



CareCredit®

User Guide

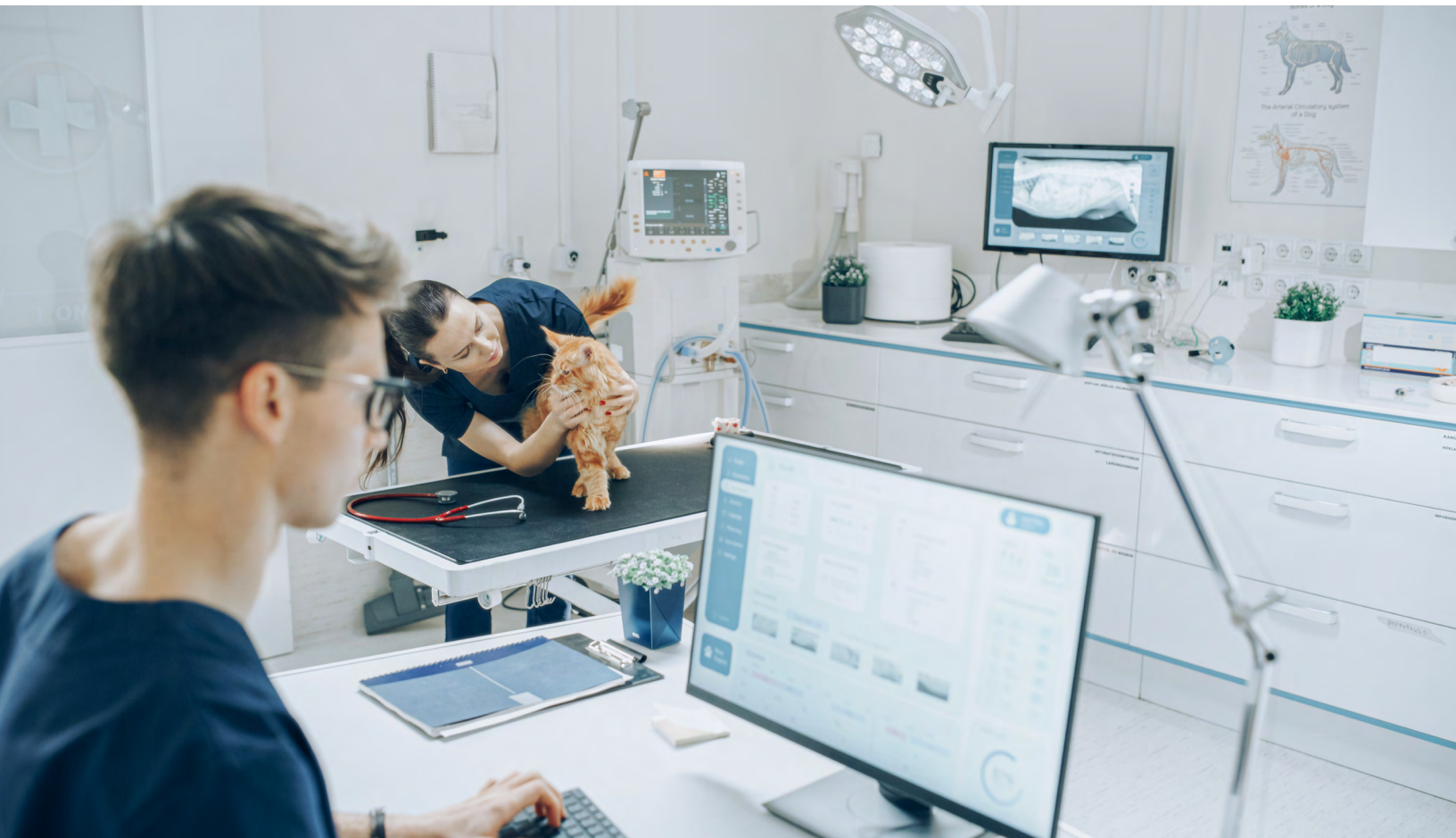


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Overview

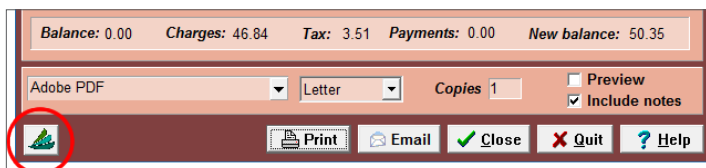
The integration of CareCredit into Avimark means veterinary businesses can process applications faster and easier. From the CID speed bar, the business selects the CareCredit button and instantly has access to the CareCredit Home Page. This page provides options to submit an application, submit a transaction, process a credit, and locate an account or reprint a receipt. With a simple click of the mouse, the client's information is automatically uploaded into the CareCredit application. A credit decision is provided almost instantly allowing the pet owner and business to immediately proceed with the best treatment program for the pet.

Activate CareCredit

For this interface to work properly in Avimark 18.11.0 or higher, the integration with CareCredit needs to be enabled and the clinic's merchant ID entered.

1. Click on  to open Options Maintenance (Advanced Options).
2. Search for CareCredit.
3. Expand CareCredit and click on **Active**.
4. Click **Change** and select **True**.
5. Click **OK**.
6. Select **Merchant ID** and click **Change**.
7. Enter the clinic's merchant ID for CareCredit then click **OK**.
8. Close out of Advanced Options.

Pressing the  button from the CID speed bar takes the active client's information and adds it to their online CareCredit application. The CareCredit button is also available from the Invoice screen.



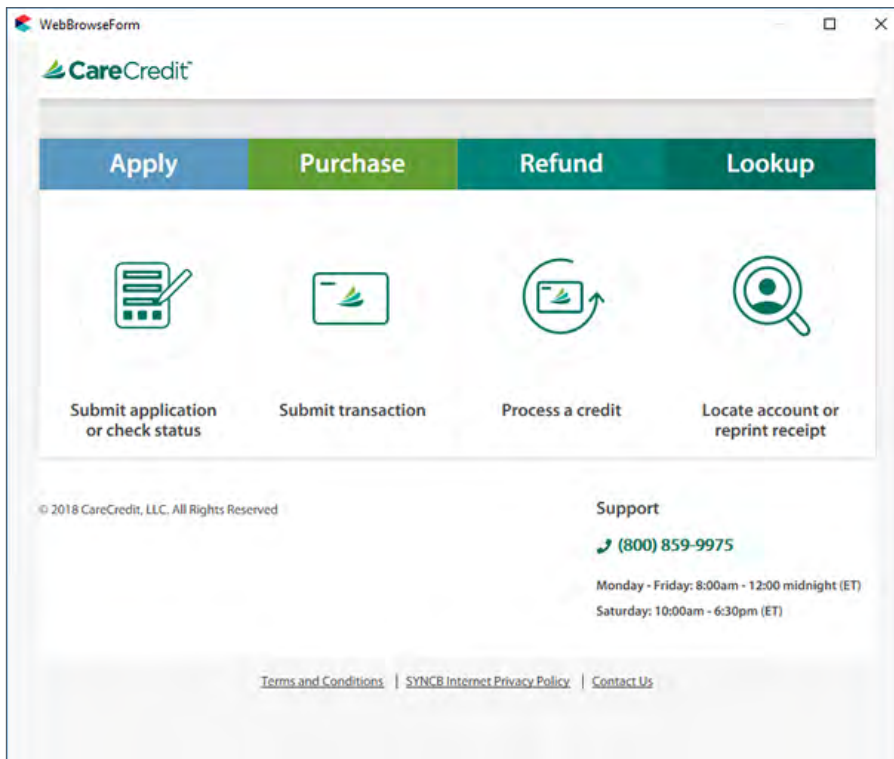
Secure the CareCredit Feature

To control who can access the CareCredit website, CareCredit has been added to Users and Security.

1. From the menu, go to **Work with > Users and Security**.
2. Select the Category.
3. Under Authorized Functions, **right-click > Choose**.
4. In User Functions, select the CareCredit category.
5. On Access CareCredit, **right-click > Select**.
6. Click **Done**.

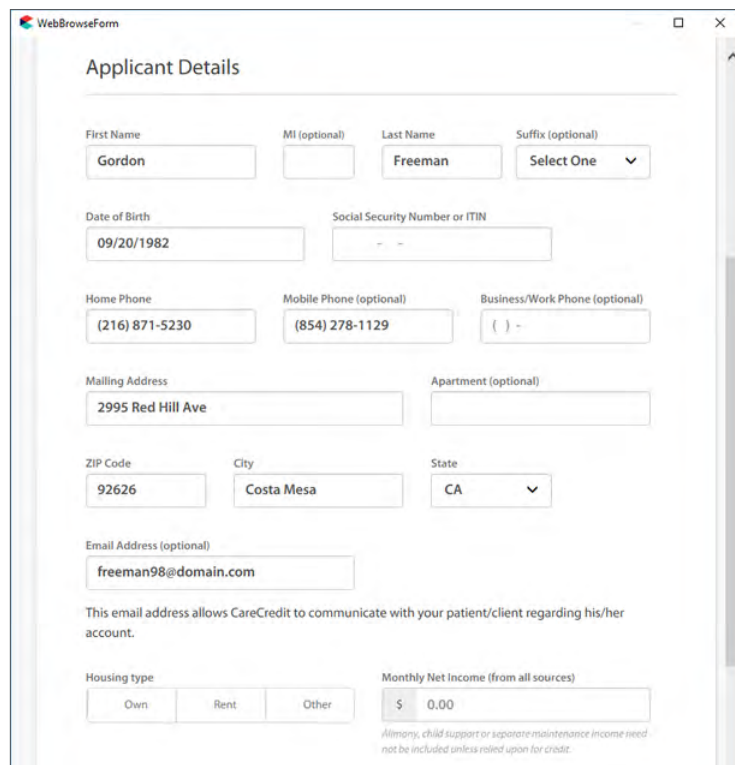
CareCredit Home Page

From the CareCredit Home Page, you have the option to submit an application, submit a transaction for purchase, or process a refund.



CARECREDIT USER GUIDE

When you click on any option, the active client's information will populate the CareCredit fields. Below is a screen shot of an application with the client's data filled in automatically from their Avimark client record.



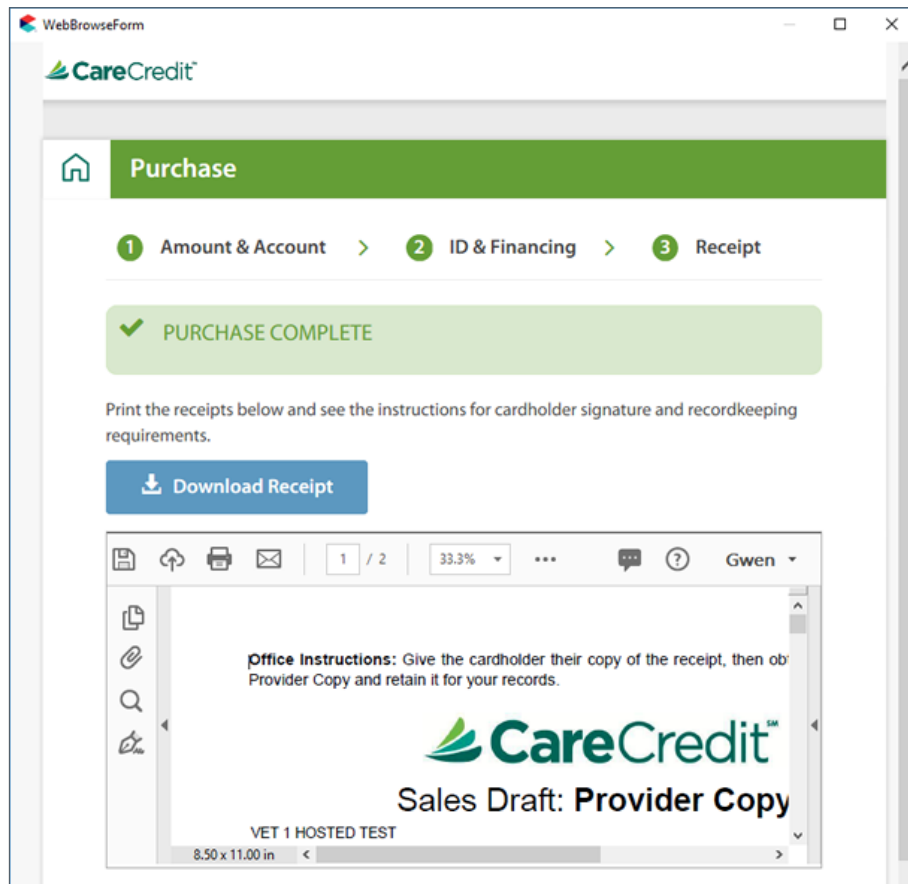
The screenshot shows a web browser window titled 'WebBrowseForm' displaying the 'Applicant Details' form. The form is populated with the following information:

- First Name:** Gordon
- MI (optional):** (empty)
- Last Name:** Freeman
- Suffix (optional):** Select One (dropdown menu)
- Date of Birth:** 09/20/1982
- Social Security Number or ITIN:** (empty)
- Home Phone:** (216) 871-5230
- Mobile Phone (optional):** (854) 278-1129
- Business/Work Phone (optional):** () - (empty)
- Mailing Address:** 2995 Red Hill Ave
- Apartment (optional):** (empty)
- ZIP Code:** 92626
- City:** Costa Mesa
- State:** CA (dropdown menu)
- Email Address (optional):** freeman98@domain.com
- Housing type:** Own (selected), Rent, Other
- Monthly Net Income (from all sources):** \$ 0.00

Below the income field, there is a small note: *Alimony, child support or spousal maintenance income need not be included unless relied upon for credit.*

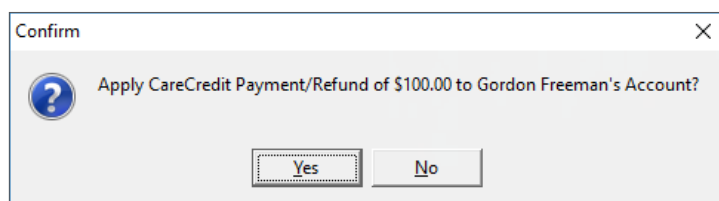
CareCredit Transactions

To make a purchase or refund, follow the screen prompts on the CareCredit site. When a payment is made or a refund processed, the receipt will display in the window. Click on Download Receipt and the receipt will open in a separate window.

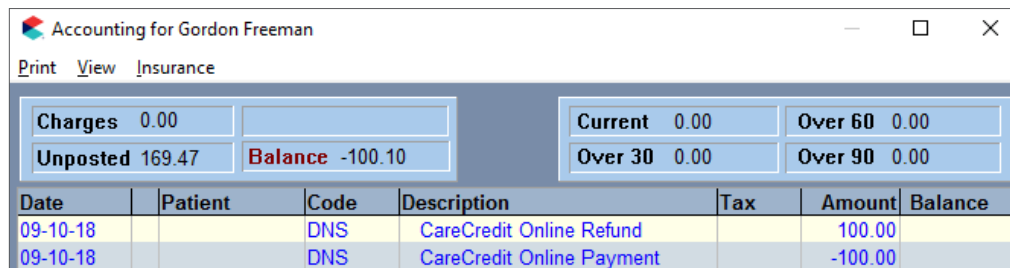


Process Payment or Refund

When the CareCredit WebBrowserForm is closed, click Yes on the message to process the payment or refund to the client's account.



The payment or refund will appear in the client's Accounting record:



Accounting for Gordon Freeman

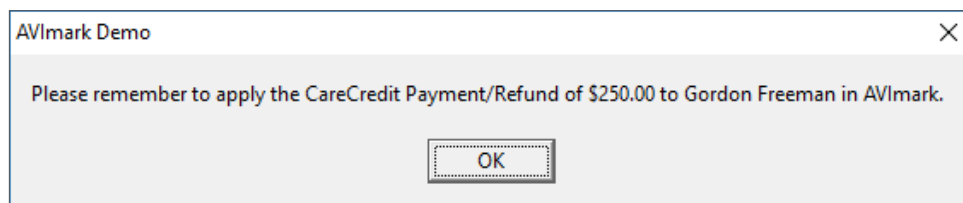
Print View Insurance

Charges 0.00		Current 0.00	Over 60 0.00
Unposted 169.47	Balance -100.10	Over 30 0.00	Over 90 0.00

Date	Patient	Code	Description	Tax	Amount	Balance
09-10-18		DNS	CareCredit Online Refund		100.00	
09-10-18		DNS	CareCredit Online Payment		-100.00	

Manually Process Payment or Refund

If the user clicks No to processing the payment or refund automatically, the following message will appear.



1. Click **OK** to close the message.
2. In the client area of the CID, **right-click > Invoice**.
3. In the Invoice screen, **right-click > New > CareCredit Online**.
4. In the Enter payment screen, enter the amount of the payment/refund.
5. Click **Done**.
6. Click **Print**.
7. Click **Close**.

The payment/refund will show on the client's Accounting record.