Using Authorize.Net®

The Authorize.Net website can be used to review, change and retrieve information on client accounts and transactions associated with the Petly Health Plan Management application. Below is a summary of key areas including: Tools and Reports.

> **Note**: For more information on a particular subject, refer to Authorize.Net for help.

To access the practice Authorize.Net account

1. Go to authorize.net.
2. Select **Account Login** > **Merchant Login**. A log in page appears.
3. Type the appropriate **Login ID** and **Password** to access the practice account.

> **Note**: Authorize.Net requires users change the password every 3 months. It must be at least 8 characters, include upper and lowercase letters, have at least 1 number or symbol and cannot be the last 9 passwords previously used.

Tools

The tool used by the Petly Health Plan Management application is the Customer Information Manager.

Customer Information Manager (CIM)

The CIM securely stores client bank, credit card and/or debit card account information for easier recurring payment processing. It is possible to edit account information, review payment history or delete a profile for an individual using this tool.

Use the search function toward the top of the page to narrow the results to a specific Profile ID, Customer ID, Email address or Description by selecting the appropriate search option, typing criteria in the field provided and clicking the Search button. Results display in the area below. Authorize.Net assigns a unique Profile ID to each new client. Clicking a Profile ID to the left of a name displays the individual's Customer Profile.

The Customer Profile Information area is used to view payment history if, for example, the client says a payment was transacted twice in one month. It is also possible to edit profile information or delete the profile if the client is no longer a part of the program.

The Payment Profile area displays each payment method associated with the account. This area can be used to view a specific payment method's history, edit the account information or delete the payment method. You can also charge a payment to or refund a payment from a specific payment method.
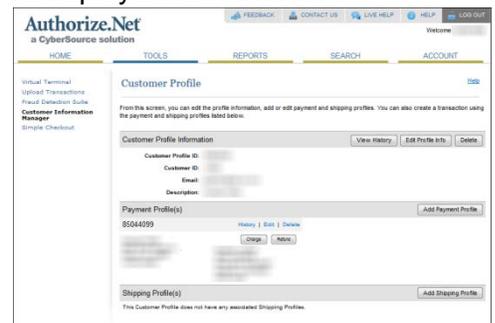
1. On the Home page, select **Customer Information Manager** within the Tools area on the left. A Customer Information Manager page appears.
2. From the Select One search field, select **Description** from the list of options.
3. Type the name of the client in the field to the right.
4. Click the **Search** button. The list of results narrow to display clients based on the criteria typed in the search field.
5. Select the **Profile ID** link to the far left of the client. A Customer Profile pane displays specific information about the client.
6. Search for the payment method used with the transaction.
7. Click the **View History** button to display the Order History Customer Profile page.

To delete a customer profile

1. On the Home page, select **Customer Information Manager** within the Tools area on the left. A Customer Information Manager page appears.
2. From the Select One search field select **Description** from the list of options.
3. Type the name of the client in the field to the right.
4. Click the **Search** button. The list of results narrow to display clients based on the criteria typed in the search field.
5. Select the **Profile ID** link to the far left of the client. A Customer Profile pane displays client information.
6. Click the **Delete** button within the Customer Profile Information area.
7. Follow any prompts to remove the profile from Authorize.Net.

Reports

Use reports to view different types of information about transactions.

- Transaction Detail: View details about settled or declined transactions for a specific date. This can be used to compare against the Petly Health Plan Management application's Transactions by Month report.

    Note: When selecting the settlement date, there are two listings for the automatic draft date; one for e-check transactions, one for credit and debit card transactions.

- Transaction Statistics: View statistics for settled or unsettled transactions on a specific date or within a specified date range.
- Returns: View e-check transactions that were returned after processing (e.g. insufficient funds, invalid account number or closed account) or charge backs due to a customer dispute. This report can be organized by settlement date, batch date or transaction ID for either settled or unsettled returns on a specific date or specified date range.
- Notice of Change: View notices of change for e-check transactions on a specific date or specified date range. This may occur if, for example, the account information or routing number changed. Use the report to update client bank account information within the Petly Health Plan Management application.

    IMPORTANT: Authorize.Net receives a change notice from the bank and gives the practice a **thirty day notice**. A change will be listed on one report but not on the next so it's important to update the information before the next transaction occurs for the account.

    Recommendation: Run this report on the first of every month.