

Scratch Checkout: Quick Start Guide



IMPROMED | SCRATCH APP

Setting up for Scratch

To use Scratch Checkout with Impromed, the **Scratch App** must be downloaded, logged in, and **Scratch Payment** added as a payment type. The Scratch App should be added to all workstations used to process payment.

Link to download: <https://get.scratchpay.com/app> (password: puppy123)

Payments

TERMINAL/CARD READER

- Within Impromed, select **Scratch Payment** at checkout
- Click **Post** then **Update** or **Apply Payment**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Be sure the correct invoice to pay is selected
- Under the **Terminal/Manual** tile, choose your designated card reader
- Select the **Send to Terminal** button
- Tap, insert, or swipe the card (or try other cards if original is declined)

MANUAL ENTRY/PHONE PAYMENTS

- Within Impromed, select **Scratch Payment** at checkout
- Click **Post** then **Update** or **Apply Payment**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Under the **Terminal/Manual** tile, scroll down to display **By Manual Input**
- Enter the client's payment information & click **Process**

STORED CARD

- Within Impromed, select **Scratch Payment** at checkout
- Click **Post** then **Update** or **Apply Payment**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Under the **Terminal/Manual** tile, scroll down to display **By Manual Input**
 - **Store a new card:** Enter card details, check **Save Card Details**, select **Process**, confirm the client's email, then click **Confirm**
 - **Use a stored card:** Click **View Saved Cards**, choose the correct card to process payment, then click **Confirm & Process**

EMAIL OR TEXT-TO-PAY

date sent = date paid

- Within Impromed, select **Scratch Payment** at checkout
- Click **Post** then **Update** or **Apply Payment**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- On the right, select to send an **Email-to-Pay** or **Text-to-Pay**
- Verify or add the client's phone or email & click **Send Email** or **Send Text**
- Payment in Impromed is updated to \$0
- **Once the client pays:** Select **Sync** within the Scratch App > Payment Requests > Writebacks (same day payments only)
- Impromed will update to reflect the payment

Support

☎ 626-600-7170

✉ partners@scratchpay.com

📄 dashboard.scratchpay.com
Click **Get Help** (in the lower right)

🖥 **Prefer visuals?** Check out our:
[Impromed <> Scratch Checkout Guide](#)

Refunds & Cancellations

FULL & PARTIAL REFUNDS

- Create a credit on the client's account in PIMS
- Within Impromed > **Refund Credit Balance** and select **Scratch Payment** as method then **OK**
- Click the pop-up or open the Scratch App
- Choose appropriate transaction to refund under the **Recent Payments** (right table)
- Select **Process Refund**

Need more help? Use our [Scratch Checkout User Guide](#) for Interac, Check & Scratch Pay refunds

CANCELING TRANSACTIONS

To remove invoices for payment within the Scratch App, start by clicking the **Delete** text

- **Delete & Reverse** removes the payment from the app and reverses payment in Impromed
- **Delete** (only) removes the payment from the Scratch App only, with no changes to Impromed

Reporting

DAILY TOTALS

- Located at dashboard.scratchpay.com
- Navigate to **Reporting > Daily Totals**
- Use for balancing/end-of-day reconciliation

PAYMENT HISTORY

- Located at dashboard.scratchpay.com
- Navigate to **Reporting > Payment History**
- Use to look up specific payments or refunds
- Shows details like date, time, client name, payment method, surcharges, and more

Scratch Pay (loan/financing) reporting can be viewed in the Scratch Dashboard > Financing



Payments – Continued

EMAIL OR TEXT-TO-PAY

date sent ≠ **date paid**

- Follow steps on previous page to send the email or text-to-pay
- Once the client pays:** Select **Manually Record** within the Scratch App > Payment Requests > Writebacks (no Sync option available for these)
- Post a new payment in Impromed** that matches the date, amount and client displayed in the **Manually Record Pop-up**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Within the App, select **Delete** on the new invoice line, then **Delete (only)**
- Finally, go back to Payment Requests > Writebacks in the Scratch App, select **Manually Record** again, then select the **Payment Recorded** button

**The original transaction line in Impromed will stay noted as \$, however there will also be a new payment recorded on the correct date*

SPLIT CARD

- Option 1:** Code as individual payment amounts within Impromed
- Option 2:** Code card total as Scratch Payment in Impromed
 - Under the **Terminal/Manual** tile, click the black **Change** text
 - Enter the amount of the first card payment & process normally
 - Process the 2nd card, or select **Change** again to further split

The Scratch App displays the remaining balance until paid in full. If the client can't pay the entire balance, select **Close Out and adjust their payment amount in Impromed.*

CHECK

eCheck (personal check)

- From Impromed, select **Check** as payment type
- Click **Post** then **Update** or **Apply Payment**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Enter the check information, then click **Submit Payment**

Lockbox Check (business check)

- Navigate to the Scratch Dashboard @ **dashboard.scratchpay.com**
- Go to **Payment > Collect Payment > eCheck**, then under the **Business** designation enter the required information & select **Create Lockbox ID**
- Write the Lockbox ID on the check & mail per the instructions provided
- Within Impromed, select **Check**, click **Post**, then **Update** or **Apply**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Within the App, select **Delete** on the new invoice line, then **Delete (only)**

Back-up Payment Options

NON-INTEGRATED PAYMENT

Use if Impromed, Server or Scratch App is down

- Navigate to the Scratch Dashboard @ **dashboard.scratchpay.com**
- Go to **Payment > Collect Payment** and take payment
- If the payment needs to be recorded in Impromed:** Within Impromed, select **Scratch Payment** at checkout, click **Post Payment**, then **Update** or **Apply**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Within the App, select **Delete** on the new invoice line, then **Delete (only)**

OFFLINE PAYMENT

Not available for all practices, to learn more view [this guide](#)

FAQs

RECONCILIATION

Scenario 1: A payment/refund appears in Scratch reporting but not recorded in Impromed

- Ensure all **Writebacks** in app are synced, if so:
- Within Impromed, select **Scratch Payment** at checkout, click **Post**, then **Update** or **Apply**
- Open the Scratch pop-up (bottom right)
- Within the App, select **Delete** on the transaction line, then **Delete (only)**

Scenario 2: A payment/refund is visible within Impromed but not listed in Scratch Reporting

- Check the **To Be Processed** area of the app
- If the transaction is listed, there are 2 options:
 - Collect money from client
 - Select **Delete** then **Delete & Reverse** which will update Impromed to \$0
- If the transaction isn't listed, change payment to \$0 Impromed **or** process as **Non-Integrated** payment (see instructions to left)

Scenario 3: End of day reporting within Impromed does not match **Scratch Daily Totals** report

- Ensure the timeframe is the exact same across both reports
- Use the **Payment History** report from Scratch to investigate individual transactions
- Use above instructions to make adjustments
- Alert Scratch Support for further investigation

APP TROUBLESHOOTING

>> Payment or Refund transaction does not come through to the Scratch App

- Verify payment type in Impromed is correct, if not remove it and add a new payment/refund
- Ensure the Scratch App is **Online** (not Offline)
- Refresh the app
- Log out/in (bottom left of app), if not fixed click the **▲** on the desktop taskbar & **Exit** Scratch
- Restart your computer

**If all fail to populate the transaction for payment in the app, reach out to Scratch Support. A Non-Integrated payment can be taken if needed (instructions to left)*

>> To Be Processed area of the app is still displaying transactions at end of day

If items are showing in this area at end of day, it signals that payments/refunds have been coded in Impromed but not collected by Scratch

- Check **Payment History** within Scratch & the client record in Impromed to verify actuals
- If the information is the same in both places select **Delete** in the app, then **Delete (only)**
- If the transaction appears differently across Impromed & Scratch, refer to **Scenario 1 or 2**