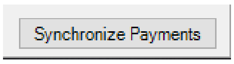
Ph: 0719193600

Email: support@clanwilliamhealth.com

Billink Online Payment Requests

Requires Socrates Version 2.7.9 or later and 2.8.1.3 or later for Aged Debtors.

Practices who register with Billink can send an online payment link to the patients mobile number. The patient can click this link and complete the payment online. The practice can view all payment requests and their status in Socrates. Online payments processed by Billink will show as payments in the patients chart. For more information please visit the Billink website at: https://billinkpayments.com or email: contact@billinksupport.com

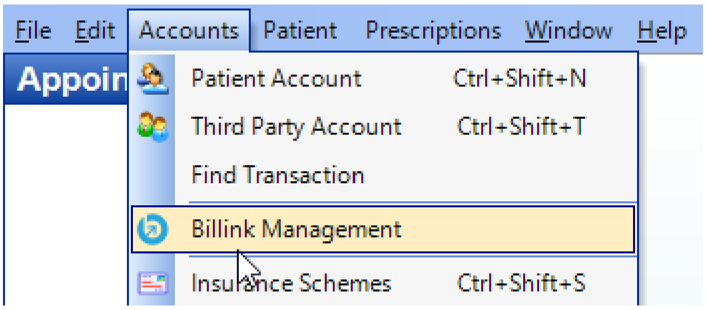
When using Billink with Socrates, **IT IS IMPORTANT TO REGULARLY SYNCHRONIZE BILLINK WITH SOCRATES.** In Billink > Search History, click the Synchronize Payments button. 

This will ensure that Socrates is up to date with any Billink payments etc.

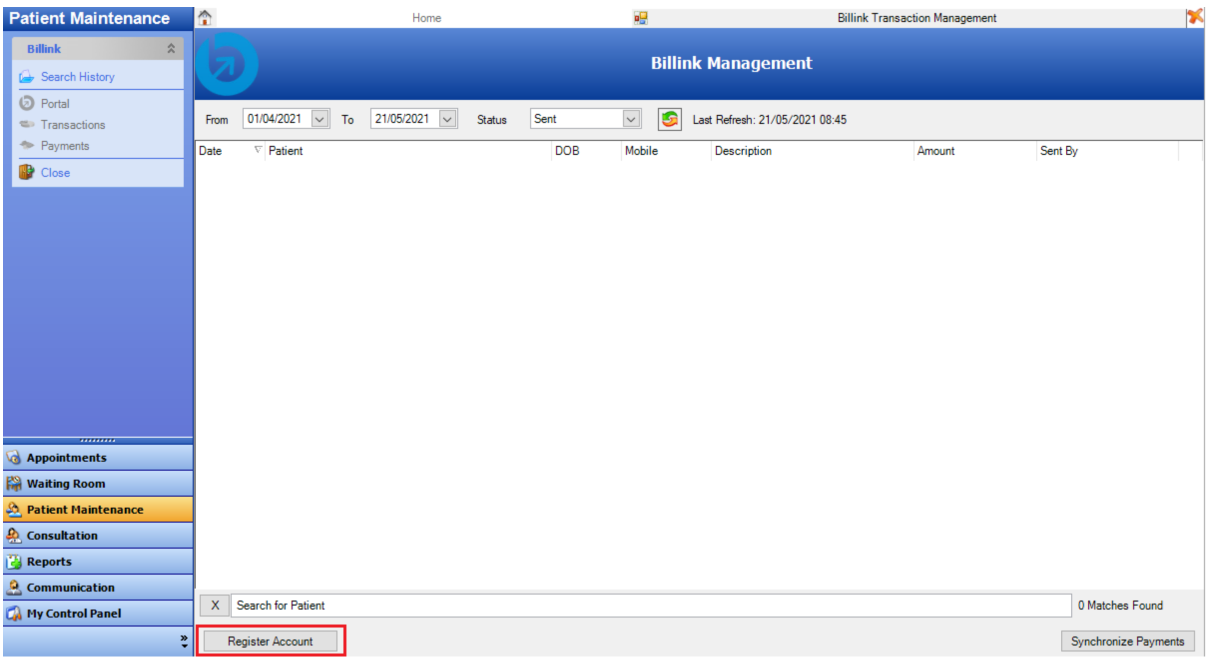
Contents

Billink Registration

Once Billink has been enabled you will see the **Billink** button on the top menu bar and the **Billink Management** menu item in the Accounts main menu.

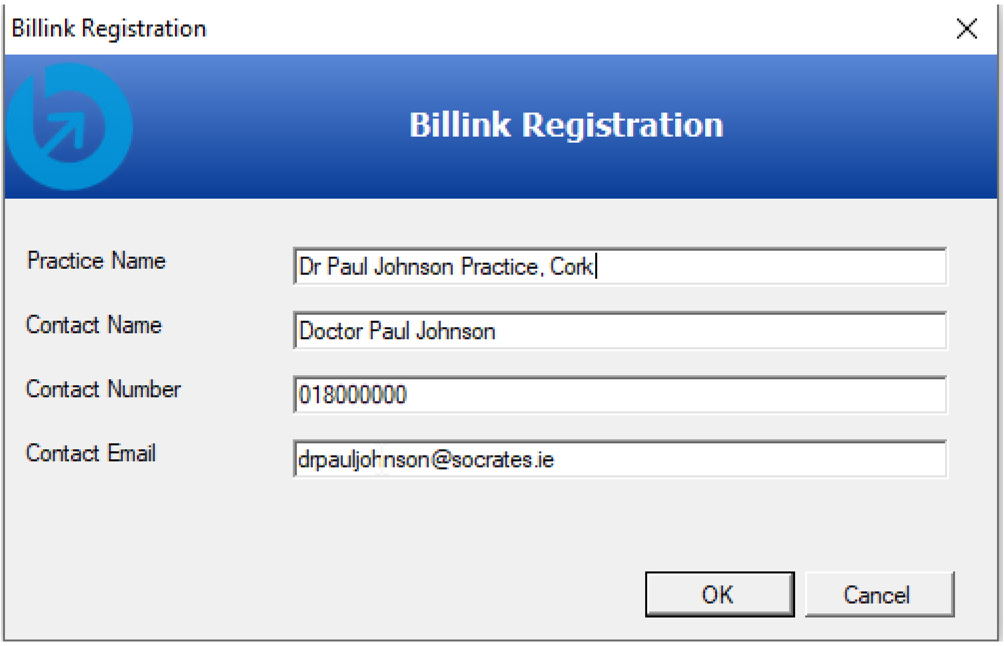


If you open Billink Management from the Accounts menu, click **Register Account** button to create a Billink account.

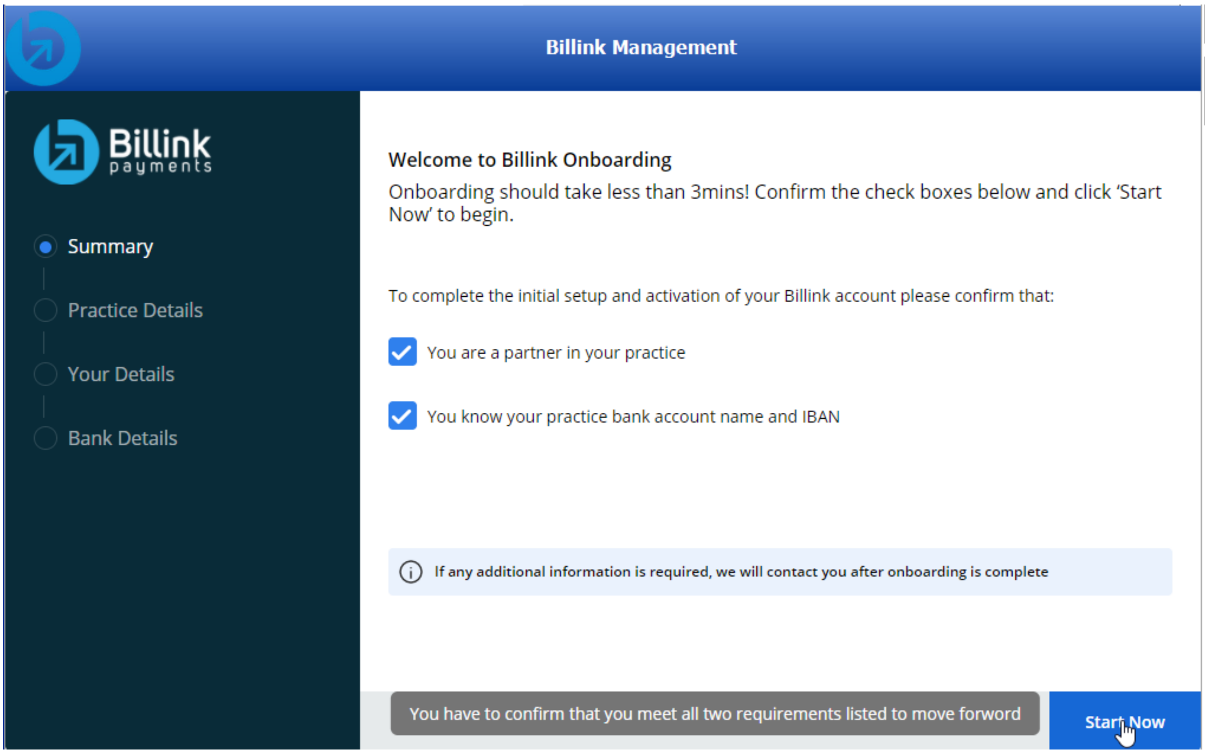


Ph: 0719193600
Email:
support@clanwilliamhealth.com

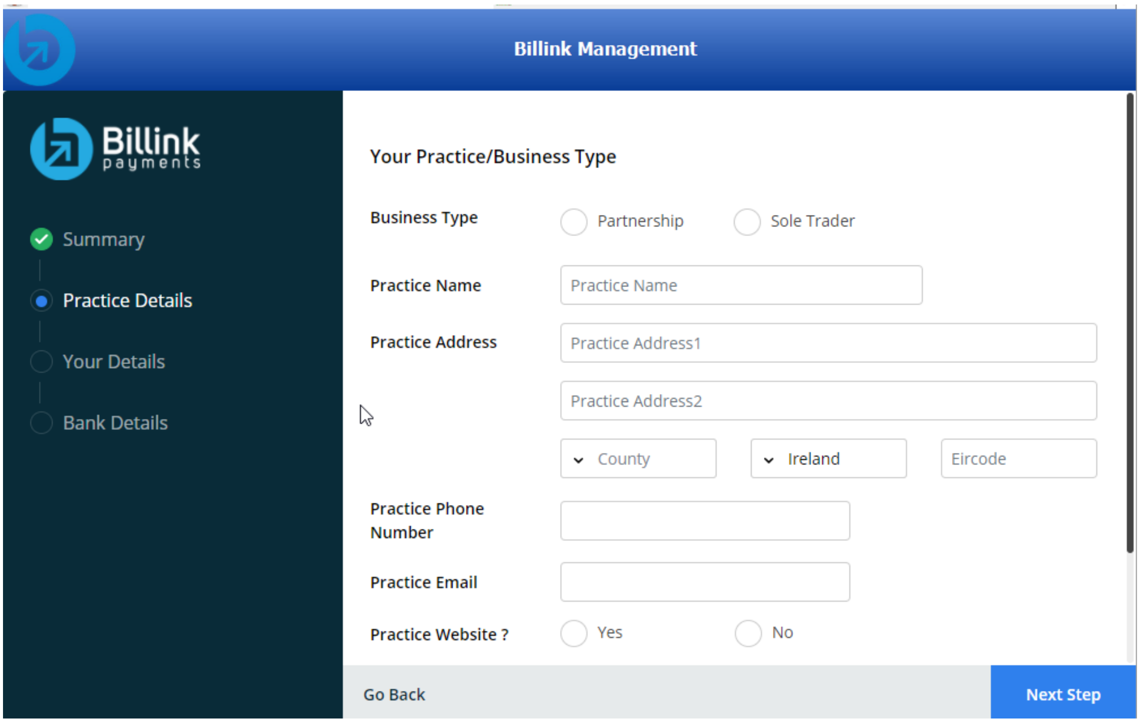
From the Billink button on the main menu, the registration screen will be displayed. Enter your Practice details and click OK.



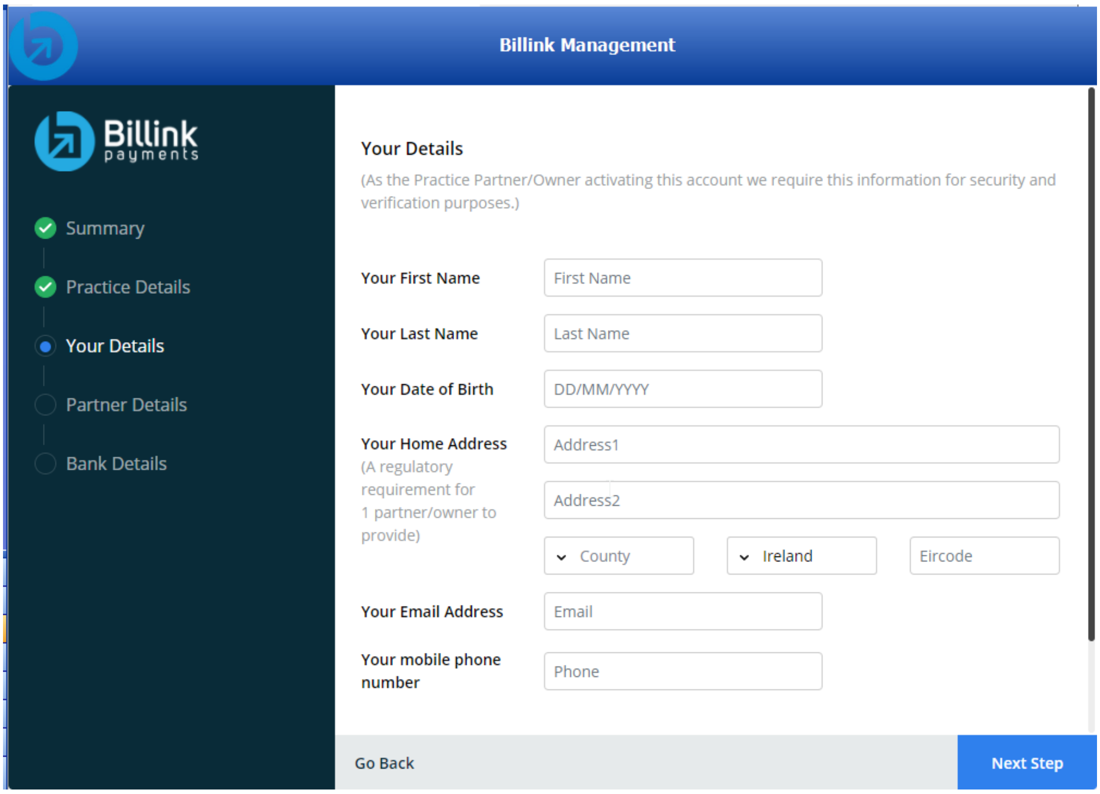
Complete the Billink registration form to sign up with Billink. Confirm you are a partner in the practice and you have the Practice bank account details ready to begin.



Enter the required details and click **Next Step**.



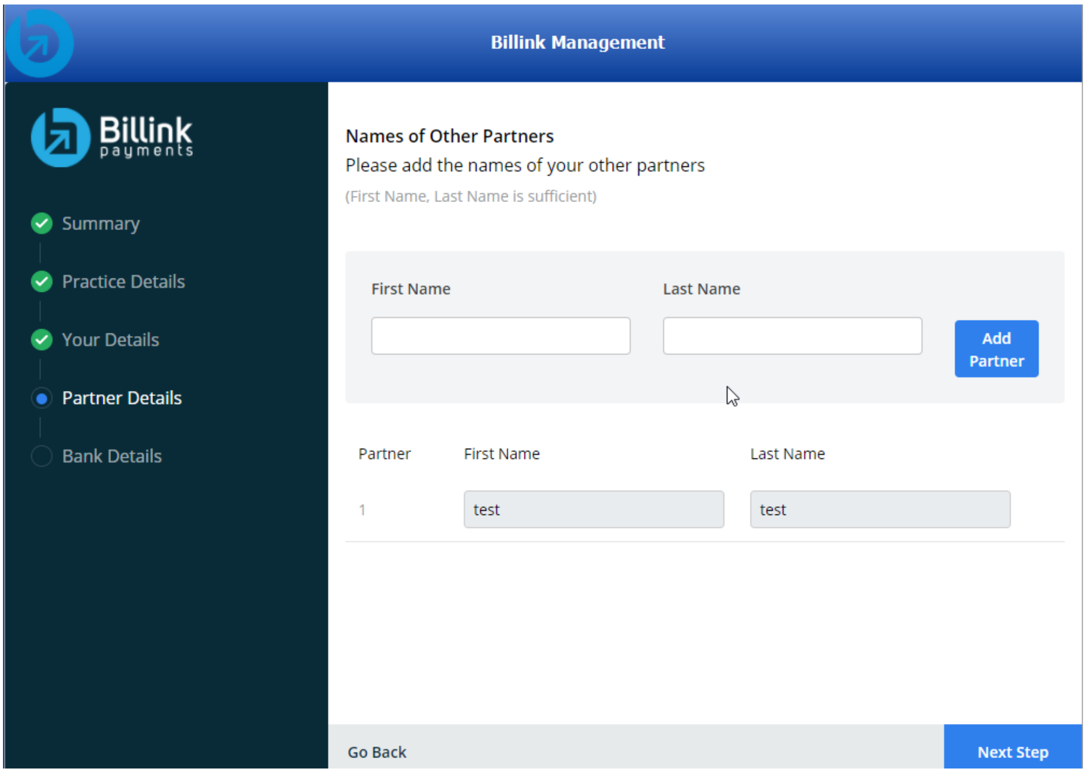
Enter the required details and click **Next Step**.



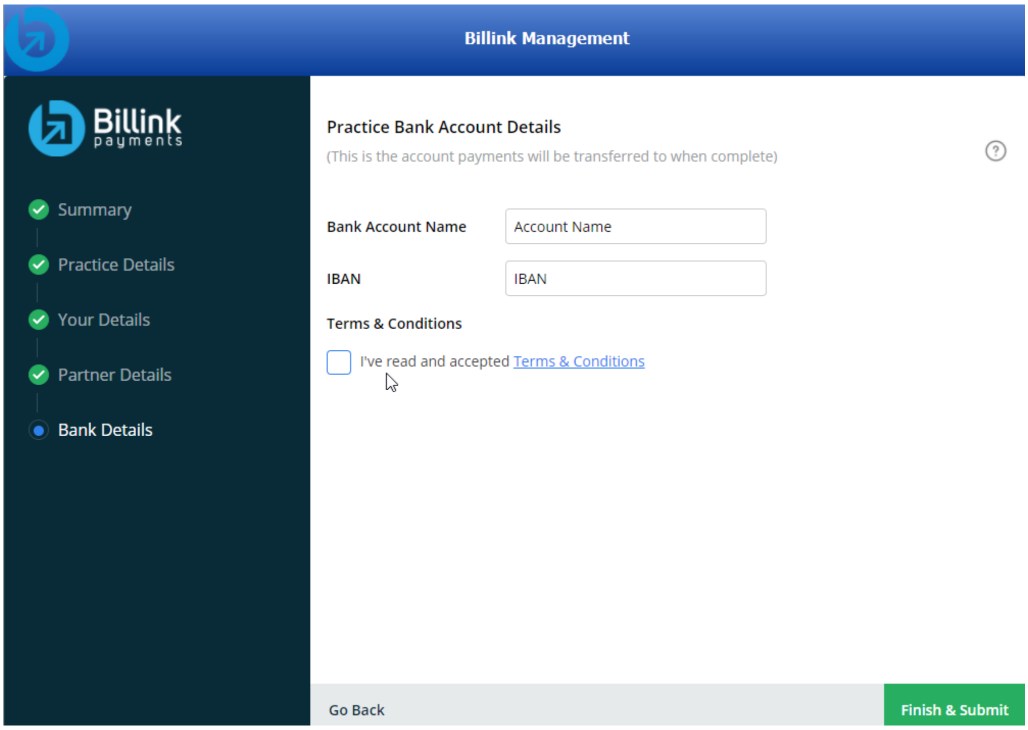
Ph: 0719193600

Email:
support@clanwilliamhealth.com

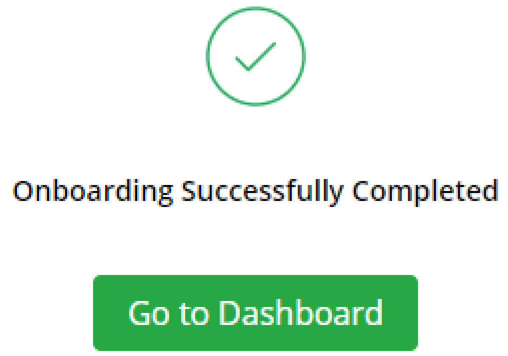
If you chose Partner then you will need to fill out details of all partners.



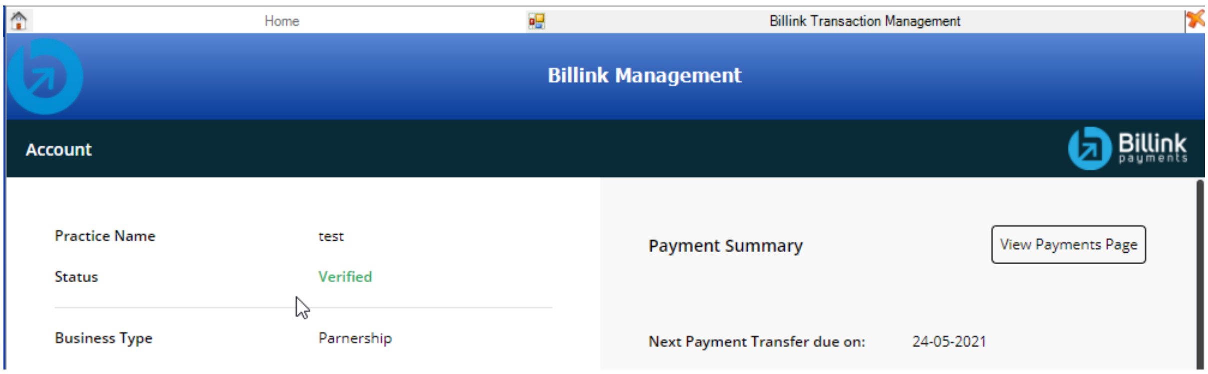
Read the Terms & Conditions and confirm if you agree, enter your bank account details and click Finish & Submit.



Once the Billink registration is complete you will receive a confirmation message. Clicking **Go to Dashboard** will open the Billink Portal.



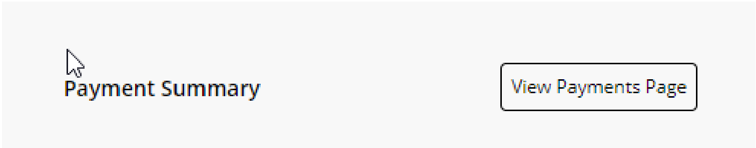
Here you will see all the information you have added during the Billink registration process.

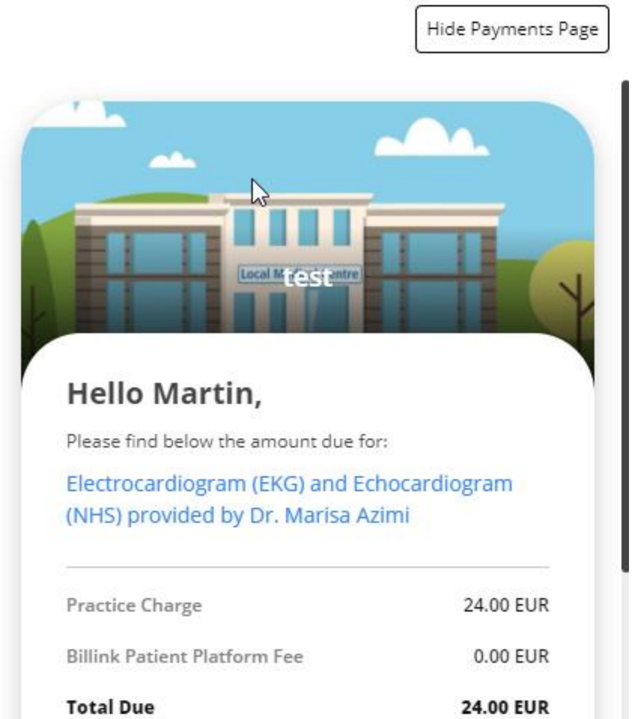


You can add your own **Practice Image** and when you send a payment request to a patient, your image will appear at the top of the request. Click X to remove the template image and drag and drop your new image.

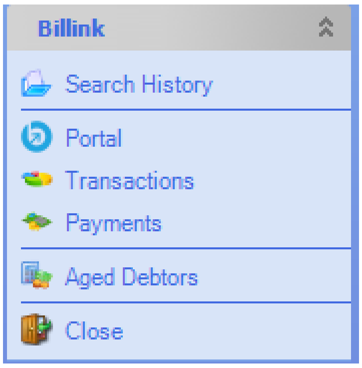
Ph: 0719193600
Email: support@clanwilliamhealth.com

Click View Payments Page to view a preview of how the payment request link will look for the patient.





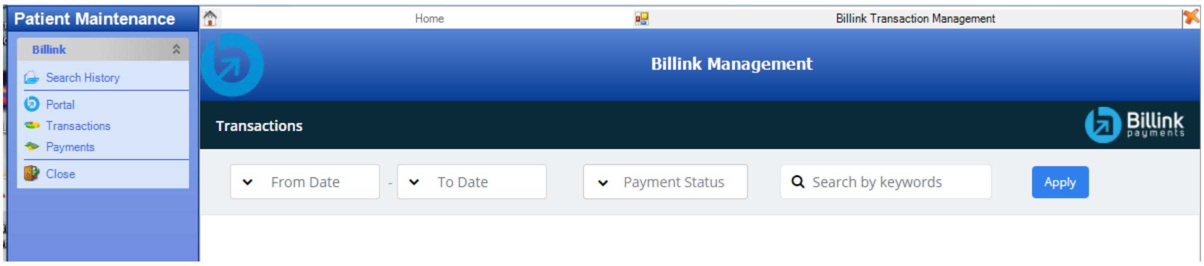
You can open the Billink Portal at any time by using the left hand explorer menu.



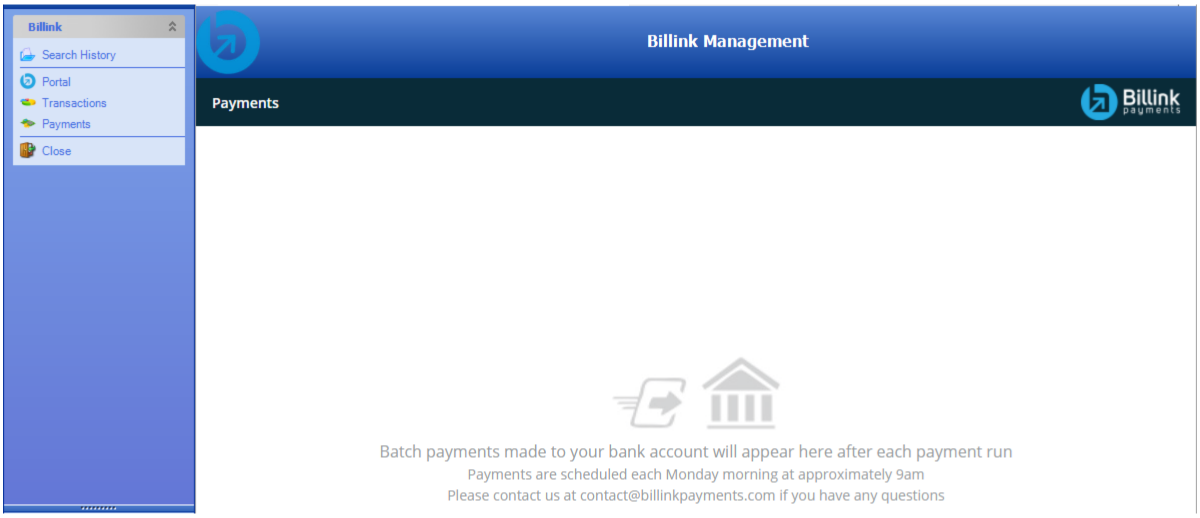
Ph: 0719193600

Email: support@clanwilliamhealth.com

Transactions will show all Billink payment transactions you have requested from Socrates and their status.

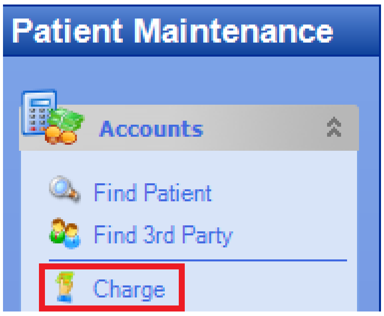


Payments will show all batch payments made from Billink into the bank account entered at Billink registration.

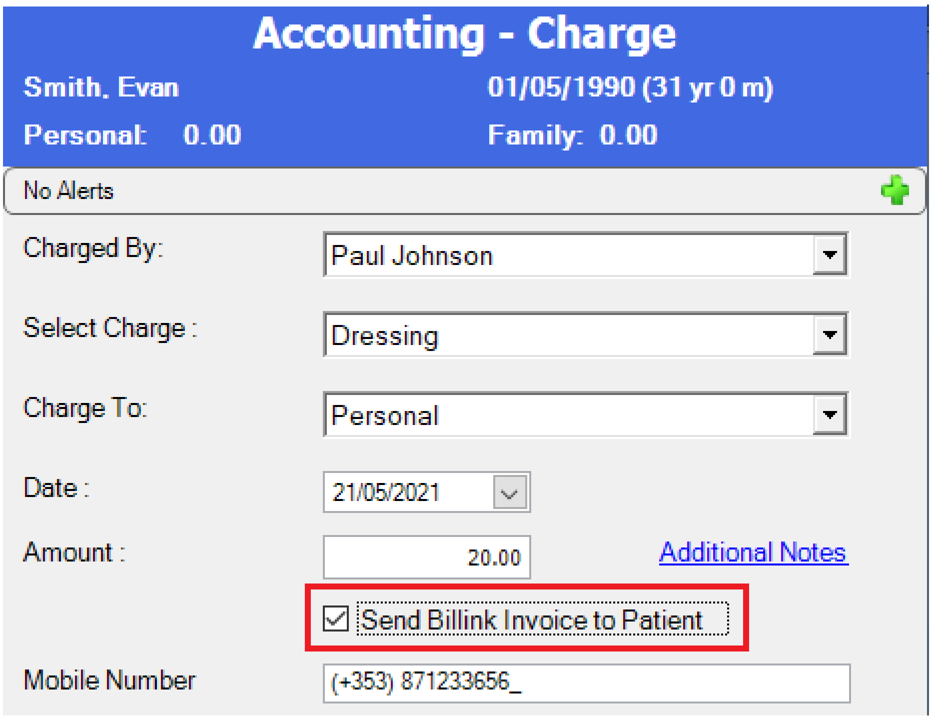


Payment Request

Select a patient from the waiting room or open the patients account and click **Charge** to send a Billink payment request.



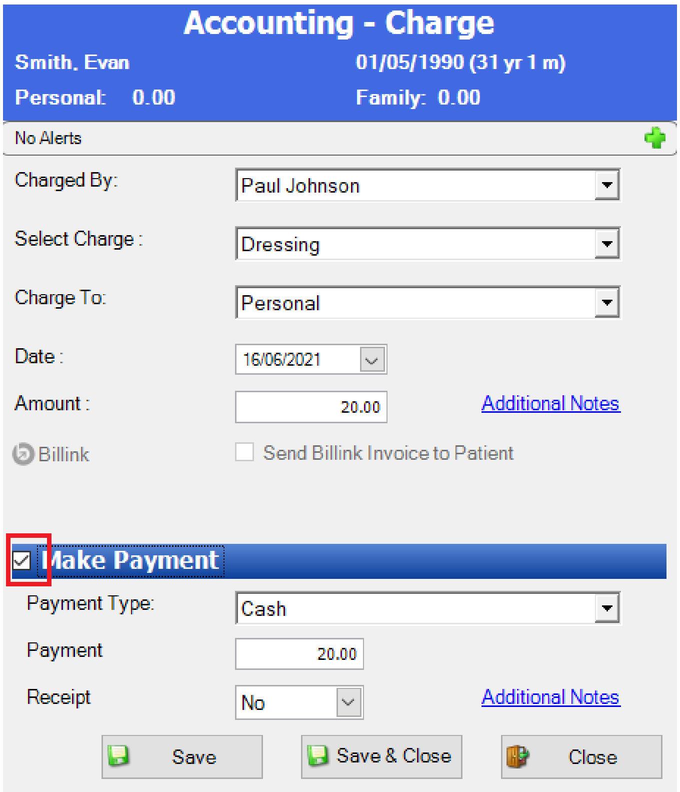
Enter the details of the charge and check ‘Send Billink Invoice to Patient’. Ensure patients mobile number is correct and click Save & Close.



Any additional notes added will be sent with the Billink Payment request to a maximum of 300 characters (which will include the charge description)**.**

Ph: 0719193600
Email: support@clanwilliamhealth.com

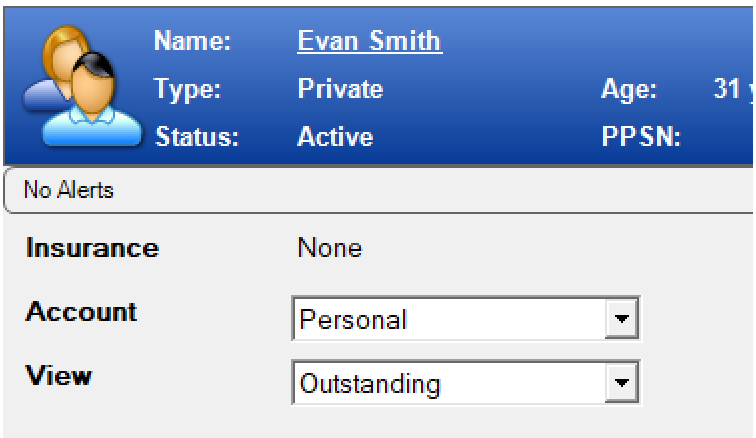
Note: If you have 'Make Payment' checked by default preference selected then you need to uncheck 'Make Payment' on the Charge window for Billink to be enabled.



Outstanding Charge(s) / Multiple Charges

If the patient has an existing outstanding charge or you want to request payment for multiple charges then open the Patient Account.

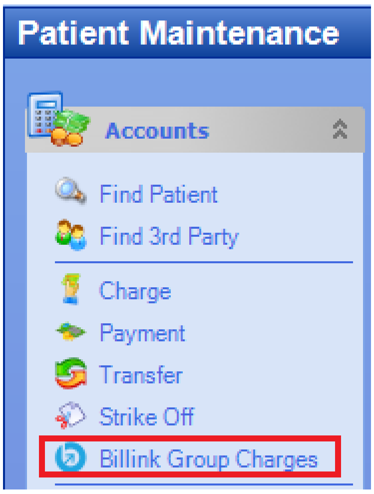
Filter dropdown to **Outstanding** to view all outstanding charges.



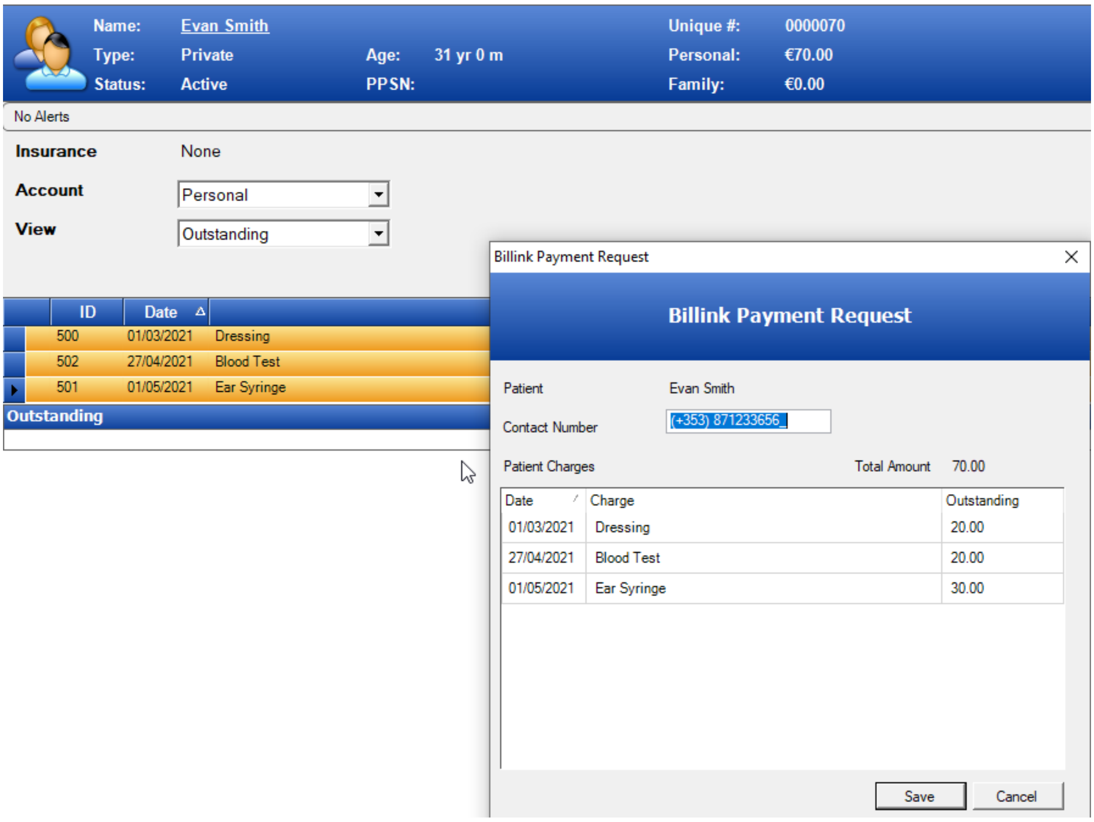
Ph: 0719193600

Email: support@clanwilliamhealth.com

Select the outstanding charge(s) that you want to request payment for and click **Billink Group Charge.**



Ensure the patients mobile number is correct and click **Save**.

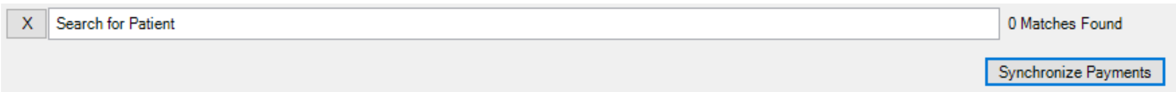


Ph: 0719193600
Email:
support@clanwilliamhealth.com

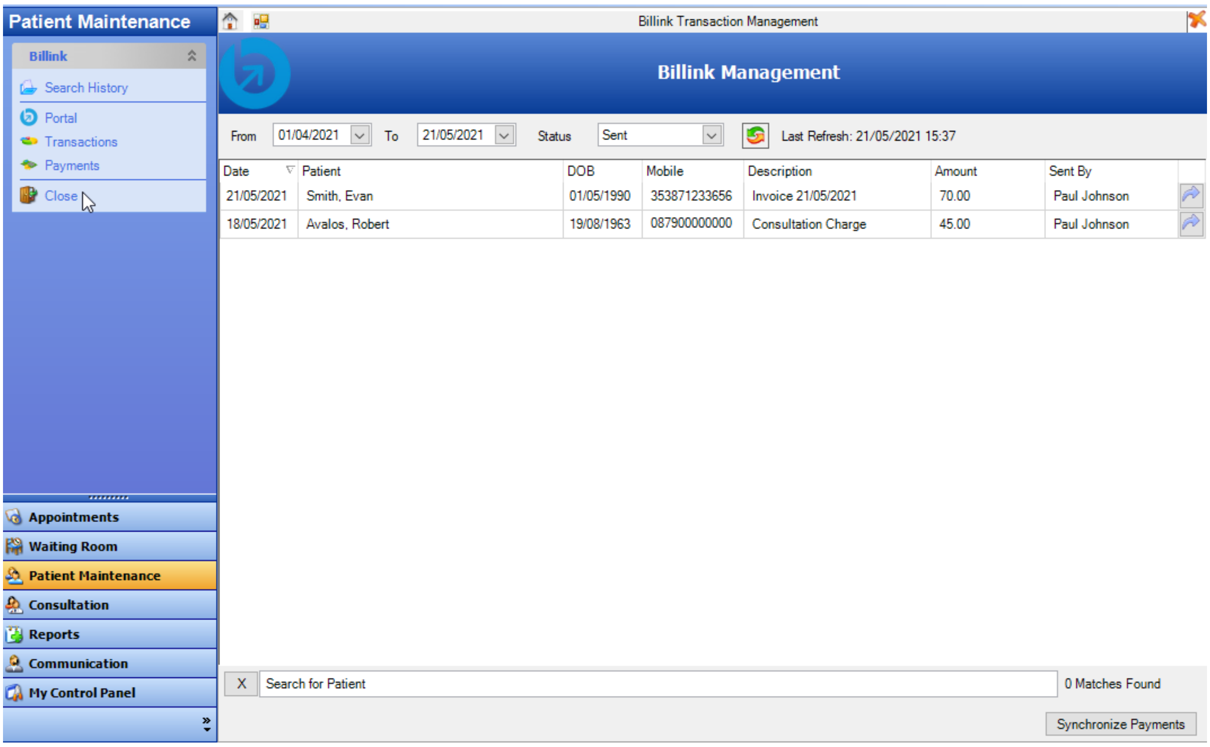
Search History

To view the status of all payment requests select **Billink** icon from main menu or **Accounts** > **Billink Management**.

Click **Synchronize Payments** button to update the list with any recent Billink payments, refunds or cancellations.



A check is completed for any updates from Billink when Billink > Search History is opened. **IT IS IMPORTANT TO REGULARLY SYNCHRONIZE BILLINK WITH SOCRATES.** A Daily Task can be created to act as a reminder. This will ensure that Socrates is up to date with any Billink payments etc.

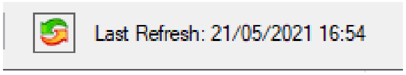


Use filters to view transactions by status.

- **Sent** – Payment request sent via Billink to Patient.
- **Paid -** Payment request sent via Billink has been paid by the Patient.
- **Cancelled** – Payment request sent via Billink has been cancelled. If Patient clicks the link in the SMS message, they will be advised the request has been cancelled.
- **Refunded** – Payment request sent via Billink has been paid by the Patient and the Practice has subsequently refunded the payment on the Billink Portal.

Ph: 0719193600
Email: support@clanwilliamhealth.com

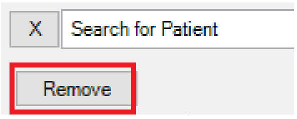
- **Settled** – A payment has been added manually to the patients account after the Billink payment request was sent. You will need to check the patient account to view the payment details.

Click Refresh button 

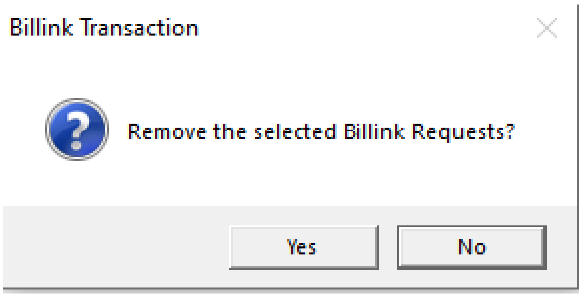
to show any new payment requests added in Socrates while the Billink > Search History page has been opened.

When payments are added to the patients chart, **Taken by** will be the user who sent the Billink payment request.

If you want to cancel a Billink payment request select the charge and click the **Remove** button.

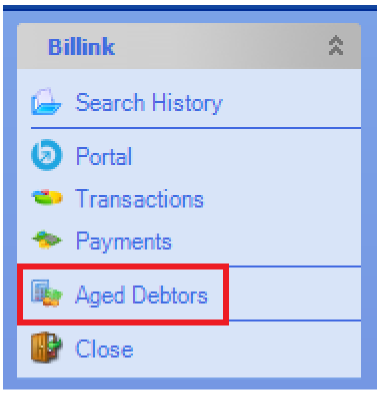


Click **Yes** to proceed.

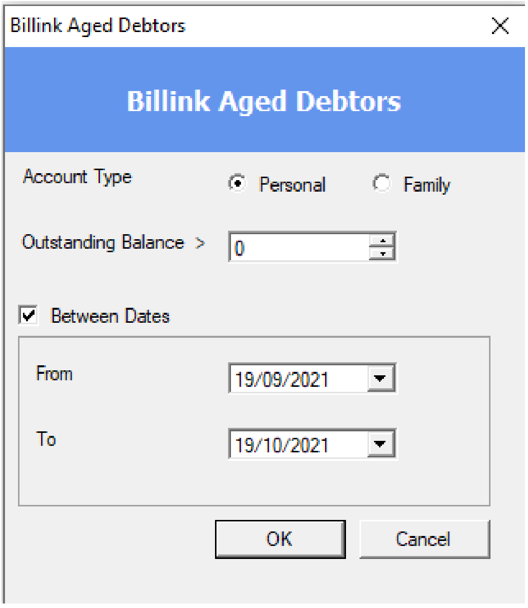


Aged Debtors

Open Aged Debtors from the Billink menu. You will see this menu in the Search History tab if you are registered for Billink.



Click **Run** to open the Billink report and enter the criteria required. Click OK to generate a list of patients based on these criteria.



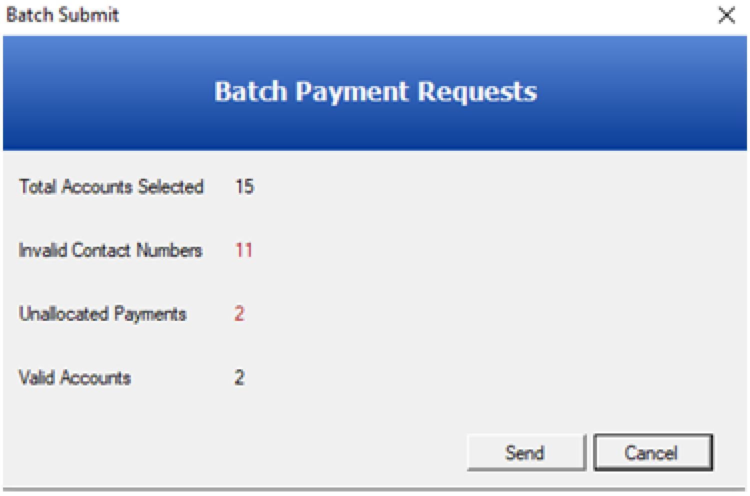
A Billink payment request will only be sent for Patients with valid mobile numbers, no unallocated charges and a current outstanding balance on their account.

Note: If you select Personal, a list will be generated of all patients who have a personal balance based on the criteria selected for the report and who do not have any Billink payment requests with a status of Sent.

- Double click on a patient to open their Account to view their current outstanding balance and confirm their personal outstanding balance is correct.
- If you use between dates to generate the list and the patient has since paid this outstanding charge then this patient will be skipped and no Billink payment request will be sent.
- Select 1 or more patients from the list and click **Batch Requests** to send Billink payment requests for the outstanding charge (as returned by the Aged Debtors report).
- A notification will be displayed of those that cannot be sent a Billink payment request and the reason i.e. Patient has no mobile number or has unallocated payments on their account.

Ph: 0719193600
Email: support@clanwilliamhealth.com

- A notification will be displayed of those that cannot be sent a Billink payment request and the reason i.e. Patient has no mobile number or has unallocated payments on their account.

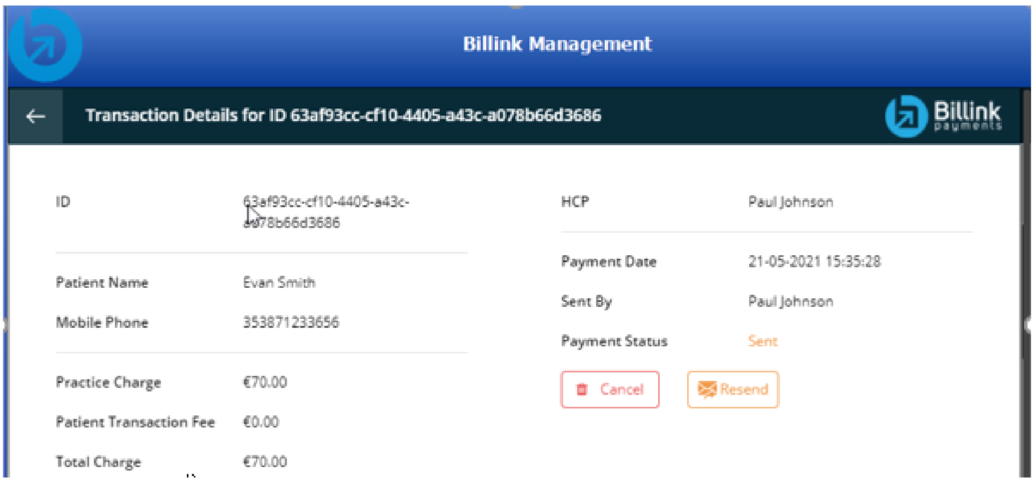


- Click **Send** and wait for requests to be sent and the window to close.
- View all Sent requests by opening Billink > Search History.
- Run the report with the same criteria again and update patients mobile number / allocate any unallocated payments to the corresponding invoice.

Billink Portal

Click the arrow beside the Payment request to view further details on the Billink portal or to update the Billink request.

Click **Resend** to resend the text message to the patient e.g. if the link has expired.



Ph: 0719193600

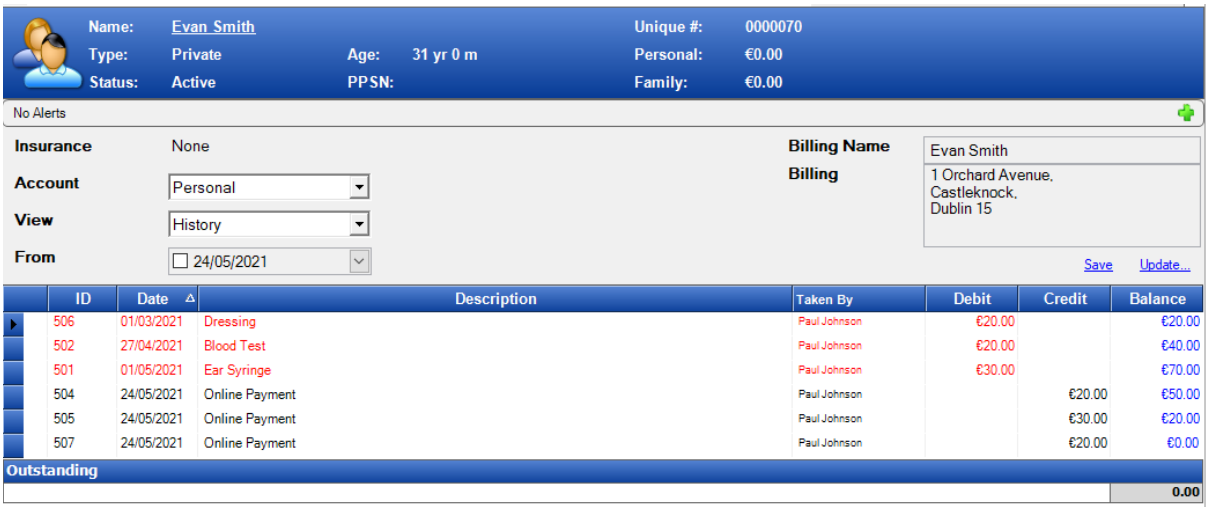
Email: support@clanwilliamhealth.com

Should you need to cancel the payment request for any reason e.g. an incorrect mobile number was used or if the patient has paid for the bill in person, then click **Cancel** to remove the payment request.

<u>Once you click **Synchronise Payments** on the Search History window or reopen the Billink window the status of the request will update in Socrates.</u>

Patients Account

Once the payment has been received by Billink it will be automatically allocated to the outstanding charge. The payment description will be 'Online Payment'.



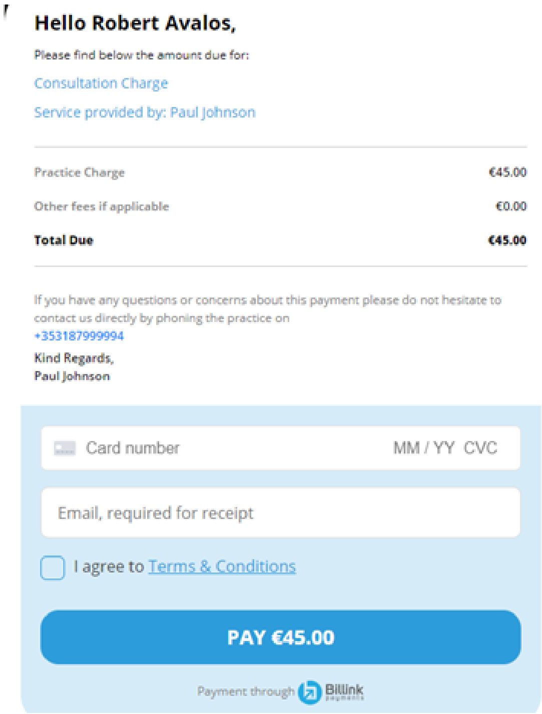
ID	Date	Description	Taken By	Debit	Credit	Balance
506	01/03/2021	Dressing	Paul Johnson	€20.00		€20.00
502	27/04/2021	Blood Test	Paul Johnson	€20.00		€40.00
501	01/05/2021	Ear Syringe	Paul Johnson	€30.00		€70.00
504	24/05/2021	Online Payment	Paul Johnson		€20.00	€50.00
505	24/05/2021	Online Payment	Paul Johnson		€30.00	€20.00
507	24/05/2021	Online Payment	Paul Johnson		€20.00	€0.00

No updates will be made to the patients account if the Billink payment request has been cancelled or refunded. You must update the patients account as required.

If a patient has a Billink payment request and they pay the charge either over the phone or in person you should select Payment Only from Waiting Room or Payment in Accounts and allocate it against the charge. A Settled status update will be sent to Billink when any payment is made in Socrates or any payment is allocated against the charge.

Patient

Once the patient receives the text message, they can click on the link provided. This link will open the payment page in their default browser. They can enter their card details and click **Pay**.



Hello Robert Avalos,

Please find below the amount due for:

Consultation Charge

Service provided by: Paul Johnson

Practice Charge	€45.00
Other fees if applicable	€0.00
Total Due	**€45.00**

If you have any questions or concerns about this payment please do not hesitate to contact us directly by phoning the practice on +353187999994

Kind Regards,
Paul Johnson

Card number MM / YY CVC

Email, required for receipt

I agree to Terms & Conditions

PAY €45.00

Payment through Billink payments