

# Patient Access Portal Overview

CareView Total Solution  
Version 3.x

December 2016

**WATSON CLINIC** LLP  
*Quality Healthcare for Every Generation*

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# Site Sign On

The user enters the Site via a link on a corporate Intranet web site.

The User is presented with a Splash Page offering 3 options:

- Sign In** - Patients have already enrolled (If not enrolled this will be displayed when signing on)
- Quick Payment** - Patients can make a quick payment without enrolling
- Enroll** - Patients can sign up using their most recent Bill

The screenshot shows the Watson Clinic patient financial services center splash page. The page features the Watson Clinic logo and tagline 'Quality Healthcare for Every Generation'. The main heading is 'My Billing Summary'. Below the heading, there are three main options: 'Quick Payment', 'Enroll Now', and 'Already enrolled? Enter your email address and password below.'. The 'Quick Payment' option is highlighted with a blue callout box labeled 'QuickPay'. The 'Enroll Now' option is highlighted with a blue callout box labeled 'Enroll'. The 'Already enrolled?' option is highlighted with a blue callout box labeled 'Sign In'. The page also includes a 'Welcome to the Patient Financial Services Center' message, a 'Sign In' button, and a 'Make a Quick Payment' button. The footer contains contact information and copyright details.

# Enroll

This page is displayed the first time a user signs on to the site or when a user clicks [Sign up for My Billing Summary](#) link from the Welcome page.

The information provided will be validated against the content provided to iPayX by the Biller.

Using the most current statement, enter the authentication fields exactly as they appear on the statement:

Authentication fields are chosen by the biller at the time of Implementation.

Passwords must be between 8 and 12 characters long and a combination of letters and numbers with at least one special character ( , / ? : @ & = + \$ #). It is recommended to use both upper case and lower case numbers for greater password security.

**Sign up for Electronic Billing Access Today!**

Please enter the information requested below.  
The guarantor is the patient if the patient is age 18 or older.  
If the patient is under 18, the guarantor is the person that brought the patient in for the visit.

Guarantor Full Name:  \*  
(As it appears on the patient statement)

Statement Color:  ▾

Patient Account Number:  \*  
(As it appears on the patient statement)

Statement Date:  \*  
(mm/dd/yyyy or mm/dd/yyyy)  
From the most recent statement

Statement Amount:  \*  
(dollars and cents, no symbols, e.g. 10.00, not \$10 or \$10.00)  
From the most recent statement

Zip Code:  \* Where statements are sent

Email Address:  \*

Verify Email Address:  \*

Choose Delivery Method:  Web  eMail  Paper

Password:  \*  
(Your password must be between 8 and 12 characters long and a combination of letters and numbers with at least one special character)

Re-enter Password:  \*

Password Strength:  Very Weak

Additional Security Question:  ▾

Your Answer:

To enroll, you must accept the [terms and conditions](#) of this site:  I agree \*

# Enroll

- Before Enrollment can be completed, the user must agree to the terms and conditions.
- Click on **Submit** to complete the enrollment.

After successful validation, an email will be sent to the email address entered in the profile set up. The enrollment is pending until the Patient confirms from this email that registration was initiated by signing on.

SUBJECT: ENROLLMENT

Dear Mary All:

This email is notification that we received your Watson Clinic Online Statements and Bill Pay enrollment application for account #\*\*3893 on December 1, 2016 at 13:33:15.

To activate your account, please click [https://ctsv3k-at-web.ipayx.net/watsonclinic/pp\\_P8000\\_Fl\\_standard.jsp?hashid=6359efbe3bb3e8ae4bid=10483](https://ctsv3k-at-web.ipayx.net/watsonclinic/pp_P8000_Fl_standard.jsp?hashid=6359efbe3bb3e8ae4bid=10483)

After clicking the link, you may access your account online. Click on 'Sign In' to sign in using your email address and the password you chose during enrollment.

Once signed in, you may use the Support menu to ask questions or report problems. In the meantime, if you have any questions, please contact us customer support.

Thank you so much for using the Watson Clinic Statements and Bill Pay. We appreciate your business.

Best Regards,  
Customer Service  
Watson Clinic

This link will expire in 24 hours  
(12/02/2016 at 01:33:15pm ET)  
If the link is expired you must repeat the enrollment process.

- Once the account has been activated by clicking on the activation link provided in the email, the customer can login to the CareView system using their credentials.

**NOTE:** If the iPayX system does not receive a reply within 24 hours, then the records are expunged from account/customer profile & pending. If customer did not receive the enrollment email but iPayX databases show that an email was successfully sent and was received by the user's service provider mail server, it is possible the issue is in the customer's spam filter or some other issue with the service Provider.

## Sign up for Electronic Billing Access Today!

Please enter the information requested below.  
The guarantor is the patient if the patient is age 18 or older.  
If the patient is under 18, the guarantor is the person that brought the patient in for the visit.

Guarantor Full Name:  \*  
(As it appears on the patient statement)

Statement Color:  ▾

Patient Account Number:  \*  
(As it appears on the patient statement)

Statement Date:  \*  
(mm/dd/yyyy or mm/dd/yyyy)  
From the most recent statement)

Statement Amount:  \*  
(dollars and cents, no symbols, e.g. 10.00, not \$10 or \$10.00  
From the most recent statement)

Zip Code:  \* Where statements are sent

Email Address:  \*

Verify Email Address:  \*

Choose Delivery Method:  Web  eMail  Paper

Password:  \*  
(Your password must be between 8 and 12 characters long and a combination of letters and numbers with at least one special character)

Re-enter Password:  \*

Password Strength:  Very Weak

Additional Security Question:  ▾

Your Answer:

To enroll, you must accept the [terms and conditions](#) of this site:  I agree \*

# QuickPay

QuickPay payments are entered by the customer using information contained on the paper statement they receive or information such as their customer account number, customer account name and date of birth or other data that would be known to them.

Once the system has matched the authentication data entered by the customer, to data contained in the system, they are provided a data entry screen for entering account information

Data entered is specified during implementation.

The eCheck payment method is an option also determined by the Biller at the time of Implementation.

### Quick Payment!

Make a payment right now using a transfer from your bank account (eCheck) or a credit card (Visa, MasterCard, American Express or Discover). Complete the payment form and press "Credit / Debit" or "eCheck". We will automatically process and post your payment. Please allow two business days for the payment to appear in your account balance. There is no charge for making a payment online. Your bank and credit card information is protected by our secure website.

Please enter the information requested below. The guarantor is the patient if the patient is age 18 or older. If the patient is under 18, the guarantor is the person that brought the patient in for the visit.

**Amount To Pay:\$**  \*  
(Enter dollar and cents in the form of xx.xx)

**Guarantor Full Name:**  \*  
(As it appears on the patient statement)

**Statement Color:** --Please select the color of your statement--  \*

**Patient Account Number:**  \*  
(As it appears on the patient statement)

**Statement Date:**  \*  
(mm/dd/yy)

**Statement Amount:**  \* (dollars and cents, no symbols, e.g. 10.00, not \$10 or \$10.00)

**Zip Code:**  \* (Where statements are sent)

**Email Address:**

**Pay By:**  Credit/Debit card  eCheck

# QuickPay – Paid by Credit/Debit Card

Payments can be made with credit card or from a checking account. Credit card payments are fully authorized at time of payment with both address (AVS) and card code CVV/CVS) validation. This insures the payment is good since funds are reserved from the Patient's account at authorization.

- Enter the Credit/Debit Card information.
- Enter the billing information as it appears on the statement.
- Click on **Continue to Confirmation** to submit the payment.

### Pay by Credit/Debit Card

Account Number: 020438  
Account Name: MARY ALL  
Due Date: 07/17/16  
Amount Due: \$377.77  
Amount To Pay: \$5.00

---

Card Type:

Card Number:

Expiration:  \* MMYY

Security Code:  \* [What's This?](#)

Name on Card:

*Enter the following billing information as it appears on your card bill.*

Billing Zip:

Billing Phone:  \*  
No dashes

# QuickPay – Paid by eCheck

Patients make check payments using the same process. The difference, other than the account data, is that eCheck payments are not balance authorized.

- Enter the Checking Account information.
- Enter the billing information as it appears on the bill.
- Click on **Continue to Confirmation** to submit the payment.

### Pay by eCheck

Account Number: 020438  
Account Name: MARY ALI  
Due Date: 07/17/16  
Amount Due: \$377.77  
Amount To Pay: \$5.00

---

*Enter the following billing information as it appears on your bank statement.*

Routing Number:  \* [What is this?](#)  
Account #:  \* [What is this?](#)  
Bank Name:  \*  
Name on Bank Account:  \*  
Billing Zip:  \*  
Billing Phone:  \*  
No dashes

---

# QuickPay – Confirmation

The confirmation form is called when submit is clicked on the credit card or eCheck screen.

This screen permits visually verifying information before actually authorizing the electronic transfer.

- If the information is not correct, click **Edit** to return to the account information page to enter the correct payment information.
- Click the box to accept the payment **terms and conditions**.
- Click **Confirm Payment** to complete the payment process.

The screenshot displays a 'Confirm Payment' form. At the top, there is a checkbox for 'Yes, I accept payment Terms and Conditions' with a link to 'Terms and Conditions'. Below this is a 'Quick Payment' section showing a total of \$5.00 and the date/time 'December 1, 2016, 2:02 PM'. A table titled 'Invoices You Are Paying' lists one invoice for 'MARY ALL' with a due amount of \$377.77 and a payment amount of \$5.00. The 'Method Of Payment' section shows 'eCheck' with various account and bank details.

Account Name:	Account Id:	Due Date:	Due Amount:	Payment Amount:
MARY ALL	020438	07/17/16	\$377.77	\$5.00

**Method Of Payment**  
Type: eCheck  
Routing #: 056007604  
Checking Account #: \*\*\*\*6789  
Bank Name: The Bank  
Name on Bank Account: Jane Doe  
Account Mailing ZIP Code: 32606

# QuickPay – Receipt

The payment is authorized (*Credit Card Payment Only*) and the Customer is presented with a Payment receipt.

- A detailed receipt can be printed by clicking on the **Printer Icon**.
- Both card and check payments are included in the daily ERA and all detail and summary payment reports.
- An email with the payment information will be sent to the email address entered at the time the payment was made.

Return to Patient Access Portal  
Print A Copy Of Receipt

Watson Clinic LLP  
(863) 680-7206

Quick Payment  
192.158.171.94

Transaction#: BLUE9980000162W  
RECEIPT TOTAL \$5.00  
December 01, 2016 2:03PM EST

Payment Information		
Patient Name: MARY ALL	Account: BLUE-020438	Amount: \$5.00

Paid By: Jane Doe  
Paid Using: eCheck \*\*\*\*6789  
Reference Number: 134  
Name On Account: Jane Doe  
Bank Name: The Bank  
Contact eMail: pat.vargo@ipayx.com

**Please Note:**  
Please allow 10 business days for this payment to be applied to the above customer account. Additionally, if an e-mail address was provided, a confirmation has been sent to that e-mail address. If for any reason this transaction should not clear your bank, this receipt becomes null and void.

powered by iPayX

Thank You!

## Payment Adjustments

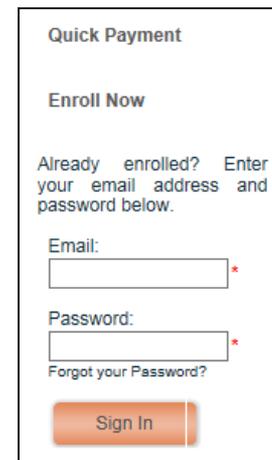
Adjustments may be made to QuickPay payments by Customer Service Agents using the Transaction tab on the CareView Customer Service Console.

# Sign In

Once a user has successfully enrolled, they can log in to the CareView system. The user login screen is provided for the customer to enter their username (email address) and password to gain entry to the application.

- Enter the email address (*Required*) and password (*Required*) that were used for the previous enrollment.
- Click on **Sign In** to complete the sign in.

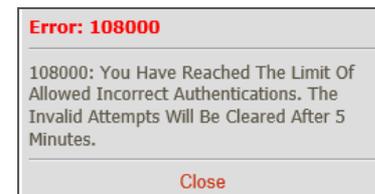
A successful sign-on will take the user to the Billing Summary page.



The screenshot shows a login form titled "Quick Payment". Below the title is a link "Enroll Now". The main text asks "Already enrolled? Enter your email address and password below." There are two input fields: "Email:" and "Password:", both with red asterisks indicating they are required. Below the password field is a link "Forgot your Password?". At the bottom is an orange "Sign In" button.

## Lockout

Six Invalid login attempts made at the same time will prevent the user from logging in. Six failed attempts is the required PCI maximum before the user must be locked out. The Number of times and the length of the lock out time, both are configurable with a default of 6 attempts and a 5 minute lockout time.



The screenshot shows an error message box with a red header "Error: 108000". The text inside reads: "108000: You Have Reached The Limit Of Allowed Incorrect Authentications. The Invalid Attempts Will Be Cleared After 5 Minutes." At the bottom right is a red "Close" button.

# Forgot Password

- Enter the email address that was used for the previous enrollment.
- Click on **Forgot your Password?**
- Enter the email address that the password is for.
- If the email is not registered or entered incorrectly an error message will be returned.
- Click on the **Return** link to try again.

Your account not registered.  
[Return](#)

- Enter the same answer to the security question as used during previous enrollment.
- An email will be sent with a new password to be used for sign on.

Your temporary password for login to our website:  
2gihUVE

[Please click this link to activate account](#)  
You will be required to log in using your temporary password and then change the password to one of your choosing.

This link will expire in 24 hours (09/12/2013 at 12:21:07pm ET)  
If the link is expired you must repeat the password change process by clicking "Forgot your Password?".

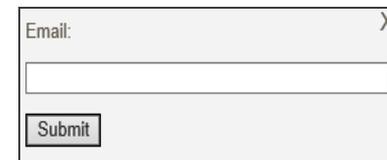
- Note the temporary password.
- Click on the **Please click to activate account** link in the email to sign in with the new password.



Email:

Password:

[Forgot your Password?](#)



Email: X



Email: X

Question:

Answer:

# Forgot Password

**Profile Activation Successful**

Your online account has been successfully activated!

You may now log in using the email address you provided as your username, and the password that you created -OR- if a temporary password was provided to you, you will be required to change it by choosing your own password during your first login.

Close

WATSON CLINIC, LLP  
Quality Healthcare for Every Generation

Quick Payment

Enroll Now

Already enrolled? Enter your email address and password below.

Email:

Password:

Forgot your Password?

## My Billing Summary

Welcome to our Patient Financial Services Center

This site provides you with tools to make the billing process more manageable and user-friendly. By creating an online account, you will gain online access to a simple, up-to-date summary of your account, useful resources that answer your billing questions, and an easy way to conveniently view, manage and pay your bills online.

Pay by credit card or eCheck. It's fast and easy and doesn't require that you complete enrollment.

The easy way to see all your statements and use advanced tools like future dating a payment and setting up automatic payments.

Contact Us | Privacy | Terms and Conditions | FAQ  
Copyright Internet Payment Exchange © 2014 — All Rights Reserved — [www.ipayx.com](http://www.ipayx.com)

Protected by U.S. Patent No. 7,567,925 and related patents.

- Sign in with the User ID and temporary password.
- The user will be required to change the password. Enter the temporary password sent in the email.

### Change Password

This is your first log-in using a temporary password.  
You must change your password now to log-in to the site.

Enter Temporary Password:  \*

(from your password reset email)

Enter New Password:  \*

(Your password must be between 8 and 12 characters long with a combination of letters and numbers and at least one special character)

Repeat New Password:  \*

Password Strength:  Very Weak

Additional Security Question:  \*

(You will need this answer if you forget your password)

Your Answer:  \*

# Billing Summary

This page is displayed when a Patient clicks on **Billing Summary** from the Welcome Page or upon initial sign on.

From this page the user can:

- View the History of payments for each Bill
- View a Statement
- Make payments

**Billing Summary**

**Recent Bills**

For bill payment history, click the **Magnifying glass** link.

To pay a bill, check the box, validate your payment amount, and then click **Continue**.

Options: Payment Type:  Payment Date:

Payment

	<b>View</b>	<b>Name</b>	<b>Account</b>	<b>Due Date</b>	<b>Due Amt</b>	<b>Pay Amt</b>	<b>History</b>
<input type="checkbox"/>		MARY ALL	02043E	07/17/16	\$372.77	<input type="text" value="\$372.77"/>	

Total Payment: \$0.00

# Billing Summary – View History

This view will display the status of payments that have previously been paid on this account.

- To **VIEW** bill payment history: Click on the magnifying glass.
- Clicking on the amount in the 'Patient Pmts/Adjs' column will display a copy of the original payment receipt.
- Clicking on the highlighted payment type in the "Description" column will display a copy of the adjustment receipt.

### Billing Summary

#### Recent Bills

For bill payment history, click the **Magnifying glass** link.

To pay a bill, check the box, validate your payment amount, and then click **Continue**.

Options

Payment Type: Visa      Payment Date: 12/01/16

✓	View	Name	Account	Due Date	Due Amt	Pay Amt	History
<input type="checkbox"/>		MARY ALL	020438	07/17/16	\$372.77	\$372.77	

Payment History

Payment Date	Description	Patient Pmts/Adjs
12/01/2016	eCheck <span style="color: blue; text-decoration: underline;">Payment</span> Online at 12/01/16 02:03 PM	\$5.00
12/01/2016	Visa Ref# Denied Online at 12/01/16 01:51 PM	\$5.00
12/01/2016	Visa Ref# Denied Online at 12/01/16 01:49 PM	\$5.00
12/01/2016	Visa Ref# Denied Online at 12/01/16 01:49 PM	\$5.00

Total Payment: **\$0.00**

Continue

# Billing Summary – Pay a Bill

- Select the Payment Type from the drop down list.
- Select a date from the calendar for future dated payments (if applicable).
- Click the box in front of the bill to be paid.
- Enter the amount to be paid *if different* than the amount displayed.
- Click on the **Continue** button to continue the payment process.

## Billing Summary

### Recent Bills

For bill payment history, click the **Magnifying glass** link.

To pay a bill, check the box, validate your payment amount, and then click **Continue**.

Options

Payment Type:  Payment Date:

<input checked="" type="checkbox"/>	View	Name	Account	Due Date	Due Amt	Pay Amt	History
<input type="checkbox"/>		MARY ALL	020436	07/17/16	\$372.77	<input type="text" value="\$372.77"/>	

Total Payment: \$0.00

**Continue**

# Billing Summary – Pay by Credit Card or Check

- If the Payment Type account is in the wallet, the payment confirmation page will display.
- If the account is not in the wallet, enter the card or check information in the screen displayed for the Payment Type.
- An account may also be added to the Wallet by checking the box next to the word **Wallet**. A nickname may also be associated with the account.
- Click on '**Continue to Confirmation**' to validate the payment information and receive a confirmation.

### Pay by eCheck

*Enter the following billing information as it appears on your bank statement.*

Routing #:

Account #:

Bank Name:

Name on Bank Account:

Billing Zip:

Billing Phone:

Wallet:  Check the box to save this payment information in MyWallet.

### Pay by Credit/Debit Card

Card Type: **Visa**

Card Number:

Expiration:  MMYY

Security Code:  What's This ?

Name on Card:

*Enter the following billing information as it appears on your card bill.*

Billing Zip:

Billing Phone:

Wallet:  Check the box to save this payment information in MyWallet.

# Billing Summary – Confirmation

- Confirm the payment information.
- If the information is not correct, click **Edit** to be taken back to the account information page to enter the correct payment information.
- Click the box to accept the payment **terms and conditions**. When the terms and conditions box is checked the Confirm Payment button will be enabled.
- If all payment information is correct, click **Confirm Payment** to complete the payment process.

### Confirm Payment

Yes, I accept payment [Terms and Conditions](#)  
You must accept the terms & conditions in order to complete payment.

**Confirm Payment** **Edit**

---

**Billing Summary Payment** TOTAL \$2.77  
pat.vargo@ipayx.com December 1, 2016, 2:33 PM

---

### Invoices You Are Paying

Account Name:	Account Id:	Due Date:	Due Amount:	Payment Amount:
MARY ALL	020438	07/17/16	\$370.00	\$2.77

---

**Method Of Payment**

Type:	eCheck
Routing #:	056007604
Checking Account #:	****6789
Bank Name:	The Bank
Name on Bank Account:	Jane Doe
Account Mailing ZIP Code:	32606

# Billing Summary – Receipt

- The payment is authorized (Credit Card Payment Only) and the Customer is presented with a Payment receipt which can be printed by clicking the Printer icon.
- Both card and check payments are included in the daily ERA and all detail and summary payment reports.
- Click [Close this window](#) to return to the Billing Summary page.

<b>WATSON CLINIC, LLP</b> Quality Healthcare for Every Generation		<a href="#">Close this window</a>  Print A Copy Of Receipt	Watson Clinic LLP (863) 660-7206
<b>Billing Summary Payment</b> pat.vargo@ipayx.com		<b>Transaction# : BLUE99980000163W</b> <b>RECEIPT TOTAL \$2.77</b> December 01, 2016 2:31PM EST	
<b>Payment Information</b>			
<b>Patient Name:</b> MARY ALL	<b>Account:</b> BLUE-020435	<b>Amount:</b> \$2.77	
<b>Paid By:</b> Jane Doe <b>Paid Using:</b> eCheck ****6789 <b>Reference Number:</b> 135 <b>Name On Account:</b> Jane Doe <b>Bank Name:</b> The Bank <b>Contact eMail:</b> pat.vargo@ipayx.com			
<b>Please Note:</b> Please allow 10 business days for this payment to be applied to the above customer account. Additionally, if an e-mail address was provided, a confirmation has been sent to that e-mail address. If for any reason this transaction should not clear your bank, this receipt becomes null and void.			
			<i>Thank You!</i>

# MyProfile

This page is displayed when a Patient clicks on **My Profile** from the Menu.

From this page you can:

- Edit the Contact Information
- Change the Delivery Instructions
- Add another Account
- Change the Password

**My Profile**

**Profile Contact Information** [Edit My Profile Information](#)

Name: Mary All  
Phone (Day):  
Phone (Night):  
Login eMail: pat.vargo@ipayx.com  
Enroll Date: Thursday December 01, 2016 01:33 pm

**Statement Delivery** [Edit My Delivery Instructions](#)

Account Number: 02043893      MARY ALL      Delivery Method: eMail (pat.vargo@ipayx.com)

**Add Account** [Add Another Account](#)

**My Password** [Change My Password](#)

# MyProfile – Edit My Contact Information

- Overtyping the fields to be changed with the new information.
- Click on the **Submit Changes** button to save the changes.
- You will be returned to the My Profile Page where the new information will be displayed.

The screenshot shows a web form titled "Profile Contact Information". At the top right, there are two orange buttons: "Submit Changes" and "Cancel". The form fields are as follows:

- Name:** A text input field containing "Mary" with a small "x" icon to its right, and a dropdown menu below it showing "All".
- Phone (Day):** Three empty text input fields.
- Phone (Night):** Three empty text input fields.
- Login eMail:** A text input field containing "pat.vargo@ipayx.com".
- Enroll Date:** A text field displaying "Thursday December 01, 2016 01:33 pm".

# MyProfile – Edit Delivery Instruction

- Delivery methods for each account may be changed by clicking the appropriate button.
- Email addresses for each account may be changed by typing over the current address.
- After all changes have been made, click on the **Submit Changes** button.
- The system will record the changes.

The screenshot shows a form titled "Statement Delivery" with the following fields and controls:

- Account Number:** 020438
- Name:** MARY ALL
- Delivery Method:** Radio buttons for eMail (selected), Web, and Paper.
- Email Address:** pat.vargo@ipayx.com
- Buttons:** "Submit Changes" and "Cancel" (both in orange).

# MyProfile – Add Another Account

This option is used to add an Account to an existing Patient Profile. There are cases where an individual will be responsible for multiple accounts.

- Enter the Profile Information as it appears on the most recent statement of the Account you want to add to the Profile.
- Choose the Delivery Method and enter an email address of where statements will be sent.
- Before the account add can be completed, the user must agree to the terms and conditions.
- Click on “**terms and conditions**” to read the biller Privacy Policy then check the “**I agree**” box. Clicking “I Agree” will enable the Submit button.
- Click **Submit** to add the account to the Profile.

### Sign up for SubAccount Today

Guarantor Full Name:  \*  
(As it appears on the patient statement)

Statement Color:  ▾

Patient Account Number:  \*  
(As it appears on the patient statement)

Statement Date:  \*  
(mm/dd/yy)

Statement Amount:  \* (dollars and cents, no symbols, e.g. 10.00, not \$10 or \$10.00)

Zip Code:  \* (Where statements are sent)

Choose Delivery Method:  Web  eMail  Paper

Delivery Email Address:

To enroll, you must accept the [terms and conditions](#) of this site:  I agree

# MyProfile – Password Change

- Enter the current Password, New Password, and verify the New Password.
- Click on **Save** to change the password.
- The system will return to the My Profile Page and let you know if the change was successful.

### Change Password

Passwords must be 8 to 12 characters long and consist of both letters and numbers

Current Password:  \*

New Password:  \*

Verify New Password:  \*

Password Strength:  Very Weak

111000: Your password has been updated.

# MyWallet – Add An Account

The Electronic Wallet stores banking information and enables future dated and automatic payment options. The wallet contains both checking and credit card information.

- To add a Credit Card or Checking Account to your Wallet click on the add link for the type of account to be added.

## MyWallet

Wallet accounts are used to simplify data entry when making payments. In order to use future dated payments or setup automatic payments you must have at least one account in your wallet.

When you get a new card be sure to visit [here](#) to change the expiration date.

<b>My Credit/Debit Card Accounts</b>	<a href="#">Add new credit/debit card</a>
<b>My eCheck Accounts</b>	<a href="#">Add new eCheck account</a>

# MyWallet – Add A Credit Card Account

- Enter a wallet **Nickname** for the Credit Card to help differentiate it from other credit cards in the wallet.
- Pick the **Card type** from the drop down list.
- Enter the required Credit Card Information.
- Click on **Submit** to return to the My Wallet Page where the new Card will be listed.

### Add New Creditcard Wallet

Nickname: \*

Card Type: -- Please Select -- ▾\*

Card Number: \*

Expiration: \*  
(MMYY format. I.e: 1220 for Dec. 2020)

Name on Card: \*

Billing ZIP Code: \*

CVV: \*

# MyWallet – Add A Checking Account

- Enter a **Nickname** for the checking account to help differentiate it from other checking accounts in the wallet.
- Enter the required Checking Account Information.
- Click on **Submit** to return to the My Wallet Page where the new Account will be listed.

### Add New eCheck Wallet

Nickname:  \*

i.e. Joe's Wells Fargo

Routing Number:  \*

(Must be 9 digits in length)

Account Number:  \*

Bank Name:  \*

Name on Bank Account:  \*

Billing ZIP Code:  \*

# MyWallet – Edit a Wallet Account

- To change a Credit Card or Checking Account in your Wallet click on the **Edit** link for the type of account to be changed

**MyWallet**

Wallet accounts are used to simplify data entry when making payments. In order to use future dated payments or setup automatic payments you must have at least one account in your wallet.

When you get a new card be sure to visit here to change the expiration date.

**My Credit/Debit Card Accounts** Add new credit/debit card

Nickname	Card Type	Card Number	Expiration	Action
My Visa	Visa	****1111	1216	<a href="#">Edit</a>   <a href="#">Remove</a>

**My eCheck Accounts** Add new eCheck account

Nickname	Routing Number	Account Number	Bank Name	Action
My Checking	056007604	****6789	The Bank	<a href="#">Edit</a>   <a href="#">Remove</a>

# MyWallet – Edit a Wallet Account

- Make desired changes to the Credit Card or Checking Information.
- Click on **Submit** to submit the changes and return to the My Wallet page.

Nickname	Card Type	Card Number	Expiration	Name on Card	Billing ZIP Code
My Visa	Visa	****1111	1216 *	Jane Doe *	32606 *
		<input type="button" value="Cancel"/>	<input type="button" value="Submit"/>		

Nickname	Routing Number	Account Number	Bank Name	Name on Bank Account	Billing ZIP Code
My Checking	056007604 *	****6789	The Bank *	Jane Doe *	32606 *
		<input type="button" value="Cancel"/>	<input type="button" value="Submit"/>		

# MyWallet – Delete a Wallet Account

- To remove a Credit Card or Checking Account in your Wallet, click on the **Remove** link for the type of account to be Deleted.

**MyWallet**

Wallet accounts are used to simplify data entry when making payments. In order to use future dated payments or setup automatic payments you must have at least one account in your wallet.

When you get a new card be sure to visit here to change the expiration date.

**My Credit/Debit Card Accounts** Add new credit/debit card

Nickname	Card Type	Card Number	Expiration	Action
My Visa	Visa	****1111	1216	<a href="#">Edit</a> <a href="#">Remove</a>

**My eCheck Accounts** Add new eCheck account

Nickname	Routing Number	Account Number	Bank Name	Action
My Checking	056007604	****6789	The Bank	<a href="#">Edit</a> <a href="#">Remove</a>

- If there are pending payments using this account, then the account cannot be deleted. Click **OK** to return to the Wallet page.

 This checking account is used by an active Auto Pay rule, it cannot be deleted.

- Click **OK** to remove the account and return to the My Wallet Page where the account will no longer be listed.

 Are you sure you want to delete?

# Auto Payment

Auto Payment consists of **By Statement (triggered)** and **By Schedule (Calendar)** options.

'**By Statement**' payment plans are triggered by an event, such as the arrival of a statement. 'By Statement' plans have the following properties:

- After the statement arrives, the payment is automatically scheduled according to several options which can be modified to accommodate your special requirements:
  - Upon Arrival
  - A certain # of days after arrival
  - A certain # of days before due
  - On the due date
  - On the 15th or 31<sup>st</sup> of the month
- A payment may not be scheduled later than the due date.
- Payment amounts may be limited to a certain amount, such as, \$300 dollars per statement.
- The payment will either be for the amount owed or the amount limit whichever is less.
- The plan will suspend when no funds are owed or statements no longer arrive.
- The plan will resume if a new statement with a balance owed arrives.
- The plan will continue as long as there is a balance owed regardless of the balance when the plan was established.

*Example: A Customer wants to use his credit card to pay his bill from the Hospital, in full or up to a limit he has requested, every month when it comes in until he wants to stop.*

# Auto Payment

'By Schedule' payment plans trigger based on the calendar and are completely independent of statement processing. 'By Schedule' plans have the following characteristics:

- A plan may trigger according to several options which can be modified to accommodate your special requirements:
  - Weekly
  - Monthly
  - Every Other Week
  - Twice a Month
  - Quarterly
  - Semi-Annually
  - Annually
- There is a plan wizard that calculates a payment amount or a payment term depending on the information entered.
- The wizard will automatically adjust the final payment amount to satisfy the balance due.
- Business rules may be applied to limit the term or the minimum amount per payment.
- The plan will continue until the final payment is made regardless of the account balance unless a 'hard' payment error, like expired card, occurs.
- The plan will stop when the final payment is made regardless of whether there is a current balance due or not.

*Example: A Customer owes the Hospital \$526.33 and he wants to use his credit card to pay them \$50.00 a month to pay it off. How long will that take and how much will each payment be?*

# Auto Payment – Add a By Statement Rule

- Click on the Add By Statement link of the account the rule will be setup for.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment. Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALL	\$ 370.00	<a href="#">Add By Statement</a>   <a href="#">Add By Schedule</a>		

- The Automatic Payment Rules page will display.

**Automatic Payment Rule**

Select conditions for the payment rule and click Continue to activate or change the payment trigger. Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid.

Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

**Create Automatic Payment Rule By Statement for:**

Rule trigger:

Pay Bills Using:  [Manage Payment Accounts](#)

Limit Payment Amount:

Limit Amount:

Effective beginning:

Rule will expire by:

# Auto Payment – Add a By Statement Rule

- Enter the rule specifications
- Click on “Continue” to complete.

### Automatic Payment Rule

Select conditions for the payment rule and click Continue to activate or change the payment trigger. Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid.

Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

**Create Automatic Payment Rule By Statement for:**

Rule trigger:

Pay Bills Using:  [Manage Payment Accounts](#)

Limit Payment Amount:

Limit Amount:

Effective beginning:

Rule will expire by:

Number of payments:  \*

Notification Email:

< Back    Continue >

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Expiration Date:  \*

Notification Email:

- You will be returned to the Automatic Payment Rules page and the new rule will be displayed for the account. The rule may now be Viewed, Edited, or Stopped.

### Automatic Payment Rules

The following is a list of accounts that are available for automatic payment.

Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALL	\$ 370.00	Upon receipt	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

# Auto Payment – View a By Statement Rule

- Click on the **View** link for the Account to be viewed.

Automatic Payment Rules					
<p>The following is a list of accounts that are available for automatic payment. Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.</p>					
Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALL	\$ 370.00	Upon receipt	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

- The Automatic Payment Rule will be displayed.
- Click **Back** to return to the Automatic Payment Rules page

Automatic Payment Rule	
<p>Select conditions for the payment rule and click Continue to activate or change the payment trigger. Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid. Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.</p>	
<p>Configure Automatic Payment Rules for: 020438.</p>	
Rule trigger:	<input type="text" value="Upon receipt"/>
Pay Bills Using:	<input type="text" value="My Visa"/> <a href="#">Manage Payment Accounts</a>
Limit Payment Amount:	<input type="text" value="Yes"/>
Limit Amount:	<input type="text" value="100.00"/>
Effective beginning:	<input type="text" value="12/05/2016"/>
Rule will expire by:	<input type="text" value="Number of Payments"/>
Number of payments:	<input type="text" value="5"/>
Num. of pmts remaining:	<input type="text" value="5"/>
Notification Email:	<input type="text" value="pat.vargo@ipayx.com"/>
<input type="button" value=" &lt; Back"/> <input type="button" value=" Stop Rule"/> <input type="button" value=" Continue &gt;"/>	

# Auto Payment – Edit a By Statement Rule

- Click on the **Edit** link for the Account to be edited.
- The Automatic Payment Rule will be displayed.
- Make required changes.
- Click on **Continue** to record the changes and return to the Automatic Rules page.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
0204361	MARY ALL	\$ 370.00	Upon receipt	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

**Automatic Payment Rule**

Select conditions for the payment rule and click Continue to activate or change the payment trigger.  
Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid.  
Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

Configure Automatic Payment Rules for: 1 .....

Rule trigger:  ▼

Pay Bills Using:  ▼ [Manage Payment Accounts](#)

Limit Payment Amount:  ▼

Limit Amount:

Effective beginning:

Rule will expire by:  ▼

Number of payments:

Num. of pmts remaining: 6

# Auto Payment – Stop a By Statement Rule

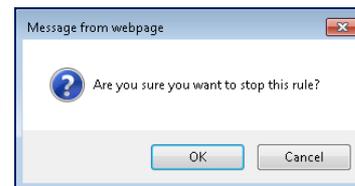
- Click on **Stop** for the Account to be stopped
- A confirmation to delete the rule is required.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438L	MARY ALL	\$ 370.00	Upon receipt	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

- Click **OK** to confirm the delete.



- The Automatic Payment Rules page will re-display showing the rule has been removed.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALL	\$ 370.00	<a href="#">Add By Statement</a>   <a href="#">Add By Schedule</a>		

# Auto Payment – Add a By Schedule Rule

- Click on **Add By Schedule** for the account the rule is going to be set up for.

The Automatic Payment Rule setup screen will be displayed.

## Automatic Payment Rules

The following is a list of accounts that are available for automatic payment. Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALL	\$ 370.00	<a href="#">Add By Statement</a>   <a href="#">Add By Schedule</a>		

## Automatic Payment Rule

Select conditions for the payment rule and click Continue to activate or change the payment trigger. Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid. Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

Create Automatic Payment Rule By Schedule for: 020438

Rule trigger:  \*

Pay Bills Using:  \* [Manage Payment Accounts](#)

Total amount to pay:  \*

Effective beginning:

Regular Pmt Amt:  ← or → Num of Pmts:

Final Pmt Amt:  First Pmt Date:  Final Pmt Date:

Notification Email:

# Auto Payment – Add a By Schedule Rule

- Enter the rule specifications
- Click on “Continue” to complete.

**Automatic Payment Rule**

Select conditions for the payment rule and click Continue to activate or change the payment trigger. Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid. Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

Create Automatic Payment Rule By Schedule for: 020438

Rule trigger: \*

Pay Bills Using: \* [Manage Payment Accounts](#)

Total amount to pay: \*

Effective beginning:  \*\*

Regular Pmt Amt:  ← or → Num of Pmts:

Final Pmt Amt:  First Pmt Date:  Final Pmt Date:

Notification Email:

- A receipt with the payment schedule information is presented
- Click on **Return to AutoPay** to close the receipt page

**WATSON CLINIC LLP** [Return to AutoPay](#)  
Quality Healthcare for Every Generation  Watson Clinic LLP (863) 680-7206

Print A Copy Of Receipt

Autopay Schedule Transaction#: BLUE999800001745  
Blue Statement - Default RECEIPT TOTAL \$300.00  
pat.vargo@ipayx.com December 06, 2016 7:57AM EST

Payment Schedule Information

Patient Name: MARY ALL' Account: BLUE-020438

This payment will start on 12/06/2016 and continue weekly (on the Tuesday of each period) until 6 payments are taken (or until the final day of 01/10/2017 ). There are Six (6) equal payments of Fifty Dollars (\$50.00) each.

Paid By: Jane Doe  
Paid Using: Visa \*\*\*\*1111  
Name On Card: Jane Doe

 *Thank You!*

- You will be returned to the Automatic Payment Rules page and the new rule will be displayed for the account. The rule may now be Viewed, Edited, or Stopped.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment. Automatic Payments stop when the statement balance reaches zero. An automatic payment rule by Statement will resume if a balance reappears while a rule by Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALL'	\$ 70.00	Weekly	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

# Auto Payment – View a By Schedule Rule

- Click on the **View** link for the Account to be viewed.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALLI	\$ 70.00	Weekly	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

- The Automatic Payment Rule will be displayed.

**Automatic Payment Rule**

Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid.  
Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

**Current Automatic Payment Rule for: 020438**

Rule trigger: Weekly  
Day of the Week: Tuesday  
Pay Bills Using: My Visa  
Total amount to pay: 300.00  
Effective beginning: 12/06/2016

Regular Pmt Amt:	Num of Pmts:	
50.00	6	
Final Pmt Amt:	First Pmt Date:	Final Pmt Date:
50.00	12/06/2016	01/10/2017

Notification Email: pat.vargo@payx.com

- Click **Back** to return to the Automatic Payment Rules page

# Auto Payment – Edit a By Schedule Rule

- Click on the **Edit** link for the Account to be edited.

**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALLI	\$ 70.00	Weekly	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

- The Automatic Payment Rule will be displayed.
- Make required changes.
- Click on **Continue** to record the changes and return to the Automatic Rules page.

**Automatic Payment Rule**

Select conditions for the payment rule and click Continue to activate or change the payment trigger. Payments will be taken up to and including the limit amount. Any remaining balance will be left unpaid. Note that when using either a date or fixed number of payments to expire a rule, the rule will turn off after the expiration date or the last payment has been made. A bill received after rule expiration is ignored and the balance will remain unpaid.

Create Automatic Payment Rule By Schedule for: 020438

Rule trigger: \*

Day of the Week: \*

Pay Bills Using: \* [Manage Payment Accounts](#)

Total amount to pay: \*

Effective beginning:

Regular Pmt Amt:  -- of -- Num of Pmts:

Final Pmt Amt:  First Pmt Date:  Final Pmt Date:

Notification Email:

# Auto Payment – Stop a By Schedule Rule

- Click on **Stop** for the Account to be stopped

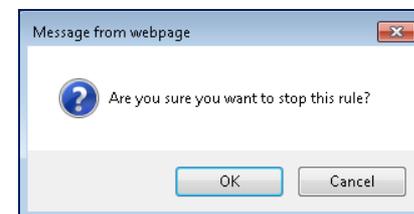


**Automatic Payment Rules**

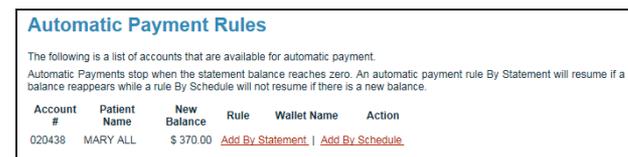
The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020431	MARY ALLI	\$ 70.00	Weekly	My Visa	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Stop</a>

- A confirmation to delete the rule is required.
- Click **OK** to confirm the delete.



- The Automatic Payment Rules page will re-display showing the rule has been removed.



**Automatic Payment Rules**

The following is a list of accounts that are available for automatic payment.  
Automatic Payments stop when the statement balance reaches zero. An automatic payment rule By Statement will resume if a balance reappears while a rule By Schedule will not resume if there is a new balance.

Account #	Patient Name	New Balance	Rule	Wallet Name	Action
020438	MARY ALLI	\$ 370.00	<a href="#">Add By Statement</a>   <a href="#">Add By Schedule</a>		

# Support

The Support page provides information for the customer to contact Customer Service by Phone, Email or mail.

## Support

Use the information below to contact Watson Clinic, Patient Financial Services about your bills.

For a medical emergency call 911. Do not use this contact information.

## Contact Us

**Phone:** (863) 680-7206

**e-mail:** [patientrelations@watsonclinic.com](mailto:patientrelations@watsonclinic.com)

Please do not use to communicate  
personal health information.

**Address:** Watson Clinic LLP  
P.O. Box 95004  
Lakeland, FL 33805

# Sign Out

- Click on **Sign Out** on the Main Menu
- The user will be returned to the Sign On Page.

