

How To: Updating Stored Cards for Wellness Plans

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UPDATING A CREDIT CARD FOR WELLNESS PLAN PAYMENTS

When a credit card attached to a wellness plan needs to be updated, the **card must be updated** directly from the patient's **Wellness Plan screen only**.

- Do not update the card from the client's profile. The card will not attach to the wellness plan payment schedule if updated from the client profile.
- If the client has multiple pets on plans, this process must be followed on each wellness plan file.

1. Go to the patient's Wellness Plan Screen
2. Expand the pet's "Payment Schedule"
3. Select "Add Card" from the payment schedule
4. Choose Card Type, select the appropriate type (American Express, Discover, Mastercard, Visa)
5. Update the card either by entering it manually or swiping the card on the appropriate terminal
6. Click on Authorize and Store

RECEIVING FAILED PAYMENT (IN HOSPITAL)

If a notification is sent about the client's payment failed, that means the past due/failed payment was put on an invoice. You will need to take payment from the "Checkout Client" screen.

1. Go go "Checkout Client" there should be a balance owed (failed payment amount)
 2. Process payment from checkout screen as normal using new stored card
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