

# PersonaPay – Express Payment Portal

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## Overview

The PersonaPay CSR portal is a web-based tool for clients that allows users to create consumer profiles to make payments on behalf of consumers and payment history and run reports.

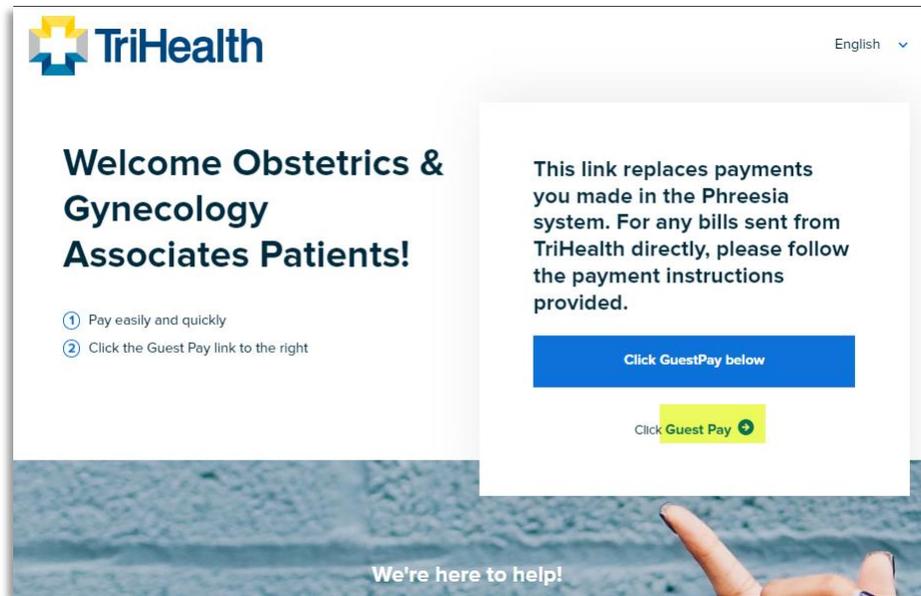
*Please note - Consumers do not have access to this portal.*

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## Accessing the Customer Facing Guest Payment Portal (no fees)

Enter the URL in your browser: <https://www.personapay.com/trihealthguest/login>

Responsible Party resources can access the portal by using the URL above. No user profiles exist for this portal. The responsible party simply has to click the Guest Pay link



The Responsible Party will need to populate the appropriate fields for the account. Responsible Party will need to provide the payment information within the form and click 'make payment'.

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English ▾

## Guest Payment

Account Details      Payment Method      Confirmation

**Account Details**

Account Number      First Name

Last Name      Payment Amount

Email

I'm not a robot

Back To Login      Select Payment Method

TriHealth      We're here to help!      About bill pay      Secured by

Responsible Party will have the ability to print, email or text themselves a receipt for the single transaction.

## Thank you for your payment test

We received your payment of \$1,400.00. Please allow 2-3 business days for your balance to reflect this payment.

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Payment amount: **\$1,400.00**  
Payment method: **Visa \*\*\*\* 1111**  
Confirmation number: **uAZCOOdN**

Your receipt

Email      Text      Print

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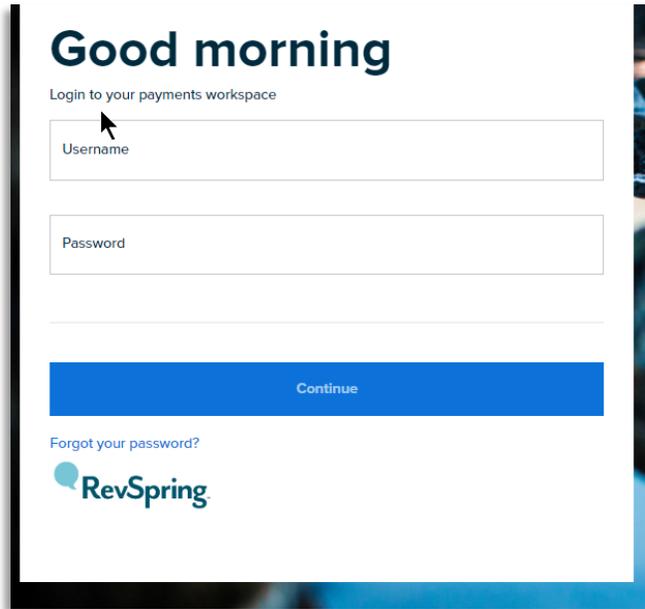
## Accessing the Customer Service Express Payment Portal

Enter the URL in your browser: <https://www.personapaycsr.com/trihealthguest/login>

To log into the portal for the first time, users must be set up with an assigned location and role. Once a user has been set up, they will receive a password reset email. Clicking the link in the email will bring the user to the password reset page. A password must be entered (and confirmed) that matches the outlined requirements. Clicking Save & login will log the user in with their new password.

*Please note: the password reset link expires after 24 hours*

For all future login attempts, users will log in with their username and the password created in the step described above. If the user doesn't remember their username, they will need to contact their site's administrator.



### User Lockouts

If a user unsuccessfully enters their password 6 times, their user account will become locked. The user may use the 'Forgot your password?' link on the login page to unlock their account and select a new password. Admins may also unlock the user on the Admin page of the portal. Please see the Admin section of this document for how to unlock a user account. Password Expiration CSR user passwords expire every 45 days. Users are notified via email when their password expires but they will also see a message if they attempt to log in using an expired password. When this happens, they will need to reset their password using the 'Forgot your password?' link.

### Logging Out

To manually log out of the portal, click the Log out button in the lower left corner of the screen.

After 15 minutes of inactivity on the portal, users will be automatically logged out. A prompt will appear for 60 seconds prior to the automatic logout. The user may click Keep me signed-in to keep their session open.



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Please note - The 15 minute inactivity period is a PCI Requirement and cannot change. PCI Requirement 8.1.8 states: "If a session has been idle for more than 15 minutes, require the user to re-authenticate to re-activate the terminal or session."

## Create Consumer - Open Payment Workflow

Create consumer allows information to be entered for a consumer that is not yet available in the CSR portal, which in turn will allow a payment to then be made. Click 'Create Consumer' on the left side of the page. You will see this form below:

Populate the 'Name' and 'Account Number' fields with the information that is known and then scroll down to Account details.

The Name and Account Number will be prepopulated with the details entered above. Proceed with entering the 'Payment Amount' and select the location the payment is for from the facility drop down listing.

Once this is completed, click the save button.

*Please note: If the Account number already exists in the system, the user will receive a warning indicating that "the Account number entered is an existing account". They will have the option to proceed to checkout and post that payment to the existing account -or- go back and change the file number to make it unique.*

Once the account details are saved, there is an opportunity to edit, if needed. (by clicking Edit). Otherwise, the user can proceed with the payment using the Full Payment button.

*Please note: Once Save has been clicked to create a new consumer, that name and file number cannot be edited or deleted via the portal. Contact RevSpring if any edits need to be made to a consumer (or the user can create a new consumer with the corrected information).*

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## Processing a Payment Workflow

After the Full Payment button is clicked, you will be routed to the page below. Here click the 'Choose Payment Method' button to proceed to next screen

Account number	Name	Balance
999999999	TEREALTH TEST	\$10.00
<b>Total Payment</b>		<b>\$10.00</b>

On this screen you will select the payment method, Credit Card or ACH. You also have the option to select a future date for the payment to be processed, if needed by clicking in the 'Schedule payment on' field.

**Choose your payment method**

Credit or Debit Card

e-Check

**Schedule payment on**

Date in process: 12/04/2023

**Review your preferences for payment receipt & reminders.**

Choose how to receive your receipt for this payment and notifications for upcoming payments. Providing the contact information would be treated as consent to communicate. Your preferences will be updated according to your selection.

Email

As you scroll down this page you can enter the consumer email or phone number to send a receipt to them after the transaction is processed.

The payment terms agreement box will need to be checked to proceed to the payment form. Click 'Next'.

**Review your preferences for payment receipt & reminders.**

Choose how to receive your receipt for this payment and notifications for upcoming payments. Providing the contact information would be treated as consent to communicate. Your preferences will be updated according to your selection.

Email

Phone

**Please add your date of birth to your account**

Date of birth (MM/DD/YYYY)

**Review payment terms agreement**

I signify that I have read, understood, and agree to the terms of the agreement.

After clicking Next, you will a payment form to capture the payment details based on the payment method selected above. All required fields will need to be populated in order to proceed to submitting the transaction to the merchant processor.

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**New Credit or Debit Card** [X]

Name on card  
TRIHEALTH TEST

Credit/debit card number  
AMEX DISCOVER MASTERCARD VISA

Expiration date (MM/YY) CVV

**Billing address**

Country/Region  
US-United States

State/Province  
State/Province

ZIP/Postal code

City

Address line 1

Address line 2

Save this card for future use

Once all fields are populated, click 'Confirm Payment'

You will then see the payment confirmation page, providing the response received from the merchant processor (approved response below). You can provide the confirmation number for this transaction to the consumer at this point.

Thank you for your payment Test

We received your payment of \$1,000.00. Please allow 2-3 business days for your balance to reflect this payment.

Payment amount: \$1,000.00  
Payment method: Visa  
Confirmation number: C2142426

Contact information  
Email in text and email notifications  
Language setting  
or English  
Update preferences >

Notification types  
There is nothing set up yet.  
**UNSUBSCRIBED DELIVERY PREFERENCE**  
or Paper Only  
You will receive a paper copy beginning with your next statement.  
Update notifications >

Back to Your account

You also have an opportunity to email, text or print the consumer receipt, if the details were not provided prior to this transaction being submitted.

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## Locating Consumer (Debtor) – Open Payment Workflow

### Consumer

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When Consumer is selected from the dropdown in the upper right corner, this will allow the user to search across the data that RevSpring has archived for your organization's consumers. Two search boxes appear at the top of the screen to aid with selecting the proper consumer. Populate the 'Name' and/or 'File Number' to locate the consumer record.

Account Number	Name	Amount due	View account
999999999	TRIHEALTH TEST	\$0.00	<a href="#">View account</a>

*Please note: if no results are returned based on your search criteria, a consumer profile may not have been created in the portal. In these cases, you will need to follow the create consumer – open payment workflow.*

Based on the search criteria entered you will see the record(s) matching the criteria under the Account listing. Click **View Account** to access the consumer record to proceed with submitting a transaction.

In the Consumer record, there will not be a balance due presented on the Account Summary page. You will need to select the 'Open Payment' tab on the right side of the page to submit a new transaction for this consumer.

Account status

4 Hello TRIHEALTH! You have a payable balance.  
4 Your current balance is \$0.00

View statements

Current balance as of 01/24/2024 \$0.00

Update your communication preferences

Update Now

See all payment options

*Please note: you can view previous transaction activity for the consumer record under the Account Activity tab.*

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## Reporting

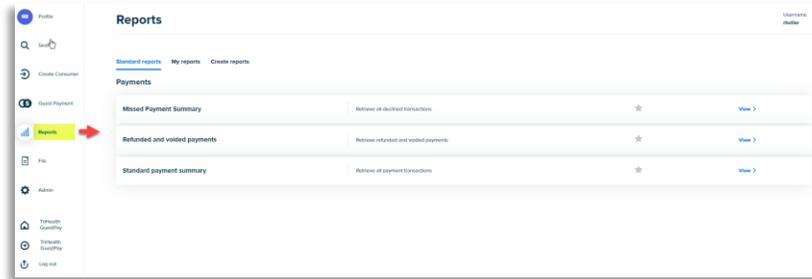
The Reports section contains our EvokePay Portal Standard reports. To view the contents of a standard report, select View. Three reports have been pushed to your portal. Here are the names and description below:

**ACH Returns:** Retrieve returned ACH payments

**Missed Payment Summary:** Retrieve all declined transactions

**Standard payment summary:** Retrieve all payment transactions

The Standard Payment Summary will likely be the most commonly used report. All report can be modified on this screen to reorder columns, sort, and filter.



## Admin – User Profile Maintenance

Password Reset If a user has forgotten their password, select Edit User to facilitate the resetting of their password.



Select Send password reset link to send a password reset email. The user will be able to click a link that will take them to the password reset page.



## System Details:

### Supported Browsers

The following browsers are supported:

#### Desktop

- Chrome: Current Version
- Edge: Current Version
- Firefox: Current Version
- Safari (Mac Only): Current Version

#### Current Version Mobile

- Stock browser on Android 4.0+
- Safari on iOS 9+

Portal Access Payment transactions via EvokePay are limited to users accessing the site within North America, for security purposes. If a transaction is attempted outside of North America, it will be declined.