

Enter a Client Payment

Last Modified on 09/26/2022 10:21 am EDT

Path: Main Menu > Admissions Menu > Payment Center

About

Client payments are entered directly through the Payment Center (Swerve Pay). It is important to note that some fields, actions, or buttons may not be available to you depending on the enabled features for your Agency or individual user permissions.







- [Enter a Client Credit/Debit Payment](#)
- [Enter a Client Cash or Check Payment](#)

Enter a Client Credit/Debit Payment

1. Navigate to the Payment Center by following the path above.
2. Search for and select the client.
3. If your Agency is using Scheduler integration, select the appointment where you collected the payment. The **Payment Amount**, **Payment Date**, **Payment Method** (Cash, Check, Credit/Debit), **Note**, and **Reference #** is pulled from the Scheduler RDP, if entered there. If using the Web Scheduler, a **Reference #** is autogenerated and pulled over.



Note: If your Agency does not have Scheduler integration, add the Payment Amount, Payment Date, and Payment Method manually.


Enter text to search... Clear						
Date	Time	L	A	S	Resources	Collected
6/13/2021	7:45 AM		<input type="checkbox"/>			\$27.00
6/11/2021	10:45 AM		<input type="checkbox"/>			\$0.00
6/8/2021	7:15 AM		<input type="checkbox"/>			\$25.00
4/8/2020	8:45 AM		<input checked="" type="checkbox"/>			\$20.00
4/8/2020	8:15 AM		<input type="checkbox"/>			\$12.00
4/8/2020	7:30 AM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		\$0.00

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4. If you are using a previously saved card, select it from the **Payment Method** drop-down.
5. If this is a new Credit/Debit card, complete the following fields:
 - **Name On Card:** Enter the name on the card.
 - **Save Card?:** Select this checkbox if the card should be saved on file to use in the future. If this is unchecked when using a card saved on file, the card information will be removed from the system.
6. If applicable to your Agency, select the **Location**, **Agency**, and/or **Category** from the drop-downs.
7. (Optional) Add or edit information about the payment in the **Note** field.
8. For Credit/Debit payments, the **Reference #** auto-populates after the transaction completes.
9. Choose one of the following Payment Actions:
 - **Payment/Charge:** Charge to the client.
 - **Payment Plan:** See [Creating a Payment Plan](#).

Note: The **Validate Card** option allows you to validate a newly entered card and store it. Validating a card does not process a charge to the card, it will only check to ensure the card details are correct. This is used for validating swiped cards.

10. If using a card that is not saved on file (Credit/Debit), either:

- **Swipe Card:** Click to use an electronic card swiper.
- **Key Card:** Click to launch the external card validation form. Enter the required information. After you are finished, within the Payment Center click the **Refresh** button  and select the newly keyed card from the **Payment Method** drop-down.

11. Click **Submit Payment**.














12. Click **Yes, Submit Payment** to confirm submission. A window is displayed, Payment Submitted. The payment is sent to the Billing Engine as an Unapplied Private Pay payment.



Note: For Agencies who have Scheduler integration, the payment history can be viewed by clicking on the appointments in the appointment window. If your Agency is not using Scheduler integration, the payment is displayed in the Payment History grid within the Payment Center.

Enter a Client Cash or Check Payment

1. Navigate to the Payment Center: **Main Menu > Admissions Menu > Payment Center**
2. Search for and select the client.
3. If your Agency is using Scheduler integration, select the appointment where you collected the payment. The **Payment Amount, Payment Date, Payment Method** (Cash, Check, Credit/Debit), **Note**, and **Reference #** is pulled from the Scheduler RDP, if entered there. If using the Web Scheduler, a **Reference #** is autogenerated and pulled over.

Note: If your Agency does not have Scheduler integration, add the Payment Amount, Payment Date, and Payment Method manually.

Enter text to search... Clear						
Date	Time	L	A	S	Resources	Collected
6/13/2021	7:45 AM					\$27.00
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4/8/2020	8:15 AM					\$12.00
4/8/2020	7:30 AM					\$0.00

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4. If applicable to your Agency, select the **Location, Agency**, and/or **Category** from the drop-downs.
5. *(Optional)* Add or edit information about the payment in the **Note** field.
6. Enter a **Reference #** for payment.
7. Click the **Submit Payment** button.



Note: For Agencies who have Scheduler integration, the payment history can be viewed by clicking on the appointments in the appointment window. If your Agency is not using Scheduler integration, the payment is displayed in the Payment History grid within the Payment Center.