

CareCredit Direct How to Transact



CARECREDIT DIRECT TRANSACT PROCESS (PROVIDER)

Note: Please ensure you have customized your Practice Settings within CareCredit Direct, including selecting the promotional financing options and minimum amounts your practice offers, before initiating a transaction. For additional help on how to do so, login to: CCpro>Learning Center> How to Use CareCredit Direct, part #184-492-00

1 Login to www.carecredit.com/pro

2 Expand the **Transact** menu and click **Process Transaction**.

3 Select **Purchase (via CareCredit Direct)** as the Transaction Type.

4 Click **Continue**

5 Enter the **Account Number**.

6 Indicate whether or not the card is present.

7 Click **Continue**



8 Enter the transaction **Amount** and then select the **Program**.

9 If available, we recommend that you enter your practice's record **Patient/Client ID**.

10 Enter the patient/client government-issued **ID** information. Note that only one primary form of ID is required on CareCredit Direct transactions. Do not use identifications with expired dates. (See the CareCredit Operating Guide for acceptable forms of ID).

11 Select the CareCredit Direct registered device that the customer will use to process the transaction.

12 Click **Submit**

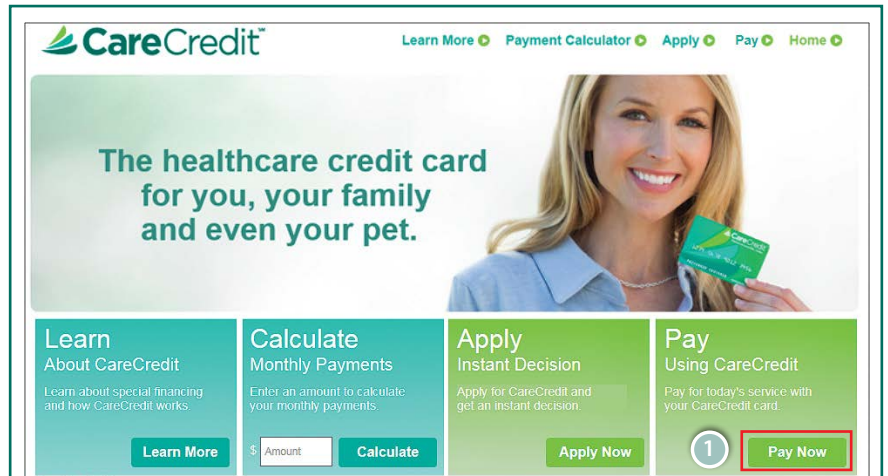
Note: The next step will be to tell the cardholder to complete the transaction on the CareCredit Direct (CCD) device. The cardholder has 15 minutes to complete the transaction. **Please do not navigate away from this page.**

CareCredit Direct How to Pay

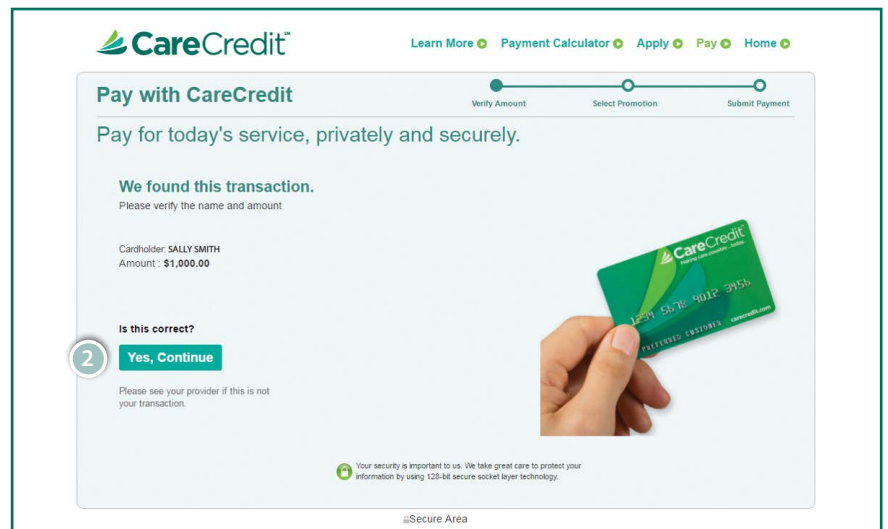


CARECREDIT DIRECT PAY PROCESS (CARDHOLDER)

1 From your selected CareCredit Direct device, cardholder clicks **Pay Now**.



2 The cardholder verifies the transaction by clicking **Yes, Continue**.

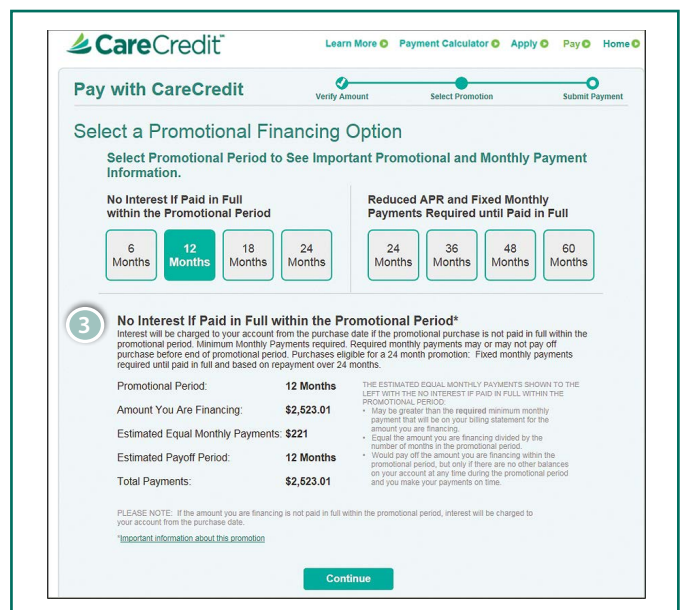
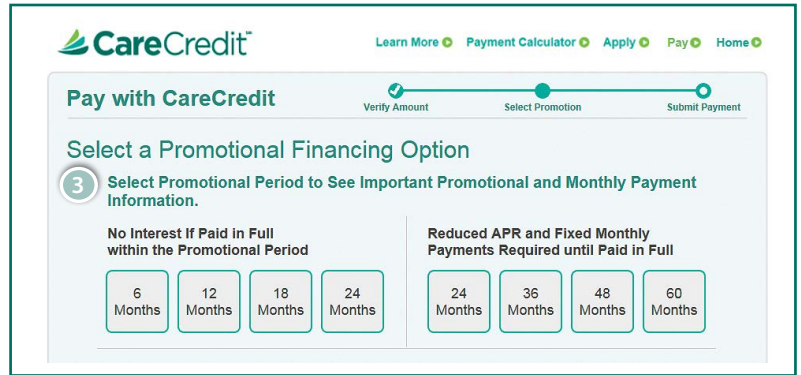




3 The cardholder clicks the desired financing option.

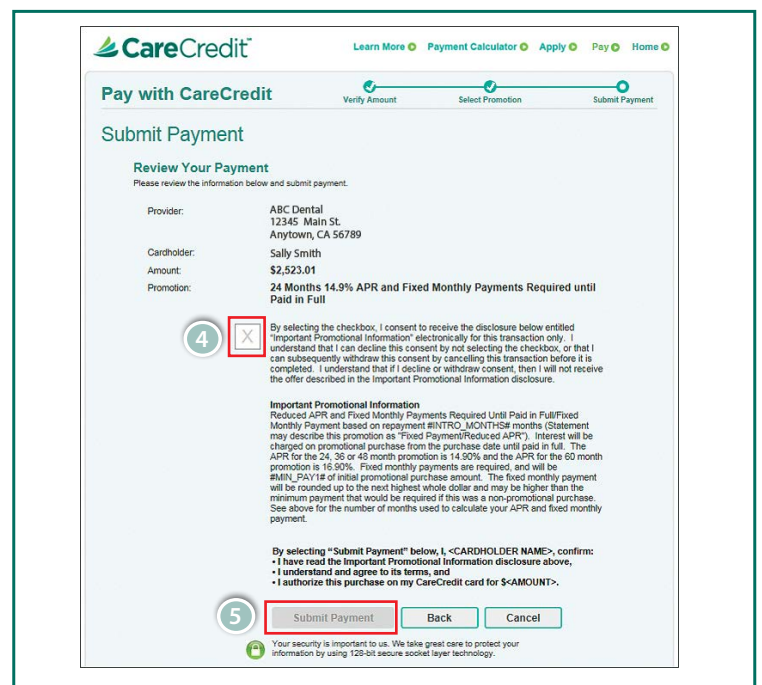
The cardholder can click on different financing options to display the details.

Note: The available financing options displayed are based on the financing options selected by the provider within CCD Provider Settings (at the time of the device set up).



4 The cardholder consents to the electronic disclosure by selecting the check box. The cardholder can also click **Back** to change the financing option or click **Cancel** to cancel out of the transaction.

5 To complete the transaction the cardholder clicks **Submit Payment**.



Cardholder Payment Confirmation



- 6 If the transaction is approved, the cardholder clicks **Close** to finish the transaction and return to the Home Page.

CareCredit™ Learn More Payment Calculator Apply Pay Home

Pay with CareCredit Verify Amount Select Promotion Submit Payment

Payment Confirmation

Payment has been approved. Ask your provider for a receipt.

Provider:	ABC Dental 12345 Main St. Anytown, CA 56789
Cardholder:	Sally Smith
Amount:	\$2,523.01
Promotion:	24 month 14.9% APR

6 **Close**

This transaction is completed. Select Close to clear your information.

Your security is important to us. We take great care to protect your information by using 128-bit secure socket layer technology.

Secure Area

- 7 If the transaction is not approved, the cardholder clicks **Done** to return to the Home Page.

CareCredit™ Learn More Payment Calculator Apply Pay Home

Pay with CareCredit Verify Amount Select Promotion Submit Payment

Payment Not Approved

The transaction was not approved. See your provider for alternate payment arrangements.

7 **Done**

This transaction is completed. Select to clear your information.

Your security is important to us. We take great care to protect your information by using 128-bit secure socket layer technology.

Secure Area

CareCredit Direct Finish Transaction



CARECREDIT PAY PROCESS (PROVIDER)

1 When the cardholder is finished, click **Cardholder Has Finished**, which will allow you to print the receipt.

For information on sales receipt retention requirements, please refer to the CareCredit Operating Guide, part # 851-338-00.

Welcome, JOE DOE | Log Out Payment Calculator

Process Transaction Purchase (via CareCredit Direct)

INITIATED

Cardholder Name: SALLY SMITH
Device: IPAD

Remain on this page while the cardholder finishes the transaction on the CareCredit Direct device, then click "Cardholder Has Finished" to complete the transaction and print the receipt. The cardholder must finish within 15 minutes.

Time Remaining: 15 Minutes

CareCredit Home | Contact Us Payment Calculator

Welcome, JOE DOE | Log Out

Process Transaction

APPROVED

Sales Draft

ABC DENTAL
12345 MAIN ST
Address: ANYTOWN
CA
95789

Date/Time: 08/17/2016 05:30:03 PM EDT

Account Number: XXXXXXXXXXXXX0732

Amount \$: 1000.00

Seq#: 025744

Authorization Code: 017870

AVS Code:
Cardholder Name: SALLY SMITH

Reminder: You must retain the sales receipt, signed by the cardholder, in accordance with the guidelines outlined in your Operating Guide.