CommBank Smart Health User Guide

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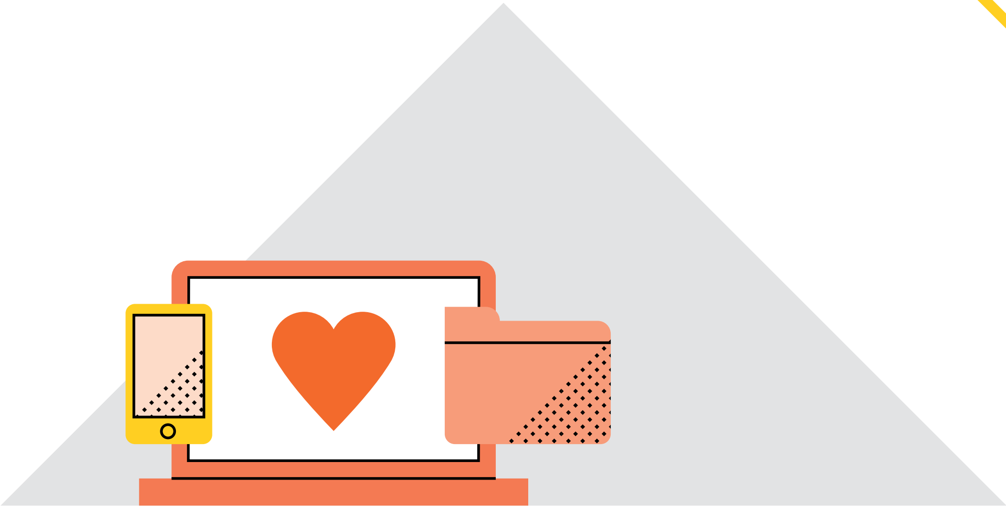
Contents



About CommBank Smart Health

What is the Smart Health Terminal?

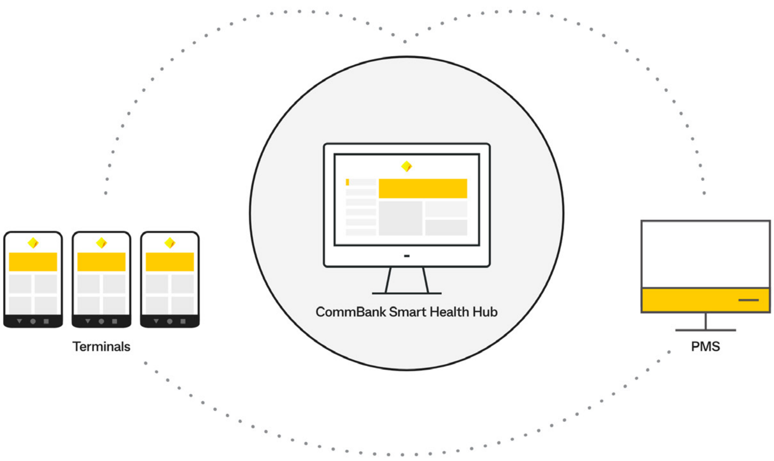
The CommBank Smart Health Terminal is the physical device that can be linked to the Smart Health Hub.

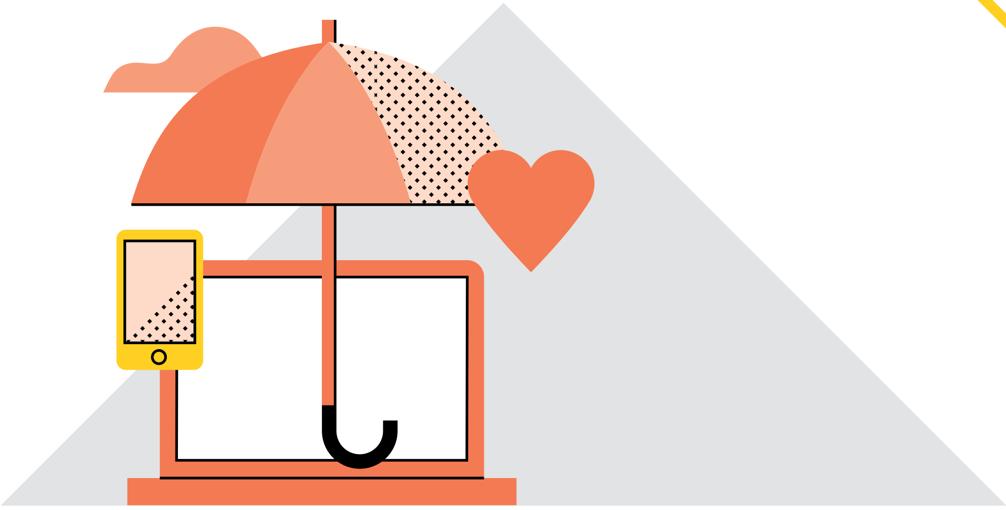
What is the Smart Health App?

The Smart Health App runs on the Smart Health Terminal and provides the interface for the payments and claiming features on the device.

What is the Smart Health Hub?

The CommBank Smart Health Hub is a web application accessed through your web browser. This is the central point of access and navigation for administrators and practice users, and can be integrated with your PMS. The Hub displays detailed transaction listings and digitally stored copies of your private health insurance declarations.





Support

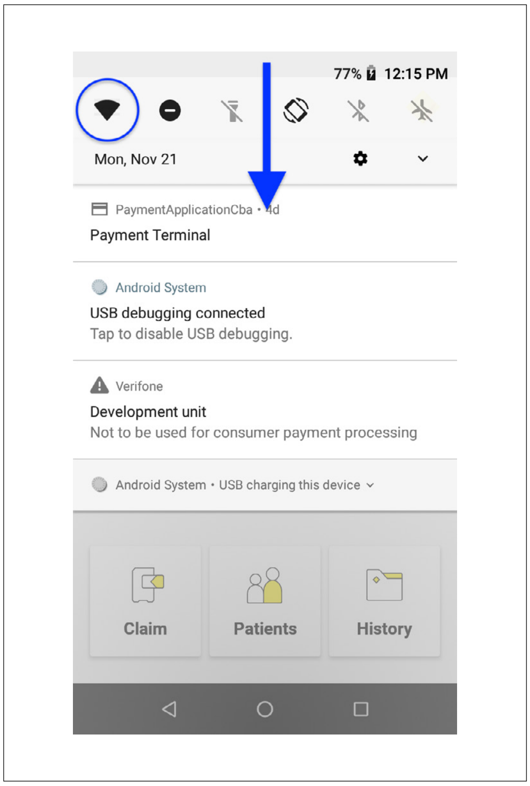
Before you start

You will need to ensure that

1. Your staff are aware of upcoming delivery of the terminal. This ensures that the terminal delivery occurs at the scheduled date and time
2. When the Smart Health terminal arrives

   2.1 “Wifi must always be turned “On” however terminal may connect via 4G or Wifi (refer image below)

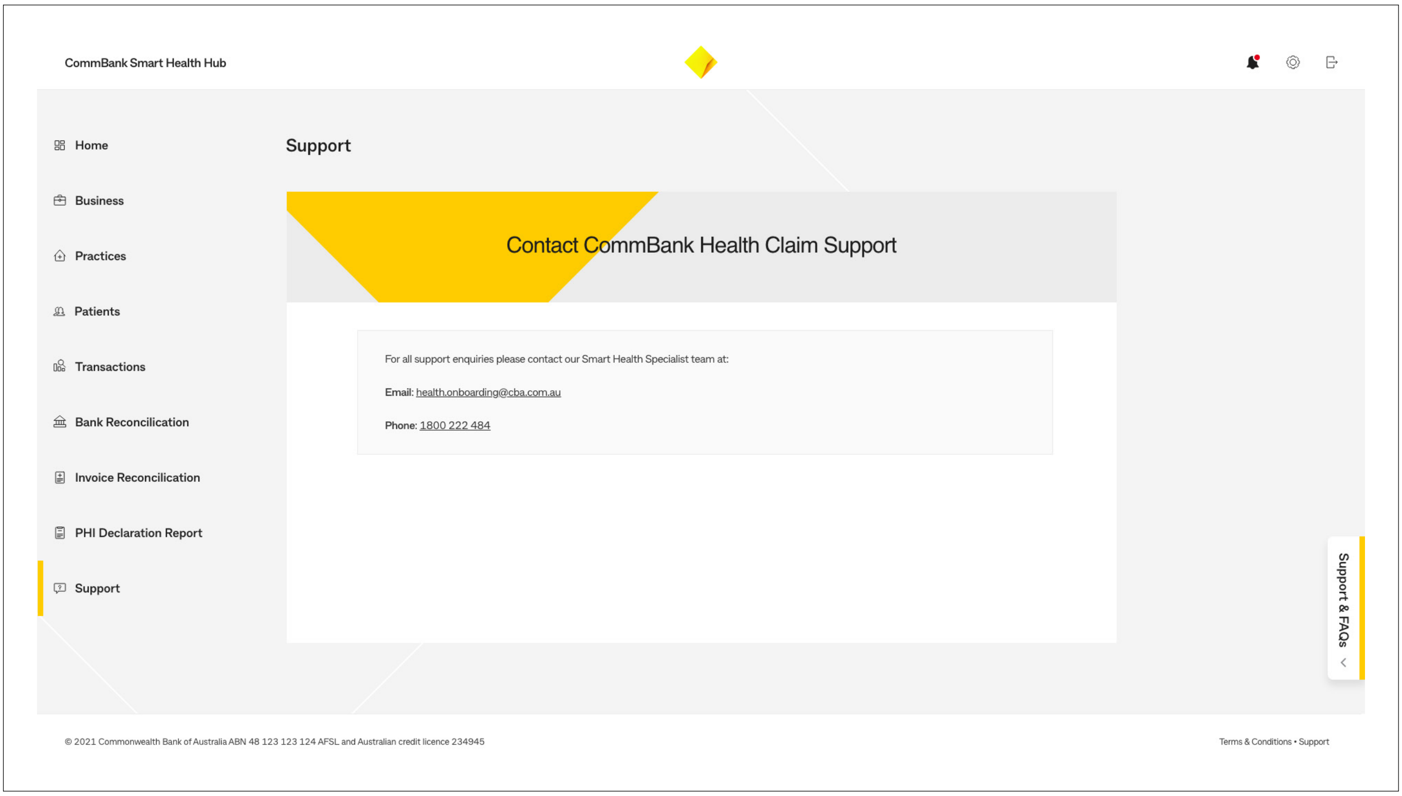
   2.2 Locate the Smart Health App by navigating to apps installed on your terminal.



How to get help

For questions about the CommBank Smart Health Hub or Terminal
You get help in three easy ways:

Support page
You'll find our Support page by clicking the ***Support*** tab in the hub (this is the last tab in the menu at left). You will find the contact details of CommBank Smart Health specialist team.



Support and FAQs tab
At the bottom right of every page in the hub, you'll find a drop down menu called Support and FAQs. This contains further information (and user guides) on how to use the CommBank Smart Health Hub.

Within this menu, a "walk me through" tool will guide you through the initial setup steps and can be accessed at any time.

Help Desk
You can call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

For questions related to your PMS

For help with any transactions involving the use of your PMS, please see your PMS User Guide or call your PMS Help Desk. For example, you may need help with:

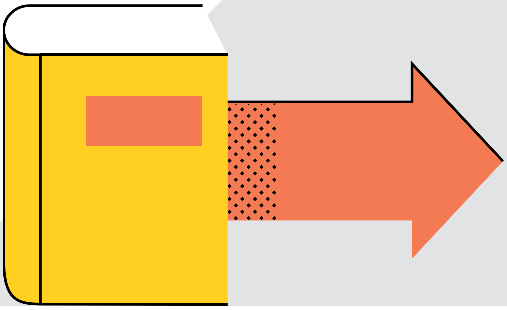
- Initiating or processing transactions in integrated mode via your PMS
- Finding out where to paste your User Key, PIN and PMS Integration Key when connecting the CommBank Smart Health Hub to your PMS, and
- Handling PMS error messages.

If you use any of the following PMS' below, you can also access help through these links and phone numbers:

Dental 4 Windows – https://www.centaursoftware.com.au/contact-us/ or 1300 855 966

Optomate – https://www.monkeysoftware.com.au/contact-us.html or 1300 650 295

Best Practice – https://bpsoftware.net/contact/ or 1300 401 111



Quick start guide

What I need to begin

1. Welcome email sent to your registered email address, containing:
    a. User name
    b. temporary password
2. One of the following for each practitioner:
    a. Medicare Provider Letter
    b. HPOS Screenshot
    c. Association Letter (for Massage Therapists only)

See Page 22 for further information

Log in to Smart Health Hub

Visit the Smart Health login page at www.commbank.com.au/smarthealth

or type https://merchant.whitecoat.com.au/login in a browser.

Review company details

1. Enter the CommBank Smart Health Hub Home page
2. Through the Business tab, look at the pre-loaded details about your business to check they are correct, including:
   a. Business details
   b. Primary bank account (individual accounts may differ across sites)

If any incorrect details appear call 1800 222 484 between 8am and 8pm AEST Monday to Friday

See page 14 for further information

Assign administrators/users

1. Click on the Practices tab and select the appropriate practice
2. Existing Administrators will appear in the Administrators tab
3. For new Administrators, click on the Add Administrators link and provide unique email address and details
4. Each new Administrator will only be able to access this specific practice, and will be sent an email with login details

See page 20 for further information

Add providers

1. Search for providers by Medicare Provider Number or add details manually
2. Complete all fields and upload Medicare Provider Number Letter or screenshot from PRODA or HPOS (with time and date)
3. Click on the Save Provider Details button
4. New providers are verified by the CommBank Smart Heath Team, then show as “Active” in the Hub
5. Once Active, Medicare claiming begins. Allied claiming begins within 72 hours

See page 22 for further information

One-time terminal setup

1. Press and hold power button on right side of terminal
2. Generate your terminal pairing code found in the Commbank Smart Health from the Practice menu under the Terminal tab
3. On the Smart terminal, within the Smart Health app enter the above pairing code
4. Assign each terminal a nickname so you can identify each one, remembering to keep a record of your Terminal ID.

See page 25 for further information

Link to your PMS

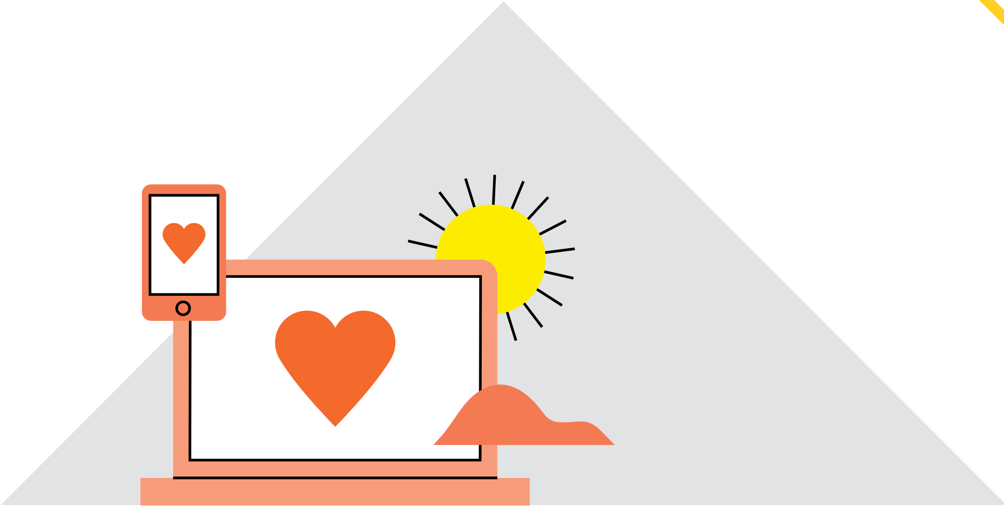
1. From the Practices tab, select the appropriate practice and click on the PMS tab. Then click Add PMS Certificate
2. Type in a PMS Nickname
3. Select your PMS system from the dropdown menu
4. Create your own PMS Integration Key
5. Click Add PMS Certificate to complete the process

See page 31 for further information

Add patients

1. Click the Patients tab on the Home page
2. Add patients manually by clicking Add Patients, entering the details and clicking Save
3. Upload patients from your PMS by clicking on the Upload Patients button

See page 38 for further information



Setting up CommBank Smart Health

1. Logging in for the first time

Where do you get your credentials to log in?
Thank you for choosing CommBank Smart Health.

Now you're registered as a Commonwealth Bank of Australia merchant, we upload your details into the Smart Health Hub and you will receive a welcome email.

Your welcome email includes:

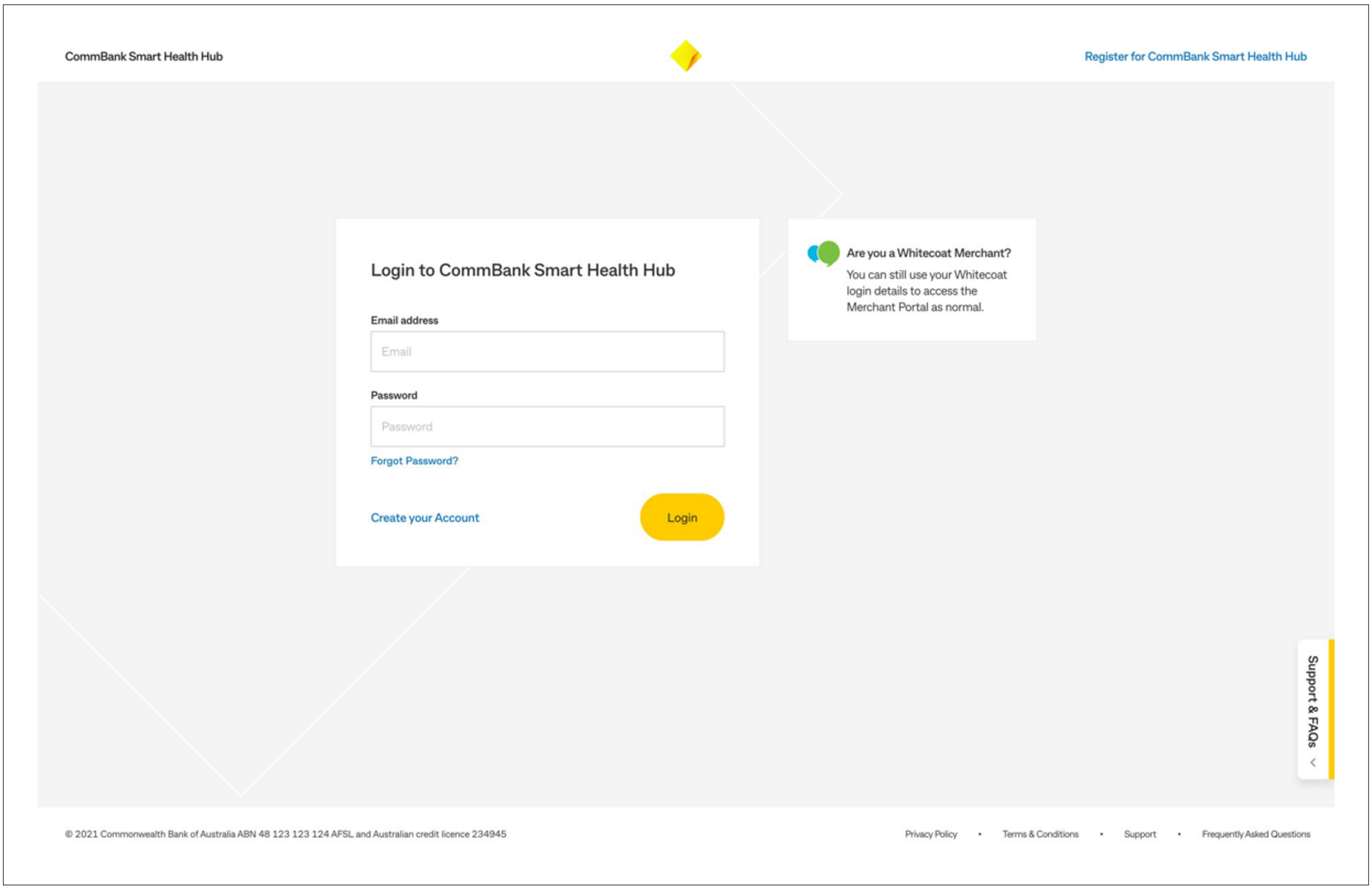
- URL for CommBank Smart Health Hub
- Your username, and
- Temporary password. **Note:** You will be required to change the password at first login.

Note: Your user name and password will expire after 28 days.

Who should log in to complete setup?
Set up can be completed by business owner their delegate. They will have full access to log in and set up everything you need to use the CommBank Smart Health Hub and CommBank Smart Terminal/s. Setup can also be completed by person nominated on the application form, who will have received the welcome email.

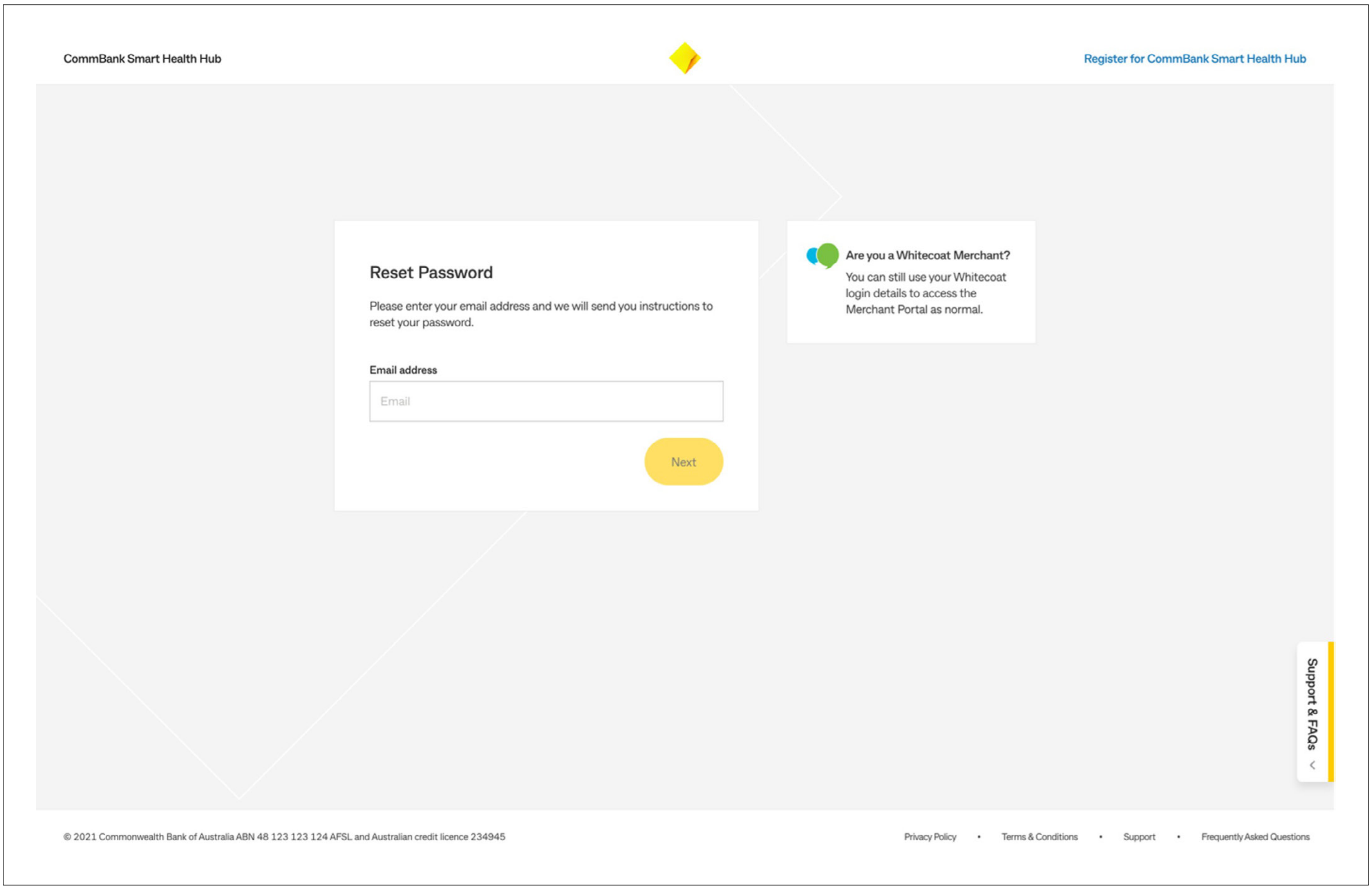
How do you log in?

Simply visit the Smart Health Hub login page, and log in using the username and temporary password you received in the email, shown below, then click Login. You must then change your password.



How do you change your password?

You'll receive a prompt after you first log in. Your new password must contain six characters, including one upper and one lower case letter, one number and a special character (e.g. !@#$%^&*).



Once your new password is created, click ***Next*** to read and accept Terms and Conditions.

How do you reset your password?

At a later date, should you wish to reset your password, go to the CommBank Smart Health login page then click the ***Forgot Password*** link, shown in the previous image.

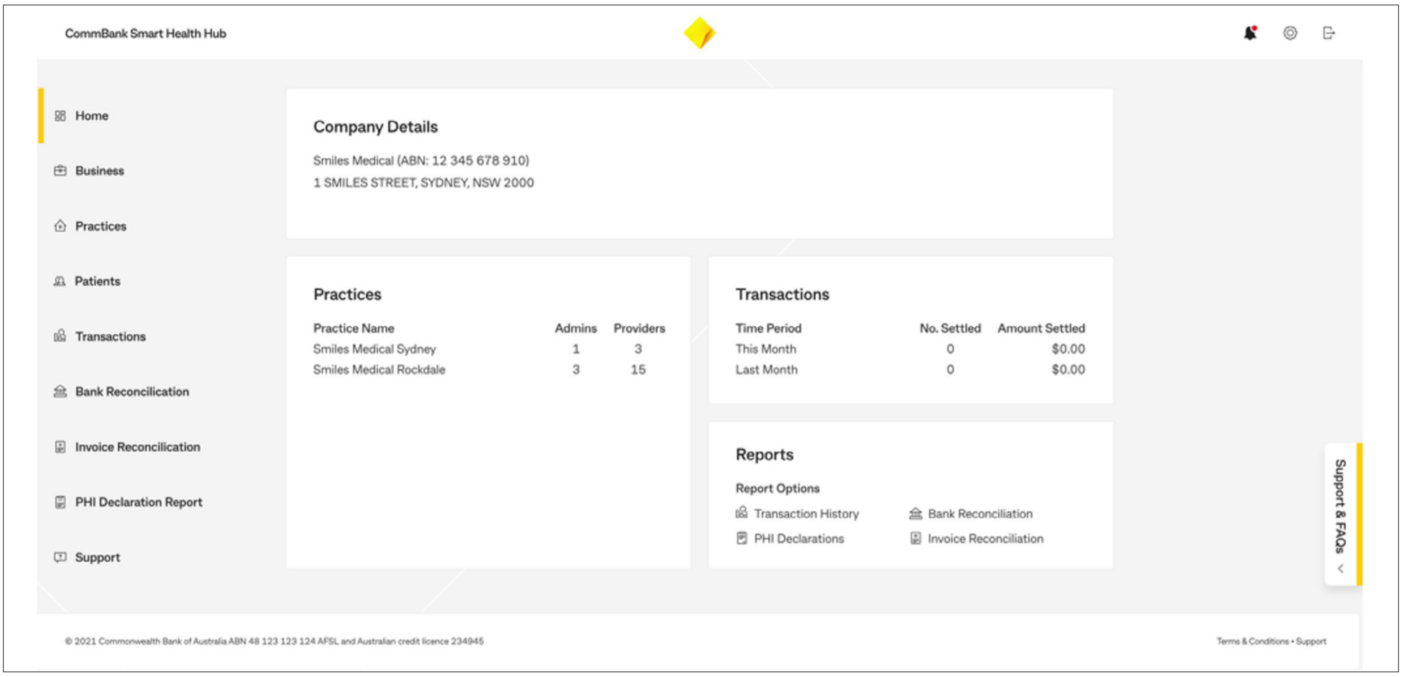
How do you accept the Terms and Conditions?

After reading the Terms and Conditions, scroll to the end, check the boxes and click **Accept**. You can access a copy of the Terms and Conditions via a link in the bottom right hand corner of the hub's footer at any time, or via the Support page in the hub.

What's your next step?
Getting to know the CommBank Smart Health Hub Dashboard.

2. The CommBank Smart Health Hub dashboard

Once logged in, you're on the CommBank Smart Health Hub Home page. This is the central dashboard from which you can navigate to all features, and shows you:



1. **Your Company Details** (provided at Application)
2. **Practices** (provided at registration)
3. **Transactions** (this will be blank at first log in)
4. **Reports** (this will be blank at first log in, but shows the report names).

You can navigate directly to the underlying pages by clicking on the dashboard panels, or using the tabs running vertically down the left hand side of the Home page, including:

1. **Business** – where you can view your company details
2. **Practices** – where you can view your practice details
3. **Patients** – where you can view your patient details
4. **Transactions** – where you can view your transaction history and details
5. **Bank Reconciliation** – where you can view the amount sent to bank account. It shows whether money received from patients, from the terminal or card not present transactions, has arrived in your bank account.
6. **Invoice Reconciliation** – where you can view a summary of transactions at an invoice level. It itemises the money your practice received from health funds or patients yesterday. You can compare this report with the Bank Reconciliation Report to identify payment gaps.
7. **Report PHI Declaration** – where you can view your Private Health Fund declarations and signed receipts from your patients, and
8. **Support** – where you find information about how to use CommBank Smart Health, including user definitions, terms and conditions, or contact the CommBank Smart Health Help Desk.

What is the Bell icon 🔔 in the top right hand corner of the Smart Health App?
This is a global messaging service notifying users of:

- Systems outages or upgrades, or
- Enhancements or additions to the platform, for example, when new health funds become available for claiming.

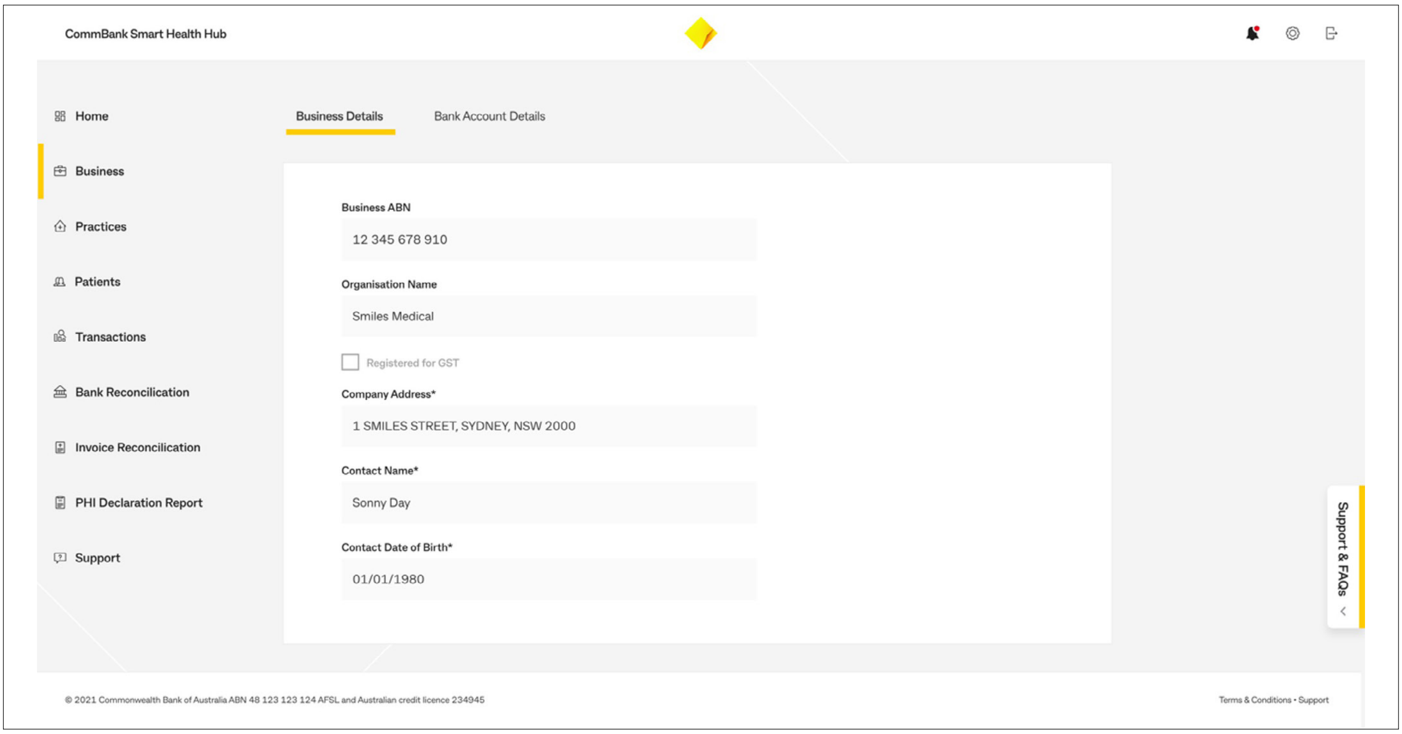
What's your next step?
Reviewing your details.

3. Reviewing your details

What should you do first?
Please review the pre-loaded company details you used to register to check they appear correctly, including:

- Business details
- Bank account details, and
- Practice details.

How do you check your business details?
From the Home page, click the ***Business tab*** on the menu at left or the Company Details panel on the dashboard. This takes you to the Business page. Now click the ***Business Details*** tab from the menu at the top left of this page.

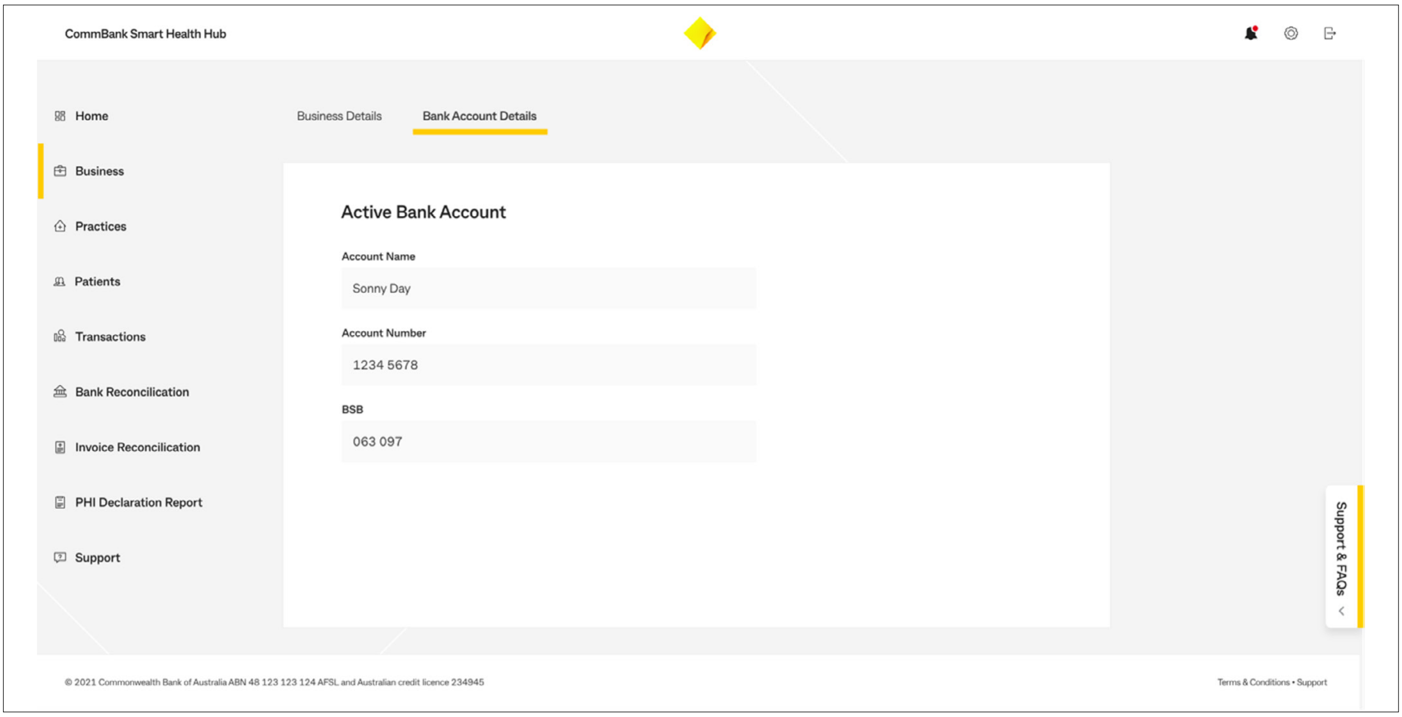


On the Business Details page, check that the pre-loaded details in all fields are correct. This includes Business ABN, Organisation Name, Company Address, Contact Name and Contact Date of Birth (optional).

Note: Business Details relate to the portal owner (or master administrator) so may be a Group-level business rather than an individual practice name.

If anything is incorrect, please call our CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

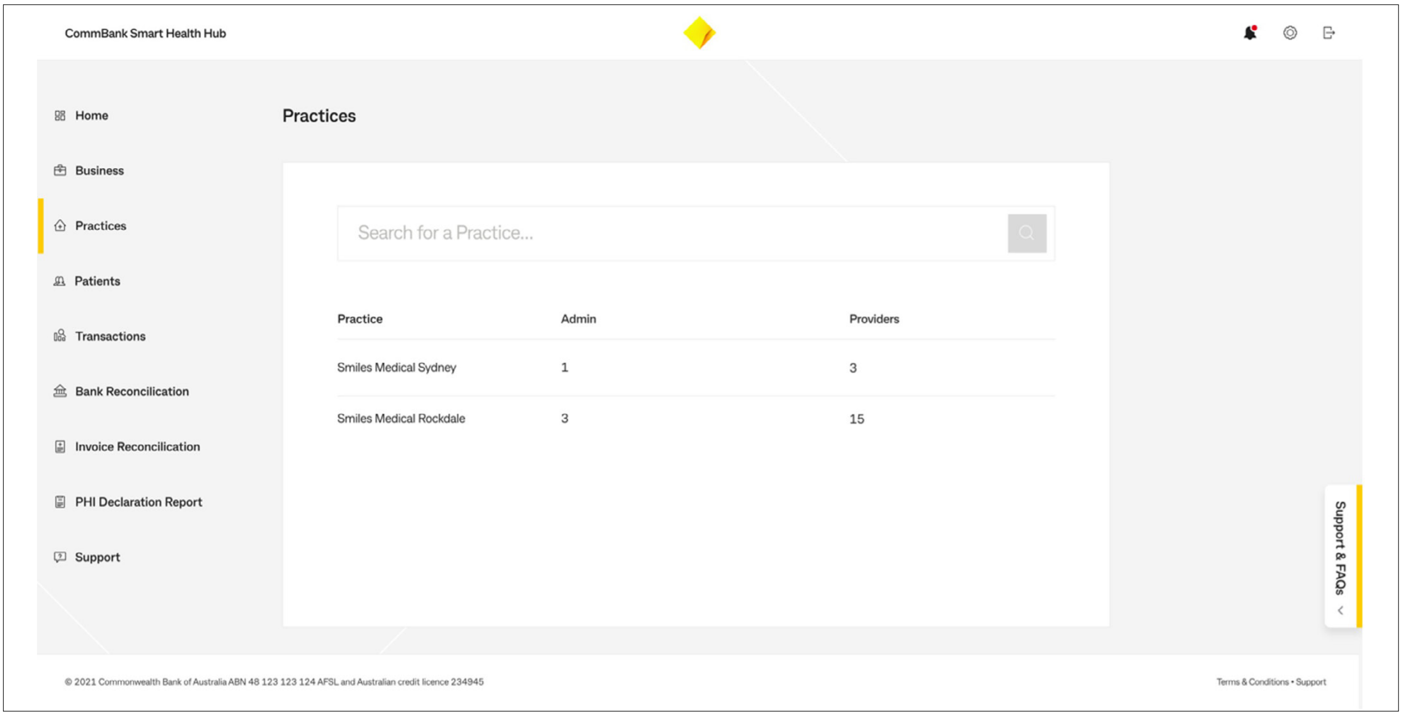
How do you check your bank account details?
On the Business page, click the ***Bank Account Details*** tab, to the right of the Business Details tab.



This page shows the primary account you nominated at application for depositing settlement funds.

Please note: If you have multiple sites with multiple accounts, this page will relate to one site only, which is the site that you established first.

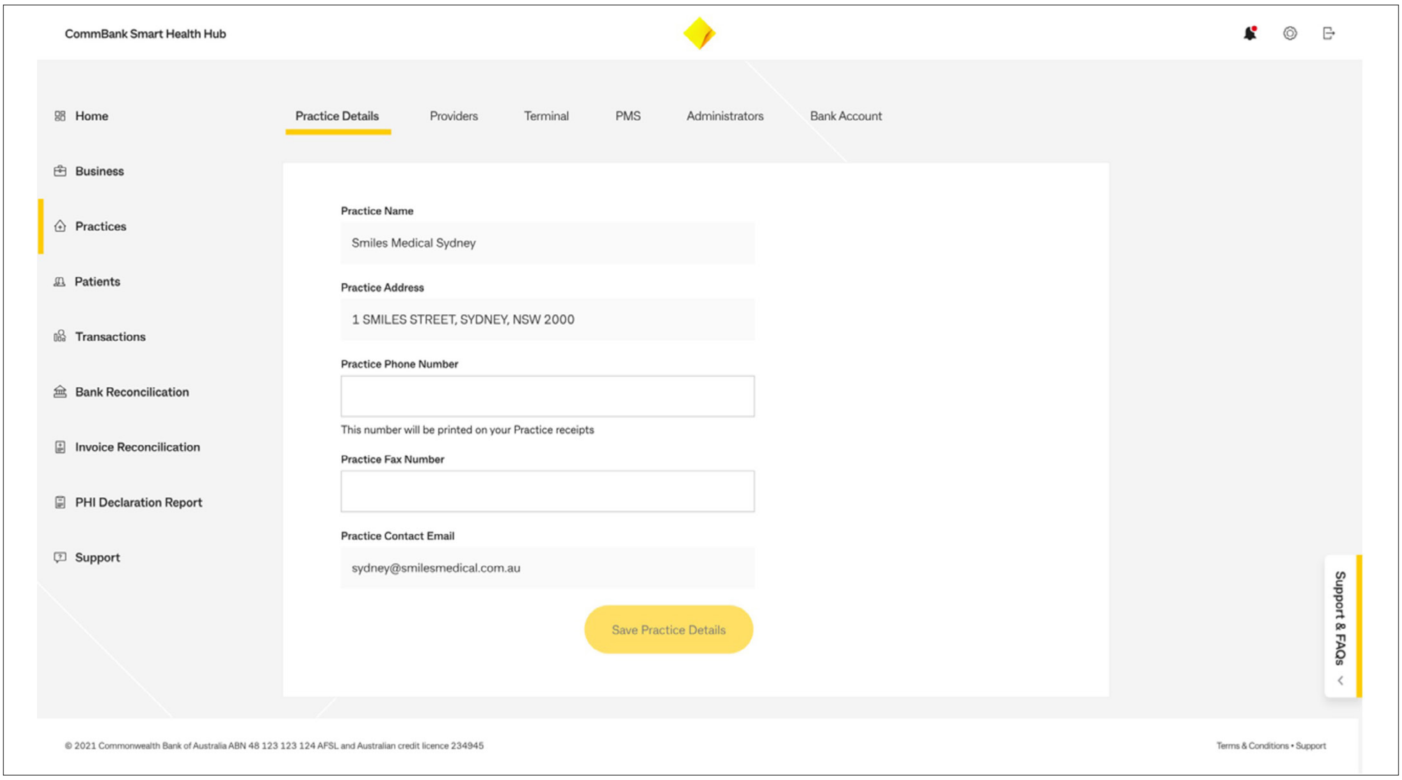
How do you check your practice details?
To check the accuracy of the practice details you provided to CBA with your new merchant application, click the ***Practices*** tab on the menu. You are now on the Practices page. This is what it may look below. You can also go straight to a specific practice by clicking its name on the dashboard's Practice panel.



For current practice information: To check that the Practice Details you provided at registration are correct, click on the relevant practice name, for example, Smiles Medical Sydney. This takes you to the Practice Details Page. Check all details, including Practice Name, Address, Phone Number, Fax Number and Contact Email.

Note: Only the practice phone number and fax number fields can be edited. If they are incorrect or blank, edit or add those fields, then click Save Practice Details, as shown below. If anything else is incorrect, call our CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Here is an example of what you will see on the Practice Details page when viewing current practice information:



To add a new practice: You must complete a new merchant application. Please contact your CBA Relationship Manager or the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday. They will help you complete an application. Please have the practice name, address, phone number, fax number, and contact email for this call.

Once your application is approved by our team, please allow up to three working days for new practice details to appear within the Practices tab in the CommBank Smart Health Hub. Once they appear, check for accuracy on the Practice Details page and, if required, call the CommBank Smart Health Help Desk to change any details (remember you can edit the practice phone number and fax number on-screen).

Note: Only Head Office Administrator/s will have access to view all practices.

What's your next step?
Adding Administrators (Users).

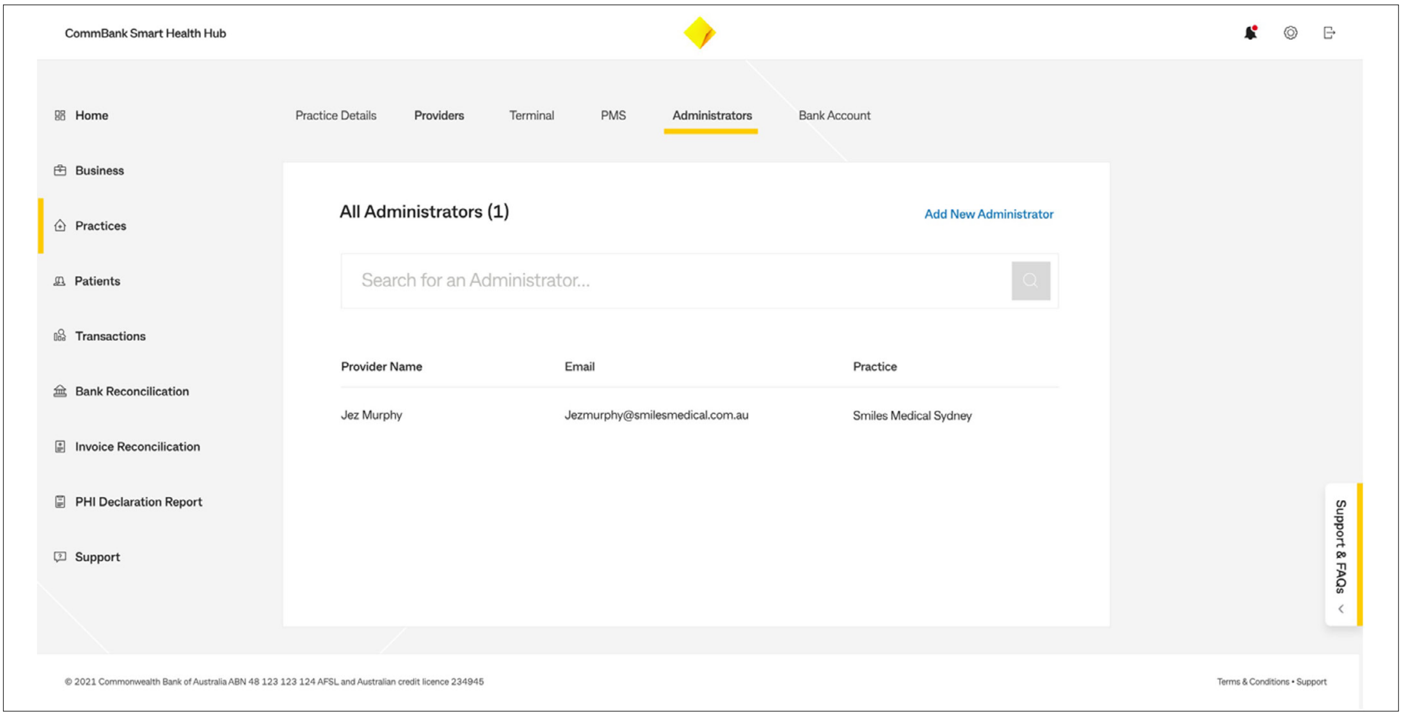
4. Adding Administrators (users)

Who can be added to use the CommBank Smart Health Hub and Smart Health App?
Users are called Administrators. Two types of users can log in, manage and use your CommBank Smart Health account, with a tiered level of access:

Head Office Administrator/s: You, as business owner or director, an area manager, authorised single-site or group practice manager, or your CEO, CFO or accountant, are authorised to have full access to view transactions and reports across multiple practices, and add providers and administrators (users) to practices. To add a new Tenant Administrator, contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Practice Administrators: Practice managers and other authorised personnel that can view add providers for their practice only.

How do I assign Administrators?
From the Home page, click the ***Practices tab*** on the menu at left. Then select the appropriate practice on the Practices page. Now click the ***Administrators*** tab in the top menu.

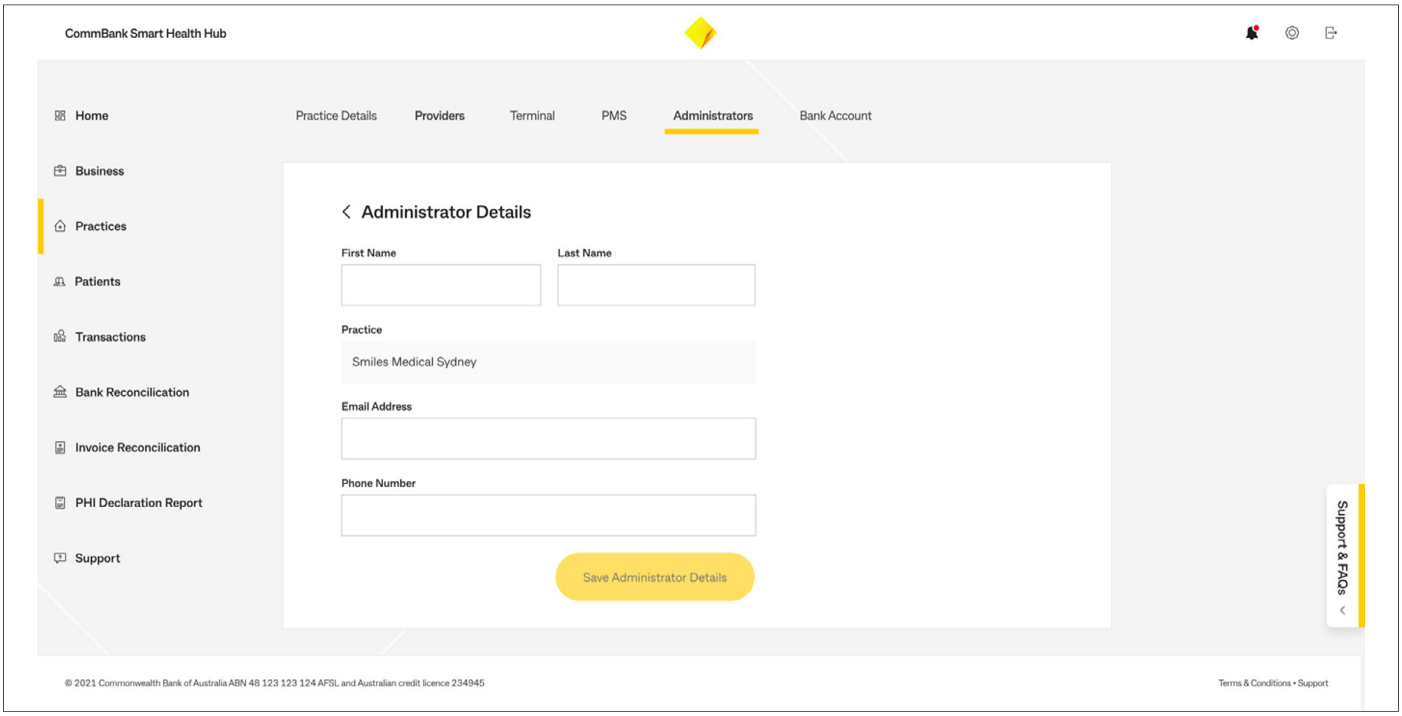


Details of any administrators you provided at registration will appear here. Please check all details and if anything is missing or incorrect, call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

How do you edit existing Administrator details?
If you need to change the details of current administrators, please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

How do you add new administrators to your account?
To add new administrators, click ***Add Administrator*** to the right of the Administrators page, shown in the image above.

Once on the Administrator Details page, enter the new administrator's First Name, Last Name, Email Address and Phone Number, and click ***Save Administrator Details***. **Please note:** Every new administrator must have a unique email address.



New administrators receive a welcome email from a HealthyPay email address providing their login details and asking them to change their password on their first visit.

How do you remove an administrator?
Should practice administrator access no longer be required, click ***Block Administrator*** in the top right of the Administrator Details page to suspend access. Access can be reinstated by clicking ***Unblock Administrator***.

To completely delete an Administrator, please call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What's your next step?
Adding Providers

5. Adding Providers

A provider is a health practitioner who delivers services to your patients, for example, dentists, general practitioners, physiotherapists, optometrists and osteopaths.

How do you add a provider?
From the Home page, click the ***Practices*** tab on the menu at left. You are now on the Practices page. Select the provider's practising location from the dropdown list, or if there are multiple sites use the search function for a faster result.

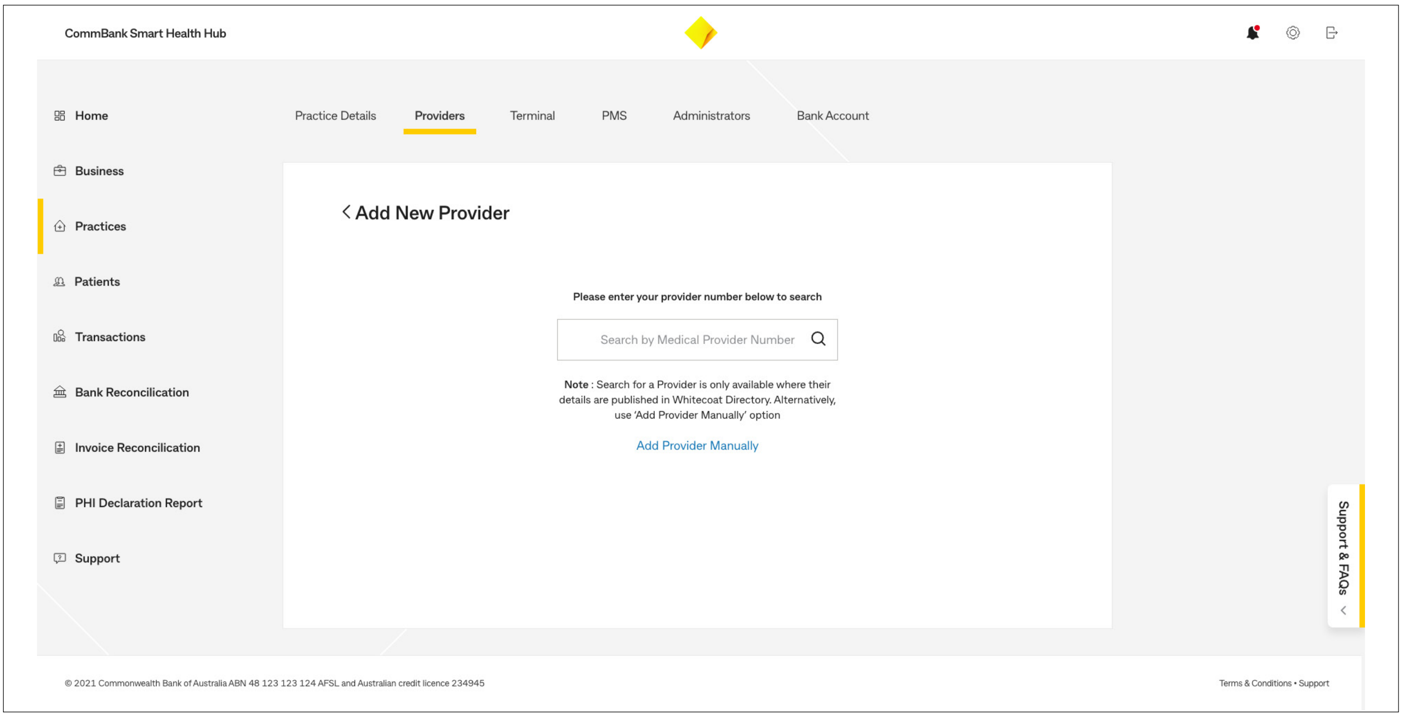
Note: You can also click a specific practice from the Practices panel on the Home page dashboard.

Now click on the ***Providers*** tab.

On your first visit, the Providers page is blank.

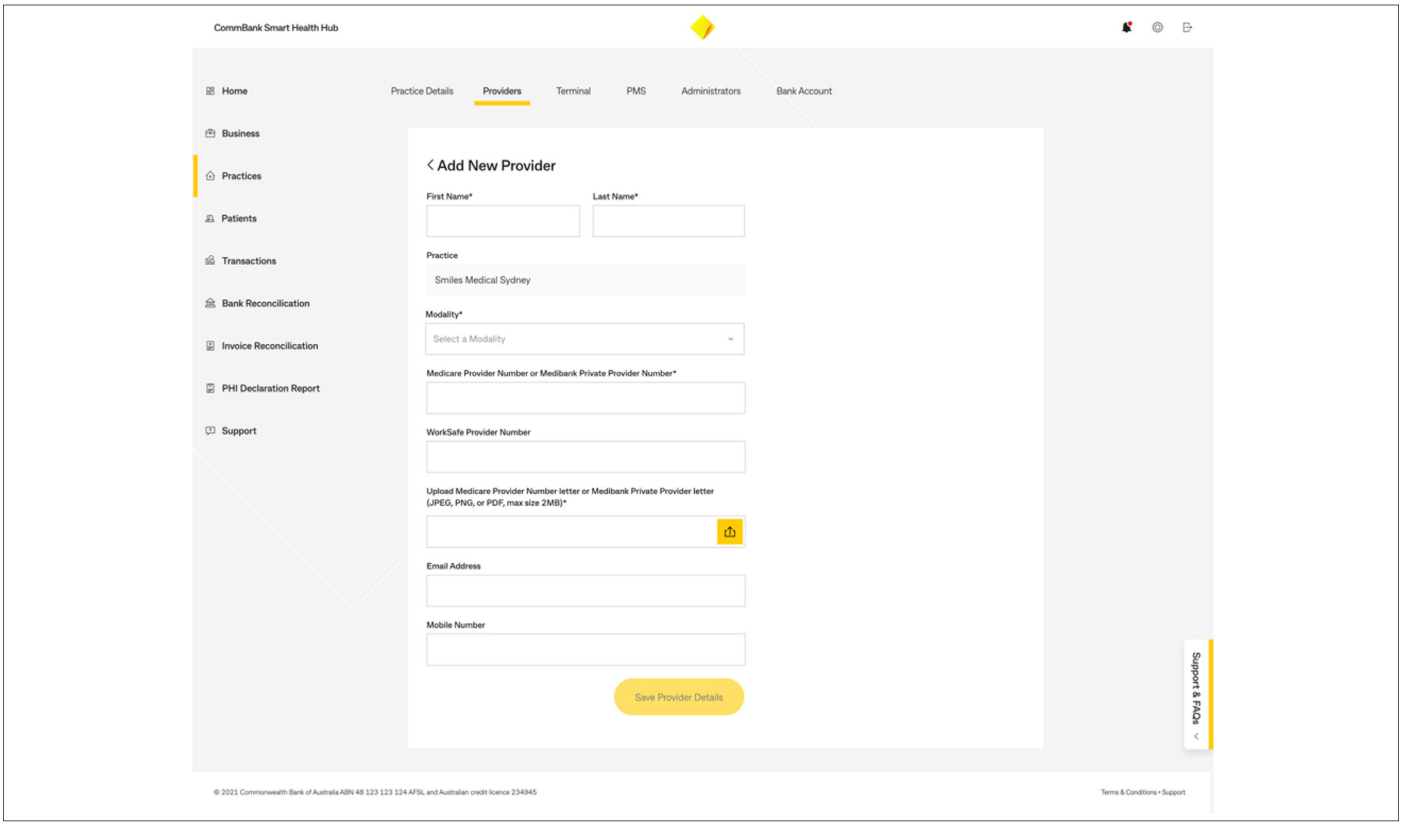
To add a provider:

1. Click Add New Provider in the top right corner.
2. Search for a provider by typing the Medicare Provider Number into the field, as shown below. This will return matches for relevant practitioners.



3. Once selected, certain details will be pre-loaded.
4. Providers can also be added manually by clicking ***Add Provider Manually*** located under the search box, shown above.

5. Complete all details shown at right, including First and Last name, provider Modality[1] from the dropdown menu, Medicare Provider Number or Medibank Private Provider Number.



6. Attach a copy of each Provider's confirmation of registration for this practice and modality via one of the following acceptable methods;
   a. A Medicare Australia Provider Letter for the Registered Address of the Practice, or
   b. A Print out of the HPOS Medicare Registration Status for the Registered Address of the Practice with Date/Time of access visible or
   c. A Medibank Private Provider Letter for the Registered Address of the Practice AND a current Certificate of registration from each Provider's professional association.

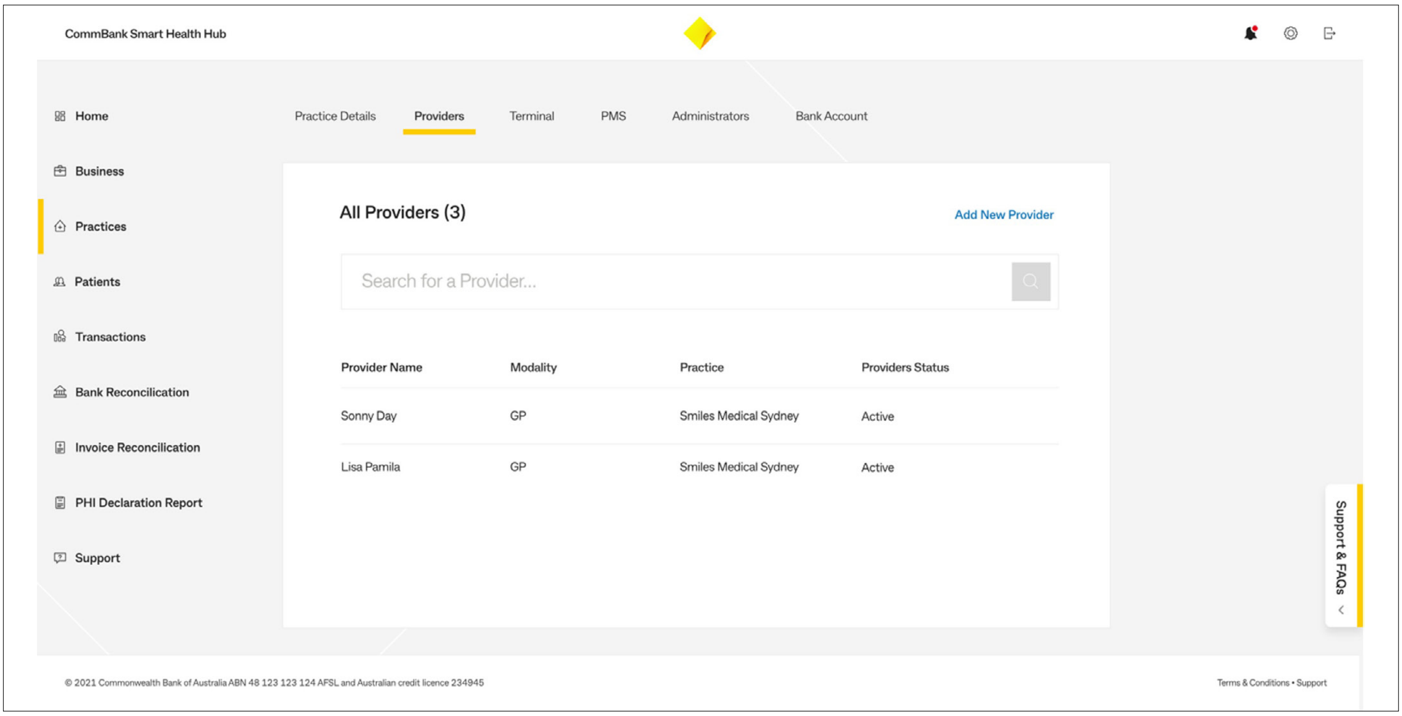
Medicare Australia Provider Letter/HPOS Printout is required for the following modalities/service types: Audiology, Chiropractors, Dentists, Dental Prosthetists, Dietitians, Exercise Physiotherapists, Podiatrists, Psychologists and Speech Pathologists.

Medibank Private Provider Letter is required for modalities/service types: Acupuncturists, Counsellors, Myotherapists and Remedial Massage Therapists.

7. Add Email Address and Mobile Number.
8. Click ***Save Provider Details***.

[1] Note: If you are a provider with more than one modality, you need a provider number for each modality you service in each practice location. This means each practitioner will have a different provider number, per practice, per modality. Where providers have more than one modality and provider number, each will need to be added to each practice separately. For example, Dr Smith is a registered Dentist and Orthodontist at Sydney Smiles, so needs to be added as a Dentist with one provider number and an Orthodontist with a separate provider number at the Sydney Smiles practice.

Once details are saved, you will be taken to the All Providers page within the Providers tab. The status field for the newly added provider will change to "Provider Pending," then "Active," as shown below. This means the new provider registration has been received and is being verified by CBA. Once Active, providers can immediately begin Medicare claiming. For Private Health fund, registration with funds is completed progressively over a 72 hour period, so please allow up to 72 hours for CBA to register you with all participating funds, and verify your documents, before claiming is permitted.



What happens if you try to claim before a provider is approved?
If you try to claim before provider registration is successful, you will receive the following error message: "Creating Invoice Unsupported Claim Type Error code:400" with a ***Cancel*** button. If this occurs, please wait the full 72 hours before claiming. If Error code:400 is received post 72 hours from provider registration, please contact the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What happens if you change address of practice and providers are issued with a new provider number?
When you change your practice address, a new Medicare provider number will be issued to you. In order to continue claiming with your new provider number, you will need to request change of address by contacting the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday, to update your address. Once we process your request, all existing provider details will be deleted. You will need to add provider details by following steps in section 5 of this user guide.

What's your next step?
Linking your CommBank Smart Terminals.

6. Linking terminals

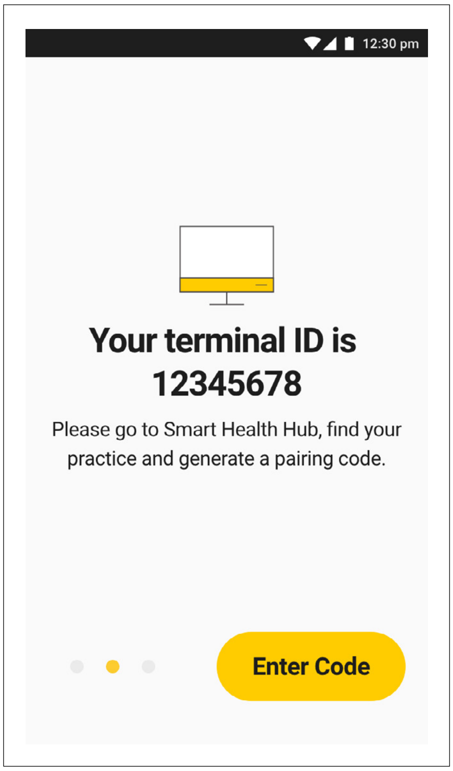
This step links your CommBank Smart Terminal to the CommBank Smart Health Hub so they can connect to each other.

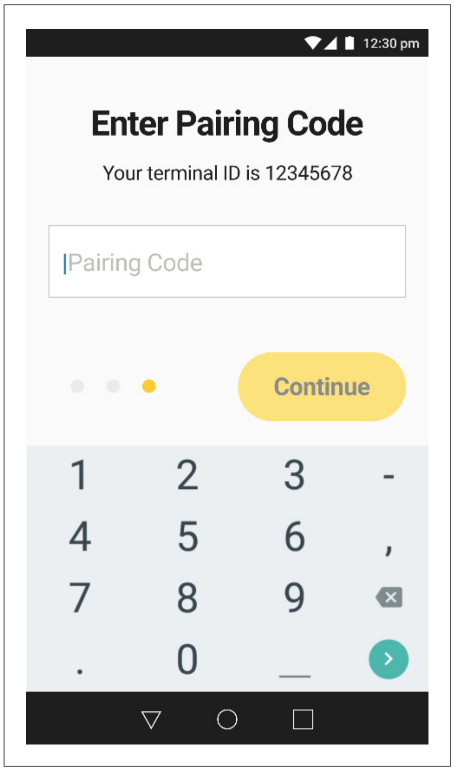
Terminals are added to your CommBank Smart Health Hub at registration. Once a terminal is approved for use, it automatically appears in the Terminal tab (accessed from the Practices page, then by clicking on a specific practice to get to the Practice Details page).

If you need more terminals than have been approved, please contact the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What does the terminal Home screen look like when you start it up?
The first time you launch the Smart Health app you will be greeted with the "Welcome" screen. Swipe left to reveal to "Terminal ID" screen followed by the "Enter Pairing Code" screen.

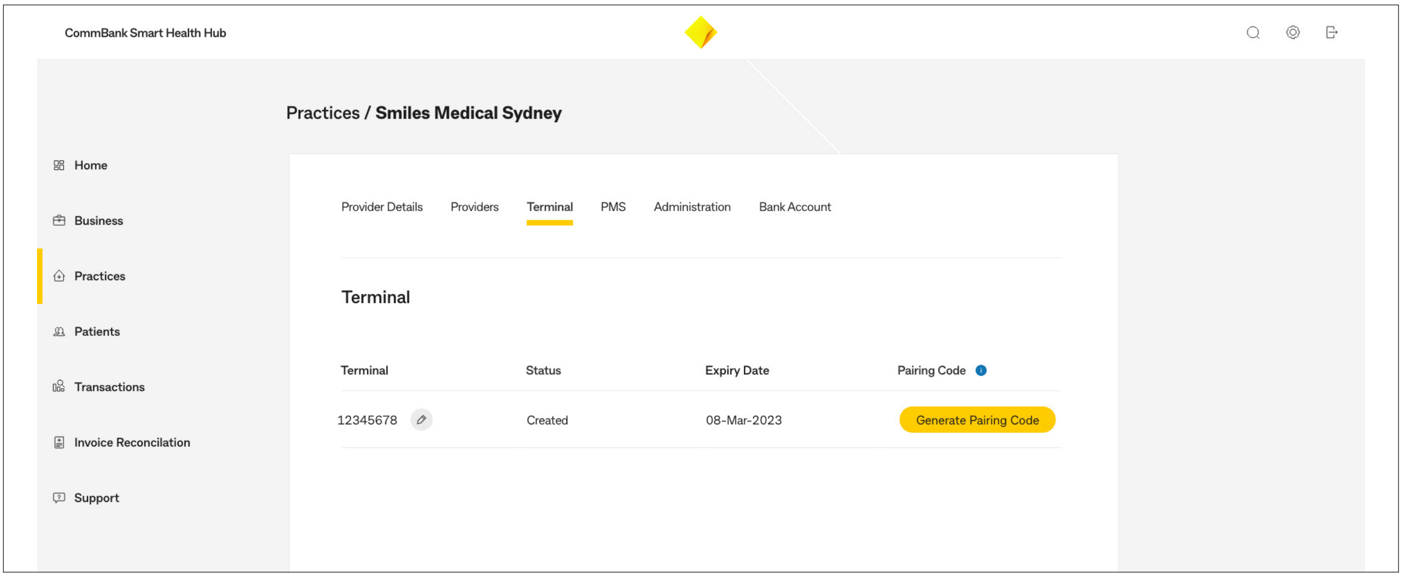
You use this screen to link your terminal to the CommBank Smart Health Hub.

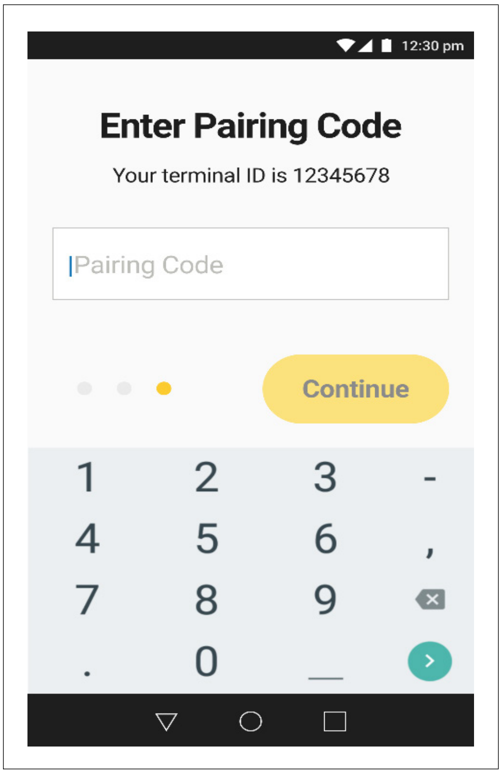




How do you link your terminal to the CommBank Smart Health Hub?
You only need to do this step once.

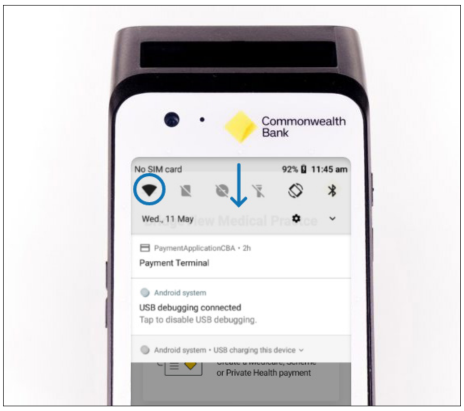
1. In the CommBank Smart Health Hub, navigate to the practice where the terminal is located by clicking on the Practices menu at left, clicking on the specific practice, and then clicking the Terminal tab. Identify the terminal in front of you using the Terminal ID which is displayed in the Smart Health app on the terminal (refer to screen shots on the previous page).



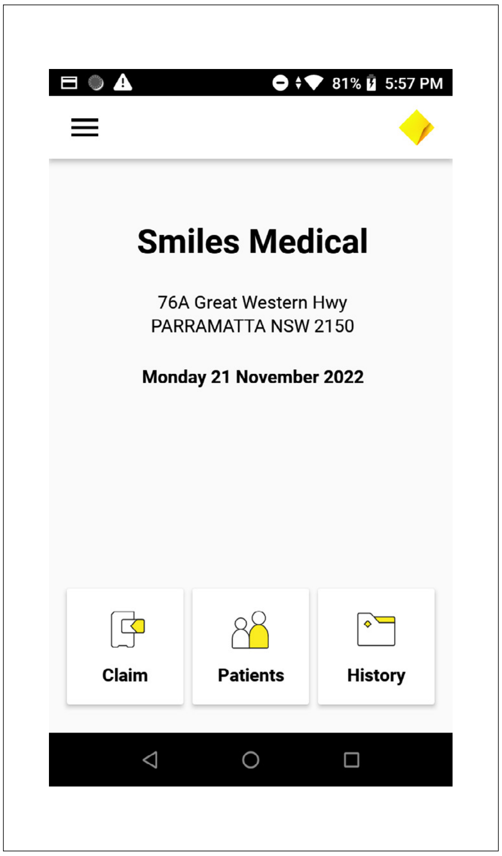


2. In the Commbank Smart Health hub click on the “Generate pairing code” associated with the terminal in front of you.
3. On your terminal, within the Smart Health app enter this pairing code you have just created on the “Enter pairing code” screen and press “continue”
4. When prompted tap “yes” to allow location services.

   Note: Even if not connected via Wifi please ensure this is turned “On”. To do this swipe down from the top of the terminal screen and tap the Wifi icon as pictured.



5. Follow this process for every terminal you have been allocated.



7. If the download is successful and you're connected to the hub, an "Initiating system" message appears and you land on the terminal Home screen, which will look like this:

   Practice Name: Smiles Medical

   Practice Address: 76A Great Western Hwy
   Parramatta NSW 2150

   Claim: Tap to start a new payment and claim

   History: Tap to view settled transactions

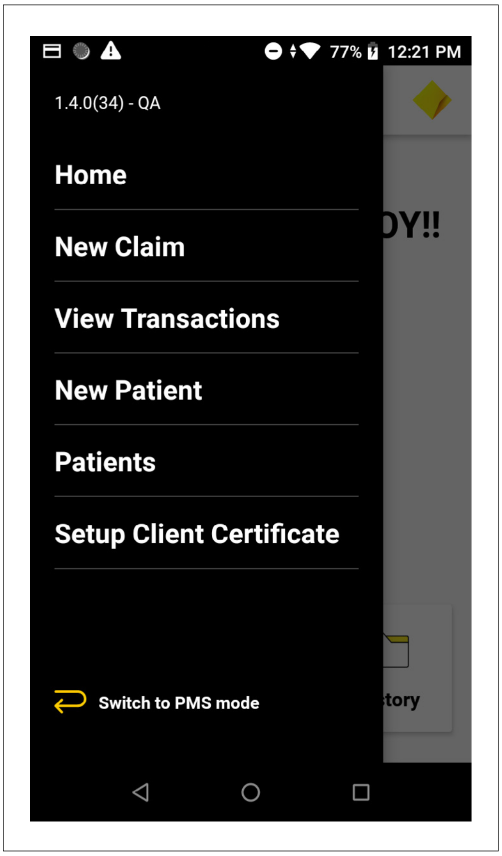
   Patients: Tap to search existing patients or add new patient

Congratulations, your terminal is now linked to the CommBank Smart Health Hub.

If the download is unsuccessful an error will display "Invalid id / PIN". Please try again by re-inserting your ID and PIN, and if you're still having trouble, please contact the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

How do you navigate the Terminal?
The Smart Health App is already pre-loaded on the terminal. Its three most-used menu items are Claim, Patients and History. You access these via the Home screen, shown above.

You can also access two additional menu items from the app's Hamburger menu, at top left. This menu is shown below.



As well as returning you to the App's Home page, the two additional menu items are:

Patients: A list of all the patients you have added to the app, and

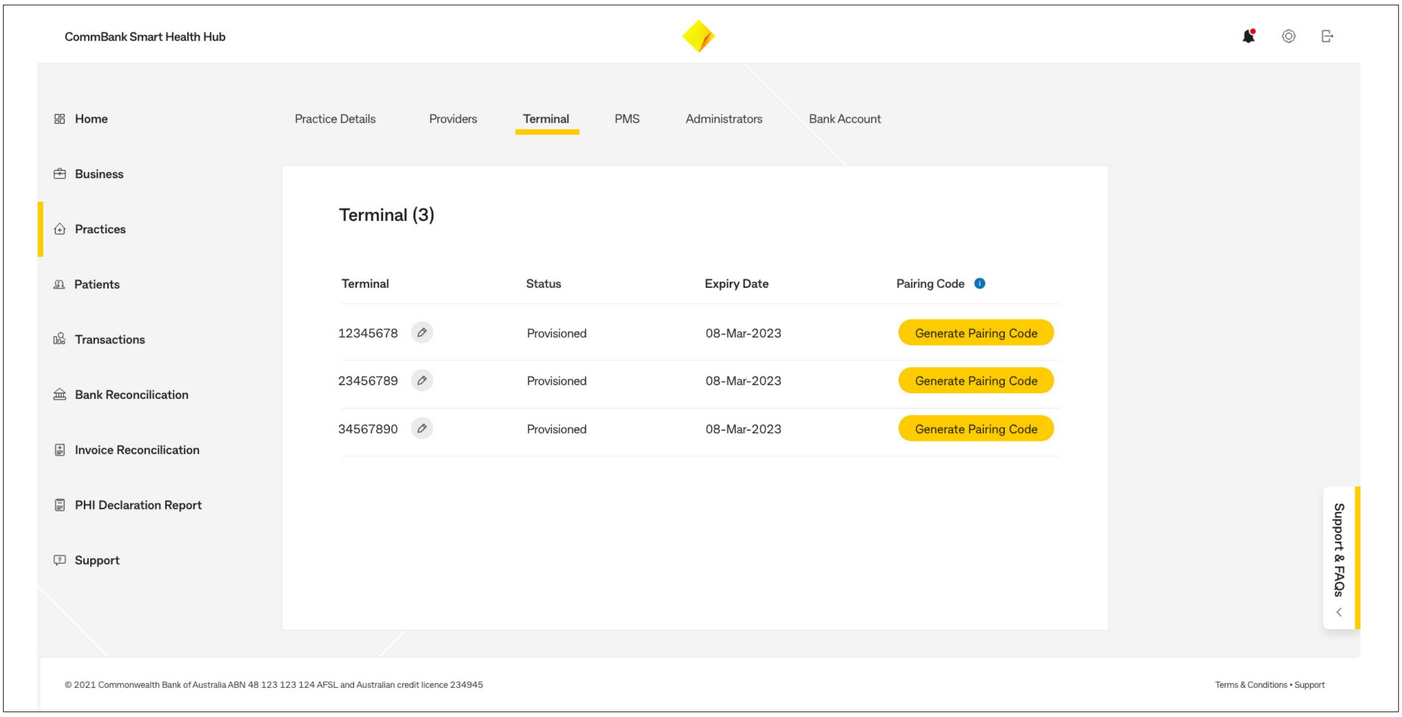
Setup Client Certificate: Access to the Setup Client Certificate Screen to connect the terminal to the hub.

Should you give each terminal a nickname?
Yes, especially if you have more than one terminal linked to your account. This avoids confusion by helping practice users identify which terminal they are sending transactions to.

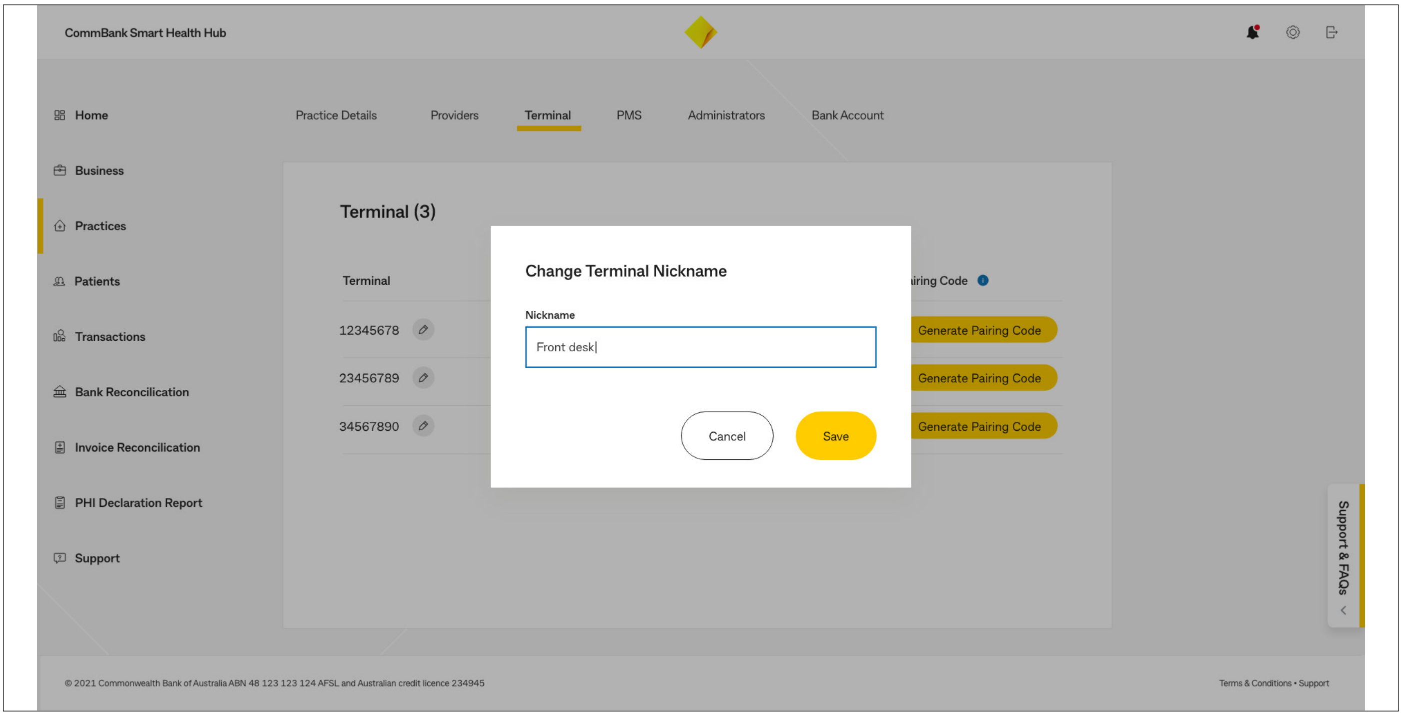
Helpful Tip: When renaming, keep the original terminal number and add a nickname to that. For example, Northern Rivers front desk, 1204765412. This is because your Terminal ID number is printed on all terminal receipts. So, if you need to replace a terminal, you must be able to quote the original Terminal ID number to the CommBank Smart Health Help Desk.

How do you create a terminal nickname?

1. Click on the Edit icon next to the Terminal ID.



2. The Change Terminal Nickname popup appears, containing a free format field. Type in your nickname.



3. Click **Save** (or ***Cancel*** if you do not wish to add a nickname).

What should you do if you have more terminals than login details?
If you have, for example, two terminals and can only see one Terminal ID on the Terminal page, please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What's your next step?
Integrating with your Practice Management System (PMS), or if you're not integrating, go to Section 8 Adding Patients.

7. Integrating with your Practice Management System (PMS)

Do you have to link your PMS to the Smart Health Hub to use the Smart Health App?
No. There are two ways you can use our CommBank Smart Health Hub:

- **Integrated mode** – the Smart Health Hub and Associated Terminals ***are linked*** to your PMS, or
- **Standalone mod**e – the Smart Health Hub and Associated Terminals ***are not linked*** to your PMS.

The Smart Health Hub works equally well in both modes. The difference is in how you get to the point of invoice creation:

In integrated mode, you initiate all transactions from your PMS:

- Saving you time in transaction processing
- Reducing the risk of typing in transactions incorrectly, and
- Enhancing reconciliation efficiency.

In standalone mode you initiate all transactions from the terminal, and type in all details manually.

Once the invoice is raised, the next steps are identical for both modes.

So, if your PMS cannot yet be integrated with our CommBank Smart Health Hub, and you're using the Smart Health App on the terminal in standalone mode, please disregard this section and go to Section 8, Adding Patients.

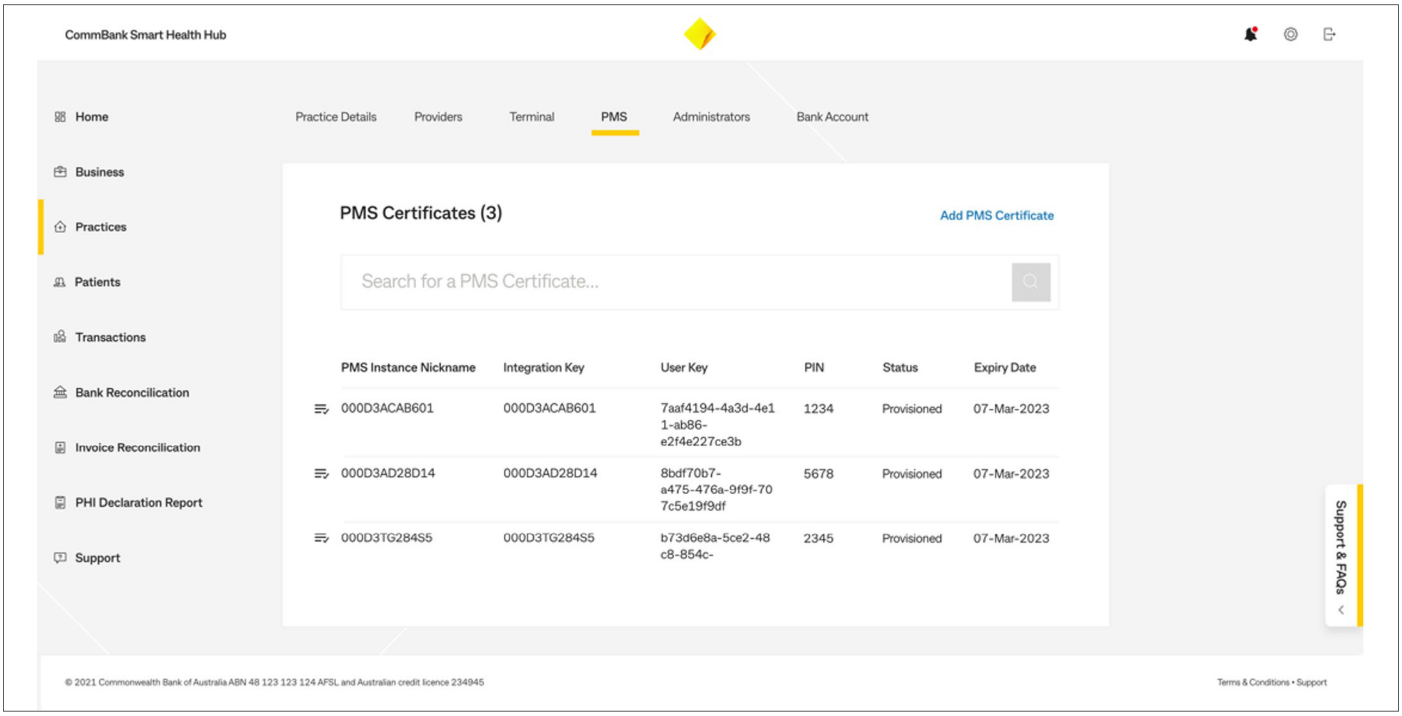
How do you link your PMS to our CommBank Smart Health Hub?

From the Home page, click the ***Practices*** tab on the menu at left. You are now on the Practices page.

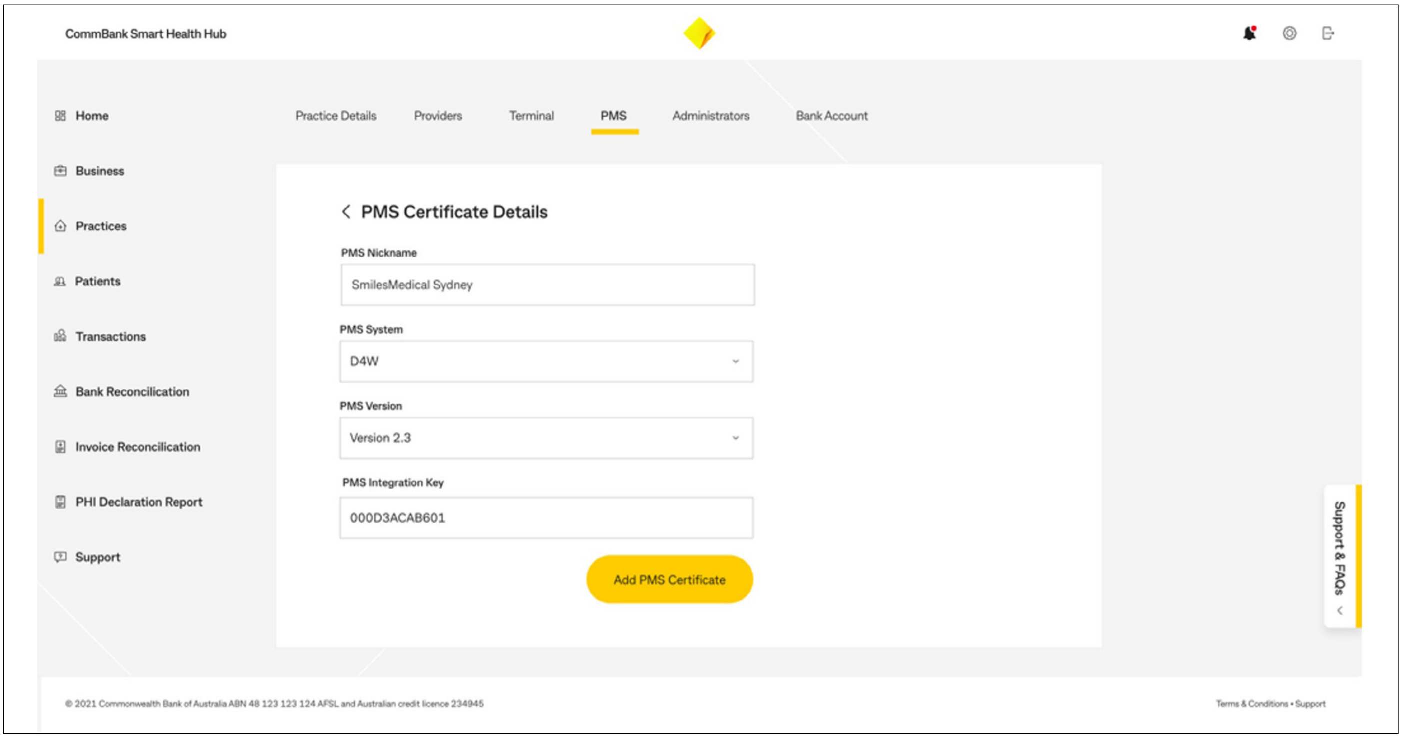
On the Practices page, select the relevant practice from the dropdown menu, or from the practice list below the search bar, then click the ***PMS*** tab on the top menu. This screen will be empty.

First, you have to add a PMS certificate to the CommBank Smart Health Hub by:

1. Clicking ***Add PMS Certificate*** at top right, shown below.

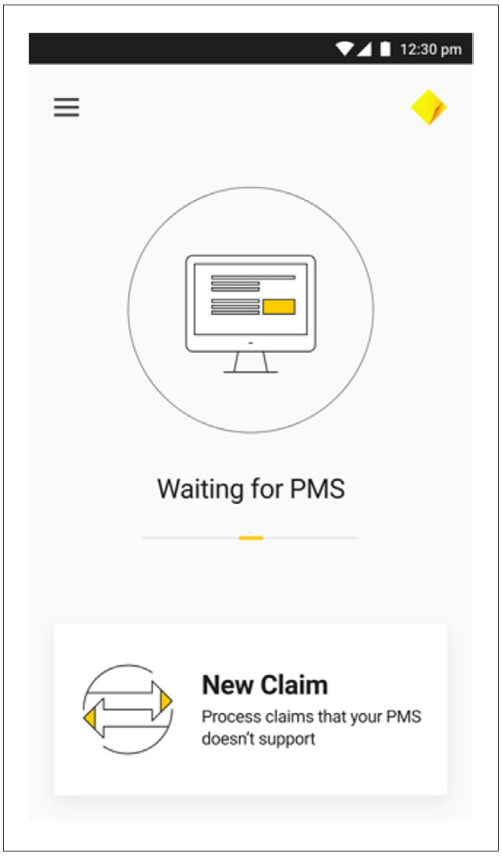


2. Typing in a PMS Nickname into the blank field, shown below, using a combination of your location and the software. For example, "Dental 4 Windows, Northern Practice.



3. Selecting the PMS System your practice uses from the dropdown box.
4. Selecting the PMS Version you use from the dropdown box (select the minimum version required).
5. Creating and entering a PMS Integration Key of your choice in the PMS Integration Key field. To keep things simple, we recommend using your PMS Nickname as your PMS Integration Key.
6. Clicking ***Add PMS Certificate***.
7. You are now taken back to the Practices page. Finalise the link by:
8. Clicking the ***PMS*** tab.
9. Refreshing the PMS page. The Status will change within seconds from "Created" to "Provisioned".
10. When it says "Provisioned" copy and paste your PMS Integration Key, User Key (this is automatically generated for you) and PIN into your PMS. Please refer to your PMS User Guide to find out where to paste them.

How do you know your PMS Certificate is successfully integrated?
Your PMS is successfully integrated with the CommBank Smart Health Hub when:

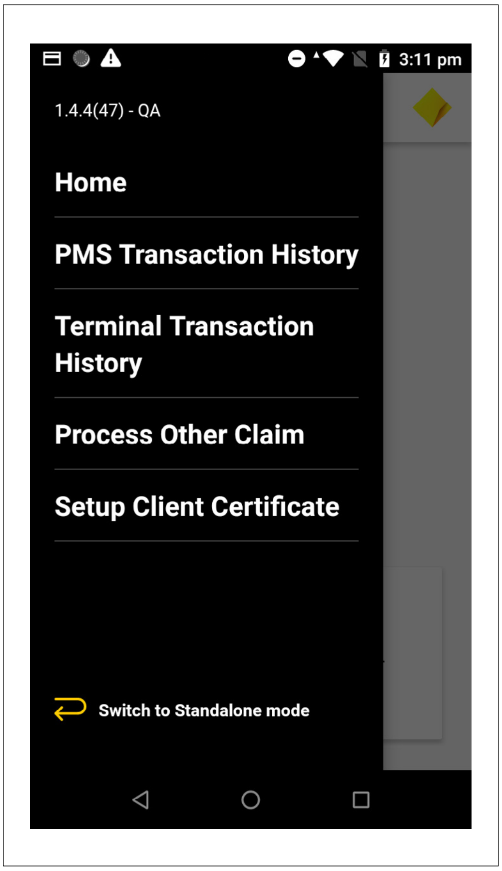


1. ***You see this message on the terminal screen:***

   "Waiting for PMS".

   This message is not an error. It's the terminal's standby mode, and means your terminal is ready and waiting instruction from your PMS.

So, **it will always say this** until a transaction is sent to it from your PMS.



2. ***The terminal's Hamburger menu now looks like this:***

   You can see that this is different to the Hamburger menu on a standalone terminal (shown on page 33).

   Now that your PMS is integrated with the CommBank Smart Health Hub, the menu items have slightly changed and now include:

   Home: A quick way to get back to the terminal Home screen.

   PMS Transaction History: A list of all transactions initiated in your PMS.

   Terminal Transaction History: A list of all transactions initiated in on the terminal.

   Process Other Claim: A way to process a transaction in standalone mode, separately from your PMS (just like tapping ***Claim*** in the standalone terminal screen).

   Setup Client Certificate: Access to the Setup Client Certificate Screen to connect the terminal to the hub.

   Switch to Standalone mode: A quick way to switch from integrated to standalone mode, or vice versa

Congratulations, you're ready to process payments and claims.

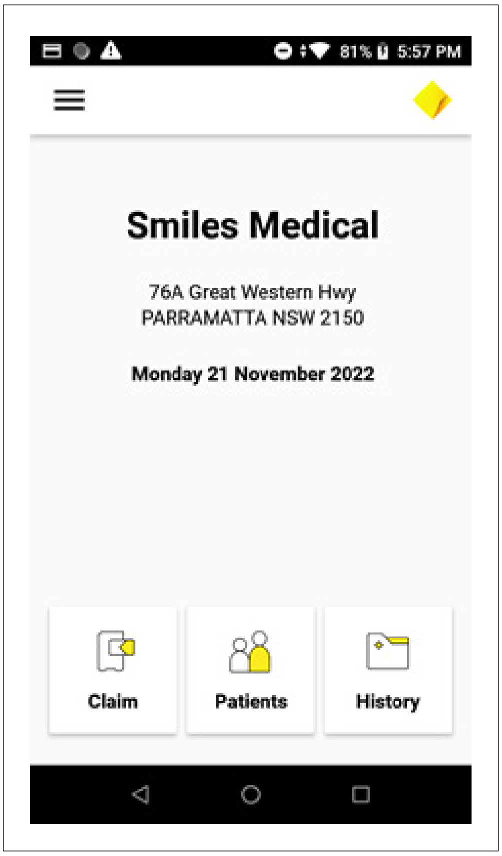
Transactions and invoices will now run straight from your PMS, through the CommBank Smart Health Hub, to the terminal and back again.

For how long is my PMS Certificate valid?
It's valid for one year. To renew it, please call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Can you use the terminal in standalone mode, even if it's integrated?
Yes. If you're a practitioner, for example, wanting to treat an overseas visitor or student or a person visiting from interstate, and don't want to add their details to your PMS.

To move from integrated to standalone mode:

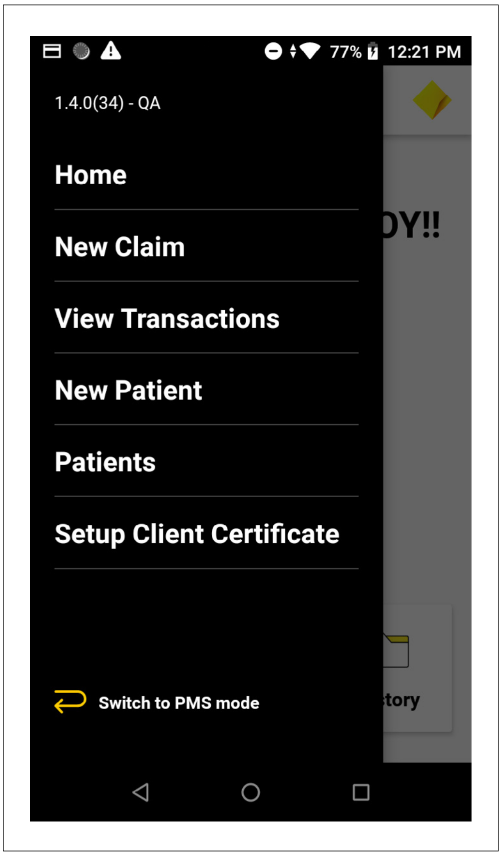
In integrated mode, when terminal screen says, "Waiting for PMS," tap ***Claim*** in the box at the bottom of the screen. You can also toggle between modes by clicking "Switch to Standalone mode" at the bottom of the Hamburger menu, shown in the image above.



You're now on the practice home screen in standalone mode, which looks like this, at left.

To process the transaction, see the standalone claiming process on page 40.

How do you know if the integration hasn't worked?
The terminal screen looks like this:



The terminal's Hamburger menu still looks like it does in a standalone terminal, at left.

Or

You will receive errors when you try to initiate the invoice. Specifically, an error code will appear, advising that integration has failed. If this happens:

- Check your credentials and try again
- Ensure that your PMS Certificate has not expired, and/or
- Contact your PMS provider for assistance.

Who can you contact for error messages?
If you have any questions on where to place to PMS Integration Key or where to paste your User Key and PIN in your PMS please contact your PMS provider:

Dental 4 Windows – https://www.centaursoftware.com.au/contact-us/ or 1300 855 966

Optomate – https://www.monkeysoftware.com.au/contact-us.html or 1300 650 295

Best Practice – https://bpsoftware.net/contact/ or 1300 401 111

You've now completed your onboarding process, and are ready to process transactions. Because you have a PMS, you do not need to create a patient database, so please disregard Section 8 and go straight to Processing Payments and Claims on page 40.

8. Adding patients

If you're currently unable to link your PMS with the CommBank Smart Health Hub, or you don't use a PMS, you'll find the hub's Adding Patients capability extremely valuable.

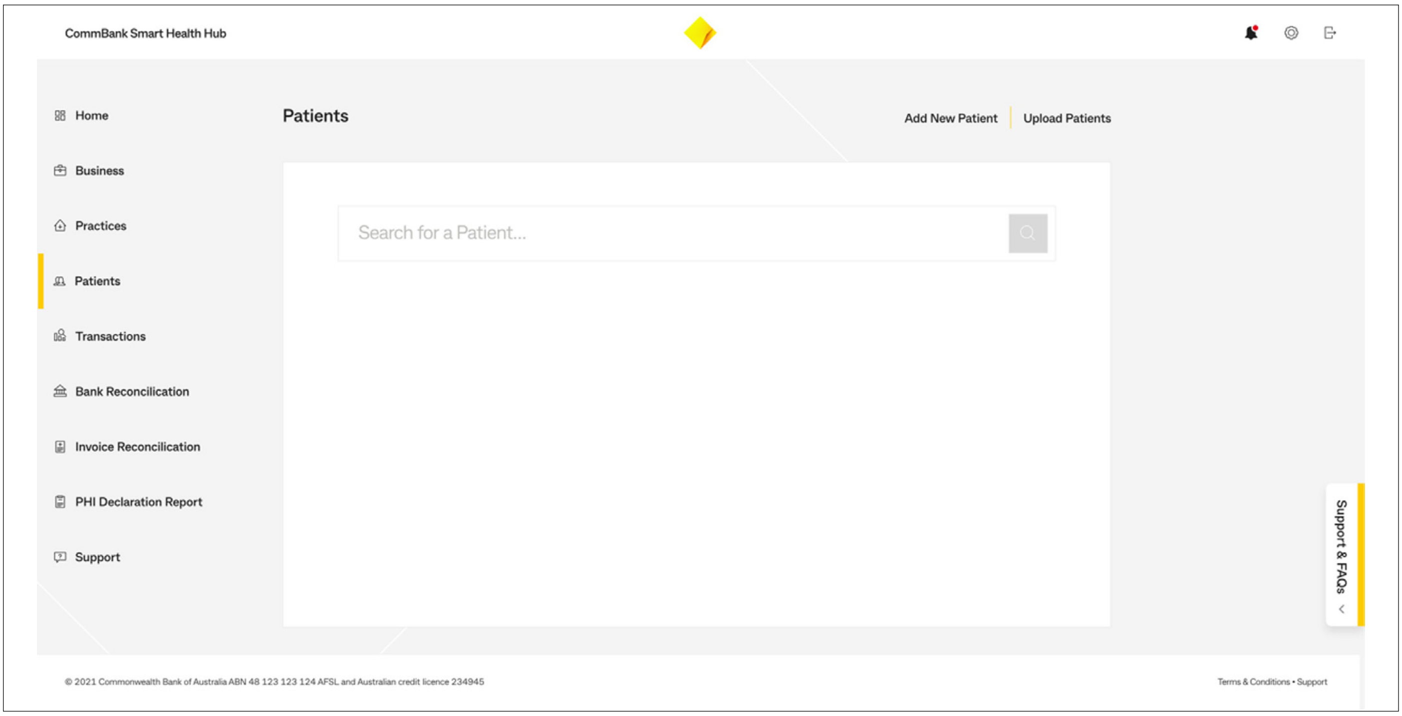
You can add or upload patients easily to the hub, so it becomes your practice's central patient database. This means you can quickly and efficiently search for patients when using your terminal to process payments and claims.

How do you add or upload patients to the hub?
From the hub's Home page, click the Patients tab at left. You're now on the Patients page, as shown below.

Here, you can:

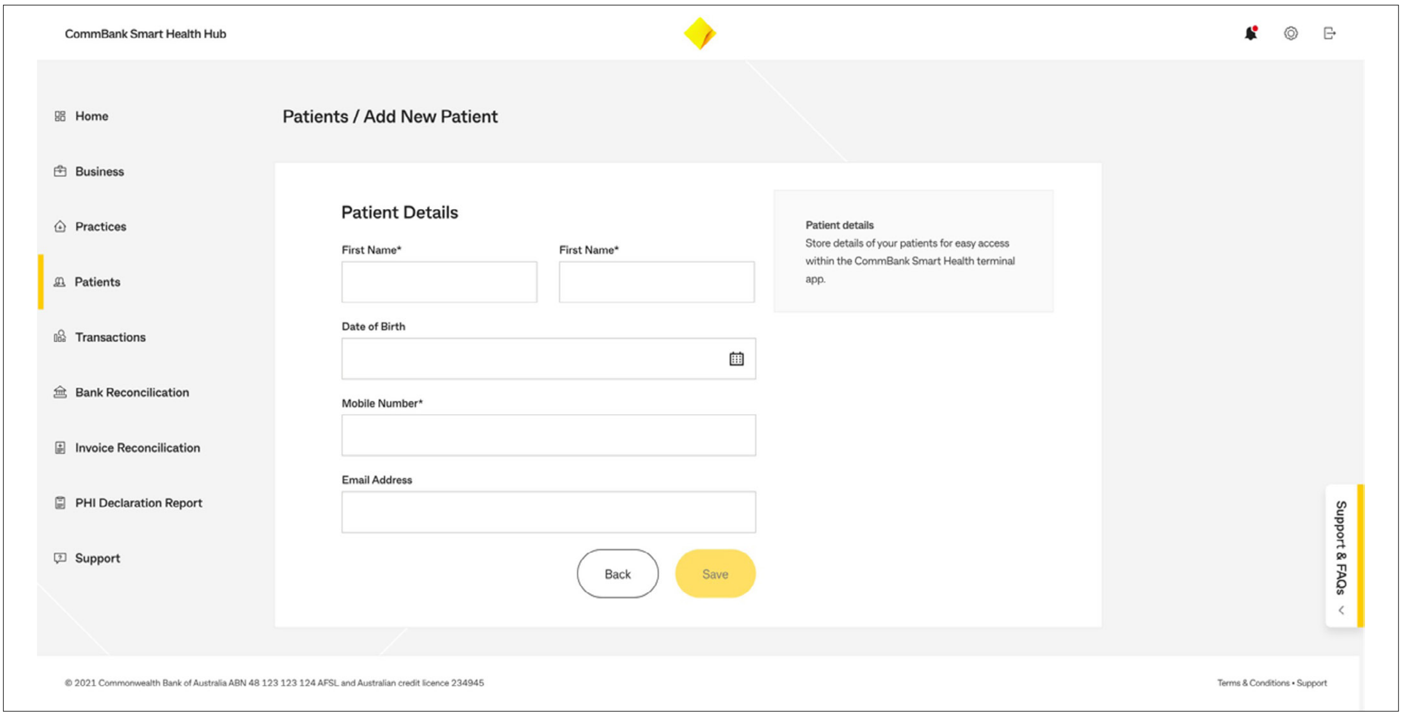
1. ***Search for existing patients***

   By typing in the patient's name in the search bar, as shown below.



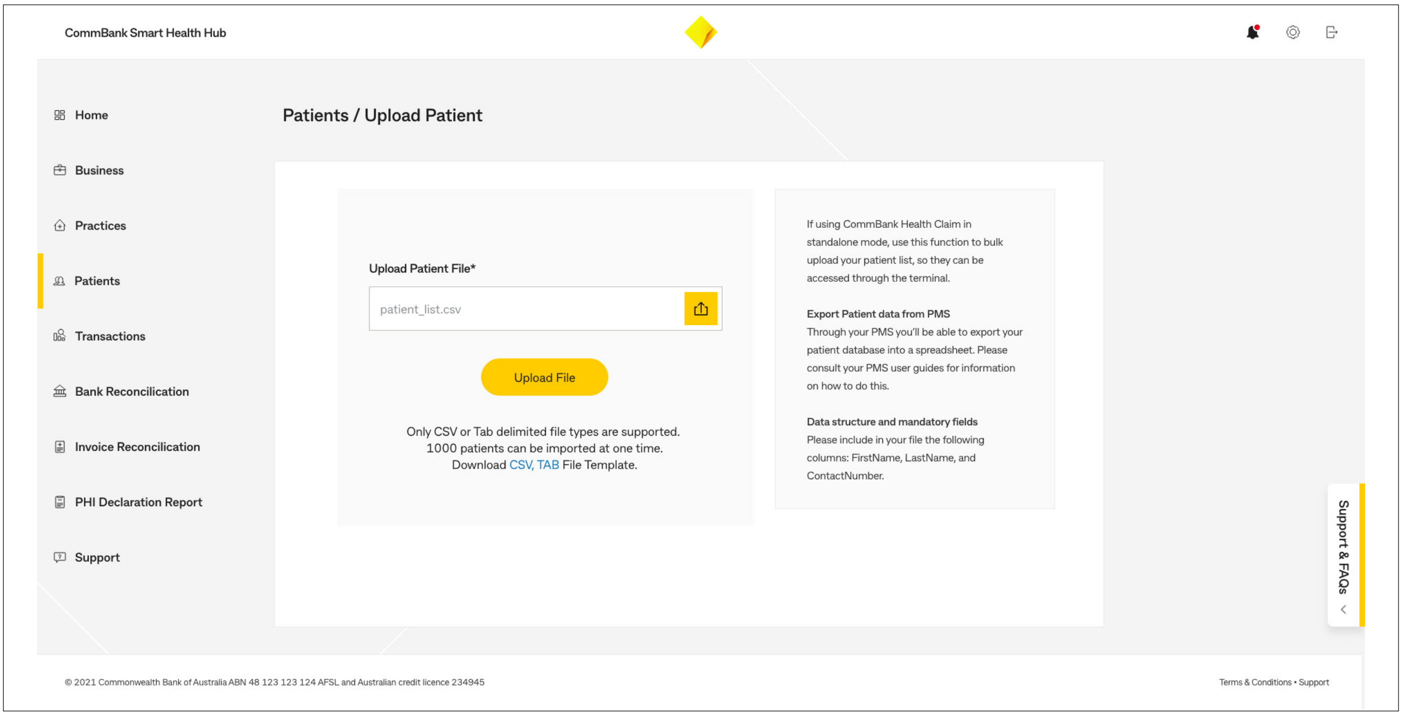
2. ***Add New Patients***

By clicking on the ***Add New Patient*** in the top right hand corner of the page. On the Add New Patient page, fill in patient details, including First Name, Last Name, Date of Birth, Mobile Number and Email address. Then click ***Save***.



3. ***Upload Patients***

By clicking on Upload Patients in the top right hand corner of the Patients page.



You can bulk upload your patients quickly and easily to the hub by clicking the ***Upload*** arrow button to select a file, or ***Upload File*** to do the same. This simple file template can be downloaded by clicking on the hyperlinked ***CSV*** or ***TAB*** file format buttons, as shown above, and must include a patient's First Name, Last Name and Contact Number.

You've now completed your onboarding process, and are ready to process transactions.

Processing payments and claims

Processing transactions: Overview

You can use your CommBank Smart Terminal in both integrated and standalone modes. The difference is how you get to the point of invoice creation. Please refer to page 31 for an explanation.

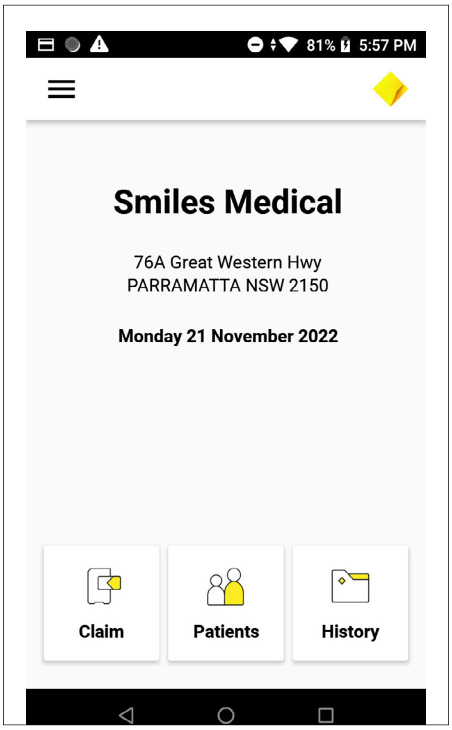
Once you have raised the invoice, follow the Next Steps in the standalone section below for each claim type, which are identical for both modes.

Processing health claims: Standalone mode

How do you initiate and process transactions in Standalone mode?

In standalone mode every transaction is manually typed in from the terminal.

You start via the Smart Health App Home screen, which looks like this:



As you can see, the Terminal Home page includes:

Practice Name: Smiles Medical
Practice Address: 76A Great Western Hwy Parramatta NSW 2150
Claim: Tap to start a new payment and claim
History: Tap to view settled transactions
Patients: Tap to search existing patients or add new patient

The terminal's hamburger menu at top left also includes:

Home: To get back to the terminal's Home page
New Claim: As described above
View Transactions: As described above
New Patient: Tap to add new patient
Patients: Tap to search existing patients or add new patient
Setup Client Certificate: Access to the Setup Client Certificate Screen to connect the terminal to the hub

To raise an invoice:

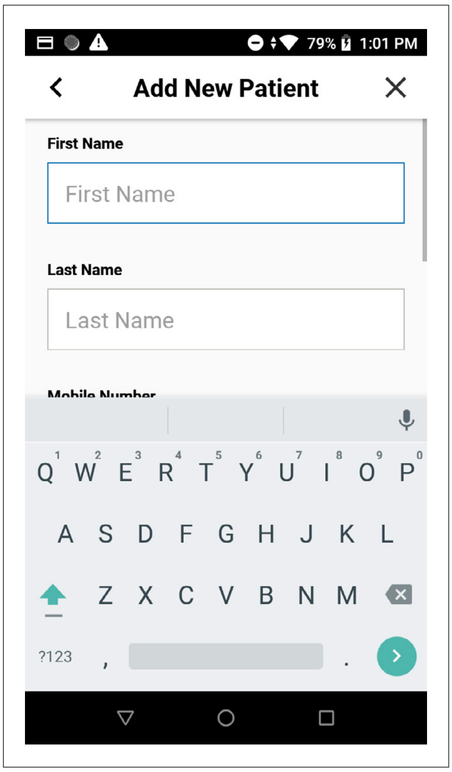
If the patient is an *existing patient*, skip to Step 2 below.

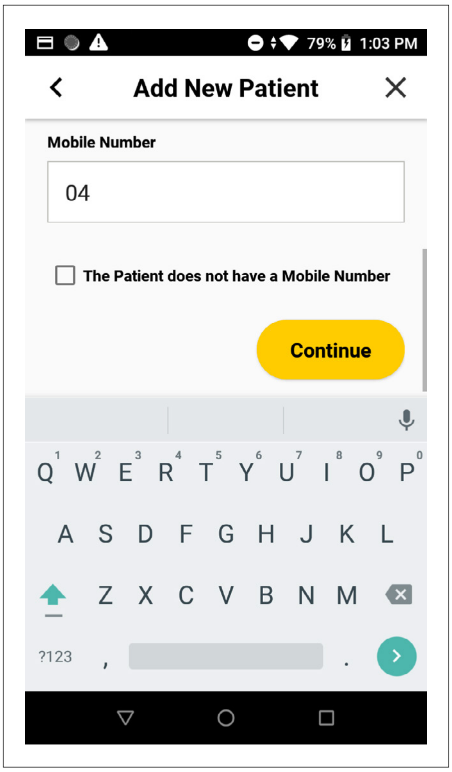
If the patient is *new* to your practice:

1. Tap ***Patients*** and select ***Add New Patient*** and type in the patient's First Name and tap ***Create***.

   Note: Mobile Number is optional however it will be required if adding more than one patient with same First name and Last name

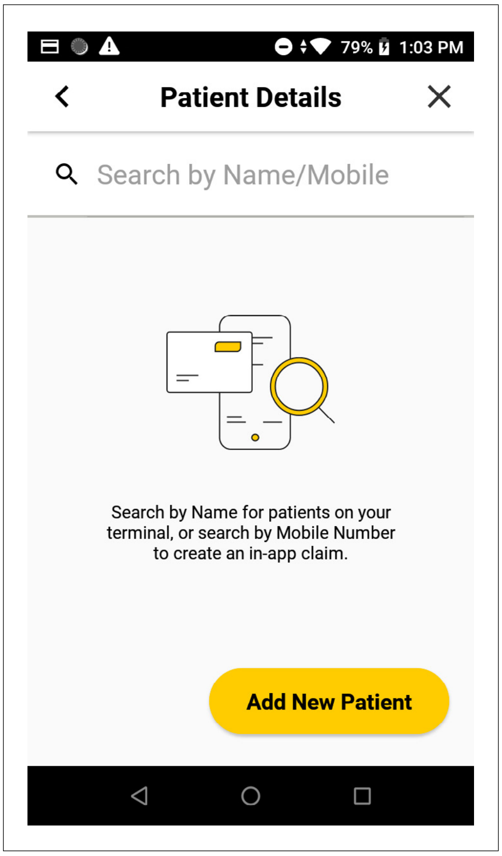
   The screens you will see when doing this are shown below.





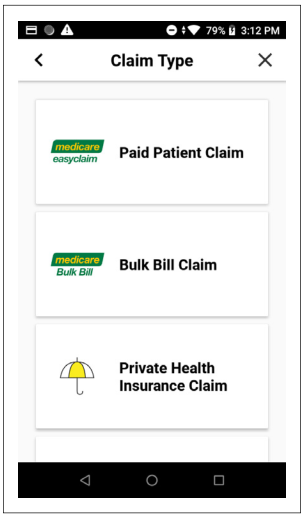
You are then taken back to the terminal Home screen.

2. Tap ***Claim***

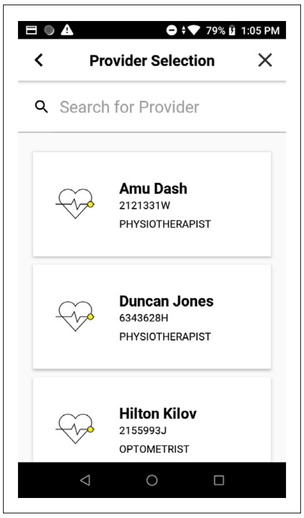


3. On the Patient details screen, use the search bar to type in the patient name or mobile number. Once you start typing the terminal auto populates the patient search, finding the name and mobile number.
4. When you find the right patient, tap ***Continue***.
5. On the Billing Selection page, select the claim type (either Paid Patient Claim, Bulk Bill Claim, Private Health Insurance Claim, Overseas Student / Visitor Health Claim or Stock Item / Other Payment). See the relevant sections below to find out how to process each different claim type.

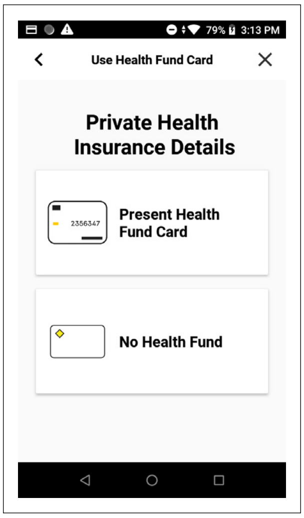
Next steps for a Private Health Claim:



1. Tap ***Private Health Fund Claim*** from the Claim Type page, shown at left.

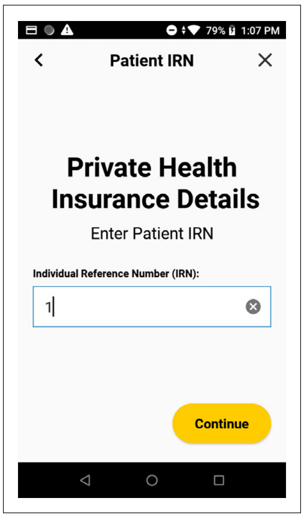


2. Select the practitioner from the Provider Selection page by typing the name in to the search bar at the top, or scrolling to find the practitioner and tapping on their name, as shown at left:

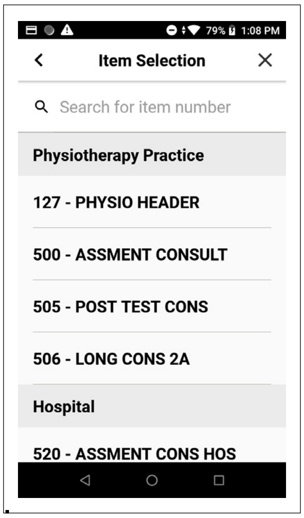


3. Tap ***Present Health Fund Card*** on the Use Health Fund Card screen, shown at left. If no health fund exists, or the patient does not have a health fund card with them, tap "No Health Fund" and proceed as below, ignoring all Health Fund claiming steps.

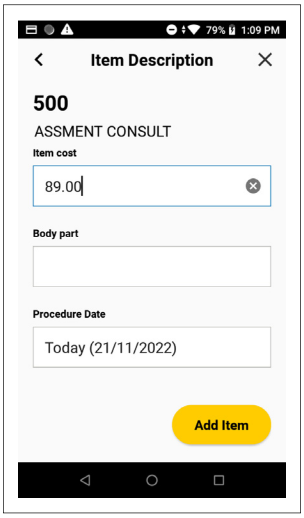
   Note: Patients can use their Digital PHI Membership card on their mobile phone instead of Swiping their PHI Membership card. They will need to activate their card, from participating insurers, on their mobile phone and bring it near the top of terminal to process the claim.



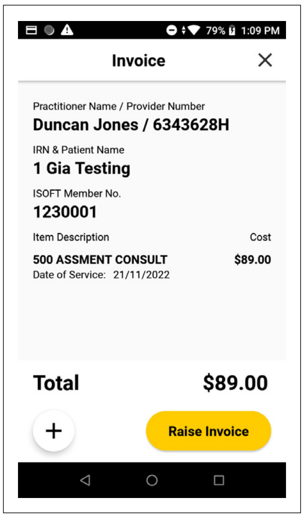
4. Type in the patient's unique member number (IRN) and tap "Green Tick" on on-screen keyboard or tap ***Continue***



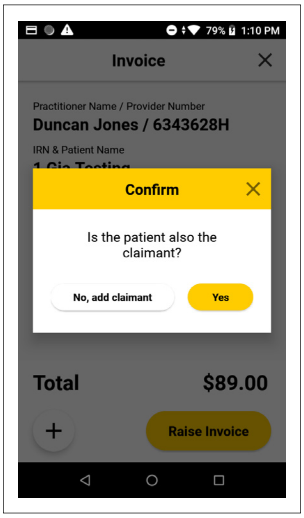
5. On the Item Selection page, either type in the item number in the search bar, or tap on the relevant item number from the preloaded item list (e.g. 500 for Assessment Consult – and if required type in the code for the body part).



6. Type in the item cost on the Add Items Details screen. Then tap ***Add Item***.



7. You are now on the Invoice screen. Here, you can:
   - ***Add a new item for the same patient*** by tapping the **+** button at bottom left. Then type in the item number or select from the available list, type in the cost on the Add Items Details screen, then tap ***Add Item***, as per Step 6 above. If you're ready to continue, tap ***Raise Invoice***, if you're not adding a new patient to the same invoice, or
   - ***Add a new patient on the same invoice*** by clicking on the + button and typing in the patient name on the search bar of the Patient details screen. Tap on the patient name to confirm details and then tap ***Continue***. Tap ***Health Fund Claim*** on the Billing Selection screen (and repeat steps 2 to Step 6, above, tapping ***Yes*** or ***No***, when the Card Reuse pop-up window appears (***Yes*** to use the same card or ***No*** to swipe a different card). If you're ready to continue, tap ***Raise Invoice***, or
   - Tap ***Raise Invoice*** if you are not adding a new patient or a new item to the invoice.

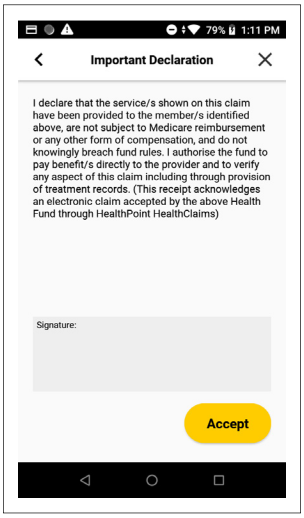


8. A pop-up window appears saying "Is this patient a claimant?". If yes, tap ***Yes***. If not, tap ***No, Add Claimant*** (use if patient and claimant are not the same;).
9. The transaction screen quickly moves from, "Creating Invoice", to "Processing Invoice", and then "Waiting for Response from your Private Health Insurer."

To record patient approval for PHI claim:

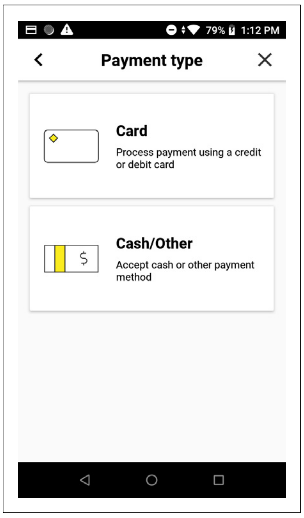
1. The patient Invoice screen shows a cost breakdown, including service provided, cost covered by the fund, any limit boost received and the gap payment. It looks like this, at left.

   Present this screen to the patient, ask them to tap ***Approve***.



2. On the next screen, if the patient accepts the charge, ask the patient to sign in the ***Signature*** field and then tap ***Accept***. If there is an error in the invoice or the patient will not accept the charge, then return to previous screen and tap ***Reject***.

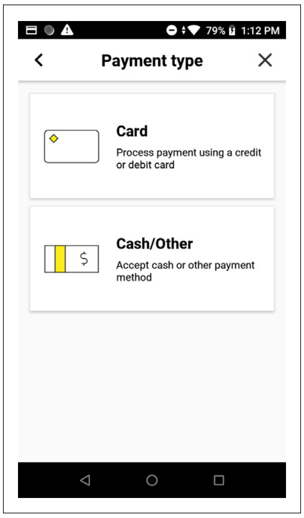
To arrange Gap payment:



By card:

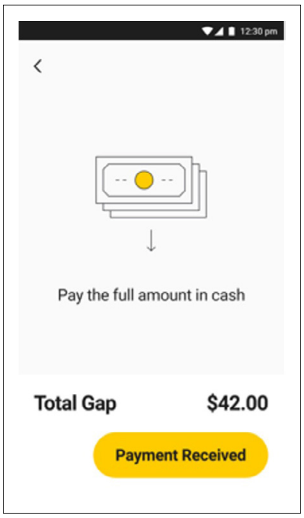
1. Where patient payment is needed, the Payment type screen appears. Tap ***Card***.

2. This takes you to the CommBank Payment App, where the gap amount appears automatically. Process the payment using Visa, Mastercard, AMEX, CUP (China union pay) or eftpos by swiping, tapping or inserting the card as appropriate.
3. The patient enters his or her PIN and taps Enter.
4. The screen says “Processing transaction.”
5. If approved, a green tick appears along with “Approved” across a copy of the receipt.
6. If the payment is declined, a red cross and “Declined” will appear on the receipt, and the screen returns to the CommBank Smart Health App asking for payment again. The patient re-uses the same card, tries another card or selects Cash as payment.
7. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish*** or ***Cancel*** (to look at the transaction once more).
8. Once you hit ***Finish***, the terminal returns to the Home screen, and the signed PHI declaration is filed by date in the PHI Declaration Report page on the CommBank Smart Health Hub. This saves you keeping physical receipts for seven years.



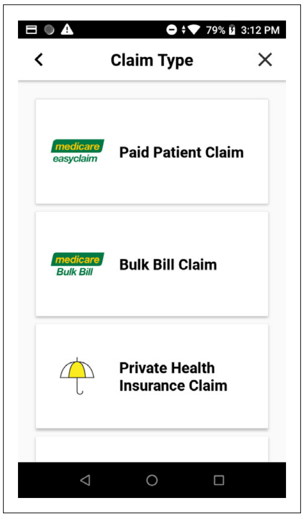
By cash:

1. Where patient payment is needed, the Select Payment Method screen appears: Tap ***Cash/Other***. “Other” can be anything from cash, to a “buy now pay later” arrangement or WeChat payment.

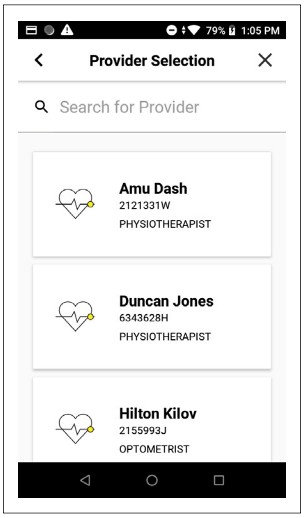


2. The Cash/Other Payment screen says “Pay the full amount in Cash,” showing the Total Gap to pay at the bottom right, as shown below.
3. The practice processes the payment elsewhere with an exchange of cash or a buy now/pay later platform. Once done, tap ***Payment Received***.
4. A Payment Success screen appears on the terminal. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish*** or ***Cancel*** (to look at the transaction once more).
5. Once you hit ***Finish***, the terminal returns to the Home screen, and the signed PHI declaration is filed by date in the PHI Declaration Report page on the CommBank Smart Health Hub. This saves you keeping physical receipts for seven years.

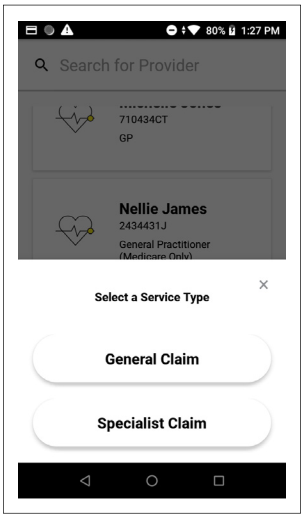
Next steps for a Medicare Claim



1. Tap ***Paid Patient Claim*** from the Claim Type screen.



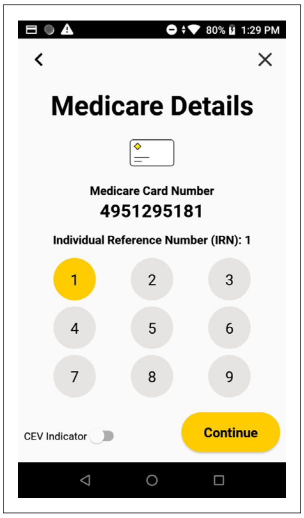
2. Select the practitioner from the Provider Selection screen by typing the name in to the search bar at the top, or scrolling and tapping on the name.



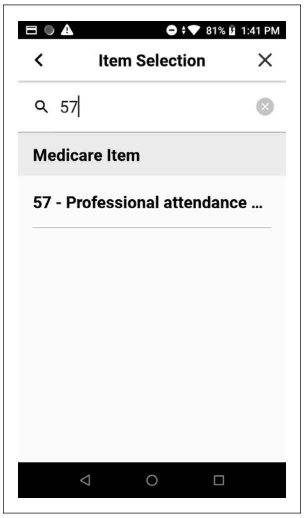
3. Select General Claim or Specialist Claim on the pop-up window that appears.

   Note: Specialists may need a referral (see page 62 for instructions on processing referrals).

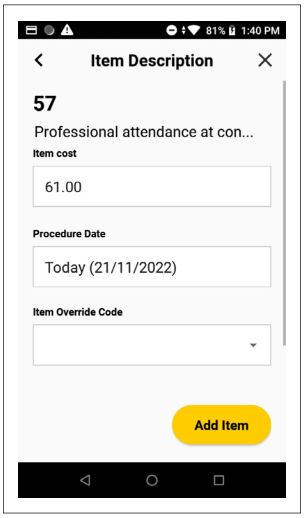
4. Select to present Medicare Card or use the field below to enter Medicare Card number manually. On the next screen, swipe the Medicare card on the Medicare Details screen.



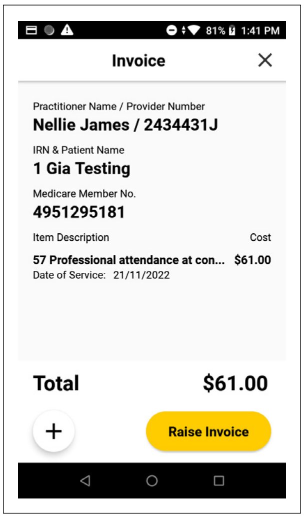
5. Select the patient's Medicare IRN, and tap ***Continue***. (Individual Reference Number, default :1)



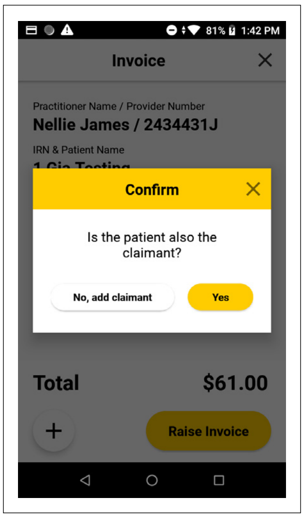
6. On the Item Selection page, type in the item number in the search bar, or tap on the relevant item number from the preloaded item list (e.g. "23" for GP consult, or "57" for Professional Attendance).



7. Type in the cost on the Add Items Details screen. Then tap ***Add Item***.



8. You are now on the Invoice screen. Here you can:
   - ***Add a new Item for the same patient*** by tapping the **+** button. Then type in the item number or select from the available list, type in the cost on the Add Items Details screen, then tap ***Add Item***, as in Step 6 above. If you're ready to continue, tap ***Raise Invoice***, if you're not adding a new patient to the same invoice, or
   - Tap ***Raise Invoice*** if you are not adding a new item to the invoice.

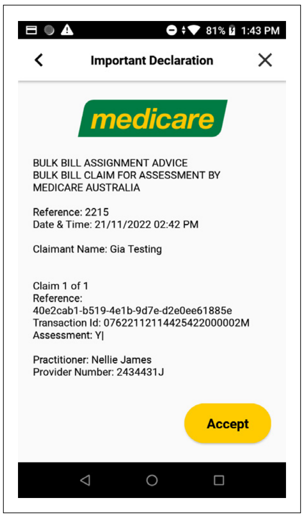


9. A pop-up window appears saying "Is the patient also the claimant?" If yes, tap ***Yes***. If not, tap ***No, Add Claimant*** (use if patient and claimant are not the same).

11. The transaction screen says, "Creating Invoice", then the Patient Invoice screen appears, showing the total cost of the services provided, and the Total Gap. Tap ***Next***. This takes you to the Select Payment Method screen, because with Medicare claims, you pay the total amount up front.

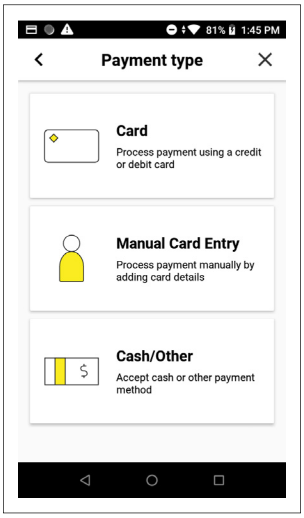
To record patient approval for a Medicare Easyclaim:

1. The Invoice screen shows a cost breakdown, including patient name, Medicare number, item description, Medicare rebate and total cost. It looks like this, at left. Present this screen to the patient, ask them to tap ***Approve***.
2. On the next screen, if the patient accepts the charge, ask the patient to sign in the ***Signature*** field and then tap ***Accept***. If there is an error in the invoice or the patient will not accept the charge, tap ***Reject***



3. Patient agrees to Medicare Declaration by tapping ***Accept***.

To arrange Medicare payment:



By card:

Please note: Patients need a ***debit*** card (cheque or savings account) to physically insert into the terminal to process Medicare payments – ***they cannot use a credit card***.

1. Where patient payment is needed, the Select Payment Method screen appears. Tap ***Card***.

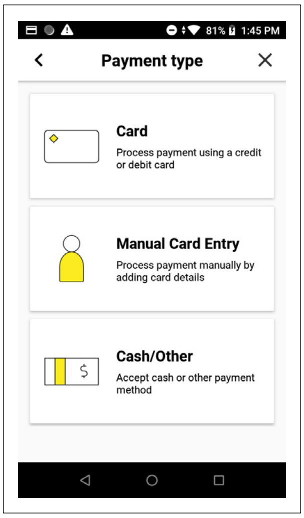
This takes you to the CommBank Payment App, where the Total Gap amount appears automatically. Process the payment using eftpos by swiping or inserting the card as appropriate.

2. The patient enters his or her PIN and taps ***Enter***.
3. The screen says "Processing transaction".
4. If approved, a green tick and "Approved" appear across a copy of the receipt.

   (If the payment is declined, a red tick and "Declined" appear on the receipt, and the screen automatically returns to the CommBank Smart Health App asking for payment again. The patient re-uses the same card, tries another card or selects Cash as payment.)
5. Remove the Card. Tap ***Print Receipt*** (if the patient requests a hard copy of the receipt) ***Finish***, or **Cancel** (to go back to the transaction screen).
6. A Please Wait screen appears saying "Waiting for response from Medicare," then "Payment Successful". The Status displays as "Rebate pending" and the Medicare figure is shown at the bottom.

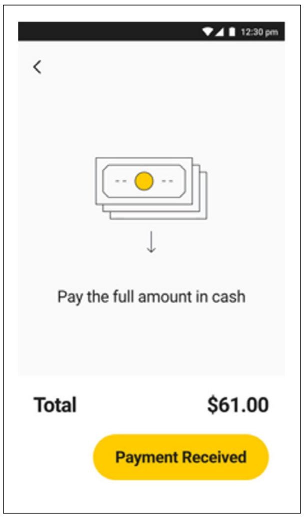
The Medicare Rebate is now processed.

7. A Medicare Rebate Invoice screen appears with the total rebate amount shown at the bottom. Tap ***Proceed*** to continue or ***Reject Rebate*** to go back.
8. If you Proceed, the CommBank payment app opens, with the prefilled rebate amount to be deposited onto a card (as mentioned a savings or cheque account). Swipe or insert the card to process the deposit, select savings or cheque account, and enter the PIN.
9. The screen switches back to the CommBank Smart Health App indicating payment and rebate success, and displaying a summary of the transaction.
10. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish*** or ***Cancel*** (to look at the transaction once more).
11. Once you hit ***Finish***, the terminal returns to the Home screen, and the signed Medicare Declaration is filed by date in the Medicare Declaration Report page on the CommBank Smart Health Hub. This saves you keeping physical receipts for seven years.



By cash:

1. Where patient payment is needed, the Select Payment Method screen appears. Tap ***Cash/Other***. "Other" can be anything from cash e.g. "buy now pay later" arrangement or WeChat payment.

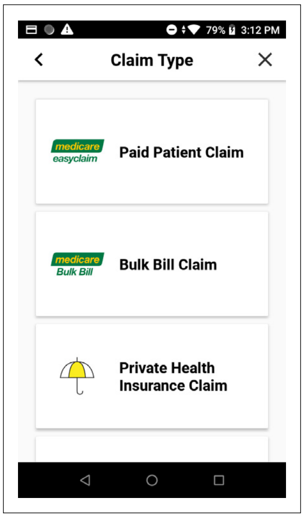


2. The Cash/Other Payment screen says "Pay the full amount in Cash," showing the total to pay at the bottom right. Tap ***Continue***.
3. A Please Wait screen appears saying "Waiting for response from Medicare," then "Payment Successful". The Status displays as "Rebate pending" and the Medicare figure is shown at the bottom.

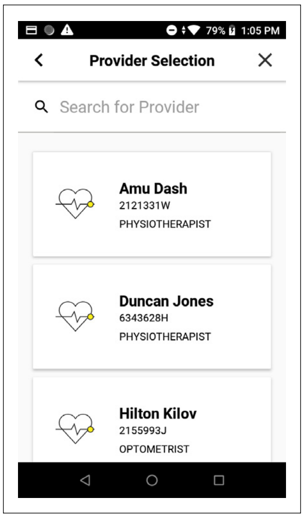
The Medicare Rebate is now processed with a physical debit card with a linked savings or cheque account.

4. A Medicare Rebate Invoice screen appears with the total rebate amount shown at the bottom. Tap ***Proceed*** to continue or ***Reject Rebate*** to go back.
5. If you Proceed, the CommBank payment app opens, with the prefilled rebate amount to be deposited onto a card (as mentioned a savings or cheque account). Swipe or insert the card to process the deposit, select savings or cheque account, and enter the PIN.
6. The screen switches back to the CommBank Smart Health App indicating payment and rebate success, and displaying a summary of the transaction.
7. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish*** or ***Cancel*** (to look at the transaction once more).
8. Once you hit Finish, the terminal returns to the Home screen, and the signed PHI declaration is filed by date in the PHI Declaration Report page on the CommBank Smart Health Hub. This saves you keeping physical receipts for seven years.

Next steps for a Medicare Bulk Bill

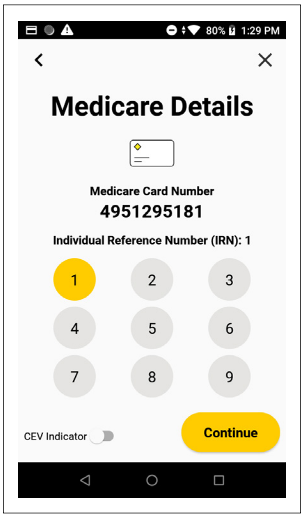


1. Tap ***Bulk Bill Claim*** from the Claim Type screen.

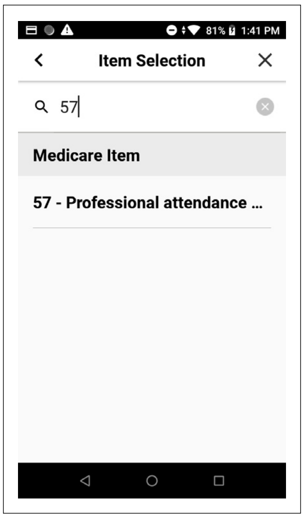


2. Select the practitioner from the Provider Selection screen by typing the GP's name in to the search bar at the top, or scrolling and tapping on the GP name.
3. Select the Service type from the Dropdown menu on the Select Service Type pop-up window, then tap ***Next***.

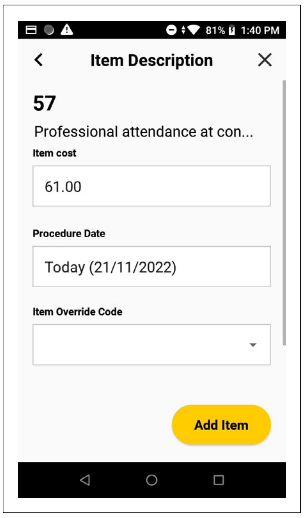
4. Tap "Select to present Medicare Card" tile to swipe patient's Medicare card.



5. Individual Reference Number (IRN): 1 is preselected. Make a selection of patient's IRN by selecting a number on the keypad and tap ***Continue***.



6. On the Item Selection page, either type in the item number in the search bar, or tap on the relevant item number from the preloaded item list (e.g. "23" for GP consult).

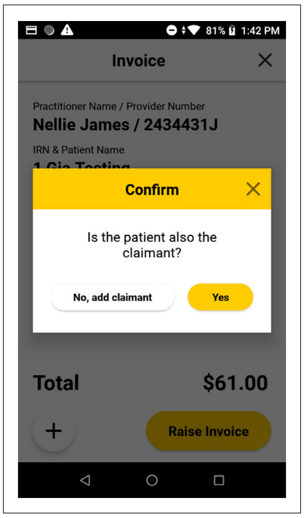


7. The cost automatically loads onto the Add Items Details screen (this is the maximum amount Medicare pays for that item). Then tap Add Item.

8. You are now on the Invoice screen. Here you can:

   - ***Add a new Item for the same patient*** by tapping the **+** button. Then type in the item number or select from the available list, type in the cost on the Add Items Details screen, then tap ***Add Item***, as in Step 7 above. If you're ready to continue, tap ***Raise Invoice***, if you're not adding a new patient to the same invoice, or

   - Tap ***Raise Invoice*** if you are not adding a new patient or a new item to the invoice.



9. A pop-up window appears saying "Is this patient a claimant?" If yes, tap ***Yes***. If not, tap ***No, Add Claimant*** (use if patient and claimant are not the same).

10. The transaction screen says, "Creating Invoice", then "Waiting for response from Medicare."
11. Patient Invoice screen appears, showing the total cost of the services provided, and the Total Gap, which is $0. Tap ***Approve***. This will take you to the Medicare Declaration screen, then tap ***Accept***.
12. The screen says "Processing Invoice", then "Waiting for response from Medicare." A Payment Success screen appears, providing a summary of the invoice.
13. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish*** or ***Cancel*** (to look at the transaction once more).
14. Once you hit ***Finish***, the terminal returns to the Home screen.

Note: Many practices do not process Medicare Bulk Billing transactions with the patient in front of them. They can be processed in one go at the end of the day.

Processing health claims: Integrated mode

How do you initiate and process transactions in Integrated mode?

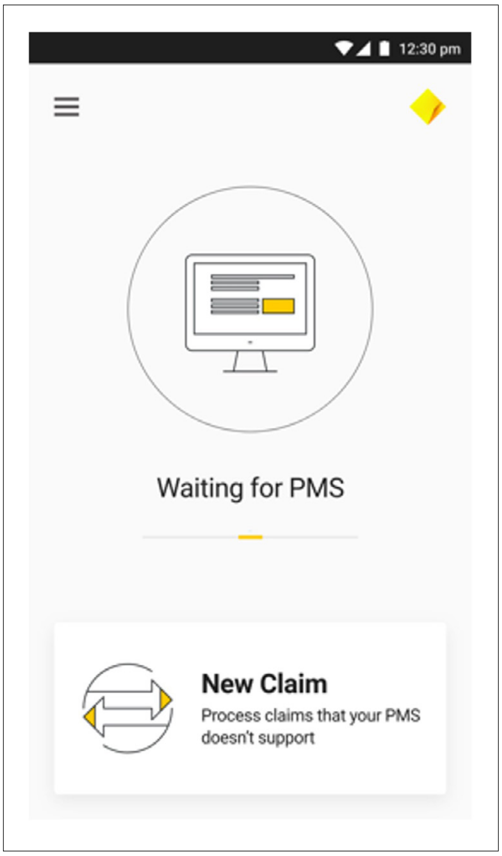
In integrated mode, you initiate all transactions through your PMS.

To find out where to start, please follow your PMS User Guide or contact your PMS Help Desk:

Dental 4 Windows – https://www.centaursoftware.com.au/contact-us/ or 1300 855 966

Optomate – https://www.monkeysoftware.com.au/contact-us.html or 1300 650 295

Best Practice – https://bpsoftware.net/contact/ or 1300 401 111



What should you do before initiating a transaction in your PMS?

Check that your terminal is ready. It will say, "Waiting for PMS." This is the normal standby mode for the terminal, showing that the terminal is awaiting instruction from your PMS, as shown at left.

What should you do if the terminal doesn't display this message?

Your PMS is likely not connected to your terminal. Please see page 25 to find out how to link your terminal. If you've already completed this step, call our CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Processing Private Health Claims: Integrated mode

What are the two ways you can process a transaction in Integrated mode

For private health claims, you can process a transaction with a private health fund member card present and with no card present.

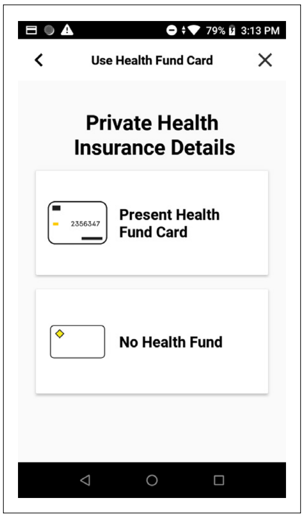
Card present: the patient has a physical health fund card with them, so after sending the transaction through the hub, into the terminal, you swipe the card to process the transaction.

Card not present: the patient doesn't have a health fund card with them, and the transaction can be sent straight from the CommBank Smart Health Hub to the private health fund without using the terminal. The patient uses a private health fund app on their mobile device to process the transaction on the spot. The receipt is sent from the health fund to the CommBank Health Hub and PMS and automatically filed in the PHI Declaration Report page.

Processing a PHI claim in Integrated mode: Card Present

Please refer to your PMS user guide for any information on how to initiate an invoice. Once initiated and the invoice is pushed from your PMS to the terminal:

1. Use the exact terminal selected in your PMS to process the transaction (if you have more than one terminal at your practice location).



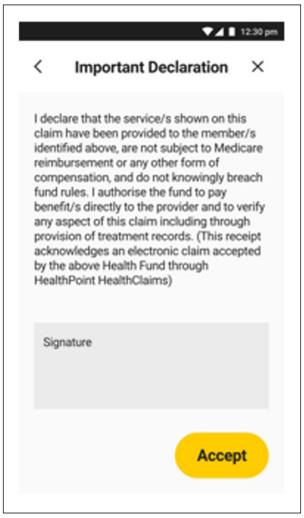
2. Tap ***Present Health Fund Card*** on the Use Health Fund Card screen, shown at left. If no health fund exists, or the patient does not have a health fund card with them, tap "No Health Fund" and proceed as below, ignoring all Health Fund claiming steps.

   Note: Patients can use their Digital PHI Membership card on their mobile phone instead of Swiping their PHI Membership card. They will need to activate their card, from participating insurers, on their mobile phone and bring it near the top of terminal to process the claim.

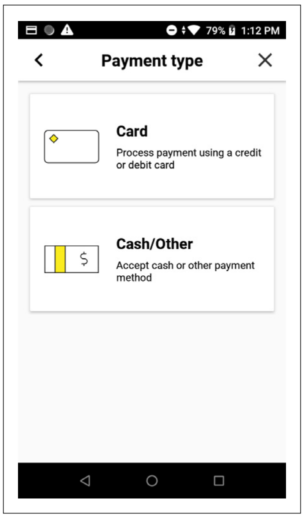
3. On the Private Health Insurance Details screen, confirm which member is present by typing in the reference number from the health fund card and tapping ***Continue***; the screen quickly moves from "Updating Invoice", to "Processing Invoice", then "Waiting for response from your Private Health Insurer."

4. The Patient Invoice screen appears showing a cost breakdown, including service or items provided, cost covered by the fund, any limit boosts and the gap payment, like this at left.

   Show this to the patient to confirm.



5. Tap ***Approve*** and ask the patient to read the Important Declaration screen and sign in the ***Signature*** field. Once signed, tap ***Accept***.



6. On the Select Payment Method screen, you can tap payment by ***Card*** or ***Cash/Other***.

   (Other can be any payment not supported by the terminal e.g. “buy now pay later” arrangement or a WeChat payment).

7. Tapping “Card” takes you to the CommBank Payment App, where the gap amount appears automatically. Process the payment using Visa, Mastercard, AMEX, CUP (China union pay) or eftpos by swiping, tapping or inserting the card as appropriate.
8. The patient enters his or her PIN and taps ***Enter***.
9. The screen says “Processing transaction”.
10. If approved, a green tick appears along with “Approved” across a copy of the receipt.
11. If the payment is declined, a red cross and “Declined” will appear on the receipt, and the screen returns to the CommBank Smart Health App asking for payment again. The patient re-uses the same card, tries another card or selects Cash as payment.
12. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish***, or ***Cancel*** (to look at the transaction once more).
13. Once you hit ***Finish***, the terminal returns to the Home screen, and the signed PHI declaration is filed by date in the PHI Declaration Report page on the CommBank Smart Health Hub. This saves you keeping physical receipts for seven years.

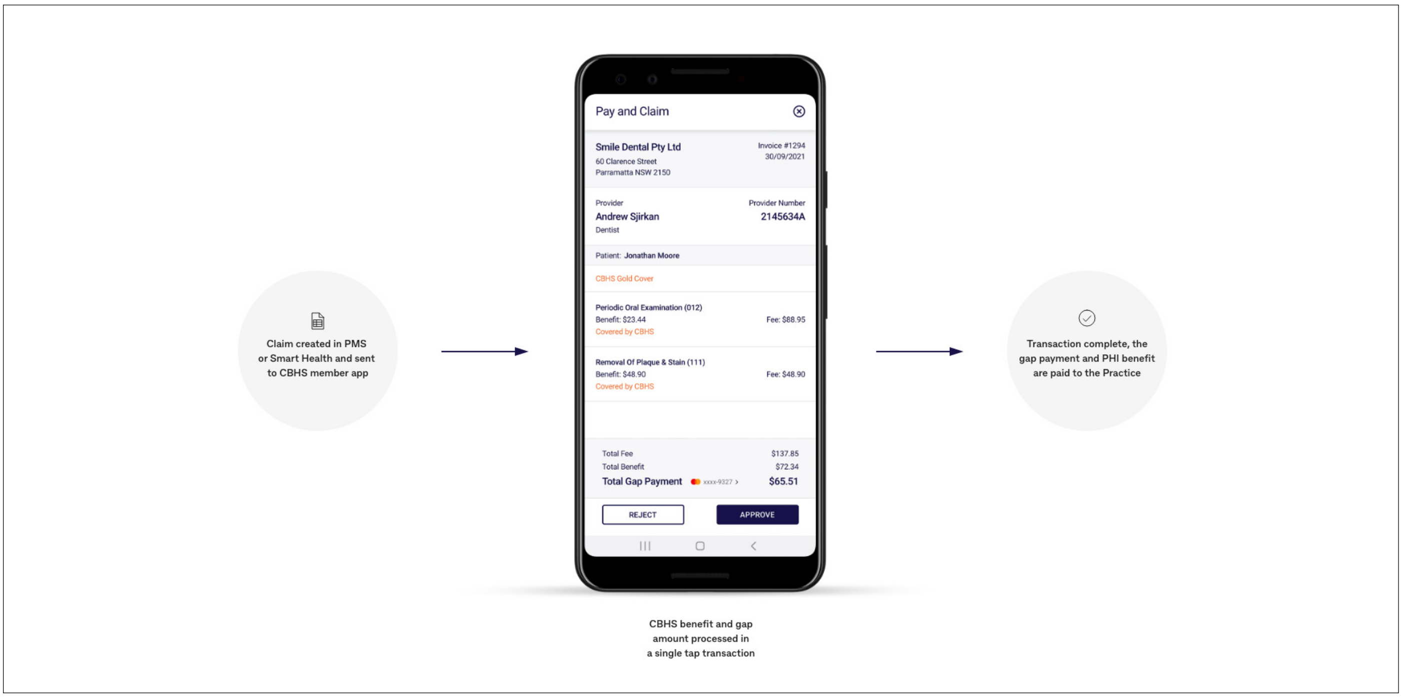
Where can I find or print PHI declarations in the Smart Health Hub?

On the PHI Declaration Report screen via the Home page. This can be downloaded and printed for the patient at their request. Please see page 83 for more information.

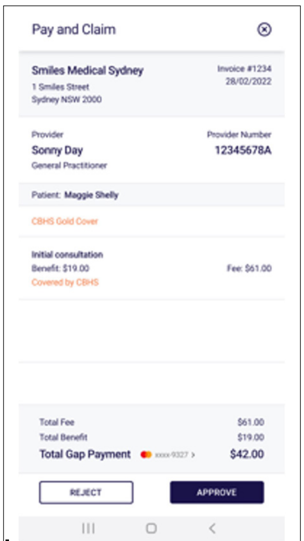
Processing a PHI claim in Integrated mode: Card Not Present

Using this option, no terminal is needed. So, when processing a claim and gap payment:

1. In your PMS, select ***Card Not Present*** on the transaction screen. The transaction is sent from the PMS via the CommBank Smart Health Hub to the patient's private health fund, as shown below.



2. The patient receives a notification on their Private Health Fund App to say they have a claim to approve. The patient selects the relevant transaction from the app, and views the claim details including total service cost, how much the health fund is covering and the total gap payment.
3. The patient either taps ***Reject*** or ***Approve***.



4. When the patient taps ***Approve***, the approval is a geotagged location pin (marking their exact location at acceptance) and includes the patient's mobile phone number. This is sent to the private health fund, to the PMS and to the hub (appearing on the digital receipt, as shown here).
5. The private health fund then transfers the money from the health fund to the practice, and the patient's stored card on the app is debited for the gap amount.
6. The patient taps ***Close*** in the app. No eftpos transaction is required. All transactions are stored on the private health fund app.
7. A response is sent to the PMS via the hub that the claim is settled. A copy of the transaction is stored in the hub on the PHI Declaration Report page.

What should you do when a patient doesn't have a private health fund card with them?

You have two options:

- Ask them to download the health fund app to their phone (contacting their Private Health Fund for assistance for support if needed), or
- Process a full payment for service, print a receipt and ask the patient to claim the amount back from their private health fund in their own time.

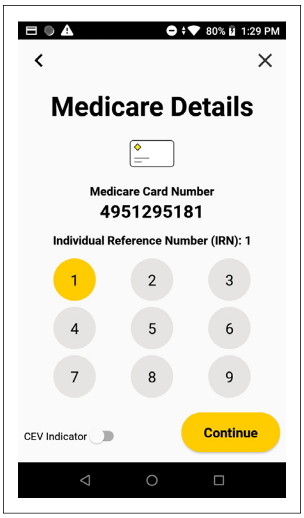
Processing a Medicare Paid Patient Claim: Integrated Mode

Please note: If your PMS has integrated online Medicare claiming built in, this section is not relevant to you. You can continue to send the patient claim to Medicare through your PMS so that you patient receives the rebate directly from Medicare the next day.

If your PMS doesn't have integrated online Medicare claiming:

After the raised Medicare invoice is pushed from your PMS to the terminal:

1. Where asked, swipe the Medicare card on the Medicare Details screen.



2. If the card has been swiped, type in the patient's unique member number (IRN) from the card on the Add Patient Number screen and tap ***Continue***. IRN: 1 is selected by default but you can use the dialpad to make a selection.

3. The Patient Invoice screen appears, showing the total cost of the services provided and the medicate rebate amount.

   Tap ***Approve***. This will take you to the Select Payment Method screen, because with Medicare claims, you pay the total amount up front.

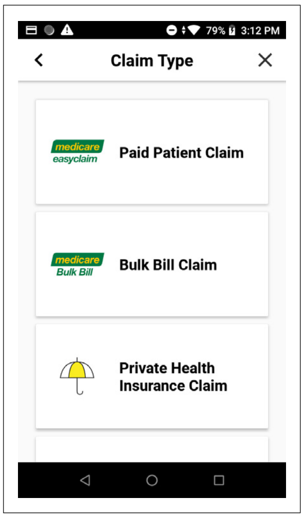
To arrange Medicare payment and rebate:

The next steps for processing payment and rebates are identical to standalone mode for both cash and card payments. So please see page 51 for instructions.

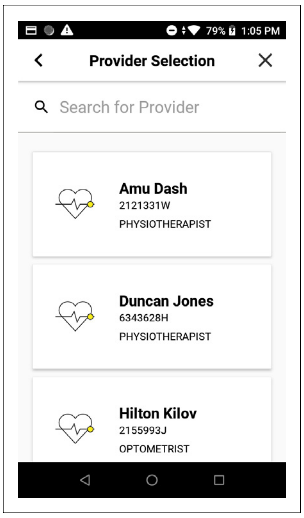
Once you tap "Finish" on the CommBank Smart Health App, your PMS will confirm that the transaction has been successfully settled.

Processing a referral

This type of claim is relevant for any specialist covered by a Medicare claim who isn't a GP. This can be, for example, a physiotherapist, psychologist, psychiatrist or a general dentist who is able to claim on Medicare, for instance, when a child visits the dentist and is covered under the Child Benefits Scheme.

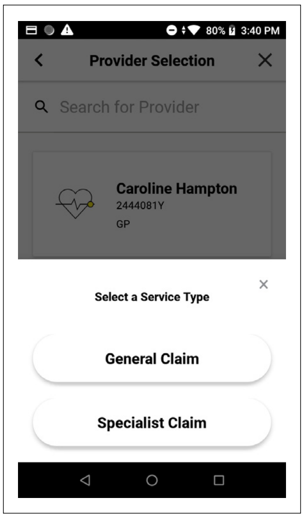


1. From the Terminal, Tap ***Paid patient Claim*** from the Claim Type screen.



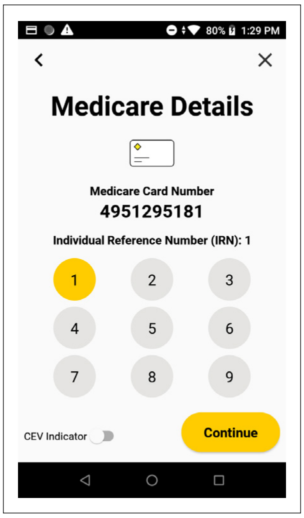
2. Select the practitioner from the Practitioner Details screen by typing the practitioner's name in to the search bar at the top, or scrolling and tapping on the relevant name.

3. Select the Service type from the dropdown menu on the Select Service Type pop-up window (in this case, not GP, but Specialist), then tap ***Next***.

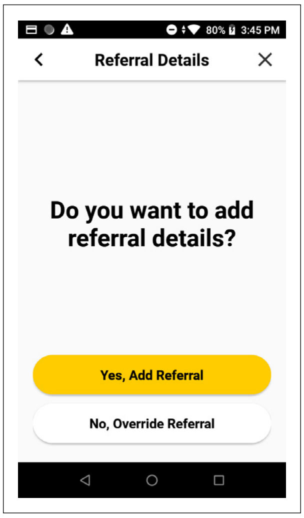


4. Select ***Specialist Claim*** service type

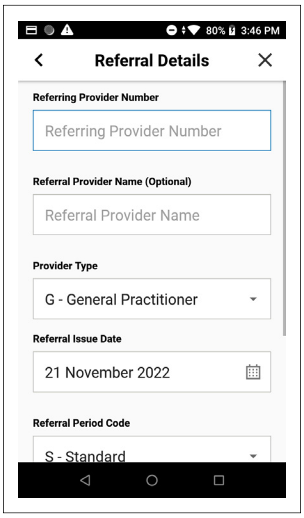
5. Select to present Medicare Card or use the field below to enter Medicare Card number manually. On the next screen, swipe the Medicare card on the Medicare Details screen.



6. Individual Reference Number (IRN): 1 is preselected. Make a selection of patient's IRN by selecting a number on the keypad and tap ***Continue***



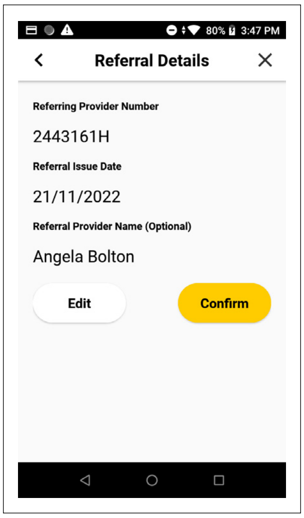
7. To add a referral, select "Yes, Add Referral" or to override "No, Override Referral".



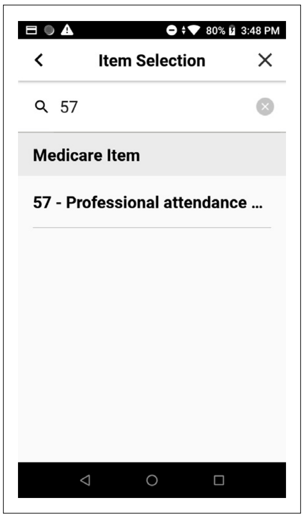
8. A Referral Selection page appears, saying "Couldn't Find Referral".

   Here, you can either:

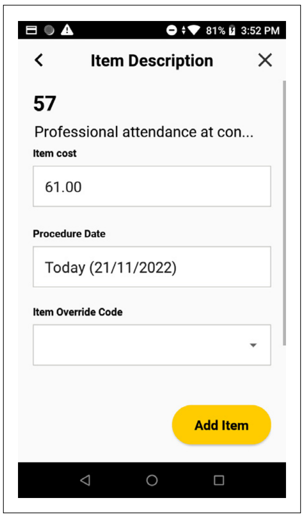
   - **If you have a referral** from another specialist, say a psychologist or physiotherapist, tap ***Create***. Then fill in the Referral Details screen, including Referring Provider Number, Provider Type from the dropdown menu, Referral date, Referral Period Type Code, Referring Provider Name and Validity and, if relevant, Reference Override Code from the dropdown menu (either Lost Referral, Emergency or Not Required). Then tap ***Continue***, or
   - **If you don't have a referral**, when it's not needed, say in the case of a dentist, tap ***Skip***. Then on the "Referral Override Code" popup, select the reason why no referral is needed from dropdown menu (Lost Referral, Emergency or Not Required) and tap ***Save***.



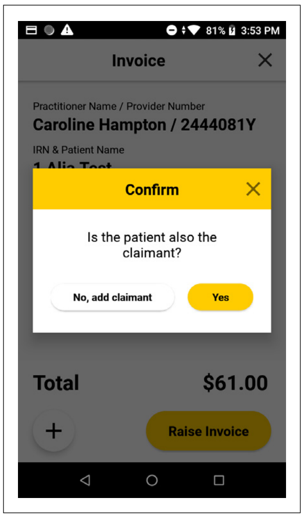
9. Review referral details and tap “Confirm”



10. On the Item Selection page, type in the Medicare item number in the search bar (for example, for a dentist servicing a child under the Child Benefits Scheme, it is 88011 Comprehensive Oral Examination).



11. Type in the cost on the Add Items Details screen. Then tap ***Add Item***.
12. You are now on the Invoice screen. Here you can:
    - ***Add a new Item for the same patient*** by tapping the **+** button. Then type in the item number or select from the available list, type in the cost on the Add Items Details screen, then tap ***Add Item***, as in Step 8 above. If you’re ready to continue, tap ***Raise Invoice***, if you’re not adding a new patient to the same invoice, or
    - Tap ***Raise Invoice*** if you are not adding a new patient or a new item to the invoice.



13. A pop-up window appears saying "Is this patient a claimant?" If yes, tap ***Yes***. If not, tap ***No, add claimant*** (use if Patient and Claimant are not the same).
14. The transaction screen says, "Creating Invoice", then the Patient Invoice screen appears, showing the total cost of the services provided, and the Total Gap. Tap ***Next***. This will take you to the Select Payment Method screen, because with Medicare claims, you pay the total amount up front.

To arrange Medicare payment, see instructions on page 54.

Payment transactions with no health claim (stock item)

How do you process a transaction with no health claim – integrated mode?

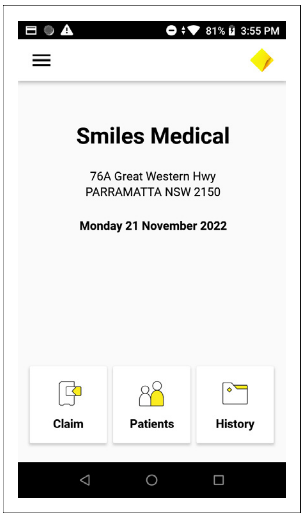
If you sell goods or services that are not subject to health claiming, such as stock items:

- Process the transaction using your PMS, selecting the terminal for payment.

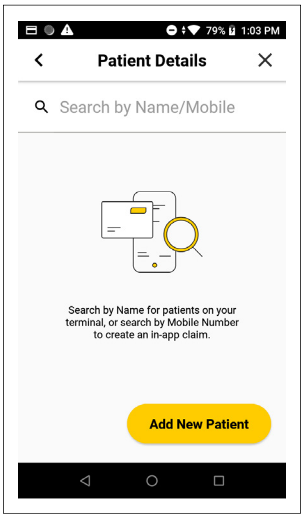
Once the invoice is raised in your PMS and pushed to the terminal to request payment:

1. The Patient/Invoice screen appears on the terminal, tap ***Next***.
2. The Payment method screen appears; choose ***Card***, then the Payment App appears.
3. The Payment Request screen appears with the amount. Tap ***Next***.
4. Once payment is received, if approved, a green tick appears along with "Approved" across a copy of the receipt.
5. If the payment is declined, a red cross and "Declined" will appear on the receipt, and the screen returns to the CommBank Smart Health App asking for payment again. The patient re-uses the same card, tries another card or selects Cash as payment.
6. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish***, or ***Cancel*** (to look at the transaction once more).
7. The terminal returns to standby mode saying, "Waiting for PMS."

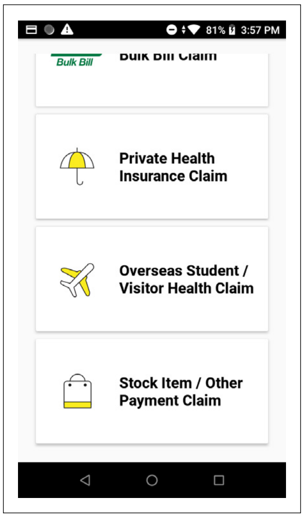
How do you process a transaction with no health claim – standalone mode?



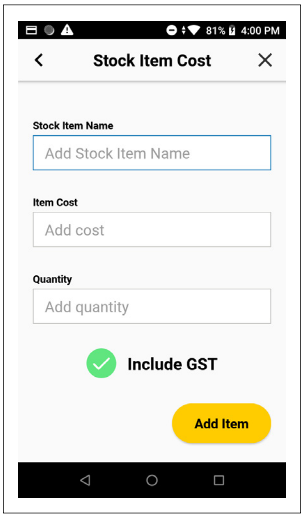
1. On the terminal, tap ***Claim***.



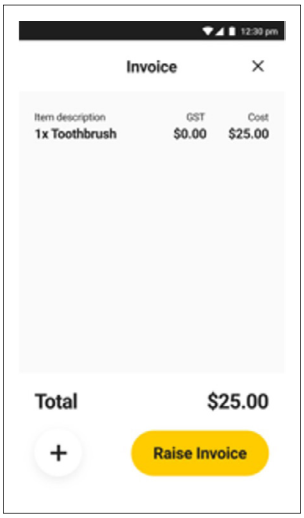
2. Search for the patient name and once found, tap ***Continue***.



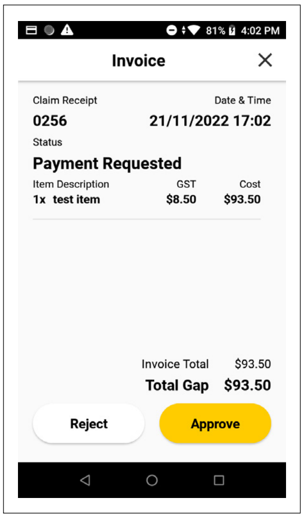
3. Select ***Stock Item / Other Payment***.



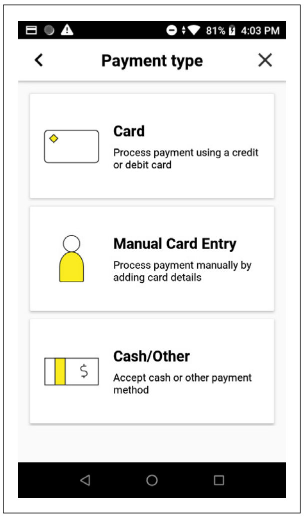
4. Type in the stock item name, cost and quantity, as shown. You can include or exclude GST by toggling the “include GST” icon. Tap ***Add item***.



5. On the Invoice screen, if you wish to add another item, tap **+ at bottom left**, or if you don’t have another item to add, tap ***Raise Invoice***.

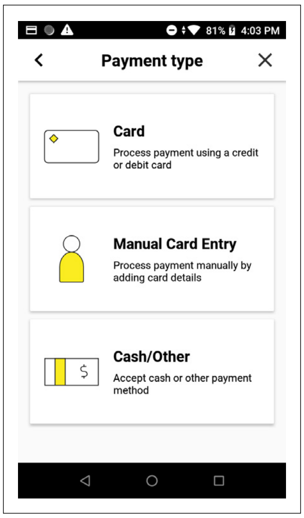


6. After showing the patient the invoice, tap ***Approve*** to proceed.
7. Choose the payment method, selecting Card or Cash.



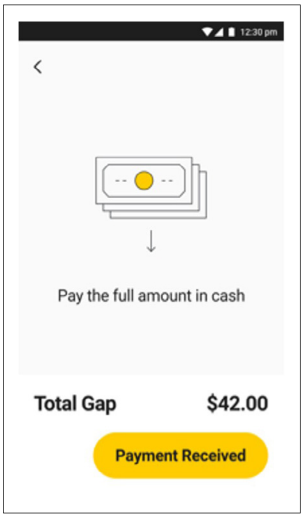
By card:

1. Tap ***Card***. This takes you to the CommBank Payment App, where the gap amount appears automatically. Process the payment using Visa, Mastercard or eftpos by swiping, tapping or inserting the card as appropriate.
2. The patient enters his or her PIN and taps Enter.
3. The screen says "Processing transaction."
4. If approved, a green tick appears along with "Approved" across a copy of the receipt.
5. If the payment is declined, a red cross and "Declined" will appear on the receipt, and the screen returns to the CommBank Smart Health App asking for payment again. The patient re-uses the same card, tries another card or selects Cash as payment.
6. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish***, or ***Cancel*** (to look at the transaction once more).
7. The terminal returns to the terminal Home screen.



By cash:

1. Tap ***Cash/Other***. "Other" can be anything from cash e.g. "buy now pay later" arrangement or WeChat payment.



3. The Cash/Other Payment screen says "Pay the full amount in Cash," showing the Total Gap to pay at the bottom right, as shown below.
4. The practice processes the payment elsewhere with an exchange of cash or a buy now/pay later platform. Once done, tap ***Payment Received***.
5. If approved, a green tick appears along with "Approved" across a copy of the receipt.
6. If the payment is declined, a red cross and "Declined" will appear on the receipt, and the screen returns to the CommBank Smart Health App asking for payment again. The patient re-uses the same card, tries another card or selects Cash as payment.
7. Tap the three dots at the bottom of this screen to ***Print Receipt***, ***Finish***, or ***Cancel*** (to look at the transaction once more).
8. Once you hit ***Finish***, the terminal returns to the Home screen.

Can GPs or Bulk Billing practices accept private health fund claims?

Yes, there are special private health fund claims for overseas visitors and overseas students:

- OSHC are Overseas Student Health Cover, and
- OVHC are Overseas Visitors Health Cover.

GPs or bulk billing practices can access these menu items in the PMS to raise an invoice, even though they don't normally accept private health fund claims. Please refer to your PMS User Guide for instructions.

To process these claims in integrated or standalone mode, please follow the instructions provided for processing for Health Fund claims on pages 42 and 57, selecting OSHC/OVHC on the CommBank Smart Health App's Billing Selection screen.

Cancelling an invoice

Can you cancel an invoice once it's raised?

Yes. Any user can cancel a transaction if it hasn't settled. (But, if it has been processed, it becomes a refund, which is explained in the next section, Refunding Transactions.)

Users can cancel invoices if they've made an error, or if they've raised an invoice purely to create a Rebate Estimate (this is called voiding transactions, so please see page 77 to find out how to do this).

When cancelling transactions please note that:

Medicare claims cannot be cancelled via the PMS, hub or terminal. If the practice makes an error when raising an invoice (for example, charging for a long consultation instead of a short consultation, or charging for the wrong item), the practice should contact Medicare ***the same day*** to correct it. Contacting on subsequent days requires a more complex cancellation process.

Health Fund claims can only be cancelled the day the service was provided, that is, the day of the original transaction. If patients would like a refund after that day, the Provider must contact their health fund.

The cancelling process is different in standalone and integrated modes.

Standalone mode:

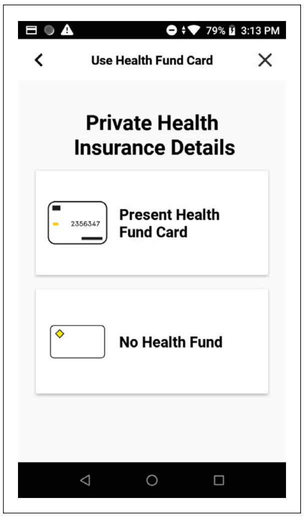
Once an invoice is raised:

1. Tap the "x" in the top right hand corner of the screen or the Hamburger menu in the top left hand corner to return to the Home page.
2. Once on the Home screen, the transaction is cancelled.

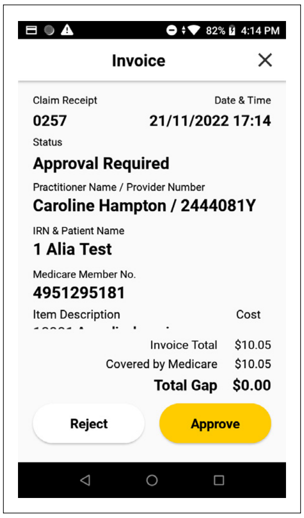
Integrated mode:

Once an invoice is raised in the PMS, you must cancel it *from the terminal*.

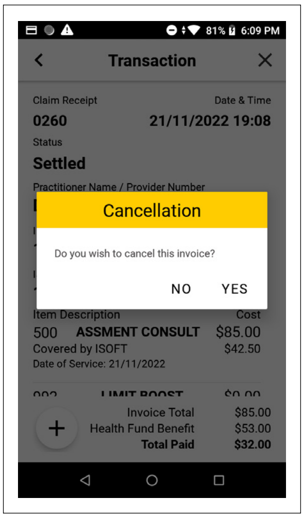
At the terminal you must initially continue processing the invoice as normal. So:



1. When it asks you to swipe the health fund card, tap ***No Health Fund***. The Terminal screen will now say "Processing Invoice."



2. When the invoice appears, tap ***Reject Invoice*** in the bottom left hand corner



3. A popup screen appears asking "Do you wish to cancel this invoice?"
4. The terminal screen will now say "Patient Rejected Invoice".
5. Tap ***Cancel Invoice***.
6. The PMS now says, "Transaction Cancelled".
7. ***Important:*** You may need to refresh the PMS screen to start again.

Refunding transactions

What is a refund?

Refunds, often called "same day cancellations" are:

- Processed from your PMS or terminal
- Initiated on the same tool as the original transaction (for terminals, on the exact terminal used), and
- Only processed in person, not online.

When can you process a refund?

Refunds can only be processed once a transaction has settled. Also:

- ***Medicare*** claims can't be refunded once the invoice is raised. The practice needs to call Medicare straight away to initiate a refund the day of the transaction.
- ***Private health fund*** refunds can only be refunded using the terminal on the day that the service was provided. After that day, the patient needs to call their fund to arrange a refund.

How do you refund a transaction?

To process a refund, you must first cancel the transaction/invoice on the same tool as the original transaction:

Integrated mode

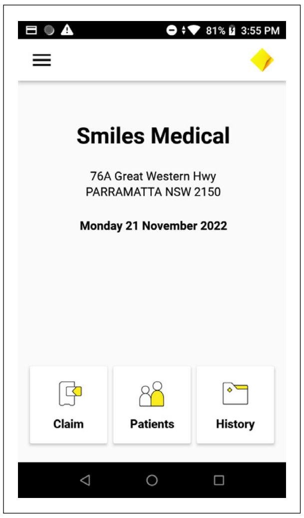
If you're in integrated mode, you must initiate a cancellation from your PMS. So please refer to your PMS User Guide for instructions.

Once a cancellation request is received by the terminal, follow the instructions below from step number 3, for cancelling in Standalone mode.

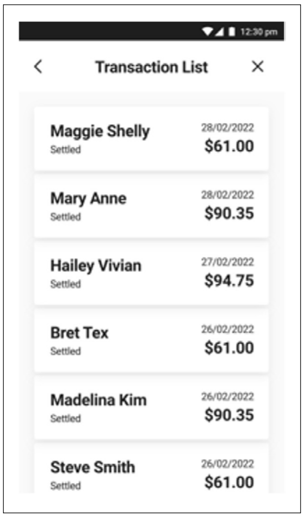
Standalone mode

For a Private Health Fund claim

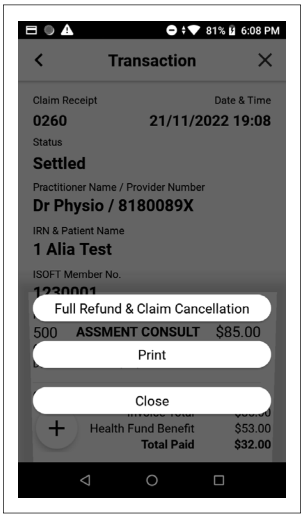
On the day of the claim:



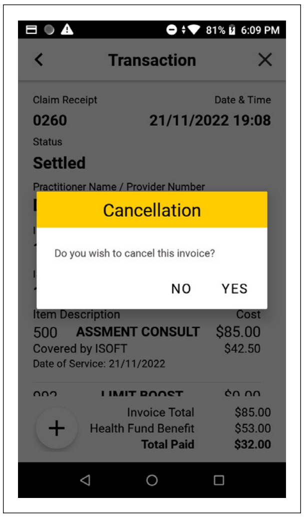
1. From the terminal home screen tap "History".



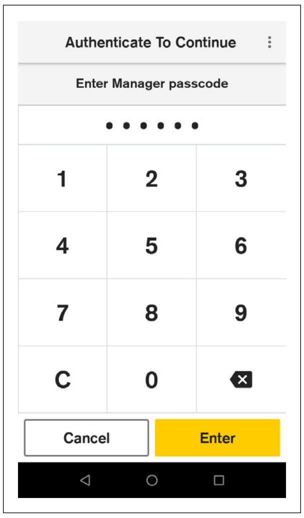
2. The Transaction List screen appears; scroll and select the transaction you wish to cancel and refund from the list.
3. Full details of that transaction appear.



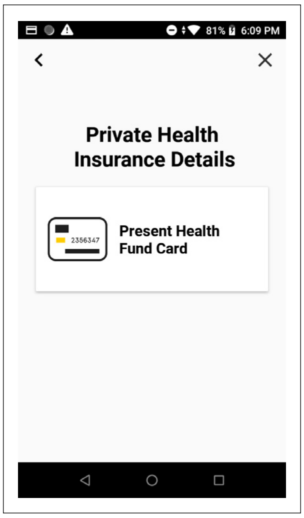
4. Tap the three dots at the bottom of the screen, then tap ***Full Refund & Claim Cancellation*** from the pop-up menu.
5. A Cancellation pop-up screen says "Do you wish to cancel this invoice?" Tap ***Yes***.



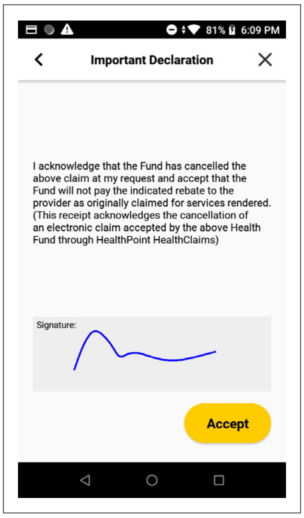
6. Confirm request to cancel invoice. This will invoke a refund where applicable.



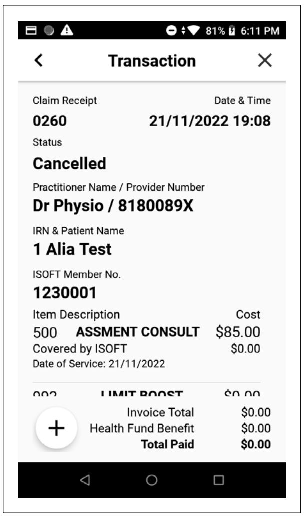
7. Depending on your settings preferences, an Authenticate to Continue screen pay appear, requiring a Manager's passcode to be entered to enable the cancellation.



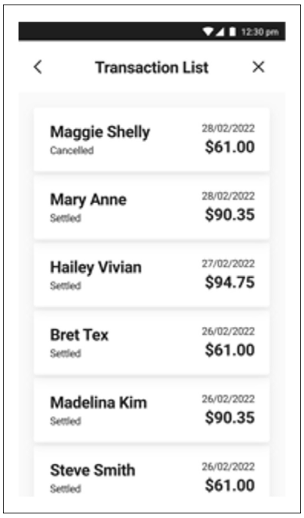
8. Swipe the Private Health Fund card.



9. The patient signs the Important Declaration screen in the signature field and taps ***Accept*** at bottom right.
10. The screen says “Processing Cancellation”, then “Reversal Completed” once received by the fund.
11. The CommBank Payment App opens to allow you to process the gap payment refund. Select Mastercard, cash or EFTPOS.
12. For EFTPOS or Card, insert the patient’s card. The patient will enter their PIN, then click ***OK***. For cash, the patient pays in cash.

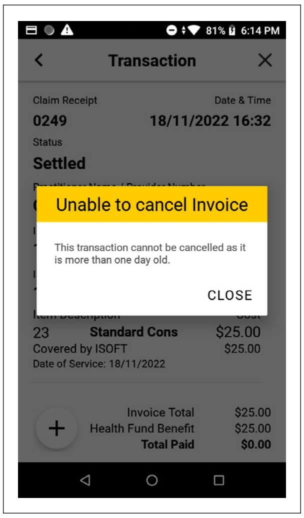


13. The invoice screen shows the claim as cancelled and the total amount paid as $0.



14. The transaction appears as "Cancelled" in the Transaction List.

What happens if you try to process a PHI refund the next day?



It can't be done by the practice - the patient must contact their private health fund to arrange a refund. If the practice tries to do it, immediately after tapping the ***Refund & Claim Cancellation*** option in Step 4, above, a pop-up menu will appear saying, "Unable to cancel invoice: This transaction cannot be cancelled as it is more than one day old."

For Medicare claims

As mentioned, once the practice contacts Medicare on the day of the initial transaction and has a refund approved, the practice can process a refund using the native payment app on the CommBank Smart Terminal.

If a practice attempts a Medicare refund before contacting Medicare, once the transaction is selected, and the ***Refund & Cancellation*** is tapped, a pop-up window appears saying "Unable to cancel invoice. The invoice cannot be cancelled because it contains approved Public Health items".

Voiding transactions

Many practices raise invoices to use as Rebate Estimates, to let patients know, for example, how much private health services will cost and what their gap payment will be. Once raised, the invoice can then be cancelled.

When you attempt to cancel a claim or when the patient rejects (voids) a claim, the health fund sends a response, which will be displayed on the receipt printed by the terminal.

How to raise an invoice as a Rebate Estimate in Standalone mode

1. Raise the invoice (see page 49 for Standalone mode instructions and 60 for Integrated mode).
2. Swipe the health fund card. The health fund responds by sending back the invoice information.
3. Tap ***Reject claim*** in the bottom left.
4. The next screen says "Patient Rejected Payment."
5. Tap ***Cancel Invoice*** at the bottom of the menu.
6. A notification will pop up saying "Invoice successfully cancelled". Tap ***Close***.
7. The app will return to the Home screen.

Once these steps have been completed, the claim status will also be updated on CommBank Smart Health Hub PHI Declaration Report page. The Claim Status for the transaction should be recorded as ***Cancelled (patient rejected)***.

How to raise an invoice as a Rebate Estimate in Integrated mode:

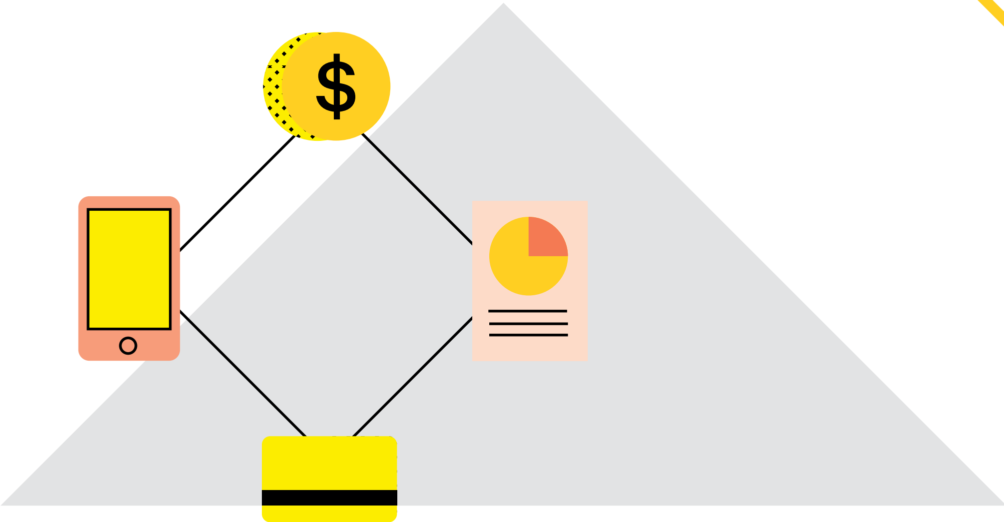
Please refer to your PMS User Guide to find out how to raise the invoice. Once it is pushed to the terminal, and once a response is received, the details are fed back to the PMS and the transaction is cancelled automatically.

Auto-voiding transactions

Auto-voiding (cancelling) transactions occurs when payment is expected on the terminal, but nothing happens. The system auto-voids the claim in about five minutes, just like a system time out.

Error messages

Examples of error specific messages users may encounter will be provided at a later date.



Transaction reporting and reconciliation

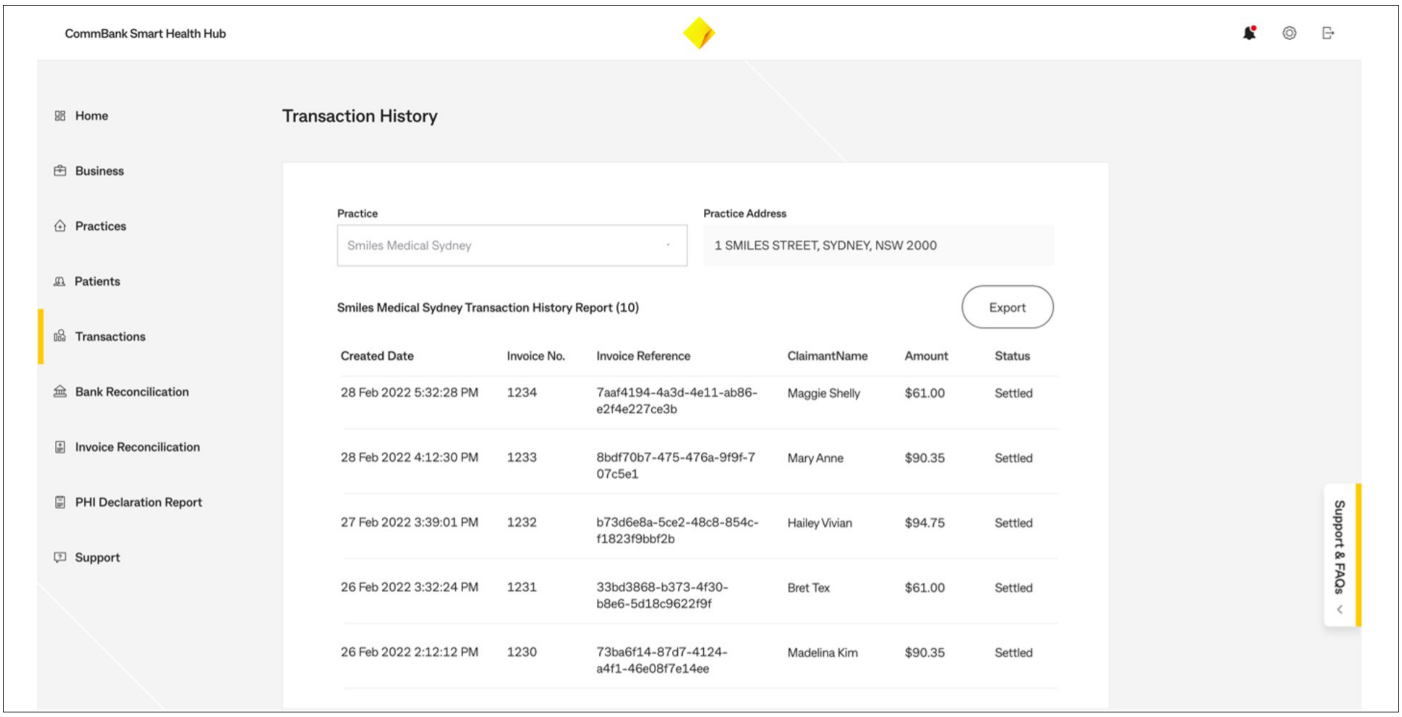
Viewing transaction history

You can view transactions from the CommBank Smart Health Hub or via the Smart Terminal.

How do you view transactions on the CommBank Smart Health Hub?

Via the Transactions page. It shows all transactions completed by the practice *the day before*. Simply:

1. Click the ***Transactions*** tab at left on the Home page. It looks like this:



2. On the Transactions page, select the practice you'd like to view using the dropdown menu.
3. Select the transaction date or dates you'd like to see.
4. A list of relevant transactions appears on screen.

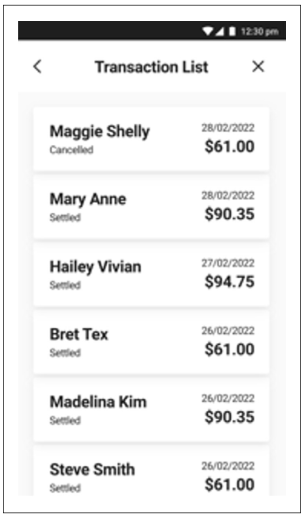
This provides a live view of your terminal, showing the status of your transactions. Data includes Created Date, Invoice Number, Invoice Reference, Claimant Name, Amount and Status.

How do you export transactions?

Once a list of your selected transactions appears:

1. Click ***Export*** in the right hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

How do you view transactions on the CommBank Smart Health Terminal?



In integrated mode – from the Home page (that says Waiting for PMS), tap the Hamburger menu, and tap PMS transaction history (all transactions initiated via your PMS and pushed through to the terminal), and Terminal Transaction History (all transactions initiated via the terminal).

In standalone mode - from the Home page, tap ***History*** or from the Hamburger menu, tap ***View Transactions*** to access date itemised receipts and a cumulative total of all transactions processed on the terminal that day. Terminal transactions and PMS transactions are separated.

End of day reporting

What is settlement?

Settlement is the transfer of funds received from your terminal to your nominated settlement account.

At the end of each day, you can see money coming in to each practice from patients, and the money received from health funds via the:

- CommBank Smart Health Hub (via Bank Reconciliation Reports), or
- CommBank Smart Terminal (this includes cumulative totals for the current, open, settlement period or settlement reports for closed periods).

There are three types of settlements per day:

- EFTPOS payments (Gap and Stock items)
- Private Health Insurance settlements, and
- Medicare Bulk Bill settlements.

When are funds settled?

Funds received by Commonwealth Bank of Australia on your behalf are settled on the same day, at around 10pm AEST (or AEDT). So, any money collected from the CommBank Payment App via Visa Card, Mastercard or EFTPOS are received that day. Transactions occurring after this time may appear in the next settlement period.

Funds received by a private health fund are settled the next day – that is, one day after the transaction occurred.

What happens if you miss settlement?

If you're using a standalone terminal and missed your settlement, for instance if the machine disconnected and you don't have a settlement on the terminal, it won't be reflected in the Bank Reconciliation Report. If this happens, please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What reports can you create on the CommBank Smart Health Hub?

You can generate three reports from the CommBank Smart Health Hub:

1. Bank Reconciliation Report
2. Invoice Reconciliation Report
3. PHI Declaration Report

Bank reconciliation reporting

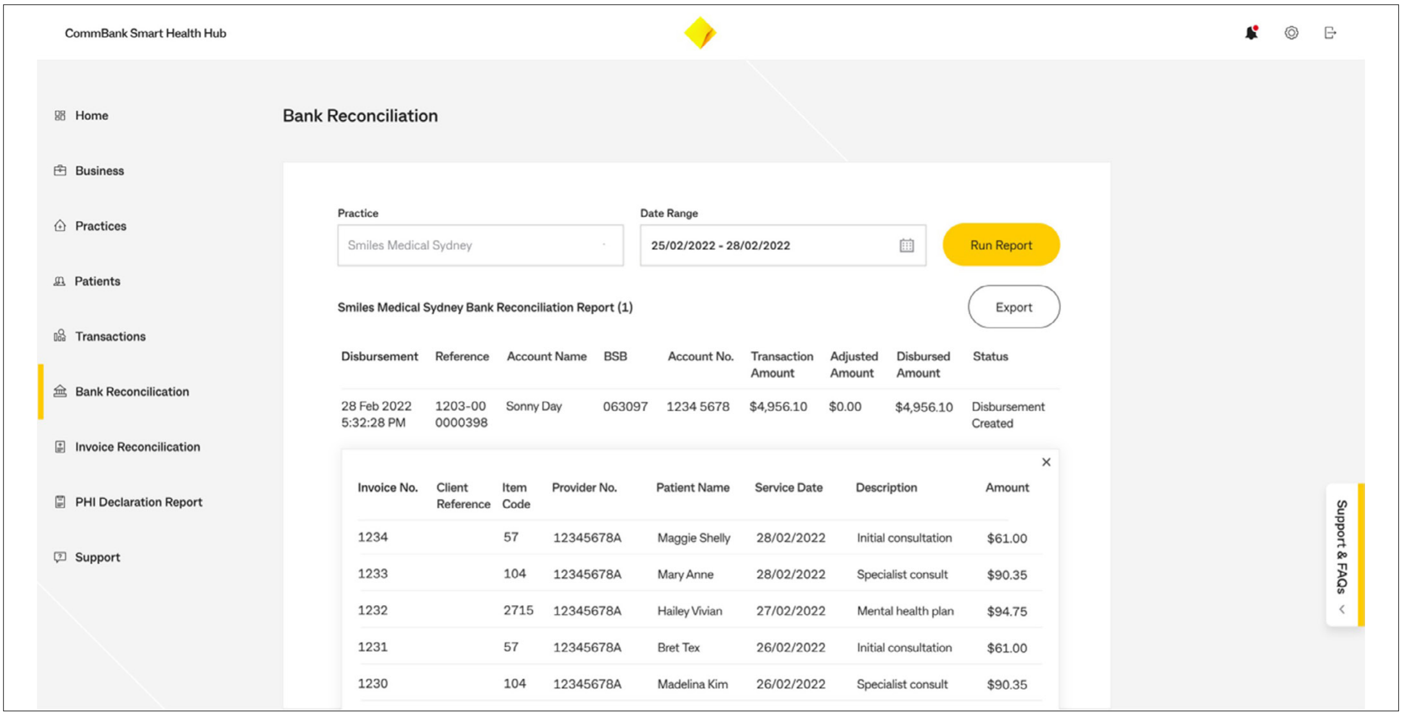
What is the Bank Reconciliation Report used for?

This report shows bank settlement. That is, the amount sent in a particular day to the provider's bank account from your terminal or Card Not Present (member app). It shows whether money received from patients – from the terminal or card not present transactions – has arrived in your bank account.

How do you create a Bank Reconciliation Report?

Click on the ***Bank Reconciliation*** tab at left on the Home page.

1. Choose the practice you'd like to report on, from the dropdown menu.
2. Select the reporting date.
3. Click ***Run Report***.
4. The Bank Reconciliation Report appears on screen.



How do you export a Bank Reconciliation Report?

Once your Bank Reconciliation Report appears:

1. Click ***Export*** in the right hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

Invoice reconciliation reporting

What is the Invoice Reconciliation Report used for?

This report gives a breakdown of the payment at the invoice level. It itemises the money your practice received from health funds or patients yesterday. You compare this report with the Bank Reconciliation Report to identify payment gaps.

What are the different types of invoice status?

What is a settled claim?

Settled means the amount has been sent to your primary bank account (merchant account), or has been received in "Cash/Other".

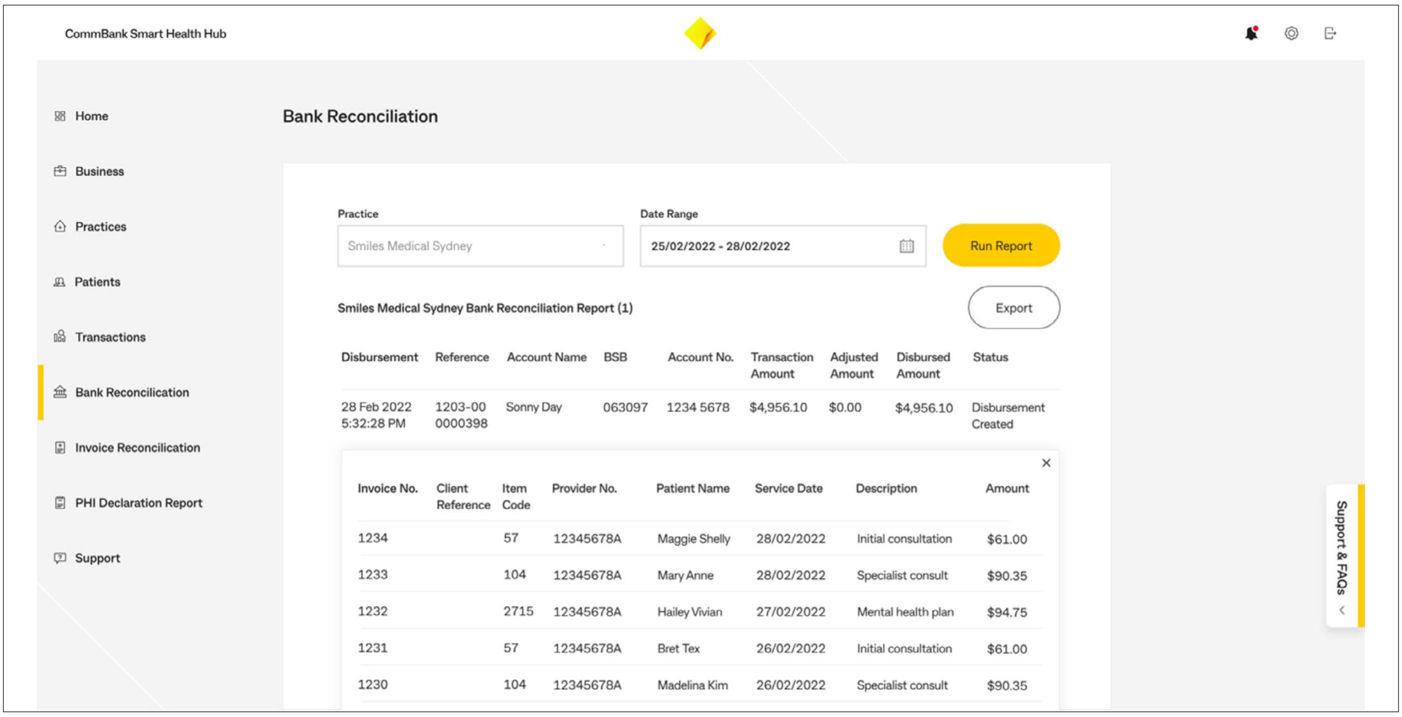
What is the difference between a matched or unmatched claim?

You will only see matched or unmatched claims when there is a gap payment or private health payment:

- **Matched** means that the amount received by your primary bank account is the amount that was expected to be paid.
- **Unmatched** means the amount that has been paid your primary bank account from a health fund is not the amount that was expected to be paid. This could occur when a claim is completed outside of the App. For example, when a gap payment of $30 is processed outside of the App, the CommBank Smart Health Hub identifies that money was received, and it will appear as an unmatched claim.

How do you create an Invoice Reconciliation Report?

1. Click on the ***Invoice Reconciliation*** tab at left on the Home page.
2. Choose the practice you'd like to report on, from the dropdown menu.
3. Select the date range.
4. Click ***Run Report***.
5. The Invoice Reconciliation Report appears on screen.



How do you export an Invoice Reconciliation Report?

Once your Invoice Reconciliation Report appears:

1. Click Export in the right hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

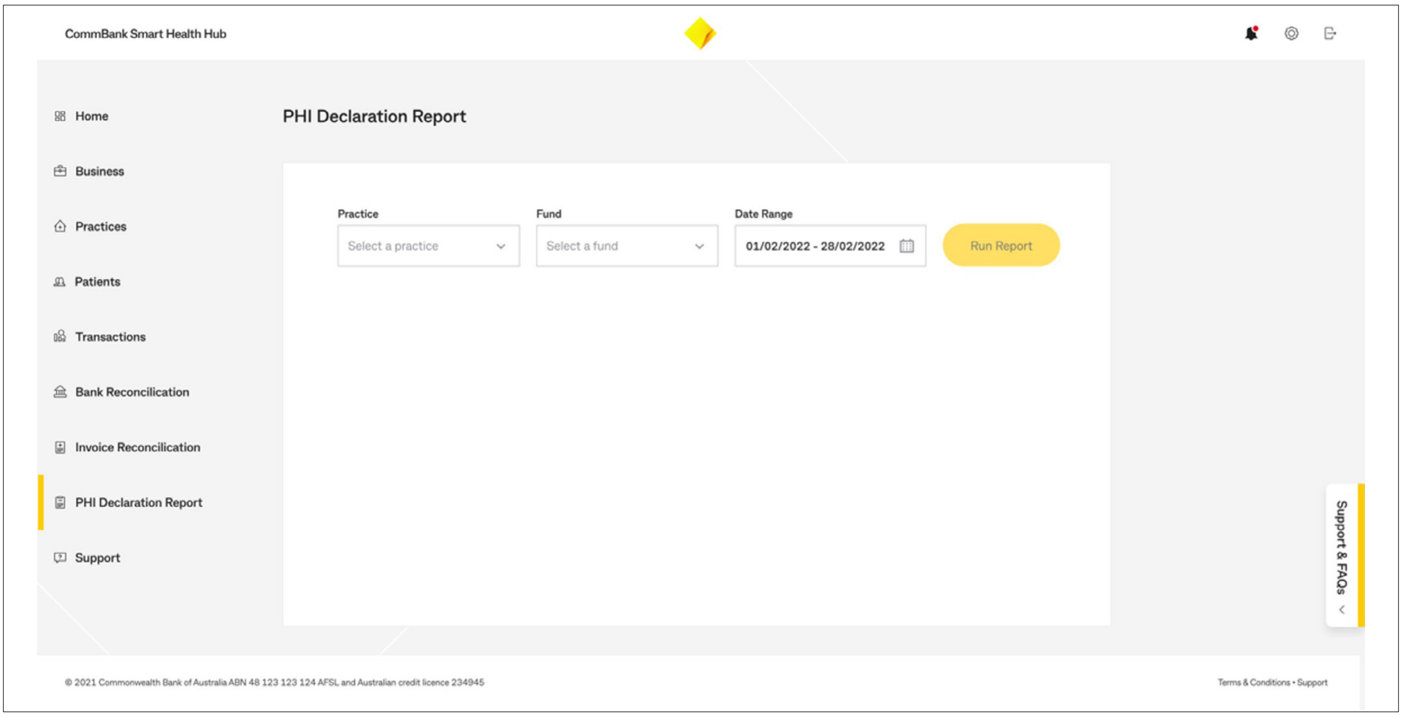
PHI declaration reporting

What is the PHI Declaration Report used for?

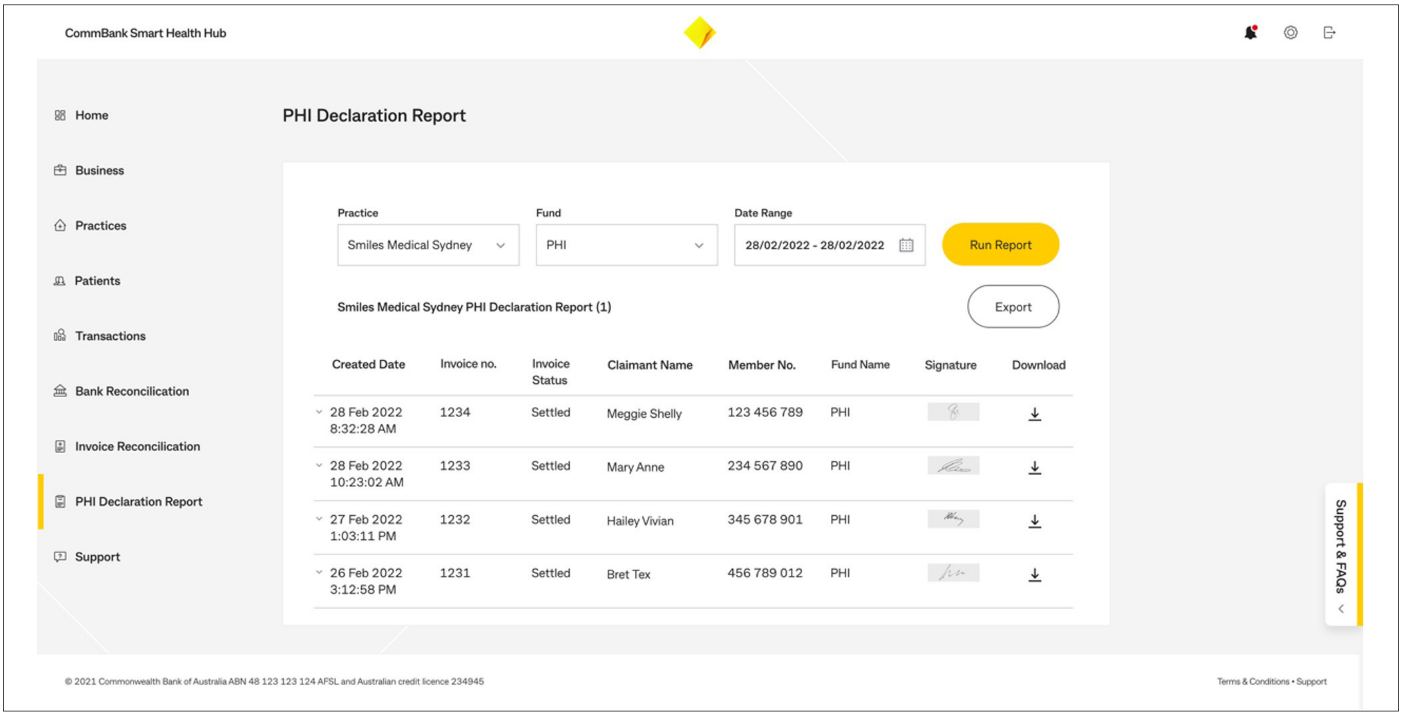
This report stores digital copies of every patient PHI Declaration or signature for seven years. This means your practice no longer has to keep physical copies of PHI acknowledgement/declaration. It's an easy and efficient way to meet the mandatory obligation to keep patient acknowledgement/declaration. And it's an easy point of reference when patients enquire about past services received, for example, to compare costs and refunds received over time.

How do you view a PHI Declaration?

1. Click on the ***PHI Declaration Report*** tab at left on the Home page.
2. Choose the practice you'd like to report on, from the dropdown menu.



3. Select a fund, or leave it open to see all funds.
4. Select the date range and click ***Run Report***.
5. A list of patient declarations appear and may be downloaded individually by clicking on the PDF Download icon to the right, as shown below.



How do you export a PHI Declaration Report?

Following the above steps, once your PHI Declaration Report appears:

1. Click ***Export*** in the right hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

Identifying gaps in app claim and pay transactions

For various reasons, you may find a difference between the Bank Reconciliation Report and the Invoice Reconciliation Report. This may occur, for example, if the payment was partially taken or taken as cash/other, so an “unmatched payment” may appear.

What should you do?

Please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday. They will be able to explain why these differences occur and what to do.

Glossary

HPOS	Health Professional Online Services. Simple and secure way for providers to do business with Services Australia.
Item Code	A specific code used by healthcare practitioners to record the type of treatment provided e.g. Medicare item 23 is a short consult.
Medicare Easyclaim	A government service providing a secure connection via EFTPOS terminals to transmit bulk bill and patient claims to Medicare (integration with a PMS is optional)
Paid Patient Claim	The patient pays for the full invoice and the practice or patient separately claims back the Medicare benefit.
Practice Administrator	Role provided in the hub to be able to process claims and payments
Practice Management Software (PMS)	Software used by practices to manage patient booking, clinical notes and payments
PRODA	Provider Digital Access. PRODA is an online identity verification and authentication system
Reconciliation / Reconcile	The process of validating that a patient claim has been paid or processed
Reporting	Data provided from the portal on historical claims and payments made to the practice
Tenant Administrator	The role that can assign other access within a business