

+ HICAPS **+**



GETTING STARTED

A guide to using
the key features
of HICAPS
Accounts Online



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1. Logging in

To bring up the login screen, click the  link which is located on the HICAPS home page at www.hicaps.com.au.

1.1 Your first login

Once you have submitted the online form on our website requesting access to HICAPS Account Online, you will be issued with a User ID and temporary password.

Your User ID will be an 8-character alphanumeric identifier allocated by HICAPS. Your User ID and password are both case sensitive.

After using your User ID and temporary password to log in for the first time, you will be taken to the HICAPS Accounts Online *Terms of Use* page. You should read this information carefully. If you are satisfied with the Terms of Use click the **I agree** checkbox to continue.

1.2 Changing your temporary password

Your temporary password can only be used for your first login. Having accepted HICAPS' *Terms of Use* you will be taken to the Change Password page. You may now choose your own password according to the format detailed in section 2.1.

You will now be taken to the *Security Identification* page. Please ensure you complete this section. The information you enter here will be used by HICAPS to verify your identity should you require your password to be reset. Please use information known only to yourself.

Set New Password

New Password Confirm Password

Enter & Confirm User Details

User ID Level3

First Name Surname

Address 1

Address 2

City State Postcode

Email

Phone

Fax

The following information is used for security purposes if you need to have your password changed by telephone.
The phone operator will ask you the query challenge question, and you must answer the query response value in order to identify yourself.

Query Challenge Query Response

Example: Pet's Name? Rover

Mother's Maiden Name

DOB (dd/mm/yyyy)

1.3 Remember to log out

After every login be sure to log out by clicking on the **Logout** link in the top right hand corner of the screen.

2. Passwords

2.1 Format

HICAPS Accounts Online passwords are case sensitive. Some other key points to remember when choosing/using your password are:

1. It must be between 8 and 16 characters in length.
2. It must be alphanumeric (ie. contain both digits and letters).
3. It must not contain spaces.

2.2 Changing your password

To change your password, select **Personal Details** from the **User Administration** menu and then click **Change Password** at the bottom of the **User Details** screen. For security purposes, you must enter your current password before entering your new password.

2.3 Forget your password?

If you forget or mis-key your password and fail to login successfully three times in a row, you will automatically be locked out of HICAPS Accounts Online.

You can reset your password by selecting the **Forgotten your password?** link from the login page. You will be required to enter your **User ID** before clicking **Reset Password**. This will initiate an automatic email containing a verification number that is sent to the registered email address of the **User ID**. Key this **Verification Number** in to the requested field and select **OK** to be prompted with the steps to reset your password.

Welcome to HICAPS Accounts Online Password Reset Assistance

Enter your 6 digit token below:

Your Verification Code has been sent to the following email address b*****y@hicaps.com.au

Verification Number: Expires in 5 minutes

[Click here to change your email](#)
Please complete all requested details in the email before sending

If the email address that is registered to the User ID does not match you can request for this to be changed by clicking on ***Click here to change your email.***

You can also have your password reset by a colleague with Level 3 access (see section 6.5).

Alternatively, you can call the HICAPS Help Desk on 1300 650 852. For security purposes, the HICAPS Help Desk will use the security information you have previously provided to verify your identity (refer to section 1.2).

3. Access Levels

Each HICAPS Accounts Online user is assigned one of three distinct access levels.

HICAPS Accounts Online Functionality by User Access Level		Access Level 1	Access Level 2	Access Level 3
Provider/s transactions	View & download	✓	✓	✓
Transactions for all providers attached to an account ID			✓	✓
Previous HICAPS statements & previous HICAPS daily			✓	✓
Manage statement frequency, type & delivery method and mailing address details			✓	✓
Create and upgrade additional HICAPS Accounts Online Users & ID's				✓
Modify own user details (mailing address, e-mail etc)		✓	✓	✓

3.1 Changing a user's access level

User access levels can be changed by any Level 3 user at your practice (see section 6.7) by selecting **Manage User Roles** from the **User Administration** menu.

CAUTION: Careful consideration should be given before upgrading a user to a higher access level as it will enable them to access additional functionality.

4. Key Level 1 Features

As a Level 1 user, you can view a provider's transactions and carry out non-financial administrative functions.

Level 1 users that have a provider number linked can also make changes to the terminal configuration of that provider (see section 6.3).

If access to statements is required to assist with reconciliation, Level 2 access is required.

4.1 View transactions for a single provider

Select **Claim Transactions** from the **Providers** menu.

You can only view transactions relating to the provider displayed in the *Provider Number* field. To tailor the report to your needs, choose from the options presented in each of the other five fields: *Fund*, *Start Date*, *End Date*, *Membership Number* and *Terminal Number*. By default your report will be displayed on screen. If you wish to save the report for future analysis, select **CSV Download**. Click **Next** to display your claim transactions search results.

Claim Transactions

Please enter the desired transactional search parameters

Search	
Provider Number	H9999981
Fund	All Participating Funds
Start Date (sys_date)	26/05/2021 (dd/mm/yyyy)
End Date (sys_date)	26/05/2021 (dd/mm/yyyy)
Membership No.	
Terminal No.	
Select Report Output Format	<input checked="" type="radio"/> View Onscreen or <input type="radio"/> CSV Download

Note that the system is updated every few hours.
The most recent update occurred at: 26/05/2021 14:09:09

NOTE: Level 3 users will have access to view claim transactions from all providers that are linked to their user groups.

If you want to view statements for reconciliation, you will require Level 2 access.

5. Key Level 2 Features

Allows users to view statements to assist with reconciliation, to view the transactions of all providers attached to the bank account ID (Settlement Account) and carry out non-financial administrative functions.

5.1 View statements

Select **View Statements** from the **Accounts** menu, then select the statement you wish to open by clicking on **SUMMARY** to view the statement or **Download** to save it.

View And Download Statements

To download the desired statement click the associated download link.

Please note that download may take several moments, particularly for large statements. If you are unable to view PDF's, [download](#) the Adobe Acrobat Reader before continuing.

Available Statements

Viewing statements for BSB

Account No.

Statement From	Statement To	Statement Type	Download
09/06/2021	09/06/2021	SUMMARY	Download
08/06/2021	08/06/2021	SUMMARY	Download
07/06/2021	07/06/2021	SUMMARY	Download
06/06/2021	06/06/2021	SUMMARY	Download
05/06/2021	05/06/2021	SUMMARY	Download
04/06/2021	04/06/2021	SUMMARY	Download
03/06/2021	03/06/2021	SUMMARY	Download
02/06/2021	02/06/2021	SUMMARY	Download
01/06/2021	01/06/2021	SUMMARY	Download
31/05/2021	31/05/2021	SUMMARY	Download
30/05/2021	30/05/2021	SUMMARY	Download
29/05/2021	29/05/2021	SUMMARY	Download
28/05/2021	28/05/2021	SUMMARY	Download
27/05/2021	27/05/2021	SUMMARY	Download

5.2 Daily totals

Select **View Daily Totals** from the **Accounts** menu, then select the account and day required. Information will be displayed on screen but you can also save the report by clicking **Download**.

6. Key Level 3 Features

Level 3 access is the highest available and allows users to access all current system features, including making changes to the terminal configuration of a merchant as well as user administration controls.

6.1 Modify statements

Select **Modify Statementing** from the **Accounts** menu. Use the drop down menus to select the **Statement Type** (SUMMARY, TRANSACTION, DETAIL), **Statement Frequency** (DAILY, WEEKLY, FORTNIGHTLY, MONTHLY, QUARTERLY) and **Statement Delivery Method** (EMAIL, ONLINE).

6.2 HICAPS terminal configuration

6.2.1 Automatic settlement (AMIS)

Enable your HICAPS terminal to automatically print out a daily settlement report of all your payment transactions, at a pre-determined time of your choosing. If you do not set up AMIS your terminal will automatically settle at 9:30pm AEST every day, provided you have not already performed a manual settlement on the same day.

Select **Merchant Search** from the **HICAPS** menu. Key in your Merchant Number and click **Show Merchant** to open up the **Modify Merchant Details** screen. Check the **Auto Settle Flag** box from the **Merchant Details** section to enable automatic settlement for your HICAPS terminal. You will also be required to key the time of when you would like your terminal to perform the daily automatic settlement in the **ATS Time (AMIS)** field.

Modify Merchant Details

SYNC Merchant Details

MERCHANT	Receipt Line 1	<input type="text"/>
12345678	Receipt Line 2	DOCKLANDS AU
New		
Change of Details <input type="button" value="v"/>		
<input type="text" value="044466666666"/>	Contact Name	<input type="text"/>
<input type="text" value="hicapsales@hicaps.com.au"/>		
Click here for Address Info		
<input type="text"/>		
<input checked="" type="checkbox"/>	Auto Settle Flag	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	ATS Time (AMIS) (Automatic Terminal Settlement)	<input type="text" value="18:00"/> (hh:mm)

6.2.2 EFTPOS to Medicare

Enable your HICAPS terminal to automatically request a Medicare card to proceed with a claim after the completion of an approved EFTPOS transaction.

Select **Merchant Search** from the **HICAPS** menu. Key in your Merchant Number and click Show Merchant to open up the **Modify Merchant Details** screen. Check the Enable **EFTPOS to Medicare Transition** box from the **Merchant Details** section to enable.

Modify Merchant Details

SYNC Merchant Details

Merchant Details			
Merchant Name	Z MERCHANT	Receipt Line 1	<input type="text"/>
Merchant Number	12345678	Receipt Line 2	DOCKLANDS AU
Current Status	New		
New Status	<input type="text" value="Change of Details"/>		
Phone Number	<input type="text" value="044466666666"/>	Contact Name	<input type="text"/>
Email	<input type="text" value="hicapssales@hicans.com.au"/>		
Address Info	Click here for Address Info		
Merchant Password	<input type="text"/>		
Enable EFTPOS to Medicare Transition	<input checked="" type="checkbox"/>	Auto Settle Flag	<input checked="" type="checkbox"/>
Enable EFTPOS to Medicare Prompt	<input checked="" type="checkbox"/>	ATS Time (AMIS) (Automatic Terminal Settlement)	<input type="text" value="18:00"/>

6.3 Provider configuration

6.3.1 Modify provider terminal configuration

Select **View/Modify Provider** from the **Providers** menu. Select or key in the number of the provider that you would like to modify and click **Next**. Modify the appropriate fields under Provider Terminal Configuration and click **Modify Provider**.

HICAPS Auto Settle – print the HICAPS daily claim totals automatically at midnight the end of each day.

HICAPS Auto Settle Txn List – print the detailed HICAPS claim transaction listing automatically at the end of each day.

Claim to Sale – automatically proceed with the gap payment after a successful HICAPS claim has been processed.

Claim to Sale Prompt – prompt the option to proceed with the gap payment after a successful HICAPS claim has been processed.

Provider Prompt Option – prompt an additional field during a HICAPS claim to input further detail on an item number (eg, tooth number on a dental item).

Item Memory – pre populate the item cost field in a HICAPS claim with the value that was last entered for that item number.

Claim to Deposit – prompt the option to input a deposit value before a gap payment transaction. The deposit value entered will be deducted from the value of the gap transaction.

Provider Terminals Configuration	
Apply to all related Providers	<input type="checkbox"/>
HICAPS Auto Settle	Enabled
HICAPS Auto Txn List	Enabled
Claim To Sales	Enabled
Claim To Sale Prompt	Disabled
Provider Prompt Option	Tooth Number
Item Memory	Enabled
Medicare Provider Type	Specialist / Allied Health / Dental
Enter to Add Item	Enabled
Claim To Deposit	Disabled
Lock Provider	Disabled

6.3.2 Terminal display name

Setup an alternative name of your preference to be displayed on the terminal screen for a particular provider. Eg; Provider name: Andrew Butler, Terminal Display Name: Dr Butler

Select **View/Modify Provider** from the **Providers** menu. Select or key in the number of the provider that you would like to modify and click **Next**. Enter the preferred name that you would like displayed on the terminal screen for this provider in the Terminal Display Name field and click **Modify Provider**.

Provider / NPO Details					
Provider Number	H9999997	Payee Number	H9999993		
Available Documents	Medicare Aust Letter, pg 1 - 07/09/2018	View Selected	Add New		
Current Status	Change of Details				
New Status	Change of Details				
Pending Deletion Date	Schedule Deletion				
Title	MR	First Name	Andrew	Surname	Butler
Terminal Display Name	Dr Butler				
Terminal Number	SDNZSA				
Modality	Dentist				
Provider Type	Single Provider				
Specialty Code 1	General Dentist - 112				

6.3.3 Payee provider number

Pre-populate a Payee Provider Number to have the payment for bulk billed Medicare claims sent to someone other than the servicing provider.

Select **View/Modify Provider** from the **Providers** menu. Select or key in the number of the provider that you would like to modify and click **Next**. Enter the number of the provider that you would like the Medicare bulk billed payments to go in the **Payee Provider Number** field and click **Modify Provider**.

Provider / NPO Details					
Provider Number	H9999997	Payee Number	<input type="text" value="H9999993"/>		
Available Documents	Medicare Aust Letter, pg 1 - 07/09/2018	View Selected	Add New		
Current Status	Change of Details				
New Status	Change of Details				
Pending Deletion Date	Schedule Deletion				
Title	MR	First Name	TEST	Surname	Dentist
Terminal Display Name	Dentist				
Terminal Number	SDNZSA				
Modality	Dentist				
Provider Type	Single Provider				
Specialty Code 1	General Dentist - 112				

6.4 Create a new user

Select **Add User** from the **User Administration** menu and complete the fields on the **New User Details** screen as appropriate.

New User Details					
Details					
User ID	<input type="text"/>				
First Name	<input type="text"/>	Surname	<input type="text"/>		
Address 1	<input type="text"/>				
Address 2	<input type="text"/>				
City	<input type="text"/>	State	NSW	Postcode	<input type="text"/>
Email	<input type="text"/>				
Phone	<input type="text"/>				
Fax	<input type="text"/>				
Personal Identification					
Password	<input type="text"/>	Confirm	<input type="text"/>		
<input type="button" value="Reset"/> <input type="button" value="Next"/>					

6.5 Reset a user's password

To reset another user's password, select **Reset Staff Password** from the **User Administration** menu. Key in the **User ID**, then enter a replacement password into both the **New Password** and **Confirm** fields.

The replacement password is temporary. After using it to log in, the user will be forced by the system to select their own permanent password.



The screenshot shows a web form titled "Change User Password". It has a yellow header bar with the text "Password Details". Below the header, there are three input fields: "User ID" with a small blue asterisk icon to its right, "Password" with a blue asterisk icon to its right, and "Confirmation" with a blue asterisk icon to its right. A "Next" button is located at the bottom right of the form.

6.6 Suspend a user

You can prevent practice staff under your supervision from logging in to HICAPS Accounts Online by suspending their access. Select **Suspend User** from the **User Administration** menu, then key in the **User ID**, **Effective Date** and **End Date**.



The screenshot shows a web form titled "Suspend User". It has a yellow header bar with the text "Suspension Details". Below the header, there are several input fields and radio buttons. The first is "User ID" with a blue asterisk icon to its right. Below it are two radio buttons: the first is selected (indicated by a filled circle) and is labeled "Suspend From" followed by an input field and the text "(dd/mm/yyyy)", and the second is unselected (indicated by an empty circle) and is labeled "Unsuspend this user". To the right of the "Suspend From" field is the text "Suspend To" followed by another input field and the text "(dd/mm/yyyy)". A "Next" button is located at the bottom right of the form.

You will be able to suspend their access for a specific duration of time e.g. on annual leave.

6.7 Assign user roles (Access Level)

To change a user's access level, click on **Modify User Roles** from the **User Administration** menu. Key in the **User ID**, then add or remove roles as appropriate.

For example, to upgrade a User from access Level 1 to access Level 2, you would click on Level 2 - Manager in the Selectable column, click [▶] then finally, to confirm the update click **Next**.

The screenshot shows a window titled "Add/Remove Roles". It is divided into two main sections: "Selectable Roles" and "Assigned Roles".

- Selectable Roles:** A list box containing "Level 3 - Administrator".
- Assigned Roles:** A list box containing "Level 2 - Manager", "Level 1 - Staff", and "No Access".

Between the two list boxes are two buttons: a right-pointing arrow (>) and a left-pointing arrow (<). To the right of the "Assigned Roles" list box are two buttons: an up arrow (^) and a down arrow (v). At the bottom right of the window is a "Next" button.

The change becomes effective when the user next logs in.

NOTE: Please ensure roles are in sequential order, ie. from highest access level to lowest. For example, to allocate a user Level 2 access, move 'Level 2' and 'Level 1' across to 'assigned roles', with 'Level 2' positioned above 'Level 1'.

CAUTION: Careful consideration should be given before upgrading a user to a higher access level as it will enable them to access additional functionality.

7. Troubleshooting

My User ID and/or password don't seem to work

User IDs must be at least 8 characters in length. If your User ID is a 7 digit HIC Number or Medibank Private Number, you will need to append a leading zero when logging in. For example, '123456E' must be keyed in as '0123456E'.

The system says I'm already logged on

This will occur if you do not click the logout link on the tools menu to log out at the end of a session, and means you will be unable to access the system for the next 20 minutes. If you require access within that timeframe, a colleague with Level 3 access can unsuspend your account by clicking on **Suspend User** from the **User Administration** menu, then entering your User ID, checking **Unsuspend this user** and clicking **Next**. Alternatively, you can call the HICAPS Help Desk on 1300 650 852.



**If you have any questions
phone the HICAPS Help Desk
on 1300 650 852.**

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