



How to Checkout with CareCredit

Goal: Learn to effectively and efficiently use CareCredit during checkout processes

What is CareCredit: CareCredit helps people to pay for out-of-pocket healthcare. Once you are approved, you can use it again and again* to help manage health, wellness and beauty costs not covered by insurance.

Video: <https://www.carecredit.com/howcarecreditworks/#>

How to Apply: Use this link:

<https://www.carecredit.com/howcarecreditworks/prospective/>

Then select “apply now”

(We can not submit an application for the patient)

How to Checkout:

→ Go to <https://www.carecredit.com/>

→ In the top right corner hover over “Login” and select “Provider Login”

◆ USERNAME: xxxxxxxx

◆ PASSWORD: xxxxxxxx

→ If you need to verify the account:

◆ Client Name: Portrait Health Inc

◆ Merchant Identification Number (MID): 5348121300590583

◆ Practice Code:0010W00002XDY7BQAX

◆ Tax ID: x0426

◆ Last 4 of Bank Account: x0300

→ Select ‘Purchase’ to charge the patient

→ You can either enter the account number using the Patients card or look up their card by selecting “Account Lookup”

◆ If you have to look up their card, ask to see their ID (you may need to enter ID number as well as date of birth, phone number and/ or social security number)

ACCOUNT NUMBER ⓘ
Swipe or enter card number

CARD SECURITY CODE
3 digits on back of card

EXPIRATION DATE
MM/YY

OR ☐ This card has no Expiration Date

Continue **Cancel**

→ After you successfully pull up the patient's account, input the transaction amount and select the name of the patient in office (if multiple names are listed):

Process Transaction

All fields are required unless otherwise noted.

TRANSACTION TYPE
Purchase

ACCOUNT NUMBER
.....1136

AMOUNT
\$

NAME(S) ON ACCOUNT

HELEN LOVEJOY
TIMOTHY LOVEJOY

→ For 'Program Name' select "Care Credit"

→ Patient/Client ID can be left blank

If the person presenting the card is not listed above, please call 800-859-9975 to verify they are authorized to use the account.

PROGRAM NAME
Select One ▼

PATIENT/CLIENT ID
Optional

Optional - For Practice Use Only. Information entered will appear on the patient/client CareCredit statement and the Recent Transactions Report.

Submit **Back**

Cancel

→ You will now have the option to select how long the patient would like to finance the purchase (the options available depend on the price of the transaction).

- ◆ 6 Months no interest (Transactions \$200-\$999)
- ◆ 12 Months no interest (Transactions \$1000-\$1999)
- ◆ 18 Months no interest (Transactions \$2000 and up)
- ◆ 24 Months no interest (Transactions \$2000 and up)

→ After you select an option, confirm with the Patient this is the correct option, it can not be changed once you have submitted it. If everything is correct select 'submit' and the transaction will be processed.

Process Transaction

Transaction Approved

AUTHORIZATION CODE 1059197	ACCOUNT NUMBER1136	TRAN/PROMO CODE 120 : 12 Month No Interest With Pay Deferred Interest
AMOUNT \$ 55.02	TRANSACTION TYPE Purchase	NAME(S) ON ACCOUNT EDNA KRABAPPEL

Reminder: You must retain the sales receipt, signed by the cardholder, in accordance with the guidelines outlined in your Operating Guide.

Print Receipt

Send Receipt

New Transaction

→ Make sure to print the receipt and have the cardholder sign it. Once they have signed it, upload the document into EHR.

→ After the transaction goes through in Care Credit you can check them out in EHR.

- ◆ There will be a box in checkout labeled 'Care Credit', write in the amount processed and the authorization #, then proceed with normal checkout procedures.