

# Your Open ACU Account

How to manage your Open ACU status, payment history and payment method.

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# Payment History

history

# Changing Your Payment Method

method

# Adding Locations

details

# Conversion of POCA Point Data

**Please do not add locations, users (including practitioners) or real patients before your conversion. This will cause duplicates and disassociated data.**

If you signed up for an Open ACU (Open) account and indicated you had a POCA Point (PP) account in the signup form we will perform a conversion of all your data in to your new Open ACU. The biggest issue is timing, so here are some things to consider.

## First things first

- Once you have a new account both Open and PP accounts are available for use.
  - Your Open account is empty of patients, blocks, appointments, health records.
    - There is one User -- you the owner. ([See user permissions for more](#))
    - There is one location -- the address you entered when you signed up. ([more on locations](#))
  - You can log into your Open account and familiarize yourself with it.
    - Look through these help files
    - Check out the [videos on our website](#).
    - Add a test patient to schedule any appointments, ect.
- Your clinic is still running on PP until you tell us to make the conversion.
- **Decide on a date and time to have us make the conversion.**
  - Your PP account will be temporarily unavailable to patients.
  - Make sure none of your staff or practitioners are using the system
    - This is to prevent the loss of data they may enter at this time
  - It will take us around an hour depending on the number of patients and appointments being converted.
- Let us know when to convert and we will confirm that time.

- Contact your patients to let them know of the change.
  - The Open patient portal isn't a lot different from PP's but it might be a surprise to them to see the new layout.
  - Patient passwords will remain the same after the import.
  - If they saved their PP password using their browser's password manager it will not work because the new link is on a different domain.
  - [Check out this sample email](#) that can help communicate the changes to your patients.

## After the data conversion:

- Your PP account will be cancelled (none of the data will be deleted though)
- All your patient's will be redirected to the proper link to check in.
  - [You will want to change your website and other links to your new patient portal link.](#)
- If you want to send your patients an email outlining the changes see [the sample email](#) we've created for you.
- Your practitioners can log in with their EHR username and password.
- Visit the [help article on getting started](#).
- Let us know if you have questions.

# Adding Credit Card Payments

[added January 2, 2023]

Open ACU allows you to take payments from patient credit and debit cards right from the schedule page via our [Stripe payment integration](#). If you purchase a Stripe card reader you can accept payment at a lower in-person rate. We allow you to capture reusable, secure cards for future payments like no-shows or if they forgot their wallet.

Adding credit card payments to your Open ACU account costs \$10 per month, plus the processing fees of 2.9% and .30¢ for each transaction.

## Advantages to adding credit card payments

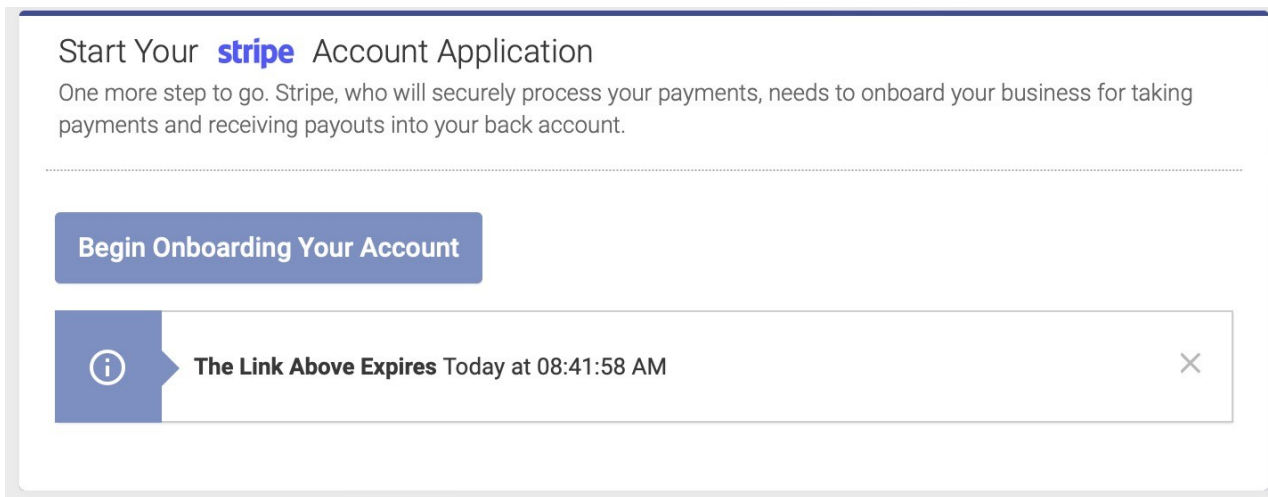
The biggest advantage for taking credit card payments within Open ACU is the full integration of payment information with patients and their appointments or transactions. It is one place for entering payments and appointment data.

One of the biggest reasons for bringing credit card payments to our platform was to provide no-show payment capturing. If someone makes an appointment and doesn't show up, per your clinic's terms and conditions you can charge the patient and send an email to them. This will help prevent loss of business and income.

## How to start taking credit card payments

1. Go to Account > Take Payments  
only users with Owner status can see this page.
2. Click "Getting Started" to create a Stripe Onboarding link specific to your Open ACU Account

After a few moments you will see the link below.



This is a link to your account onboarding process. The link makes sure your account will work with Open ACU. If you aren't ready to start the onboarding process don't worry you can always come back to the Take Payments page and generate a new link.

Stripe Onboarding must be completed by the business owner or someone with significant management responsibility of that business. What you will need

- You will enter business details (legal business name, address and IEN or Social Security number)
- Set your preferences and branding details (logo, name and web address)
- Connect a bank account for charges and payouts.
- Documents to confirm your identity:  
*business license, passport or other identifying document based on the type of business and other factors.*

## Check your Stripe account status

You may need to go back for final authorization steps before your account is ready for payments.

Look for three green checkmarks for each of the steps to go live. If the account needs further information you can click the "Log into your Stripe Dashboard" to finish the necessary steps.



Your **stripe** Account is Active

Details Submitted	✓
Charges Enabled	✓
Payouts Enabled	✓

Log into your Stripe Dashboard