

Qualifying

Getting the Merchant Interested

Ask the merchant how they are processing payments today:

If they are currently on a **stand alone terminal**. Ask if they are interested in any of the following:

- A way for payments to post back into the patient's record in their PMS/EMR. That is easy to deploy and does not require any costly IT projects
- Integrated Online Bill Pay
- Ability to set up payment plans
- Card vaulting (keeping cards on file)
- Ability to take ACH, Credit, Debit, and Commercial Payments

If they are currently **integrated with their EMR/PMS**:

- Discuss cost savings
- Additional functionality which includes online bill pay, card vaulting, ability to set up payment plans, ability to take ACH, Credit/Debit, and Commercial Payments
- Integration that is mapped to their workflow

Note: If **THE MERCHANT** mentions any of the following ***estimation, real time eligibility, financial assistance, or ability to send out and post statements***. Inform them that we do have these capabilities but that they require advanced implementation and additional fees. Then if the merchant is willing to support and fund this project please send an email to sales@payrightthehealth.com with your contact information and notes from the call. We will reach out to you to schedule a pre-call and then a follow up call with you and the merchant.

If they are interested in PayRight and the Integration Engine see the questions below to determine if their PMS/EMR is SaaS based or locally installed.

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Determining if the Merchant is on a SaaS PMS/EMR

- Do you know if your PMS system is delivered over the internet as Software as a Service.
 - If yes, then the software is SaaS. PayRight Integration Engine is not a current fit but will be available in Q1 2020.
- Can you use your PMS on a computer running any operating system? (e.g. Apple, Android and Microsoft Windows)?
 - If yes, may be SaaS,
 - If no, probably not SaaS.
- Do you open up a web browser to login to your PMS (e.g. Chrome, Firefox or Windows)?
 - If yes, may be SaaS
- Have you ever had PMS software loaded to your machine or do you ever see a notice on your screen that your PMS software has to be updated or will update automatically at a certain time?
 - If yes, not SaaS and is a good candidate for PayRight Integration engine
- Does your company have servers in the office or in a center hosted by an outsourcing company for your PMS?
 - If yes, not SaaS
- If you have problems logging in to your PMS, do you call a number on the website of the PMS company directly?
 - If yes, probably SaaS
- If the internet goes down, can you use your PMS
 - If no, probably SaaS and is not a good fit for PayRight Integration Engine
- **If you are still unable to determine** if the PMS/EMR is SaaS or locally installed send setup form to sales@payrighthhealth.com and note that they are interested in the solution, what PMS/EMR they are on, and were unable to determine if it is SaaS.
- **If you have identified they are SaaS** tell them you will reach out in Q1 when the Integration Engine is compatible with SaaS.
- **If you have identified they are a locally installed,** schedule a demo and send the integration engine handout