



## Integration Guide

This document will provide you guidance on how to set up Fortispay within PayDC.

# Subscriber Profile Settings

➔ Step 1: Select the Payment Processing Company as 'Fortis Payments'.

PayDC (STAGING2) -- Fortis | Add/Edit Settings

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**Subscriber Profile**

- Add1 Branch Locations (1)
- Users (1)
  - Patient Tasks
  - Payment Processing
  - Patient Data Export
  - Patient Data Import
  - Insurance Carrier Import
- Scheduler Preferences
  - Appointment Types
  - Office Hours/Zones/Notifications
  - Healthcare Provider
  - Blocks
- Billing Preferences
  - Insurance Carriers
  - CMS 1500 Printer Settings
  - Billing Address
  - Tax
  - Referring Providers
- Functional Preferences
  - Care Plans
  - Care Plan Templates
  - Macros
  - Discounts
  - Payment Plans
  - SOAP Notes
  - Examinations
  - Demographics

**Please enter your Subscriber Profile (Main Branch):**

Formal Corporate Name:  Legal Structure:

Required Address (Main Location)

Address Line 1:  Address Line 2:

City:  State:  ZIP code:

Country:

Market Role of the Subscriber Entity

- Healthcare Provider
- Health Care Supplier

Administrative Roles of the Subscriber Entity

- Healthcare Provider
- Health Care Supplier
- Scheduling
- Insurance Billing
- Account Management
- Financial Recovery
- Payment Processing ("Pay-to")

Subscriber Contact Information

Email Address:  Fax:

Telephone:

**Payment Processing**

Payment Processing Company:

Subscriber Identification numbers (Institutional Only)

Federal Employer Identification Number:

Save Close

→ Step 2: Create a Fortis Merchant Account with the below details.

- ◆ **User Name > User ID > User API Key > User Hash > Location ID** > Also, include the **Fortis Merchant Account**

**Add/Edit Settings**

File Help

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### Merchant Accounts

Include	Use Integrated Credit card processing	Name	Payment Processing Company	Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	test fortis	Fortis Payments	Fortis
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<b>Krishna New Fortis Acco</b>	Fortis Payments	<b>Test</b>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Himaja Fortis	Fortis Payments	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QA NEW AC BY KA	Fortis Payments	TEST
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Preethi--Fortis	Fortis Payments	

Description :

**Integrated Credit Card Processing**

Use Integrated Credit Card Processing

Payment Processing Company:   Prompt for Tips

User Name:

User ID:

User API:

User Hash:

Location Id:

Payment Plan Sub-Merchant Account Details

Use Payment Plans



Refer to the FortisPay welcome email for the user credentials, location ID & instructions on changing your default browser to Google Chrome or FireFox.

→ Step 3: At branch level, select 'Fortis Payments' as the payment processing company.

The screenshot shows the 'Add/Edit Settings' window for a branch location in the PayDC (STAGING2) system. The left sidebar contains a navigation tree with categories like 'Subscriber Profile', 'Scheduler Preferences', 'Billing Preferences', and 'Functional Preferences'. The main content area is divided into several sections:

- Geographic Information:** State (Pennsylvania), City (Hamilton), State (Select\_State), ZIP code (65514-4564), and Country (USA).
- Market Roles:** Healthcare Provider (checked), Health Care Supplier (checked).
- Administrative Roles:** Healthcare Provider, Health Care Supplier, Scheduling, Insurance Billing, Account Management, Financial Recovery, and Payment Processing ("Pay-to") (unchecked).
- Branch Location Contact Information:** Email Address (ka10@gmail.com), Telephone, and Fax.
- Payment Processing:** This section is highlighted with a red box. It contains a dropdown menu for 'Payment Processing Company' with 'Fortis Payments' selected.
- Branch Location Identification Numbers (Institutional Only):** Federal Employer Identification Number (1234567890) and a table for Blue Cross/Blue Shield numbers.

At the bottom of the window, there are buttons for 'Edit', 'Save', and 'Close'. The PayDC logo is visible in the top right corner.

→ Step 4: Select the 'user' > save 'default merchant account' with Fortis Merchant Account.

The screenshot displays the 'Add/Edit Settings' window for a user named Krishna Alugula. The interface includes a left-hand navigation pane with categories like 'Subscriber Profile', 'Users', 'Scheduler Preferences', 'Billing Preferences', and 'Functional Preferences'. The 'Users' section is expanded, showing the user's profile. The main content area is titled 'Please enter user details:' and contains several sections:

- Main:** Includes fields for First Name (Krishna), Middle Name, Last Name (Alugula), Suffix (None), Date of Birth (03/13/2020), and a checkbox for 'Is User Active?' (checked).
- User Details:** Includes Username (ka10@gmail.com), Password, Confirm Password, and a 'Locked out' checkbox.
- User Defaults:** Includes Primary Practice/Work Location (Fortis Staging2), Default Merchant Account (test fortis), and the 'Claim Clearing-House Account' dropdown, which is highlighted with a red box.
- Market Role of this User:** Includes checkboxes for Healthcare Provider, Health Care Supplier, and Health Care Assistant (all checked).
- Administrative Role of this User:** Includes checkboxes for Healthcare Provider, Health Care Assistant, Health Care Supplier, Central Administrator, Insurance Billing, Account Management, Financial Recovery, Principle Place of Business (PPB), Payment Processing ('Pay-to'), Mailing, Shipping, Security Officer, and System Administrator (all checked).

At the bottom of the window, there are three buttons: 'Edit', 'Save', and 'Close'.