HICAPS TRINITY (T650P) TERMINAL QUICK REFERENCE GUIDE

CONTENTS

TRINITY TERMINAL OVERVIEW

Getting to know your terminal

Trinity Features

Contactless Reader

Battery/Charge Indicator LED

Swipe Reader

Raised tactile dots

Audio Jack

USB-C Charging Port

Power/Accessibility Button

Volume Controls

Chip Reader

Trinity Rear

Rear Camera

Charging Pads

Speaker

Trinity Base

Micro USB

USB-A

Ethernet Port

RS-232

Trinity home screen

Navigation Bar

HICAPS Application Menu

Reports

Sale

Settings Menu

Other Transaction Types

Settlements

Support Menu

Merchant ID

Terminal ID

Software Version

Show open applications

Home

Back

# PROCESSING A HEALTH FUND CLAIM

Follow these easy steps to process a claim:

STEP 1
Swipe or tap the patient's membership card to start the health fund transaction.
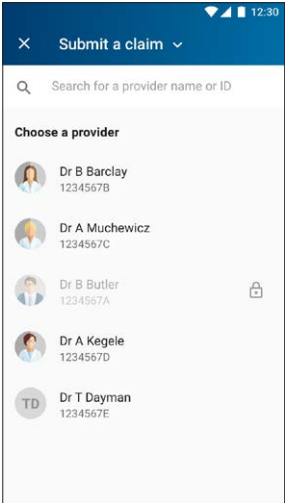
Note: Patients with digital health fund membership cards can use their Android or Apple devices to commence a claim.

Alternatively, for health funds that allow key entry you can manually enter the card number by tapping **"Enter health card"** on the screen.
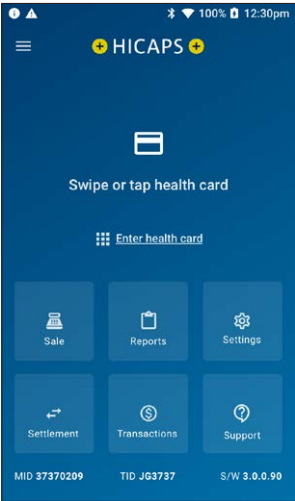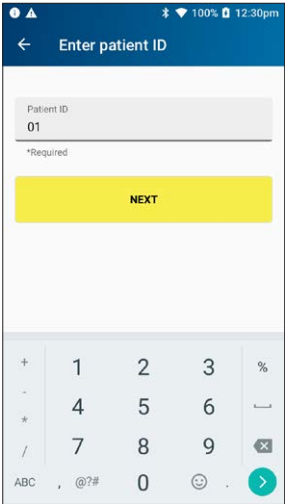
STEP 2
Select or search for the health care provider from the list.

STEP 3
Enter the Patient ID (this is the number next to their name on the membership card) and tap **"Next"** to proceed.

STEP 4

Select the claim item.

STEP 6

Before proceeding with approval to the health fund, a summary of the claim is shown.

To add additional items tap **"Add Item"**.

To make a claim for a different patient, tap **"Add Patient"**.

When ready, tap **"Send to Fund"**.

STEP 5

Enter clinical code if required, the amount for the item and tap **>** to proceed, followed by **"Add to Claim"**.


Note: The first copy of the receipt is required to be signed by the health fund member and retained for your office records. The health fund may require you to produce it.

STEP 7

The claim will be sent to the member's health fund for assessment.

After the claim has been processed by the fund, the claim summary will be displayed.

If there is a gap payment to be paid, it will be displayed here. Tap **"Pay"** to continue, or use the **"Additional Sale"** drop down to add to the sale amount (See STEP 8).
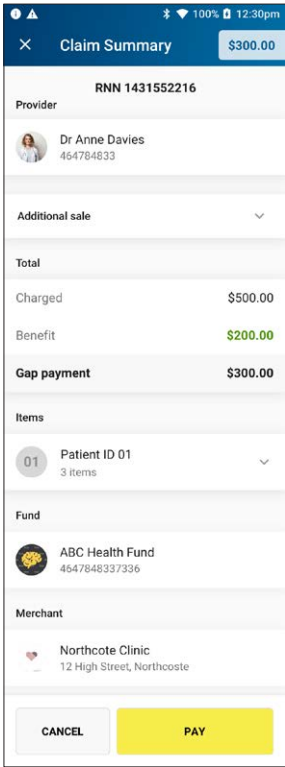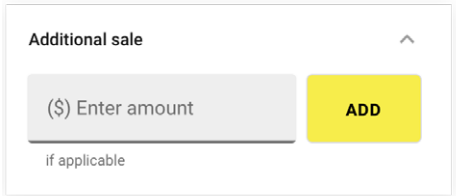

STEP 8

Additional sales can be added to the transaction prior to payment of any gap payment.

Tap on the **"Additional sale"** drop down menu to add an amount for payment.
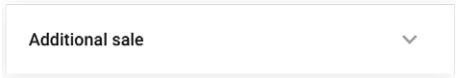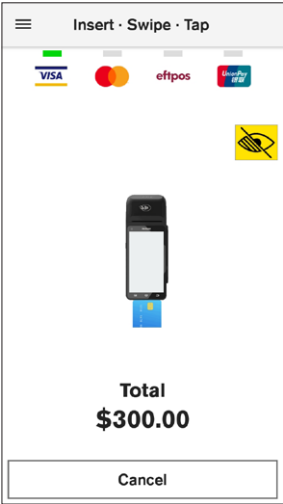

Enter the amount and tap **"Add"**.

Tap **"Pay"** to proceed to the payment screen.

Note: The additional sale amount will be added to the gap payment amount. The total payable amount will be displayed on the payment screen (See STEP 9).

STEP 9

Ask the customer to present their payment
card to finalise the transaction.

PROCESSING A HEALTH FUND QUOTE

STEP 1

Swipe or tap the patient's membership card to start the health fund transaction.

Note: Patients with digital health fund membership cards can use their Android or Apple devices to commence a quote.

Alternatively, for health funds that allow key entry you can manually enter the card number by tapping **"Enter health card"** on the screen.
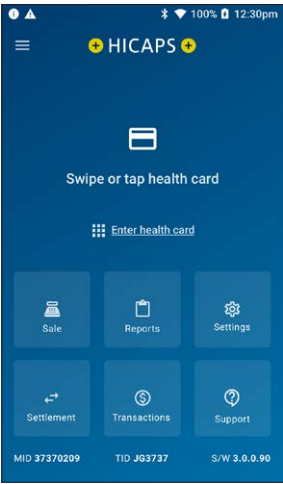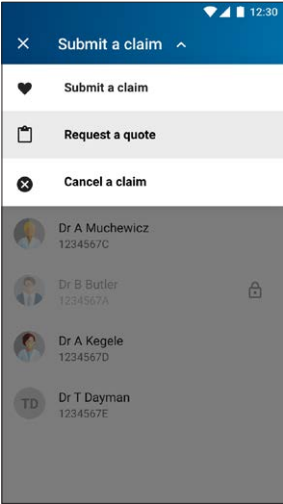

STEP 2

Tap on **"Submit a claim"** at the top of the screen to open the dropdown list.
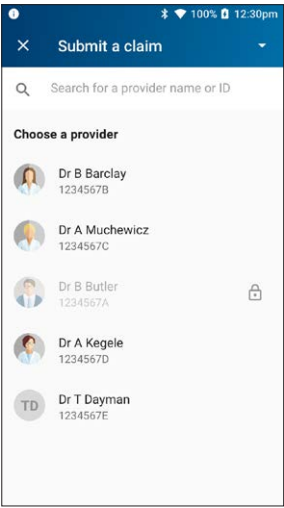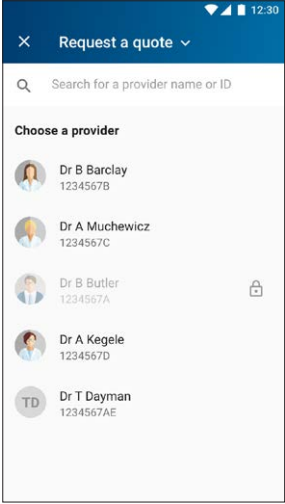
STEP 3
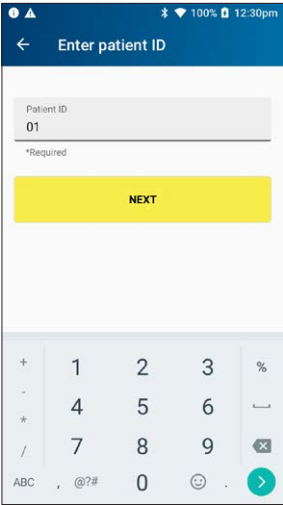Select **"Request a quote"**.

STEP 4
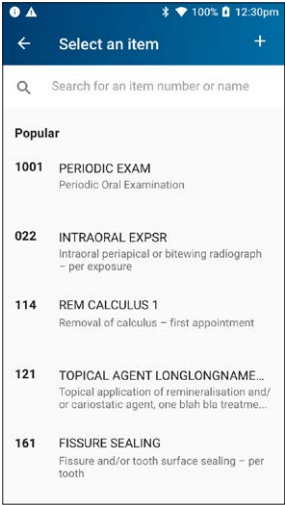Select or search for the health care provider from the list.

STEP 5
Enter the **Patient ID** (this is the number next to the patient's name on the membership card) and tap **"Next"** to proceed.

STEP 6
Select the item.

STEP 7

Enter the amount for the item and tap **>** to proceed, followed by **"Add to Quote"**.

Note: The last value used for an item will prepopulate in the Item Cost field.

STEP 8

You are now ready to send the quote to the member's fund. To add additional items tap **"Add Item"**.

To make a claim for a different patient, tap **"Add patient"**. When ready, tap **"Send to Fund"**.

STEP 9

The quote will be sent to the member's health fund for assessment.

A receipt with the quote and applicable gap payment will print.

The receipt will be clearly marked:

QUOTE ONLY

CANCELLING A HEALTH FUND CLAIM

If you need to cancel a health fund claim:

STEP 1
From the HICAPS home screen, tap **"Transactions"**.

STEP 2
Tap **"Cancel a claim"**.

STEP 3
Swipe or tap the patient's membership card.

Alternatively, for health funds that allow key entry, you can manually enter the card number by tapping **"Enter health card"**.
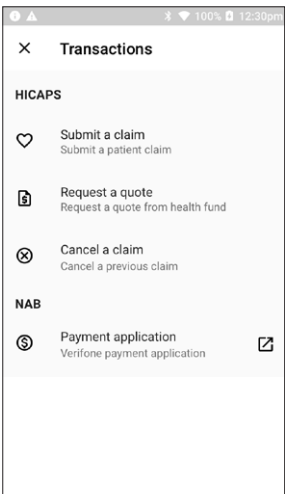
STEP 4
Select a claim or search for a claim to cancel using the RRN number from the original receipt.
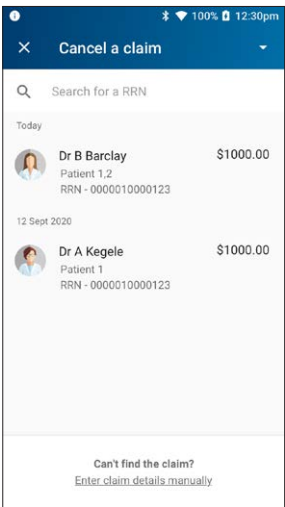
STEP 5

Tap **"Cancel Claim"** to proceed"

STEP 6

Tap **"Cancel Claim"** to confirm.

Once a claim is cancelled, the claim is reversed and there is no way to reinstate the claim.

If you do not wish to cancel the claim tap **"Go Back"**.

PROCESSING A PAYMENT TRANSACTION

To process a transaction without submitting a health fund claim:

STEP 1
From the home screen,
tap the **"Sale"** icon.
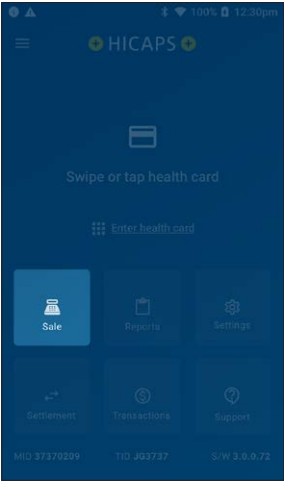
STEP 2
If the terminal has been configured as
a multi merchant terminal you will be
prompted to select the appropriate
merchant for the transaction.
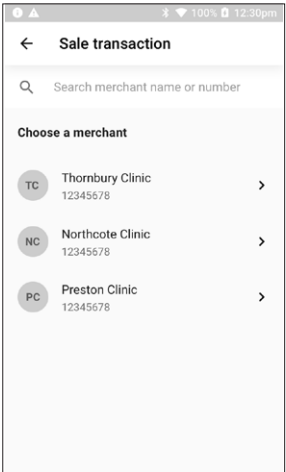
STEP 3
Enter the transaction amount and tap **"Next"**.
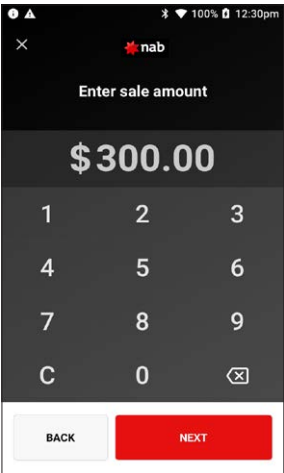
STEP 4

Ask the customer to present their
card to finalise the transaction.
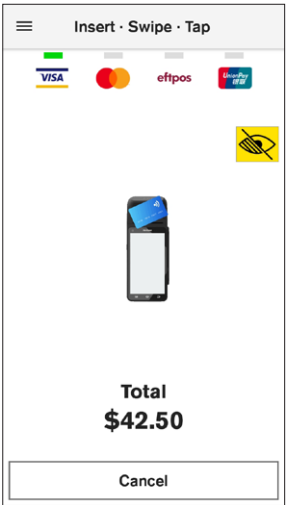
SALE - MANUAL CARD ENTRY

STEP 1
To enter the card details, select the **"Transactions"** icon from the Home Screen.

STEP 2
Select the **"Payment Application"** option under **"NAB"** group.

Note: If the terminal has been configured as a multi merchant terminal you will be prompted to select the appropriate merchant for the transaction.

STEP 3
Enter the transaction amount and tap **"Other"** in the bottom left hand corner of the screen.
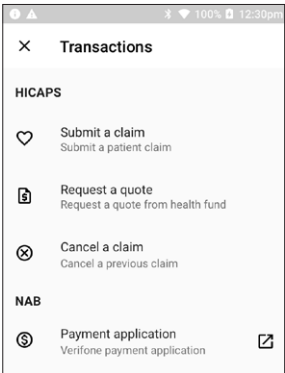
STEP 4
Select **"Manual Card Entry"** from the **"Other Options"** screen. If prompted for Payment Options, select **"Manual"**.
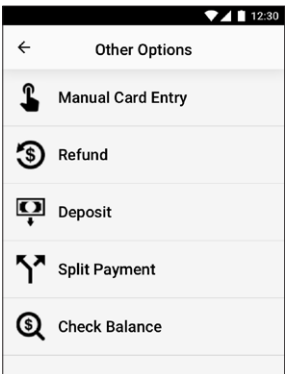
STEP 5

Enter the card number using the on-screen keypad and select **"Enter"**. The card details are masked and will appear as dots. Enter the card details carefully and tap **"Confirm"**.

Note: Merchant may be prompted to enter in the expiry date of the card, followed by CVV (which is generally found on the back of the card. Note: AMEX CVVs are on the front of the card).
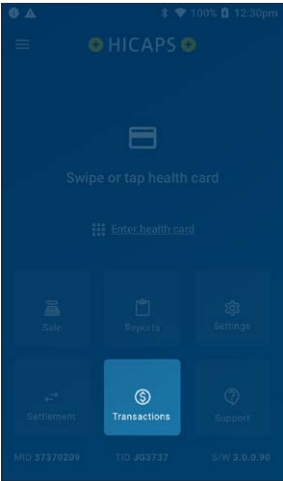
STEP 7

The transaction will be processed by the bank and be approved or declined. Please ensure you check the screen and receipt to confirm the transaction was approved or declined.

Merchant can choose to print a receipt following a response from the bank. Tap **"Print"** to print and **"No Thanks"** to decline printing a receipt.
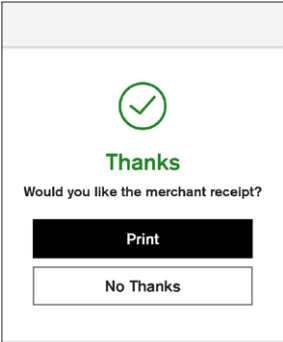
STEP 6

If a PIN is required to complete the transaction, a keypad will be displayed for a customer to enter their PIN and tap **"Enter"** to complete the transaction.

Note: In some cases the card will not require a PIN and therefore a signature will be required to complete the transaction.
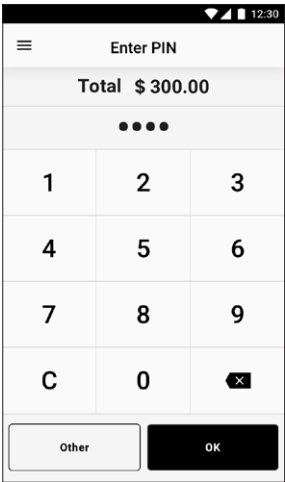
PROCESSING A REFUND

Refunds can be processed via two methods, as either a matched refund or an unmatched refund. HICAPS strongly suggests that a matched refund is used in all cases, as it ensures you are limiting your potential exposure to chargebacks.

After finding the original transaction details on the terminal, processing a matched refund ensures the card number is matching and the refund cannot exceed the value of the original transaction.

To process a matched refund:

STEP 1
From the home screen,
tap the **"Reports"** icon.
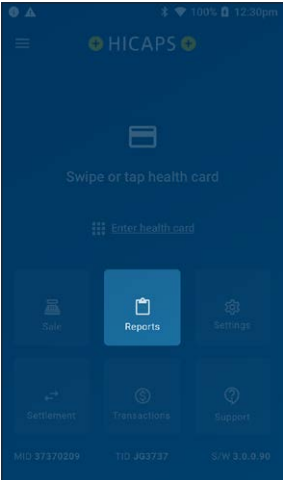
STEP 2
Tap **"NAB Reports"**.
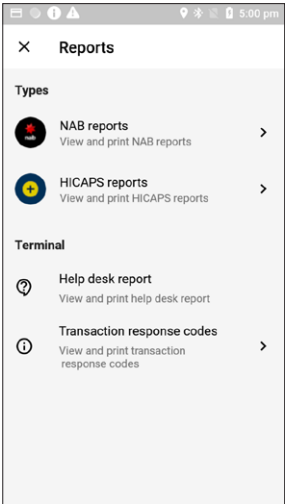
STEP 3

Tap **"Refund"**.
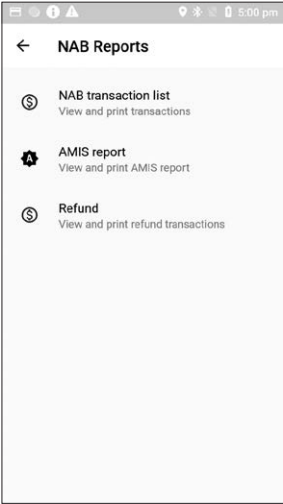
STEP 4

If you have multiple merchants, you will be prompted to select a merchant.
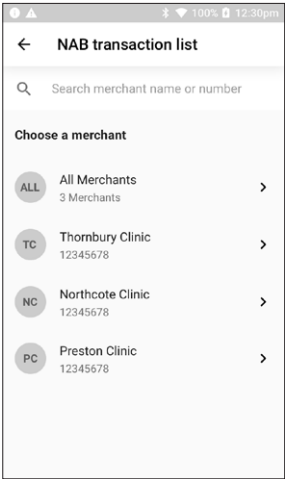
STEP 5

Search or tap the relevant date to view transactions.
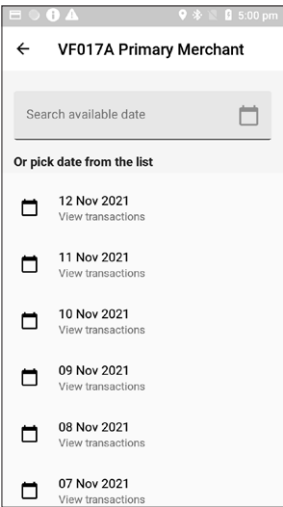
STEP 6

Select a transaction to be refunded.
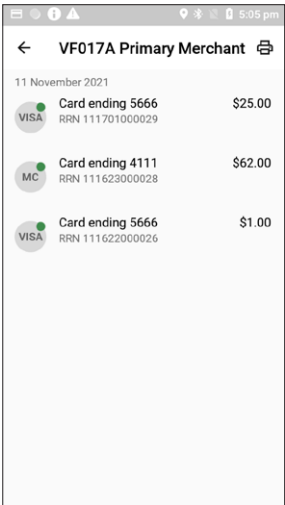
STEP 7

Tap **"REFUND"**.
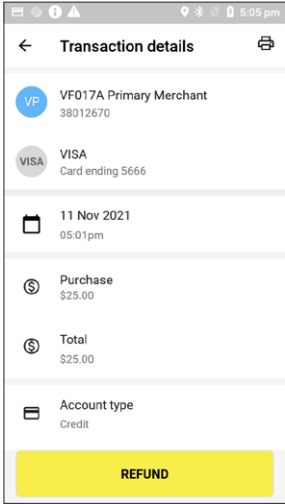
STEP 9

Select **"Card or Mobile"** to continue to the final step to refund.

Select **"Cancel"** to cancel the refund process.
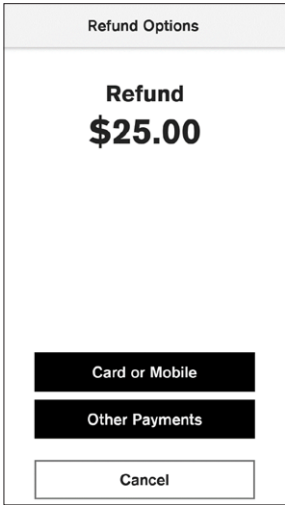
STEP 8

To complete the refund, you will be required to enter the merchant passcode.

If you have forgotten the passcode, you will need to contact the HICAPS Help Desk on **1300 650 852**.

STEP 10

Tap the card used in the original transaction to process the refund.
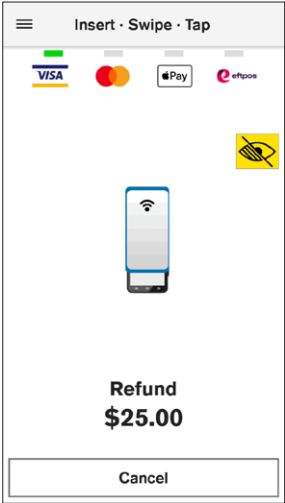
PROCESSING A REFUND

To process an unmatched refund:

Should you need to process an unmatched refund (i.e. unable to match it against the original card number), please follow the steps below:

STEP 1
From the home screen,
tap the **"Transactions"** icon.
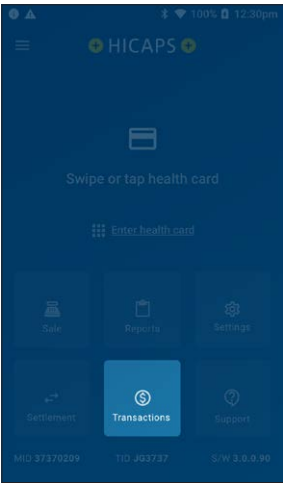
STEP 2
Tap the **'Payment Application'** icon.

STEP 3
If you have multiple merchants, you will be prompted to select a merchant.
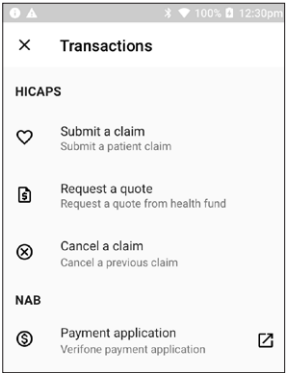
STEP 4
Enter an amount to refund and tap **"Other"** to display **"Other Options"**.
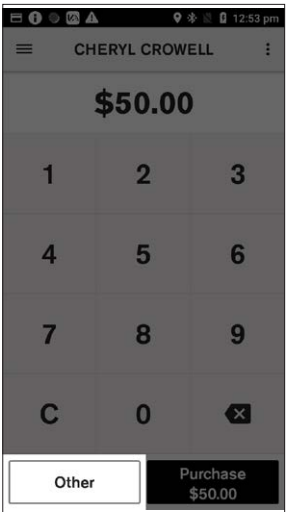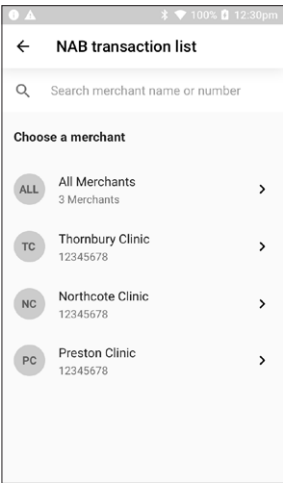
STEP 5

Tap **"Refund"**.
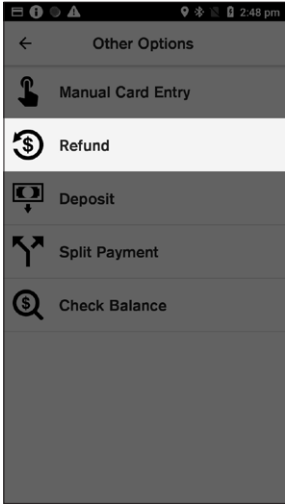
STEP 7

Select from the refund options to refund to a card, a mobile or enter a card number manually.
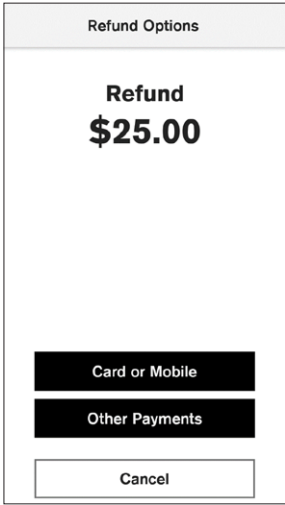
STEP 6

To complete the refund, you will be required to enter the merchant passcode.

If you have forgotten the passcode, you will need to contact the HICAPS Help Desk on **1300 650 852**.

STEP 8

Ask the customer to present their card to finalise the transaction.

SETTLEMENTS

Your terminal is configured to perform and print the day's settlement at 9.30 pm AEST daily, if a manual settlement has not been performed. If you would like the automatic settlement to occur earlier, contact the HICAPS Help Desk on **1300 650 852**.

To perform a manual settlement follow the steps below:

STEP 1
From the home screen, tap the **"Settlement"** icon.
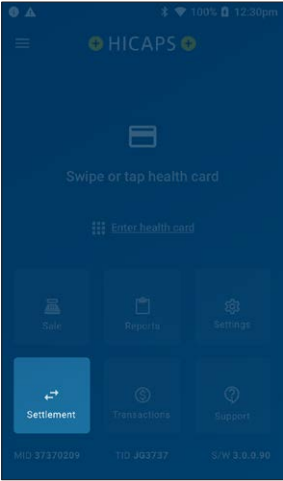
STEP 2
Tap **"Today's settlement"**.
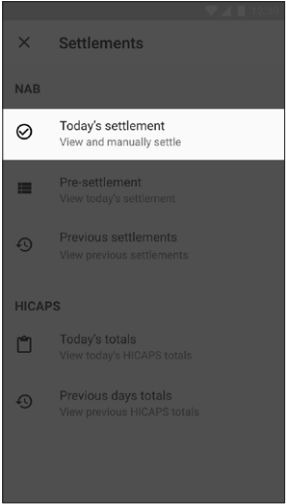
STEP 3

Choose the merchant account you wish to settle.
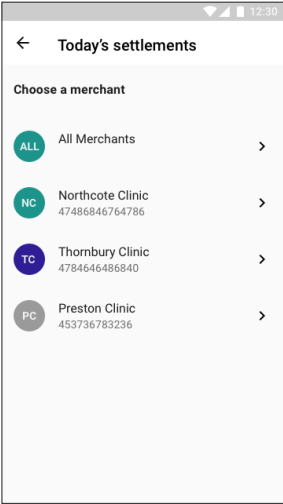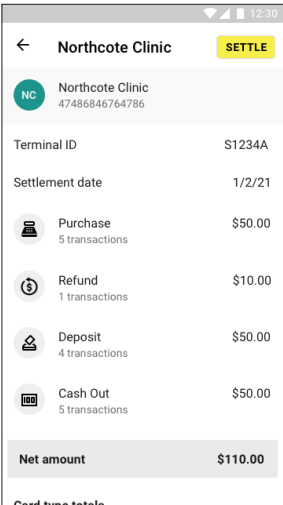
STEP 4

The terminal will download the latest settlement details.

STEP 5

Tap **"Settle"**.

STEP 6

The terminal will print the settlement receipt.

HICAPS TOTALS

Your terminal is configured to perform and print the day's HICAPS totals at midnight AEST daily.

To view or print the current days HICAPS totals, please follow the steps below:

STEP 1
From the home screen, tap the **"Settlement"** icon.
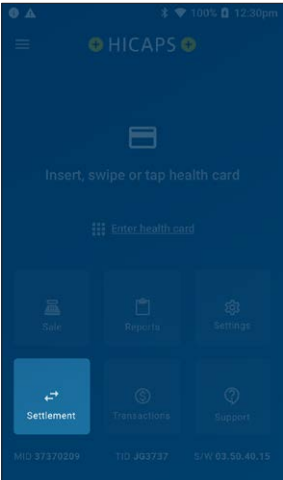
STEP 2
Under HICAPS, tap **"Today's totals"**.
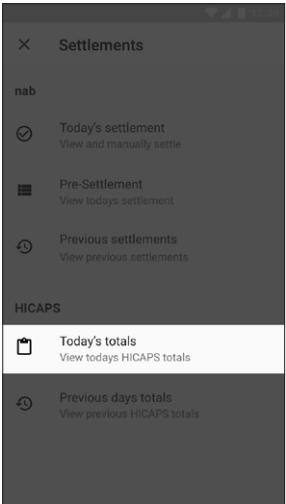
STEP 3
Choose a provider to view that provider's totals only, or **"All providers"** to view a breakdown of all provider totals.
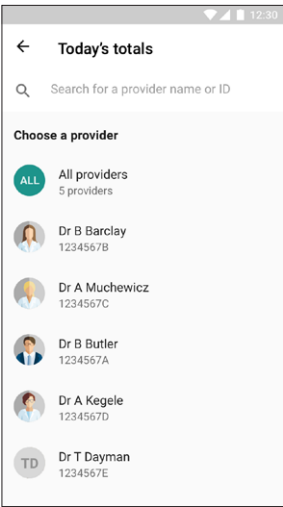
TERMINAL ACCESSIBILITY FEATURES:

Terminal Front

Raised tactile dots

Headphone Jack
for audio prompts

Volume Controls

Chip Reader

Terminal Rear

Speaker for
audio prompts

USING THE ACCESSIBILITY FEATURES FOR THE VISUALLY IMPAIRED

HICAPS Trinity terminals have new accessibility features to support customers with orientating the terminal touch screen to complete their payments.

There are physical features on the terminal around the screen with 14 tactile dots to help navigate PIN entry, audio instructions to help users and an audio jack on the left-hand side.

During the "Present Card" screen for Payment transactions, accessibility can be enabled using the yellow icon on the top right-hand corner or double tapping the screen to enable voice guidance.

The yellow icon provides options to increase the text size and change to different colours, enabling voice guidance and accessibility training.

STEP 1

After starting the transaction, at the present card screen, tap the accessibility icon:

STEP 2

Three options are available for selection depending on the needs of the customer.

To change the colour contrast and text size, tap the first option.

For customers with low or no vision, the second option (Speech for Visually Impaired) provides a voice over that will guide them through the transaction.

The third option provides first time users or those unfamiliar with the voice prompts, a training mode with instructions on how to use the terminal.

Note: Customers can connect headphones via the Audio Jack if required.
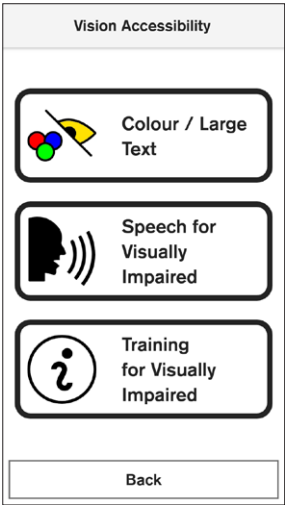
Colour / Large Text

STEP 1

After starting the transaction, at the present card screen, tap the accessibility icon: 👁

STEP 2

To change the colour contrast and text size, tap the first option.

NOTE: Customers can connect headphones via the Audio Jack if required.

STEP 3

The customer will be able to select a high contrast colour scheme. This will also provide larger buttons on screen.
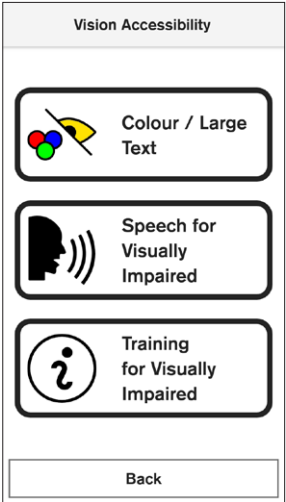
STEP 4

The customer will be a prompted to present their card. An audible voice instruction will also advise on the location of where to present the payments card.

STEP 5

If the card was inserted or swiped, the customer will be prompted to select their account.

Select Card Application

Total
$42.50

NAB Visa Debit

NAB eftpos SAV

NAB eftpos CHQ

Cancel

STEP 6

They will then be prompted to enter their PIN.

Enter PIN

1	2	3
4	5	6
7	8	9
X	0	OK

Speech for the Visually Impaired

STEP 1

Double tap on the middle of the screen to enable **Speech for the Visually Impaired**

A voice prompt will advise the customer of the transaction amount and the locations of where to present the payment card.

STEP 2

NOTE: If the customer taps their card, they will not be required to make an account selection.

Once a card has been presented, a voice will prompt to swipe left or right on the screen to choose their account. A voice prompt will read out the accounts available, and prompt the customer to confirm the account in order to process the payment.

STEP 3

A voice prompt will advise the customer on how to enter the PIN:

The PIN pad has telephone layout with 1, 2, 3 at the top and CANCEL, 0, OK at the bottom of the screen.

Tactile raised bumps surround the screen border indicating the columns and rows of the PIN pad.

The screen will be blank.

To find digits, the customer will move one finger vertically or horizontally. They will hear a beep when they run their finger over any number.

Running their finger over Cancel or OK will read the selection.

To select a digit, tap twice using one finger on the screen and listen for the acceptance sound.

The terminal will announce when the customer has entered four digits.

To finish and pay, the customer will select OK at the bottom right and double tap towards the centre of the screen.

To abort transaction, select CANCEL at the bottom left and double tap towards the centre of the screen.

TRAINING FOR VISUALLY IMPAIRED

During a payment transaction, a customer is able to practise navigating the terminal using the "Training for visually impaired" mode.
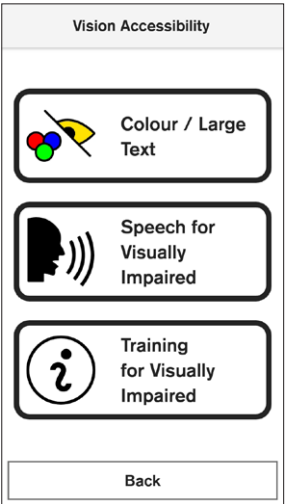
STEP 1

At the present card screen, tap the accessibility icon:
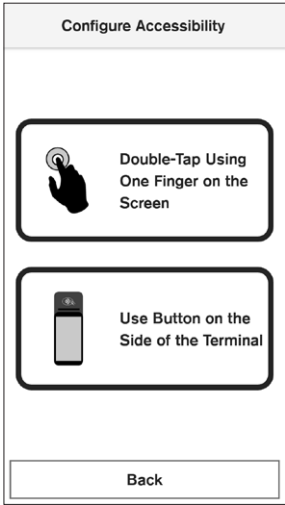

STEP 2

From the vision accessibility screen, select training for visually impaired.

NOTE: Customers can connect headphones via the Audio Jack if required.

STEP 3

Ask the customer if they would prefer to use the side button to confirm selection, or double tap the screen to confirm their selection.

STEP 4

A demo PIN entry keypad will be shown. The customer will be expected to drag one finger on the screen listening to beeps as they navigate to various digits. Digits will be spoken during training (unlike with PIN entry during a transaction).

The customer can also practise digit selection by double-tapping anywhere on the screen. The customer will decide when to exit/complete the training. This can be accomplished by navigating and selecting either the 'X' or 'OK' button.

COMMUNICATION SETTINGS

It's important to understand that some health funds limit the types of treatments that can be claimed when using communications such as mobile and Wi-Fi.

Terminals are configured at install to use Ethernet communications wherever possible. Claims processing is supported by all participating health funds when the terminal is connected by Ethernet (usually a LAN or network cable). This includes if the terminal is paired to the base via Bluetooth®.

If the terminal is removed from the base, the terminal will stay connected via Bluetooth® as long as the terminal is within range and the base is still connected to an active internet connection.

In the event your internet connection is temporarily unavailable, the Trinity terminal will attempt to process transactions via previously connected Wi-Fi or mobile networks.
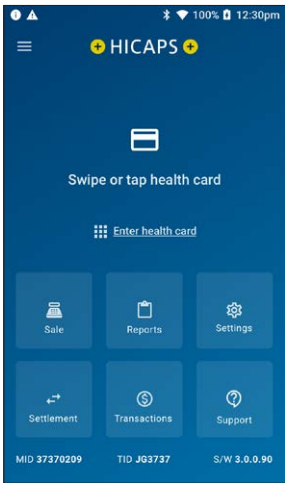
For further information on communication settings please go to www.hicaps.com.au and view the HICAPS Terminal Communications flyer.

Setting up Wi-Fi

In most cases Wi-Fi will be set up when a terminal is installed, however should you need to set up Wi-Fi on your Trinity terminal at a later date, please follow these steps.
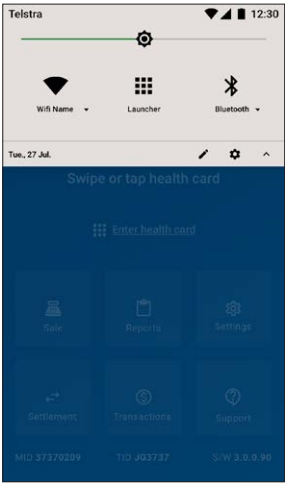
STEP 1
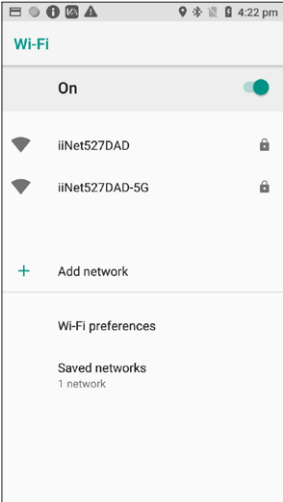Swipe down from the top of the screen.

STEP 2
Tap and hold the **"Wi-Fi"** icon on the left of the notification bar:
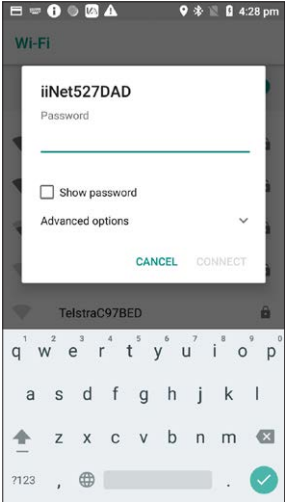
STEP 3

Tap the network you want to connect to.

STEP 4

Type in your Wi-Fi password, and tap **"Connect"**. Trinity will connect to this network automatically when in range.

NOTE: The Trinity terminal will still use the Ethernet connection (via Bluetooth® pairing to the base), when in range.
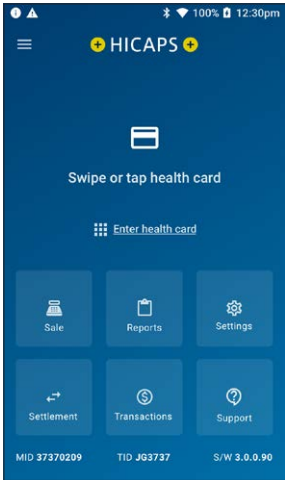
UPDATING YOUR TRINITY TERMINAL

Your Trinity terminal may sometimes require an update. If you are asked to perform a heartbeat by the HICAPS support team, the following will assist you in completing this process.
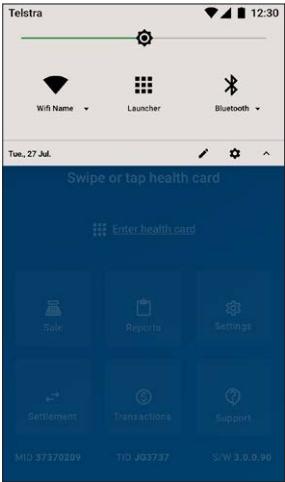
STEP 1
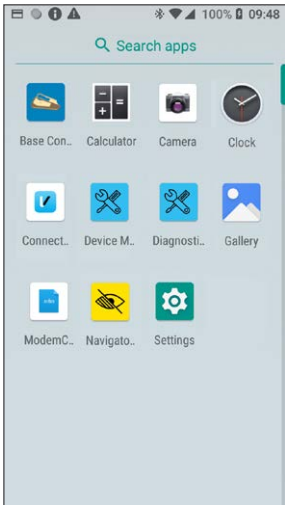Swipe down from the top of the screen.

STEP 2
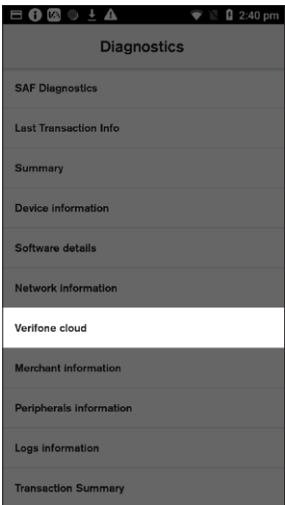Tap on the **"Launcher"** icon in the middle of the notification bar: ▦

STEP 3
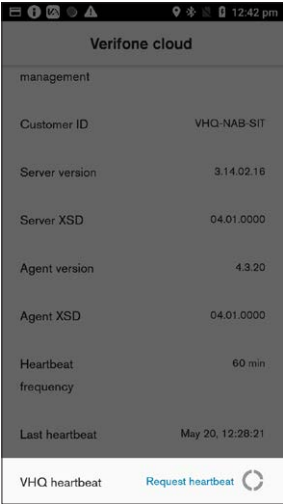Tap the **"Diagnostics"** icon: ✖

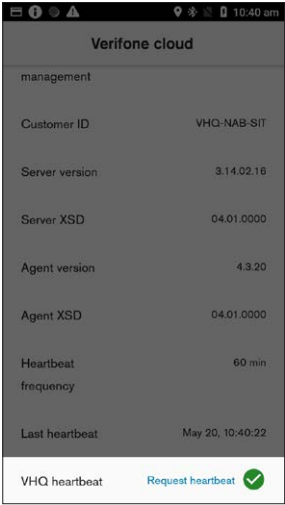
STEP 4
Tap **"Verifone cloud"**.

STEP 5

Scroll to the bottom and tap the blue **"Request Heartbeat"**.

STEP 6

A green tick will let you know the heartbeat was successful.

Press the Home button. Any updates will download to the terminal.

SUPPORT

If you need support, our team is ready to help! Call the HICAPS Help Desk on **1300 650 852**.

For the most up to date version of this Quick Reference Guide please scan the QR code below.

A163758-0422B