CHAPTER 12 CHECKLIST

Payments

- [ ] Apply for certification before or alongside processor applications
- [ ] Processor file ready: entity, EIN, bank letter, ownership, contracts, website
- [ ] Decide merchant account or payment service provider, with written answers to the five questions
- [ ] Confirm current processor policies and published approval windows (Re-check before publication.)
- [ ] Pricing and subscriptions configured to match treatment programs
- [ ] Gateway test and live credentials set up and secured
- [ ] Checkout shows full price and cancellation terms
- [ ] Recurring billing, retries and cancellations tested
- [ ] Billing descriptor set to your brand name and checked on a real statement
- [ ] Receipts and reminder emails live
- [ ] Test charge and refund completed and reconciled
- [ ] Chargeback alerts turned on
- [ ] Backup processor approved and tested