



# CareCredit



855-478-7920 | 304 Ohio St. | Oshkosh, WI 54902  
Revised June 27, 2019

# Table of Contents

CareCredit .....	3
Activate CareCredit .....	3
Secure the CareCredit Feature .....	3
CareCredit Home Page .....	4
CareCredit Transactions .....	5

# CareCredit

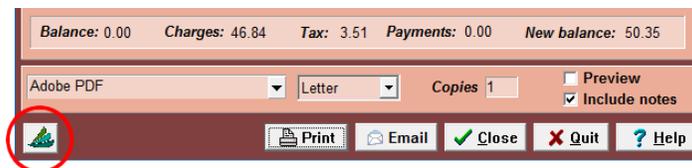
The integration of CareCredit into AVImark means veterinary businesses can process applications faster and easier. From the CID speed bar, the business selects the CareCredit button and instantly has access to the CareCredit Home Page. This page provides options to submit an application, submit a transaction, 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.



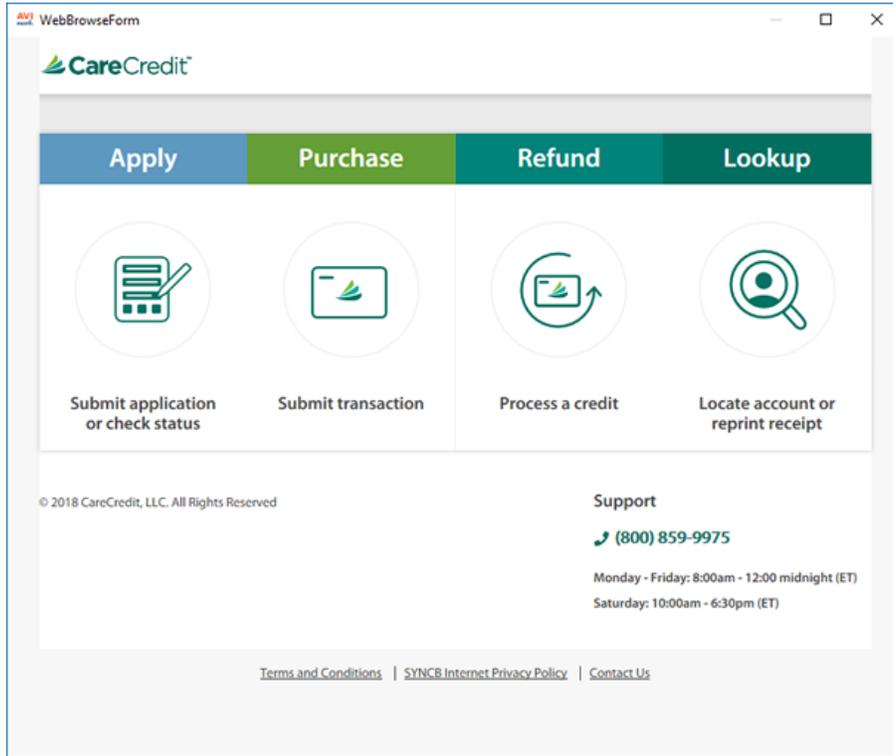
## Secure the CareCredit Feature

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.



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.

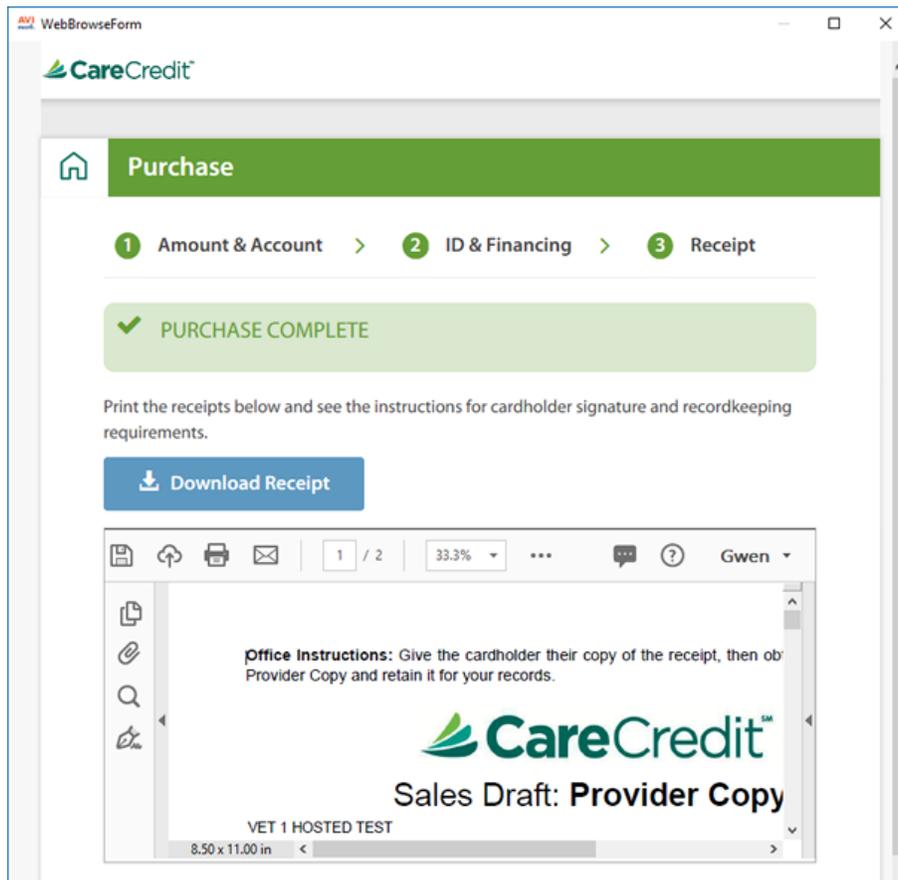
The screenshot shows the 'Applicant Details' form with the following populated fields:

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

Alimony, child support or separate maintenance income need not be included unless relied upon for credit.

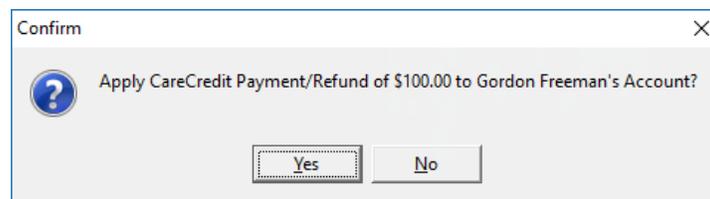
## CareCredit Transactions

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 WebBrowseForm 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:

The screenshot shows the 'Accounting for Gordon Freeman' window. At the top, there is a title bar with 'AVI Accounting for Gordon Freeman' and window control buttons. Below the title bar, there are links for 'Print', 'View', and 'Insurance'. The main content area is divided into two sections. The top section is a summary table with the following data:

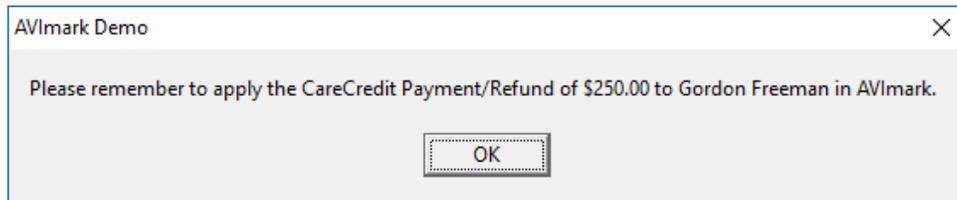
Charges	0.00		Current	0.00	Over 60	0.00	
Unposted	169.47	Balance	-100.10	Over 30	0.00	Over 90	0.00

The bottom section is a transaction table with the following data:

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.