# MAKING A SINGLE PAYMENT

- Fill in the fields as normal. Fields in bold print are required.
- If using a chip reader, select EMV.
- If using a swiper or manually entering the card number, select Swipe.

**Note:** Unchecking “Authorize Credit/Debit Card” will post the transaction to the ledger **without** running it through the payment processor.

**Note:** Pediatric payments should be made using “Pay by Charge.”

Save Cancel

Post a Payment

Patient	Cloud9 Test
Provider	(Patient Provider)
Posting Location	Sandy Lake
Assigned Location	Sandy Lake
Responsible	Cloud9 Test
Insurance	(None)
Payment Type	Credit Card Payment
Saved Payment Methods	(None)

Amount \$10.00

Card Type	
Reference #	
Note	
Receipt #	
Receipt Note	

Print Receipt Email Receipt

Authorize Credit/Debit Card

Pay By Charge

EMV  Swipe

Due Now	\$5,800.00
Future Due	\$0.00
Total Due	\$5,800.00

Uncheck this box if you only want to post the payment to the ledger and not charge the card

Check this box if you posting Pediatric/Dental Payments

Check the EMV box if you are using an EMV device to take the payment

Check the Swipe box if you are using a Magnetic Strip Reader OR typing the card number in manually

**Required Fields**

**Optional Fields**

# MAKING A SINGLE PAYMENT

- Verify the payment information, it should pull automatically from the patient record.
- Verify the amount.
- Enter the billing address information connected to the patient's payment method.
- Click "Make Payment."

### Post A Payment

Payment Information

---

Credit Card Information

<input type="text"/>	/	<input type="text"/>
Credit Card Number	Expiry Date	CVC

Transaction Information

**Amount:** \$10.00

Address Information

<input type="text"/>	<input type="text"/>
Name on Card	
<input type="text"/>	<input type="text"/>
Address	City
<input type="text"/>	<input type="text"/>
State	ZIP

# ADJUSTMENTS (REVERSE)

Removes a transaction from the ledger.

- May change Posting Location.
- May change the Comment.

**NOTE: This will NOT reverse the transaction via payment processor—that requires a Void/Return.**

### Reverse a Transaction

Original Date/Time	11/8/2023 4:46:01 PM
Original Category	Payment
<b>Original Type</b>	Cash
Original Amount	(\$20.00)
Adj/Cor Amount	\$0.00
Current Amount	(\$20.00)
Reversal Amount	\$20.00
Posting Location	Sandy Lake ▾
Comment	

# ADJUSTMENTS (CORRECTION)

Edits a transaction on the ledger.

- May change the Amount.
- May change Posting Location.
- May change the Comment.

**NOTE: When entering the New Amount, enter the amount the original payment *should* have been—the system will do the math for you.**

### Correct a Transaction

Original Date/Time	11/8/2023 1:05:05 PM
Original Category	Payment
<b>Original Type</b>	Check
Original Amount	(\$10.00)
Adj/Cor Amount	(\$10.00)
Current Amount	(\$20.00)
New Amount	<input type="text"/>
Correction Type	Correction ▼
Posting Location	Sandy Lake ▼
Comment	<input type="text"/>

# ADJUSTMENTS (EDIT PAYMENT)

**BEFORE DAILY CLOSE**

## FOR ALL TRANSACTIONS *BESIDES* CREDIT CARDS

Allows more refined editing than Correction..

- May change Posting Location.
- May change the Assigned Location.
- May change the Assigned Provider.
- May change the Transaction Type.
- May change the Note.
- May change the Receipt Note.

### Edit Payment

Location Posted	USA	▼
Location Assigned	USA	▼
Provider	Dr. Test	▼
Transaction Type	Cash	▼
Amount	\$4.00	
Note		
Receipt Note	new receipt note - 10/5	

[Edit](#) [Cancel](#)

**NOTE: The options available here will depend on whether or not the day has been closed. This slide represents *prior* to closing the day.**

# ADJUSTMENTS (EDIT PAYMENT)

**AFTER DAILY CLOSE**

## FOR ALL TRANSACTIONS *BESIDES* CREDIT CARDS

Allows more refined editing than Correction..

- May change Posting Location.
- May change the Transaction Type.
- May change the Note.
- May change the Receipt Note.

### Edit Payment

Location Posted	USA	▼
Location Assigned	USA	▼
Provider	Dr. Test	▼
Transaction Type	Personal Check	▼
Amount	\$13.00	
Note	<input type="text"/>	
Receipt Note	<input type="text"/>	

 Edit  Cancel

**NOTE: The options available here will depend on whether or not the day has been closed. This slide represents *after* closing the day.**



# ADJUSTMENTS (EDIT PAYMENT)

**BEFORE DAILY CLOSE**

## FOR CREDIT CARD TRANSACTIONS ONLY

Allows more refined editing than Correction..

- May change the Assigned Location.
- May change the Assigned Provider.
- May change the Receipt Note.

### Edit Payment

Location Posted	USA	▼
Location Assigned	USA	▼
Provider	Dr. Test	▼
Transaction Type	Credit Card Payment	▼
Amount	\$155.00	
Note	Approval Code=33977Z; Transaction ID=21378	
Receipt Note	<input type="text"/>	

**NOTE: The options available here will depend on whether or not the day has been closed. This slide represents *prior* to closing the day.**

# ADJUSTMENTS (EDIT PAYMENT)

**AFTER DAILY CLOSE**

## FOR CREDIT CARD TRANSACTIONS ONLY

Removes a transaction from the ledger.

- May only change the Receipt Note.

### Edit Payment

Location Posted	USA	▼
Location Assigned	USA	▼
Provider	Dr. Test	▼
Transaction Type	Credit Card Payment	▼
Amount	\$26.00	
Note	Approval Code=102460; Transaction ID=16229	
Receipt Note	<input type="text"/>	

[Edit](#) [Cancel](#)

**NOTE: The options available here will depend on whether or not the day has been closed. This slide represents *after* closing the day.**

# ADJUSTMENTS (VOID/RETURN)

Requests via payment processor for a transaction to be canceled and for the funds to be returned to the payment method used.

- May change Posting Location.
- May change the Note.

**NOTE: This feature will automatically disable when the payment account closes the Void/Return window. This is specific to the account and *not* something Cloud 9 can control, prevent, or circumvent.**

### Void/Return Payment

Are you sure you want to void/return this credit card transaction?

Posting Location

Note

**NOTE: It can take 3-5 business days for the funds to reappear in the patient's account. If they need those funds sooner, the practice can allow the payment to go through and process a manual refund to pay them from the drawer on the spot.**

# STORING A PAYMENT METHOD

To add a stored payment method to a patient, navigate to the patient's Relationships tab, click the Payment Methods tab, and click the "Edit" button, and then the "Add Payment Method" button.

Cloud9 Test (230045)-

Edit Patient

Save Close Cancel

Patient Tracking Relationships Referrals/Professionals Insurance Appointments Financial Summary History

Name	Relationship	Financially Responsible	Family	Authorized to Access TX Record	
Cloud9 Test	Self	True	False	False	

Payment Type	Assigned Account	Expiration Date
No matching records found		

Payment Methods

Edit This Relationship

## Edit Related Person

General Payment Methods

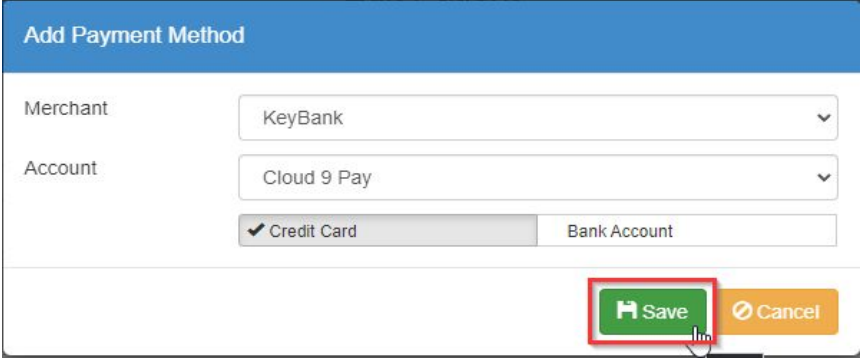
Payment Type	Assigned Account	Expiration Date
No matching records found		

+ Add Payment Method

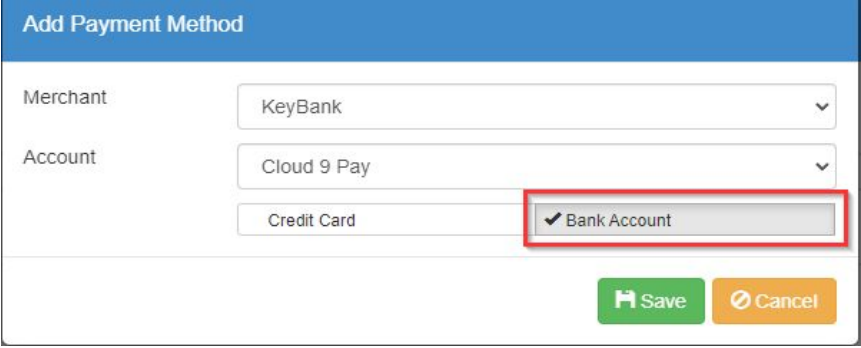
Ok Cancel

# STORING A PAYMENT METHOD

- Set the Merchant to KeyBank.
- Ensure the correct Account is selected.
- Choose either Credit Card or Bank Account.



The screenshot shows the 'Add Payment Method' form. The 'Merchant' dropdown is set to 'KeyBank'. The 'Account' dropdown is set to 'Cloud 9 Pay'. Below the account dropdown, there are two radio buttons: 'Credit Card' (which is selected with a checkmark) and 'Bank Account'. At the bottom right, there are two buttons: a green 'Save' button and an orange 'Cancel' button. A red box highlights the 'Save' button.



The screenshot shows the 'Add Payment Method' form. The 'Merchant' dropdown is set to 'KeyBank'. The 'Account' dropdown is set to 'Cloud 9 Pay'. Below the account dropdown, there are two radio buttons: 'Credit Card' and 'Bank Account' (which is selected with a checkmark). At the bottom right, there are two buttons: a green 'Save' button and an orange 'Cancel' button. A red box highlights the 'Bank Account' radio button.

# STORING A PAYMENT METHOD

- Verify the payment information in the window that appears; it should populate from the patient record..
- Click the "Save Payment Method" button.

Information

Payment Method Information

Credit Card Information

Credit Card Number / Expiry Date CVC

Address Information

**Cloud9 Test** This info will pull from the RP if entered/saved before opening this screen

Name on Card

123 St Beverly Hills

Address City

CA 90210

State ZIP

Save Payment Method

Close

**Credit Cards**

Information

Payment Method Information

Bank Account Information

Bank Account Number Routing Number

Checking Savings  Personal Organization

Bank Account Type Bank Account Holder Type

**Cloud9** Test

First Name Last Name

Save Payment Method

Close


**Bank Accounts**

# STORING A PAYMENT METHOD

- Verify the payment information, then click "OK."

Edit Related Person

General Payment Methods

Payment Type	Assigned Account	Expiration Date	
 Visa xxxxxxxxxxxx1111	Cloud 9 Pay	10/25	<a href="#">✖ Delete</a>

Showing 1 to 1 of 1 rows

[+ Add Payment Method](#)

[✔ Ok](#) [✖ Cancel](#)

- **Make sure to save the patient record afterwards.**


No-Show 0 Front Desk 0 Scheduled 0 Waiting 0 Seated 0 Ready for Checkout 0 Dismissed 0

Cloud9 Test (230045)- Edit Patient [Save](#) [Close](#) [Cancel](#)

Patient Tracking Relationships Referrals/Professionals Insurance Appointments Financial Summary History

Name	Relationship	Financially Responsible	Family	Authorized to Access TX Record	
Cloud9 Test	Self	True	False	False	<a href="#">Edit</a> <a href="#">✖ Delete</a>

Payment Methods

Payment Type	Assigned Account	Expiration Date
 Visa xxxxxxxxxxxx1111	Cloud 9 Pay	10/25

Showing 1 to 1 of 1 rows

# SETTING UP AUTO PAY FOR A CONTRACT

Click the Contract button in the ledger and select the contract you want to set up auto payments for.

The screenshot shows the 'Patient Ledger' interface. At the top, there is a title 'Patient Ledger' and a toolbar with various icons. A red box highlights the 'Contracts' icon in the toolbar, with a tooltip labeled 'Contracts' appearing below it. Below the toolbar, there is a summary table with columns: Over 90, Over 60, Over 30, Current, Due Now, Future Due, and Total Due. All values are \$0.00. Below this table are two buttons: 'Show Future Charges' and 'Hide Invalidated'. A large grey bar is present below the summary table. At the bottom, a 'Contracts' modal window is open. The modal has a blue header with a close button. Below the header, it displays 'Patient: Cloud9 Test'. There is a table with columns: Description, Status, and Amount. The table contains one row: 'Adult 18-24 Months', 'Active', '\$6,438.00'. To the right of the table are three buttons: '+ Add', 'Edit' (highlighted with a red box), and 'Delete'. At the bottom of the modal is a 'Close' button.

Over 90	Over 60	Over 30	Current	Due Now	Future Due	Total Due
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Description	Status	Amount
Adult 18-24 Months	Active	\$6,438.00



# SETTING UP AUTO PAY FOR A CONTRACT

Once in the contract, click the Auto Pay button in the Responsible Party section.

Cloud9 Test (230045)- Contract

Plan Status	Active	Plan Description	Adult 18-24 Months	Expected Start
Provider	Doctor, Fake	Charge Type	Adult 18-24 Months	Expected First
Assigned Location	Cami Test	Discount Type		Treatment Fee
Posting Location	Cami's Place	Plans	Showing All Plans	Discou

Contract St

---

Cloud9 Test

Plan Amount	\$5,438.00	Future Due	\$4,000.00
Start Date	04/14/2023	<b>Auto Pay</b>	
Down Payment	\$1,000.00		
# of Payments	10		
Frequency	Monthly		

#	T	Charge Date	Amount	Auto Pay	Auto Pay Date	S	Del	N..	P
0	Adjust...	04/14/2023	\$35.00		-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0	Adjust...	04/14/2023	(\$4,473.00)		-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0	Adjust...	11/08/2023	\$4,000.00		-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	Charge	12/08/2023	\$400.00	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Charge	01/08/2024	\$400.00	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Charge	02/08/2024	\$400.00	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Charge	03/08/2024	\$400.00	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#	T	Date
0	Adjust...	04/14/2023
0	Adjust...	04/14/2023

# SETTING UP AUTO PAY FOR A CONTRACT

Available payment methods are shown below, but selected with the drop-downs at the top of the window. Click "OK" when finished.



You can also set up a backup payment method if the patient has more than one payment methods on their account; this will allow the system to use that backup method in the event that the primary is declined or otherwise inaccessible.

### Auto Pay Setup

Primary Payment Method: Bank Account - \*\*\*\*9992 - Cloud 9 Pay

Backup Payment Method (Optional): VISA - \*\*\*\*1111 - (10/25) - Cloud 9 Pay

+ Add Payment Method

Payment Type	Assigned Account	Expiration Date	
 Bank Account <b>PRIMARY</b> xxxx9992	Cloud 9 Pay	-	<a href="#">✕ Delete</a>
 Visa <b>BACKUP</b> xxxxxxxxxxxx1111	Cloud 9 Pay	10/25	<a href="#">✕ Delete</a>

Showing 1 to 2 of 2 rows

[✓ OK](#) [⌂ Cancel](#)

# SETTING UP AUTO PAY FOR A CONTRACT

Verify the information in the RP section of the contract and **don't forget to save!**

Cloud9 Test (230045)- Contract

Reload + Start Save Close Cancel

Plan Status: Active  
Provider: Doctor, Fake  
Assigned Location: Cami Test  
Posting Location: Cami's Place

Plan Description: Adult 18-24 Months  
Charge Type: Adult 18-24 Months  
Discount Type: [Search]  
Plans: Showing All Plans

Expected Start Date: [Calendar]  
Expected First Charge: [Calendar]  
Treatment Fee Amount: \$6,438.00  
Discount Total: \$0.00  
Contract Sub-Total: \$6,438.00

Origin Of Start: [Dropdown]  
Payment Arrangement: [Dropdown]  
Initial CDT Codes: D8090  
Payment Plan Totals: \$6,438.00

---

Cloud9 Test (Bank Account)

Plan Amount: \$5,438.00  
Start Date: 04/14/2023  
Down Payment: \$1,000.00  
Future Due: \$4,000.00  
Auto Pay:   
Primary: Bank Account - \*\*\*\*9992  
Backup: VISA - \*\*\*\*1111 - (10/25)  
Frequency: Monthly

#	T	Charge Date	Amount	Auto Pay	Auto Pay Date	S	Del	N..	P
0	Adjust...	04/14/2023	\$35.00	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0	Adjust...	04/14/2023	(\$4,473.00)	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0	Adjust...	11/08/2023	\$4,000.00	\$0.00	-		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	Charge	12/08/2023	\$400.00	\$400.00	12/08/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Walmart/Blue Cross (Cloud9 Test)[Inactive]

Plan Amount: \$1,000.00  
Start Date: 04/14/2023  
Down Payment: \$1.00  
Future Due: \$0.00  
Initial Claim: \$6,438.00  
Cont. Code: D8670  
Frequency: Monthly

#	T	Date	Form Amount	Ledger Amount	Claim
0	Adjust...	04/14/2023		\$1.00	Claim
0	Adjust...	04/14/2023		(\$1,000.00)	Claim

# YOU'RE ALL SET!

You can now post and edit transactions processed using Cloud 9 Pay, as well as store payment information for point of sale and auto pay purposes.

For any additional questions regarding this process, Cloud 9 Support is happy to assist:

**Phone:** 1-800-394-6050 OPTION 2\*

**Email:** [cloud9support@planetdds.com](mailto:cloud9support@planetdds.com)