HICAPS

HICAPS TRINITY TERMINAL USER GUIDE

CONTENTS

1. GLOSSARY OF TERMS

Term	Description
AEST (Australian Eastern Standard Time)	The time zone used for automatic settlements on the HICAPS Trinity terminal unless otherwise configured.
benefit	Value of rebate authorised by a Health Fund.
body part	Two-digit alpha/numeric identifying the part on the body on which the service was performed.
cancel	Reverses a transaction processed through the terminal.
card	A membership card issued by a Health Fund or an EFTPOS or credit card, issued by a bank.
claim	After treatment is provided, details are sent electronically via the terminal to the Health Fund.
claim declined	When a Health Fund declines to pay the request, a brief response message will print with each declined item and/or claim.
claim receipt	Either the terminal or the associated Practice Management System prints a receipt, which must be signed by the patient to acknowledge services and approve the transfer of payment to the provider.
claim to sale	The terminal facility allowing you to start an EFTPOS transaction using the Gap amount returned from the HICAPS Claim.
clinical code	Two-digit alpha/numeric identifying the body part/primary condition/diagnostic intervention on which the service was performed.
fallback	The terminal was unable to contact the bank to process an EFTPOS transaction, but the transaction has been approved/declined and will be sent to the bank with the next transaction.
gap payment	The amount remaining after the Health Fund has approved a benefit for the specified services.
heartbeat	A short message sent by the terminal to the terminal management system every hour. It sends statistical information and checks for updates.
HICAPS	Health Industry Claims and Payments Service. The company responsible for the switching of transactions to health funds from the terminal.
issue date	The date the membership card was issued. Those cards with issue dates have them printed on the bottom right-hand corner of the card.
item cost	The amount charged for a given item of service.
item number	Numeric code identifying the type of service performed. Refer to the HICAPS website for a full list of approved service item numbers by modality. https://www.hicaps.com.au/support/guides/item-number-guides
member	A customer of a Health Fund.

Term	Description
MMF	The Multi-Merchant Facility. This is a feature of the HICAPS terminal which optionally allows you to settle the EFTPOS funds separately for each provider.
patient ID	A member listed on the card which identifies a given patient within a Health Fund membership.
Practice Management System	The PC-based system which allows a transaction to be sent directly to the HICAPS terminal.
Provider	Practitioners who provide Health Services to patients.
provider number	Is eight characters that uniquely identify each individual provider for a specific location. Provider numbers that HICAPS use are issued by Medicare Australia or Medibank Private. Provider numbers are location specific, so you must have a provider number for each location you wish to practice at.
quick settings panel	A pull-down menu accessed on the terminal from the home screen, or within apps, which contains easy access settings for a number of commonly used settings, such as Wi-Fi, Bluetooth® etc. Swiping down from the top of the terminal screen will reveal the terminal's quick settings panel.
refund	Refunds a previous EFTPOS or credit approved transaction.
regular heartbeat	Heartbeats that occur outside the configured maintenance window.
reversal	Reverses an approved transaction on the same day the transaction was processed.
RRN	Receipt reference number (unique 12-digit field)
swipe member card	Pass the membership card through the card reader on the right-hand side of the HICAPS terminal.
tooth number	Two-digit FDI numeric identifying the tooth on which the service was performed.

2. GETTING TO KNOW YOUR TERMINAL

2.1 Diagram of HICAPS Trinity Terminal

Contactless Reader

Battery/Charge Indicator LED

Base Charging Port and Indicator Lights

Swipe Reader

Raised Tactile Dots

Audio Jack

USB-C Charging Port

Power/Accessility Button

Volume Controls

Chip Reader

- **Contactless Card Reader** – tap health fund membership cards and customer payment cards here. Digital cards are also read from the contactless reader.
- **Battery/Charge Indicator LED** – shows the battery level and charging status of the terminal.
- **Swipe Reader** – use to swipe customer health fund membership or payment cards with a magnetic strip.
- **Raised Tactile Dots** – surround the screen to assist with orientation of the digital keypad for PIN entry. Horizontal dots represent columns and vertical dots represent rows. (Refer to the Accessibility Guide for further information – see also www.hicaps.com.au/support/trinity-support/trinity-guides).
- **Chip Reader** – insert payment cards here.

- **Volume Controls** – use these buttons to adjust the volume of sounds and alerts. The volume buttons are used to adjust the volume of spoken instructions through the in-built speaker or headphones.
- **Power/Accessibility Button** – used to power the terminal on and off or to restart the terminal.
- **USB-Charging Port** – for a USB-C charging cable.
- **Audio Jack** – in accessibility mode, used by cardholders to assist with hearing audio prompts.
- **Base Charging Port and Indicator Lights** – every terminal comes with a power pack which connects into the side of the base.
  - A solid white light indicates the base is being powered.
  - A solid blue light indicates terminal connection with Bluetooth. A flashing blue light indicates pairing mode.

Note: Any touch screen stylus can be used on the terminal screen.

Terminal base

Rear Camera

Charging Pads

Speaker

- **Rear camera** – required to pair with terminal base
- **Speaker** – for audio prompts
- **Charging pads** – for charging the terminal

Micro USB

USB-A

Ethernet Port

RS-232
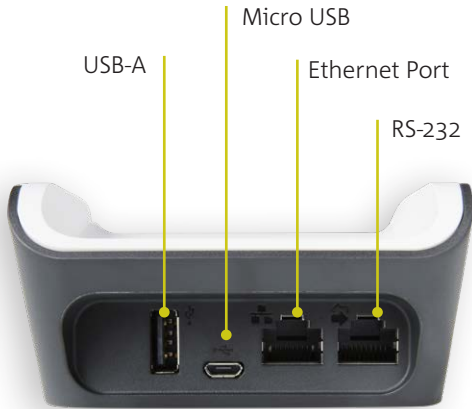
USB-A – currently not being used

Micro USB - used to connect Serial integration
NOTE: for serial integration the terminal requires a Type A to Micro USB cable

Ethernet Port – used to connect the ethernet cable for receiving IP connectivity via an active LAN cable being plugged into the base.

2.2 Terminal Accessibility features

Terminal Front

Raised tactile dots

Headphone Jack
for audio prompts

Volume Controls

Chip Reader

Terminal Rear

Speaker for
audio prompts

Trinity home screen

Navigation Bar

HICAPS Application Menu

⊕ HICAPS ⊕

Swipe or tap health card

⋮⋮⋮ Enter health card

Reports

Sale

Sale

Reports

Settings — Settings Menu

Other Transaction Types

Settlements

Settlement

Transactions

Support — Support Menu

Terminal ID

Merchant ID — MID 37370209   TID JG3737   S/W 3.0.0.90 — Software Version

Home   Back

2.3   HICAPS Home Screen Navigation

Your HICAPS Trinity terminal has a touch screen like an Android smart phone. It responds to gestures such as tapping and swiping.

- **Tap** – lightly touch to select or launch items
- **Swipe** – lightly drag your finger across a screen to swipe. For example, swipe down from the top of the screen to access the apps panel.
- **Touch and hold** – touch and hold items to open more menus.

2.3.1 HICAPS Trinity Terminal Home Screen

- **Navigation bar** – includes indicators for Bluetooth, Wi-Fi and mobile connectivity, battery charge status and time of day
- **Settings menu** – provides access to terminal and other settings
- **Transaction types** – provides access to HICAPS transactions to submit and cancel claims or to request a quote. Provides access to the payment application and a range of settings related to payments.
- **Support menu** – provides access to terminal and system information
- **Terminal ID (TID)** – the TID is displayed for easy terminal identification
- **Software version** – The software version is displayed to provide easy identification of the current version installed on the terminal.
- **Back** – allows users to go back to a previous screen.
- **Home** – returns user to the HICAPS application.
- **Merchant ID** – shows the merchant identification number for the primary merchant on the terminal.
- **Settlement menu** – provides access to the current and previous day's settlements
- **Sale** – provides access to the payment application for sales and other non-HICAPS transactions
- **Reports** – provides access to a range of NAB, HICAPS and transaction reports
- **HICAPS application menu** – provides access to transactions, settlements, reports, settings, support and a terminal guide.

3. HICAPS

3.1 Registering a new provider

To add providers you will need to register their details by completing the online form (Register a new provider), available on the HICAPS website www.hicaps.com.au/forms.

Once the completed form and supporting documents have been submitted and approved by HICAPS, the provider updates will be sent to the associated health funds and the new provider/s will automatically appear on your HICAPS Trinity terminal within 5 business days. Once a new provider appears on the terminal, they will be able to transact. There is no further action required.

3.2 Modifying a provider

To modify provider details, login to HICAPS Accounts Online.

You can refer to the www.hicaps.com.au/support/guides for more information on making modifications.

3.3 Deleting a provider

You can remove a provider that is no longer practising at your location from your HICAPS Trinity terminal by completing the online form, available on the HICAPS website www.hicaps.com.au/forms.

Once the completed online form has been submitted and approved by HICAPS, the removal of the provider will be updated with the associated health funds and the requested provider/s will automatically be removed from your terminal within 5 business days.

3.4 Processing a health fund claim

STEP 1
To process a health fund claim transaction from the home screen, swipe or tap a patient's membership card on the terminal. Alternatively for Health Funds that allow key entry, you can manually enter the card number by tapping **Enter health card** on the home screen.

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

Note: Some of the HICAPS participating health funds will not be supporting Wi-Fi or mobile terminal claiming. Claims processing is supported by all participating health funds when the terminal is Bluetooth paired with the base, with an ethernet cable connected. A list of the participating health funds that support mobile transactions is available on www.hicaps.com.au/partners/participating-health-funds
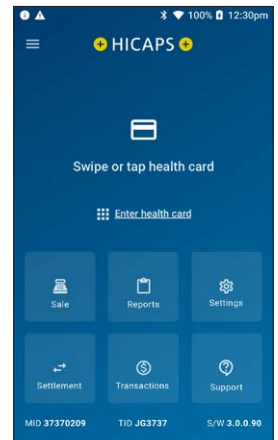
STEP 2

Select a health care provider from the list, or search for a provider by entering part of the provider's name or ID in the search bar.

Note: This prompt will only be displayed if more than one provider is loaded into the terminal.
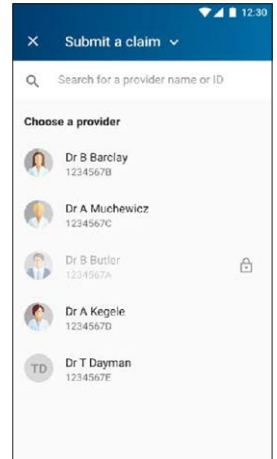
STEP 3

Enter the Patient ID (this is the number next to their name on the membership card) The Patient ID defaults to 01 on the terminal. Tap **NEXT** to proceed.

Note: For digital membership cards, if the patient has multiple members on their card they can get their Patient ID by tapping the ellipse (°°°) on their device or from their health fund's app.
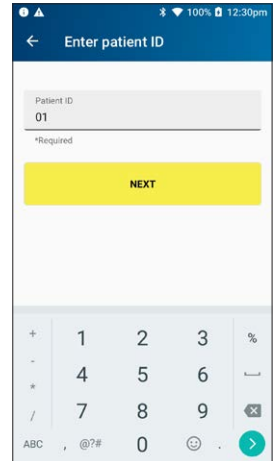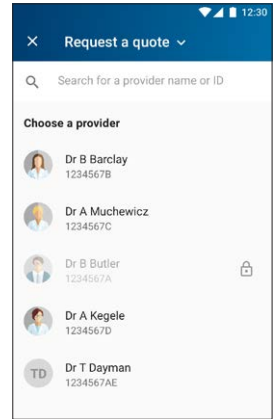
STEP 4

Select the claim item or **search** for items by number or name. As you type in the Search field at the top of the screen, options will be displayed. Tap on the relevant item to add it to the claim.
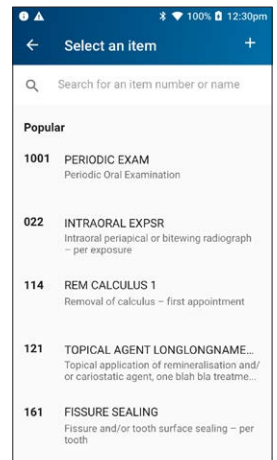
STEP 5

Enter clinical code if required, enter the amount for the item and tap ❯ to proceed. When all details are complete, tap **ADD TO CLAIM**.

Note: The item cost will display the amount that was last used for that item. The first time you use an item, you will need to add an item cost amount.

The date of service defaults to the current date. Use the calendar icon to select another date.

STEP 6

Before proceeding with approval to the health fund, details of the claim will display. From here you can add, delete or modify items and patients.

To add additional items, tap **ADD ITEM**. To make a claim for a different patient, tap **Add Patient**.

When ready, tap **SEND TO FUND**.

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. 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).

Additional sale	⌄

Additional sale	⌃
($) Enter amount	**ADD**
if applicable	
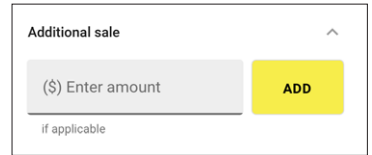
STEP 9

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

☰   Insert · Swipe · Tap

VISA   eftpos   UnionPay

Total
$300.00

Cancel

3.5   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.
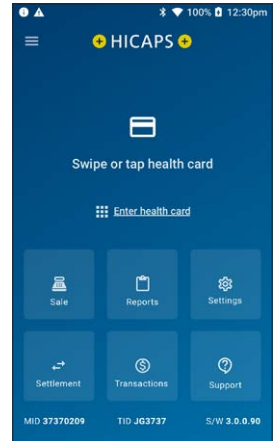
STEP 2
Tap **Submit a claim** at the top of the screen to open the dropdown list.
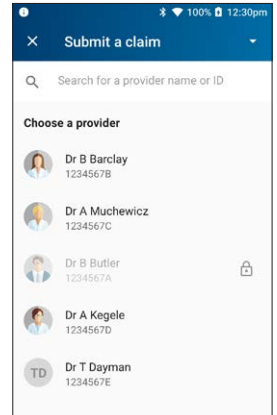
STEP 3
Select **Request a quote**.
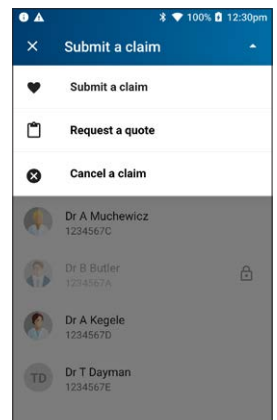
STEP 4

Select a health provider from the list, or search for a provider by entering part of the provider's name or ID in the search bar.

Note: This prompt will only be displayed if more than one provider is loaded into the terminal.

STEP 5

Enter the Patient ID (this is the number next to their name on the membership card). The Patient ID defaults to 01 on the terminal. Tap **Next** to proceed.

Note: For digital membership cards, if the patient has multiple members on their card they can get their Patient ID by tapping the ellipse (°°°) on their device or from their health fund's app.
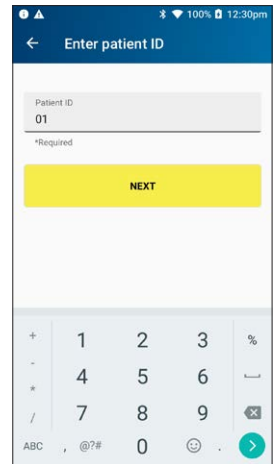
STEP 6

Select the claim item or search for items by number or name. As you type in the search field at the top of the screen, options will be displayed. Tap on the relevant item to add it to the claim.
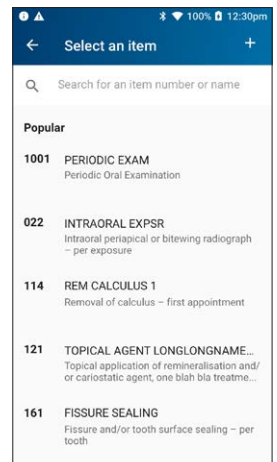
STEP 7

Enter the amount for the item and tap **>** to proceed, followed by **ADD TO QUOTE**.

Note: The item cost will display the amount that was last used for that item. The first time you use an item, you will need to add an item cost amount.

The date of service defaults to the current date. Use the calendar icon to select another date.

STEP 8

A summary of the quote is displayed. Items can be added, modified or deleted.

To add items, tap **ADD ITEM**.

To add a quote for another patient, tap **Add Patient**.

When ready, tap **SEND TO FUND**.

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 with *****QUOTE ONLY*****.

STEP 9

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

Tap **"PRINT"** to print the details, including gap payment.

The receipt will be clearly marked: *****QUOTE ONLY*****

3.6 Cancelling a health fund claim

STEP 1

If you need to cancel a health fund claim, from the HICAPS home screen, tap **Transactions**.
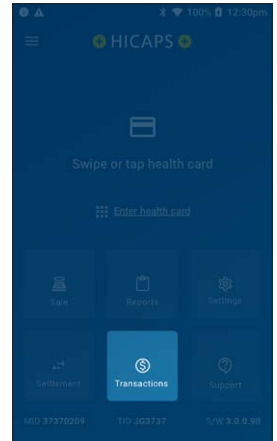
STEP 2

Tap **Cancel a claim**.
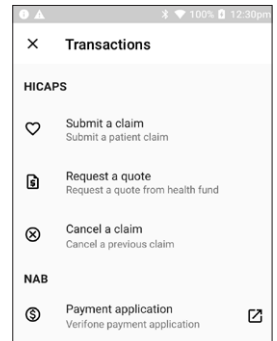
STEP 3

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**.
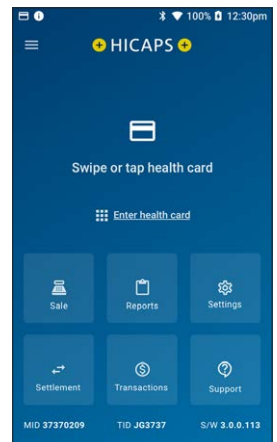
STEP 4

Select a claim or search for a claim to cancel using the RRN from the original receipt.

If the claim is not shown on the terminal, you can tap **Enter claim details manually**.
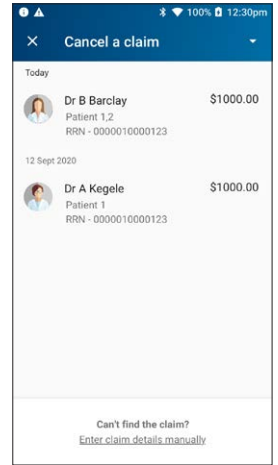
STEP 5

If entering the claim manually, type in the RRN and benefit amount from the original transaction receipt and tap **NEXT**.
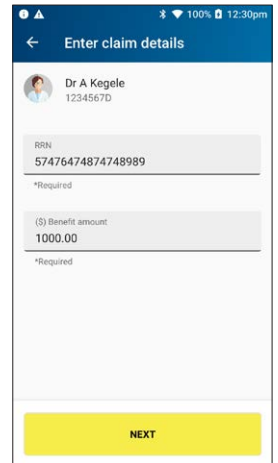
STEP 6

A summary of the original claim will be displayed. Check the claim details and tap **CANCEL CLAIM** to proceed.
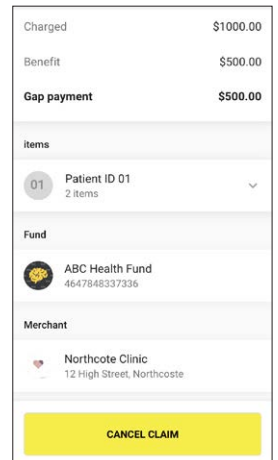
STEP 7

A warning message will be displayed to confirm cancelling of claim. Tap **CANCEL CLAIM** to continue.

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

If you do not wish to cancel the claim tap **GO BACK**.

Note: The terminal will produce two copies of the cancellation receipt. The first copy must be signed by the Fund member and retained for your records, the second copy is for the member's records.
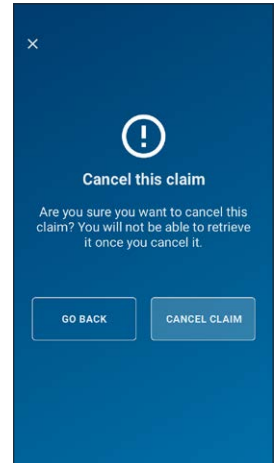
3.7   Manual daily transaction summary (HICAPS Totals)

STEP 1

Tap **Settlement** on the HICAPS Home Screen
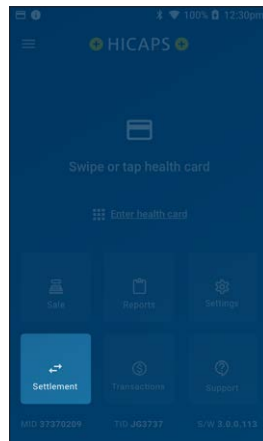
STEP 2

Under the **HICAPS** section, select **Today's totals** or **Previous days totals**.
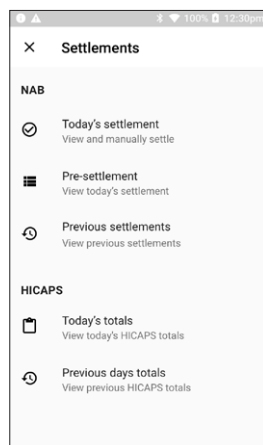
If there are multiple providers on the terminal, select the relevant provider or select **All providers** for all the providers on the terminal.
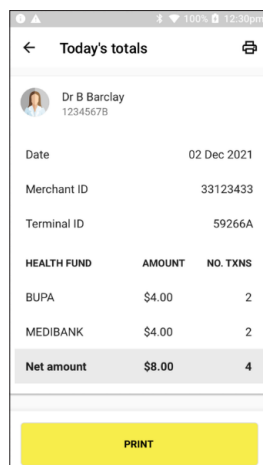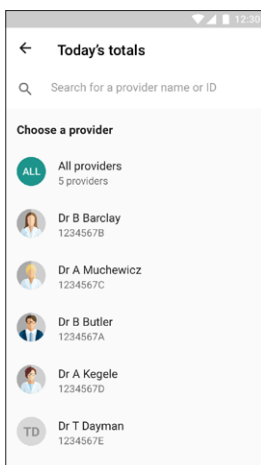
STEP 2 CONTINUED

Note: If you select **Previous days totals**, you can select a day in the last previous 30 days to print either a **Summary Listing** or a **Detailed Listing**.
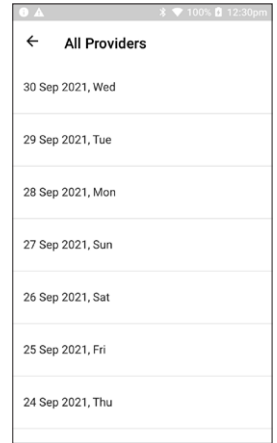
STEP 3

Tap **Print** or select the printer icon in the top right-hand corner to print either **Summary Listing** or **Detailed Listing**.
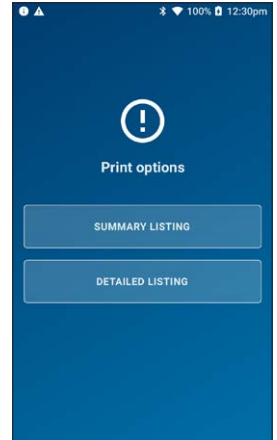
3.8   Ordering terminal paper rolls

If you need to order additional terminal paper rolls, please order via the **stationery ordering form**.

4.   EFTPOS

4.1   Sale

STEP 1
To process an EFTPOS **Sale** transaction, tap the Sale icon on the home screen.

Note: If the terminal has been configured as a multi merchant terminal you will be prompted to select the appropriate merchant for the transaction.
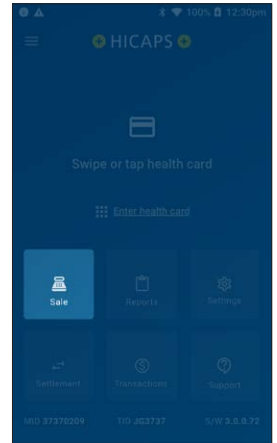
STEP 2
If the terminal has been configured as a multi merchant terminal you will be prompted to select the appropriate merchant for the transaction.

STEP 3
Enter the transaction amount and tap **NEXT**.
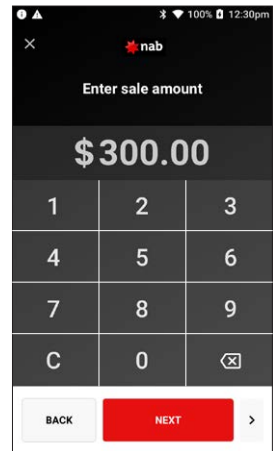
STEP 4

Ask the customer to present their card to finalise the transaction.
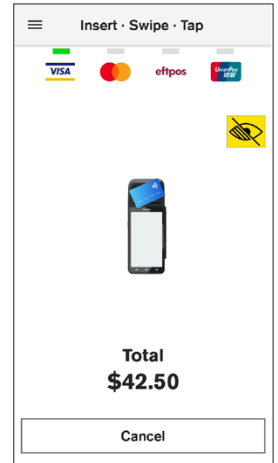
STEP 5

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.
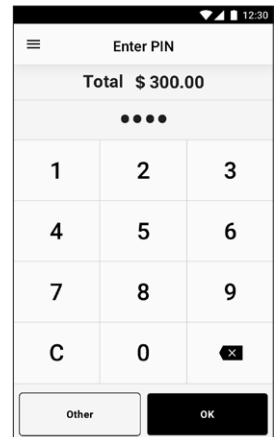
STEP 6

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

A 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.
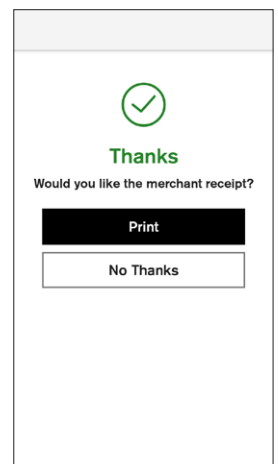
4.2 Sale – manual card entry

STEP 1
From the Home Screen, tap the **Sale** icon to enter the card details.

Note: If the terminal has been configured as a multi merchant terminal you will be prompted to select the appropriate merchant for the transaction.
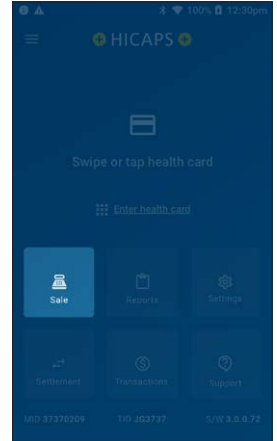
STEP 2
Enter the transaction amount and tap **">"** in the bottom right-hand corner of the screen.
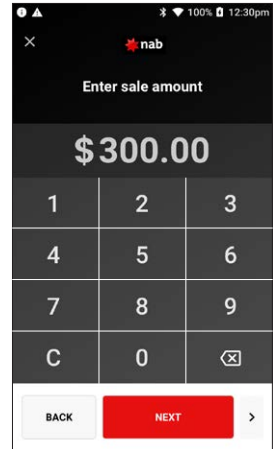
STEP 3
Select **Manual Card Entry** from the **Select payment method** screen.

When prompted for payment options, select **Manual**.
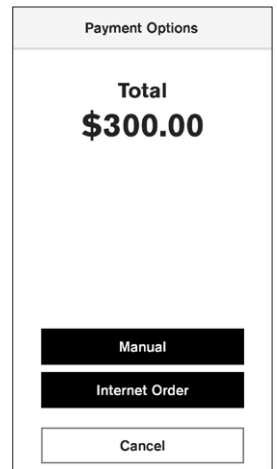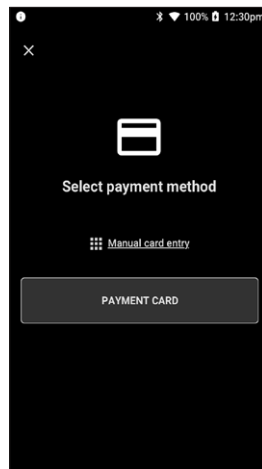
STEP 4

Enter the card number using the onscreen keypad and select **Enter**.

The card details are masked and some digits will appear as dots.

If the card details are correct, tap **Confirm**.

Enter Card Number	Enter Card Number	Confirm Card Number
Total $300.00	**Total $300.00**	**Total $300.00**
	5163 61•• •••• ••••	5163 61•• •••• 9717
1 2 3	1 2 3	1 2 3
4 5 6	4 5 6	4 5 6
7 8 9	7 8 9	7 8 9
0 ⌫	0 ⌫	0 ⌫
Cancel Enter	Cancel **Enter**	Cancel **Confirm**

STEP 5

Enter the expiry date of the card (MM/YY) and tap **Enter**.

Enter Expiration Date
Total $300.00
MM/YY
1 2 3
4 5 6
7 8 9
0 ⌫
Cancel Enter

STEP 6

Enter the CVV and tap **Enter**.

The CVV is generally found on the back of the card.

Note: AMEX CVVs are on the front of the card.

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.

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.

STEP 8

In some cases, the card will not require a PIN and therefore a signature will be required to complete the transaction. The customer can then sign the terminal screen so there is a record of their signature. Hand the terminal to the customer to sign on the touch screen.

STEP 9

You must verify the signature prior to approving.
Tap **Yes, Approve** to continue or **No**.

Once authorised the terminal will display the transaction as **Approved**.

The printed receipt includes the customer signature for your records.

4.3 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 **Transactions** icon.
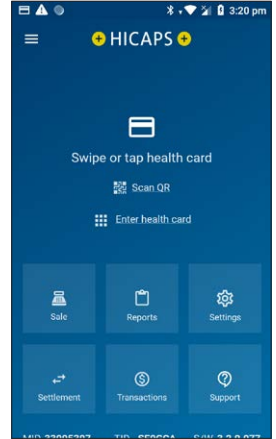
STEP 2
Tap **Refund**.
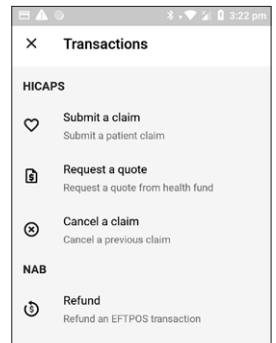
STEP 3
If you have multiple merchants, you will be prompted to select a merchant.
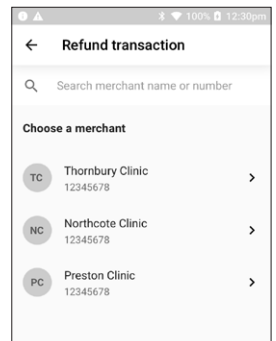
STEP 4

Tap the relevant date to view transactions.

Note: Up to thirty days of transactions are available to refund from the terminal

Alternatively tap the calendar icon and select a date.
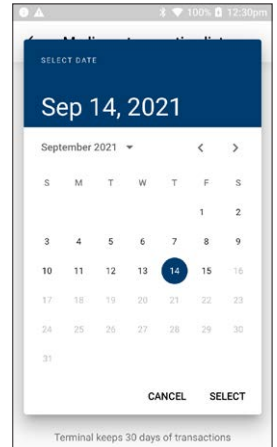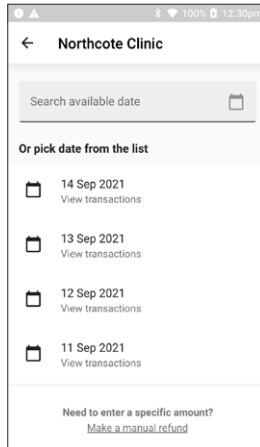
## STEP 5

Select a transaction to be refunded.

Note: The transaction can be identified by the card used in the original transaction. The amount and RRN (receipt reference number) are also displayed and can be used to verify the correct transaction is selected for refunding.
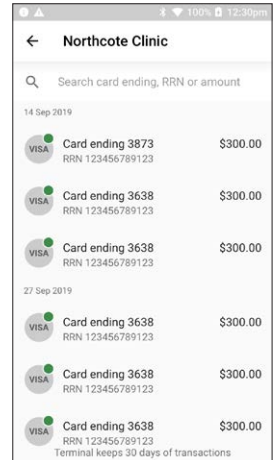
STEP 6

Confirm the details of the transaction and tap **REFUND**.

Tap ← to go back to the previous screen.
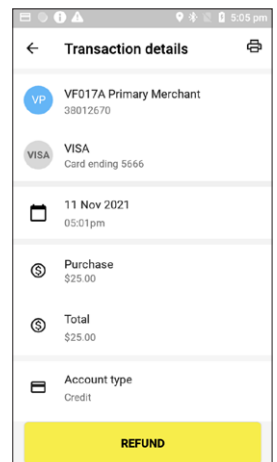
STEP 7

To complete the refund, the manager passcode must be entered.

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

STEP 8

From the **Refund Options** screen, select **Card or Mobile, Manual Card Entry or Internet Order**. Tap **Cancel** to go back.

STEP 9

Tap, insert or swipe the card used in the original transaction to process the refund.

STEP 10

Enter a PIN and tap **OK** to proceed to refund the transaction.

Enter PIN or Press Enter to Bypass		
Total $25.00		
1	2	3
4	5	6
7	8	9
C	0	
Cancel		Enter

STEP 11

The customer can then sign the terminal screen so there is a record of their signature. Hand the terminal to the customer to sign on the touch screen.

Note: If the card has been inserted and the refund is being paid to a savings or cheque account, no signature is required.

After the customer has signed the screen and tapped **Done**, the terminal will display a message asking the customer to return the terminal to the merchant. When the customer returns the terminal to you, tap **DONE**.

STEP 12

You must verify the signature prior to approving the refund. Tap **Yes**, **Approve** to continue or **No**.

Once authorised the terminal will display the transaction as **Approved**.

The printed receipt includes the customer signature for your records.

STEP 13

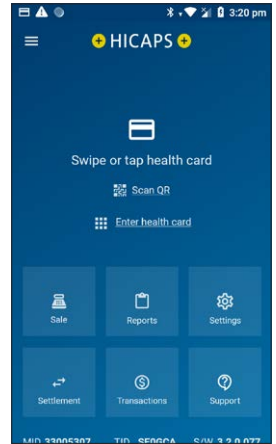To print the Refund, tap **"Print"** to print customer receipt or **"No Thanks"**.
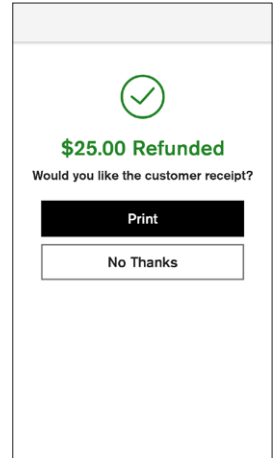
Option 2 – Unmatched Refund

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

STEP 1
From the home screen, tap the **Transactions** icon.
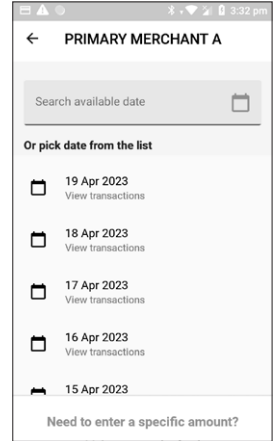
STEP 2
Tap the **Refund** icon.
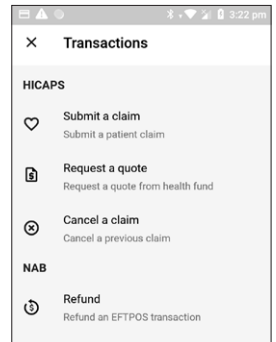
STEP 3
If you have multiple merchants, you will be prompted to select **one merchant** from the list.
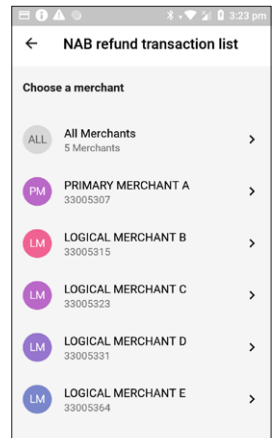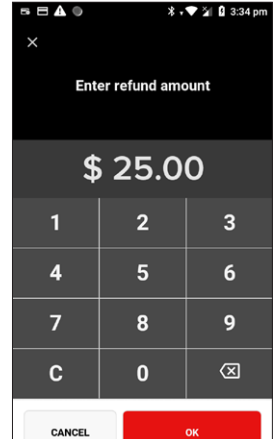
STEP 4

Tap **"Make a manual refund"** which is located on the bottom of the screen.

STEP 5

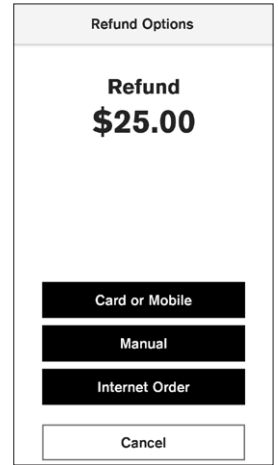Enter refund amount then tap **"OK"**.

STEP 6

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

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

STEP 7

From the **Refund Options** screen, select **"Card or Mobile",** **"Manual"** for card entry or **"Internet order"**. Tap **"Cancel"** to go back.
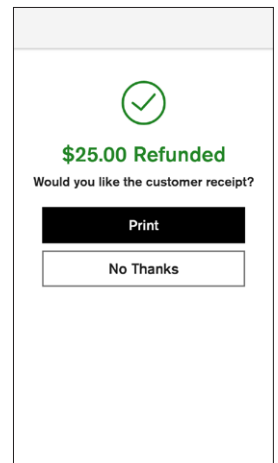
STEP 8

Ask the customer to present their card to finalize the transaction. The customer can enter **PIN** or **Press Enter to Bypass** and sign the screen with the customers signature.

Note: Please refer to **STEPS 10** to **STEP 13** under **PROCESSING A REFUND** above.
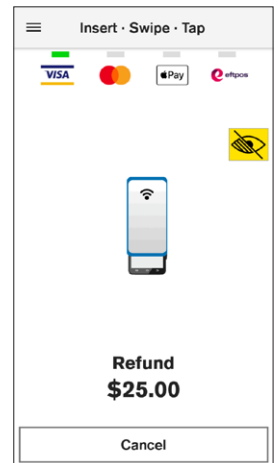
STEP 9

To print the Refund, tap **"Print"** to print customer receipt or **"No Thanks"**.
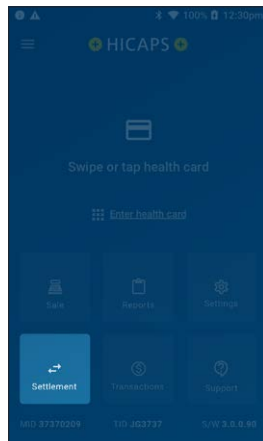
4.4   EFTPOS Settlements

4.4.1 Manual EFTPOS settlement

From the HICAPS Trinity terminal, you can view, perform and print settlements.

**STEP 1**
From the Home screen, tap the Settlement icon.

STEP 2
Select from the options provided:

Today's settlement – you can view and manually settle transactions for the day.

**Pre-settlement** – you can view and print transactions for the day.

Previous settlements – you can view and print up to 30 days of settlements by selecting the date of the settlements you want to view and print.

**Note:** Settlements older than 30 days cannot be viewed on the terminal.
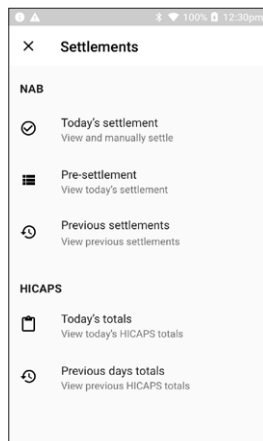
STEP 3
If the terminal has multiple merchants, select the merchant account you wish to settle or view. You may also settle all merchants at once by selecting the **All Merchants** option.
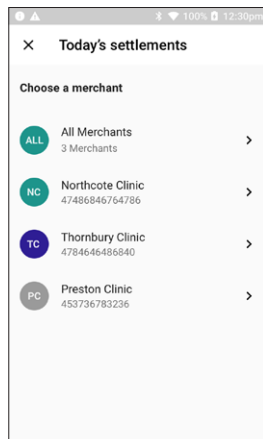
STEP 4

For manual settlement, tap **Settle** to confirm settlement.

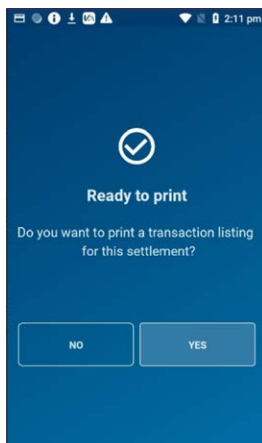Note: Manual settlement can only be completed if Automatic Settlement is disabled.
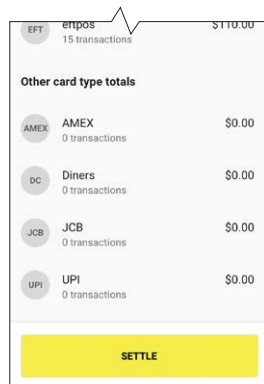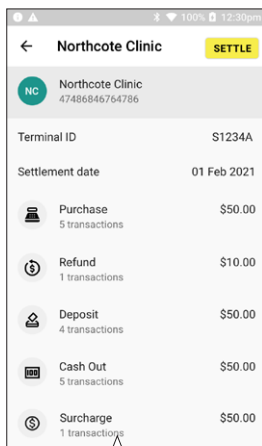
STEP 5

The terminal will print the settlement receipt.

Note: If you have settled during the day, the terminal will display **Already settled**. You can print a copy of the settlement.

Ready to print
Do you want to print a transaction listing for this settlement? Yes / No.

4.4.2 Automatic settlement

The HICAPS Trinity terminal automatically settles all transactions daily at 9:30pm AEST. The time for settlement can be set for a different time of your choice. Settlement can be configured to occur between 9am and 9:30pm AEST. Please refer to the section headed Automatic Settlement (AMIS) in the www.hicaps.com.au/support/guides on the HICAPS website for further information.

4.5   Configuring Surcharging Per Scheme

Merchants have the ability to charge customers an additional fee for paying by debit or credit cards – surcharging. The surcharge can be either a fixed fee or a percentage fee based on the value of the transaction. If you do decide to charge customers a fee for paying by a debit or credit card you will need to make sure you do not act in a misleading or deceptive way. Please refer to The Reserve Bank of Australia surcharging standard - NAB for the RBA's guidelines.

You should ensure customers are aware of the following:

• Customer is aware of the extra charge.

• How much the charge will be before the transaction is entered into.

This can be done in many ways, including in-store notices or prominent messages on bills. Customers can choose whether to pay the card fee or to use another form of payment, e.g., cash. The customer will have the option on the terminal screen to not accept the surcharge and cancel the transaction.
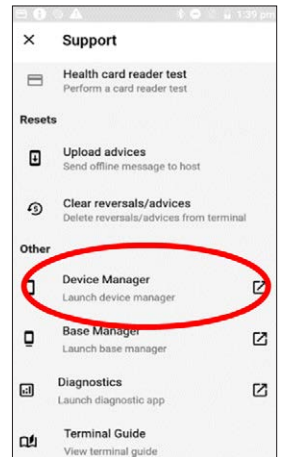
STEP 1
From the **HICAPS Home page,** Tap on **Support**
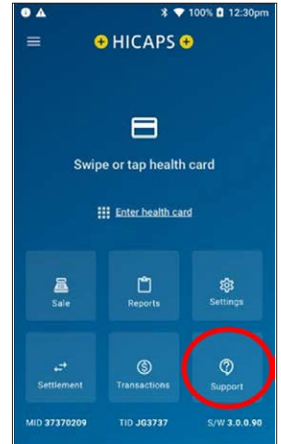
STEP 2
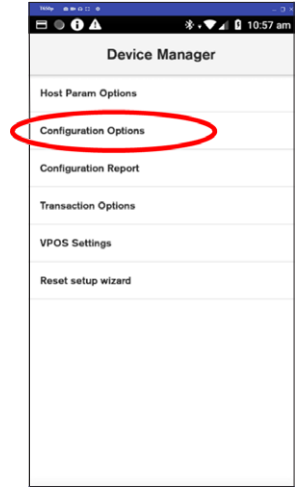From the Support page, tap on **Device Manager**

STEP 3
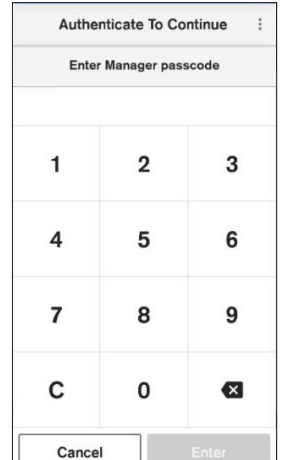Select a merchant you want to configure surcharging for

STEP 4
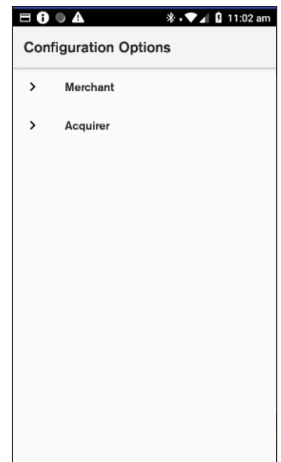From the **Device Manager** page tap **Configuration Options**

STEP 5
From the **Authenticate To Continue** screen, enter the **Manager Passcode** to allow the merchant to get to the **Configuration Options** screen.
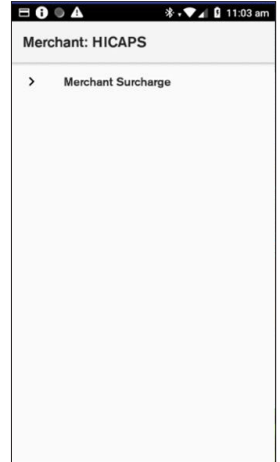
STEP 6
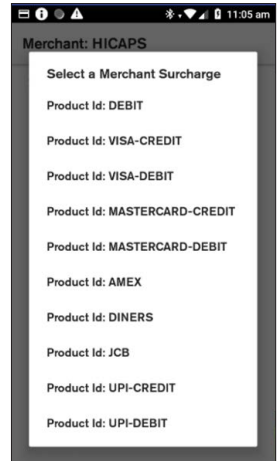Tap on **Merchant** in the **Configuration Options** screen.

STEP 7

In the **Merchant** screen, tap on **Merchant Surcharge**
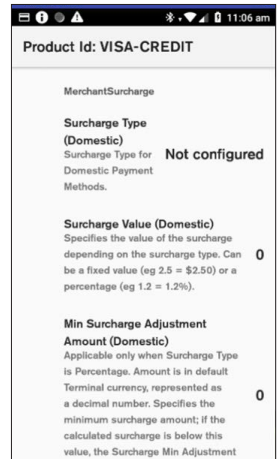
STEP 8

This will offer a selection of Schemes which will allow you configure surcharging the scheme. Tap on the **Product Id** the merchant requires.

STEP 9

Once a scheme is selected, for example, **Product id: VISA-Credit** is tapped then options for **Surcharging type** will be available to be selected:

- **Not Configured**
- **Fixed Amount**
- **Percentage**

STEP 10

Input the surcharge values and amounts as required:

- **Surcharge Value**
- **Min Surcharge Adjustment Amount**
- **Max Surcharge Adjustment Amount**
- **Min Surcharge Amount**
- **Max Surcharge Amount**

STEP 11

Once the options have been updated, tap on the **back** button to go back to update or add a new Surcharging option i.e. repeat these steps for each card type, account type and surcharge method.

Tap on the **HOME** button when completed to return to the HICAPS Home screen.

5. TERMINAL FUNCTIONS

5.1 Accessibility

5.1.1 About the Terminal Accessibility Features

HICAPS Trinity terminals have accessibility features to support users by making it easier to process transactions. Features include:

- Tactile dots surrounding the screen to orient the telephone keypad for PIN entry. Horizontal dots represent columns and vertical dots represent rows.
- Contactless card reader at the top of the terminal.
- Volume control buttons are next to the second vertical dot from the top, on the left hand side of the terminal.
- Headphone jack is next to the first vertical dot from the top, on the left hand side.

5.1.2 Speech for the Visually Impaired

STEP 1

On the card presentation screen, the terminal will sound a chime on the location of the terminal.

Double tap on the screen to enable voice reading, including the amount due and instructions to complete the transaction.

Payment cards can be tapped on top, inserted at the bottom or swiped on the right-hand side of the terminal.

STEP 2

Once a card has been presented, a voice will prompt to swipe left or right on the screen to choose an account. A voice prompt will read out the accounts available and prompt the customer to confirm the account to process the payment. Double tap to confirm selection.
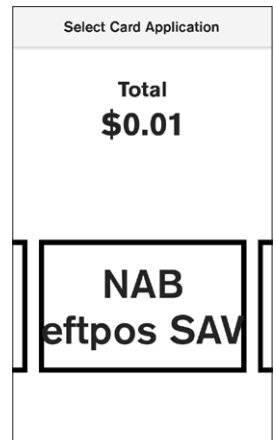
STEP 3

If prompted for a PIN, the following instructions will be played:

'Please enter a 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 bumps around the screen border indicating every column and row of the PIN pad.

The screen will be blank.

To find digits, start from one of the tactile bumps, and move one finger vertically or horizontally, until you hear a beep or the words cancel, or ok.

To find additional digits, move your finger around the keypad and listen for the beeps.

To select a digit, lift your finger, then tap two times using one finger on the screen and listen for the acceptance sound.

If you are not sure you found the right digit, do not double tap the screen. Simply start searching from the corner again.

The terminal will announce when you have entered 4 digits. To finish and pay, select ok at the bottom right and double tap towards the centre of the screen. To abort transaction, select the cancel at the bottom left and double tap towards the centre of the screen.'

5.1.3 PIN entry training mode

The HICAPS Terminal has a PIN entry training mode for cardholders to understand how to process payments requiring a PIN. To enable this function, use the following steps:
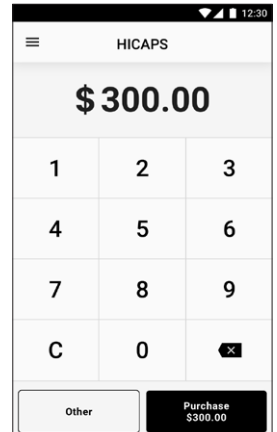
STEP 1

To process an EFTPOS Sale transaction, select **Sale** icon from the home screen.

Note: If the terminal has been configured as a multi merchant terminal you will be prompted to select the appropriate merchant for the transaction.
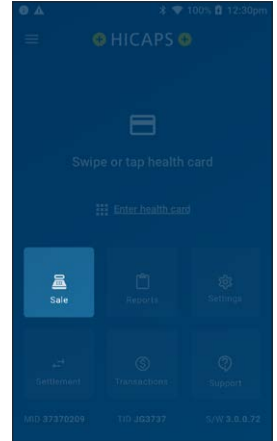
STEP 2
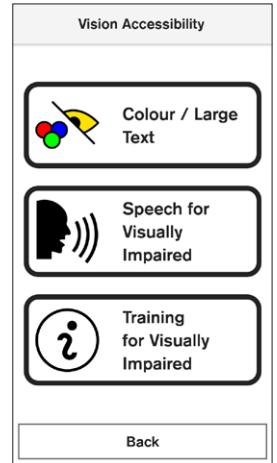
Enter a transaction amount and tap **Next**.

STEP 3

On the card presentation screen, tap the **Accessibility** icon on the top right-hand corner.
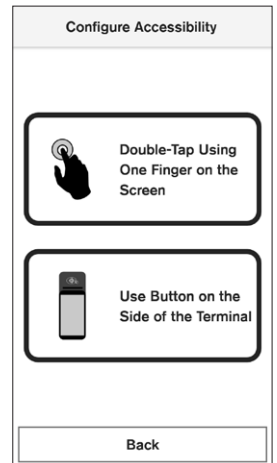
STEP 4

Select **Training for Visually Impaired** from **Vision Accessibility** options.

STEP 5

Select the preferred accessibility configuration, either **Double-Tap Using One Finger on the Screen** or **Use Button on the Side of the Terminal**.

STEP 6

Follow the terminal instructions on how to orient the terminal to enter a PIN. The training instructions are:

'Welcome to accessibility mode and PIN entry training. To enable accessibility mode during a transaction double tap using one finger on the screen when you hear the accessibility chime. Listen for the chime and try once now. (Chime sounds. Double tap the screen with one finger to proceed.) Training mode activated, double tap when you hear the chime.

PIN pad has telephone layout with 1,2,3 at the top, and cancel, 0, ok at the bottom of the screen.

Tactile bumps around the screen border indicating every column and row of the PIN pad.

Do not guess where the numbers are.

The size of this keypad is different from what you are used to and the numbers will not be spoken.

Only cancel and ok buttons will be spoken and can be used as reference points.

Please note, during PIN entry training only, all digits will be spoken.

To find digits, start from one of the tactile bumps, and move one finger vertically or horizontally, until you hear a beep or the words cancel, or ok.

To find additional digits, move your finger around the keypad and listen for the beeps.

To select a digit, lift your finger, then tap two times using one finger on the screen and listen for the acceptance sound.

To finish training, navigate to **Cancel** or **OK** and double tap using one finger on the screen.'

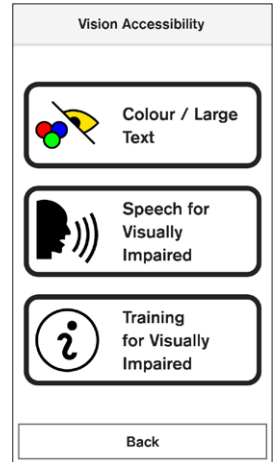### 5.1.4 Changing Colour/Large Text

STEP 1

On the card presentation screen, tap the accessibility icon in the top right-hand corner.

STEP 2

Select **Colour / Large Text** to change colour contrast and text size.

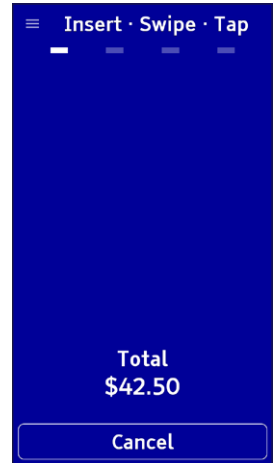**Note:** Customers can connect headphones via the audio jack if required.

STEP 3

Cardholder can choose from 4 different colour options and will be used for the payments flow. All options will also provide larger buttons on screen and voice guidance.
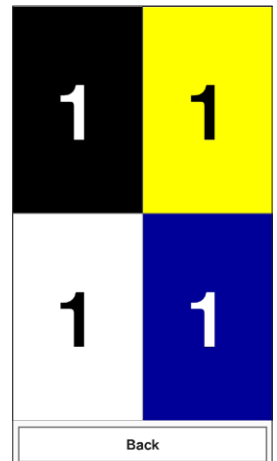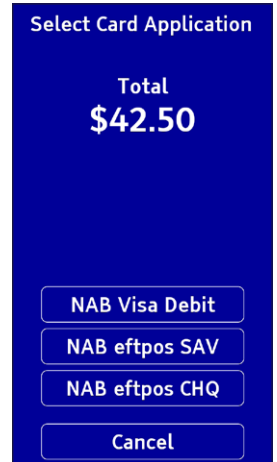
STEP 4

The customer will be prompted to present their payment card. An audible voice instruction will also advise on the location of where to present the card.
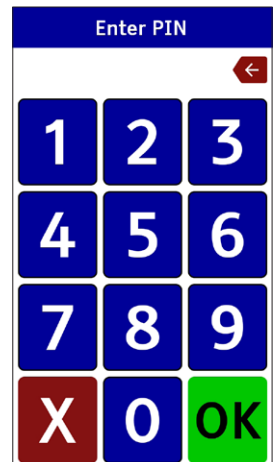
≡ **Insert · Swipe · Tap**

Total
$42.50

Cancel

STEP 5

The cardholder may be required to select the card account type.

Select Card Application

Total
$42.50

NAB Visa Debit
NAB eftpos SAV
NAB eftpos CHQ

Cancel

STEP 6

If prompted for a PIN, use the larger buttons on screen to enter a PIN.

Enter PIN

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

5.2 Support

On the home screen tap the **Support** icon to view the support options available on the terminal.

5.2.1 Contact

From the **Support** screen, tap **Contact** to display the contact numbers and opening hours for the HICAPS Help Desk and HICAPS Sales.

The HICAPS Sales team email address (hicapssales@hicaps.com.au) and the HICAPS website (www.hicaps.com.au) are also displayed.

5.2.2 Changing the paper roll

STEP 1
Open the paper roll cover and remove the used paper roll.

STEP 2
Insert the new roll so the paper feeds from the bottom and up against the top of the terminal screen.

STEP 3
Close the printer door, pressing gently until it clicks shut, ensuring the leading edge of the paper is exposed.
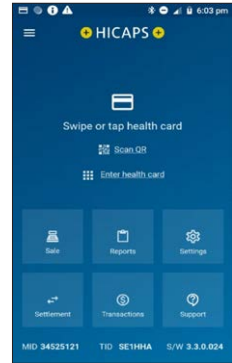
5.2.3 HICAPS logon test (Communication Type Status)

To perform a logon test and/or to identify the communication type the terminal is currently using, follow the steps below.
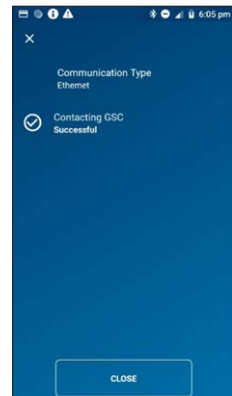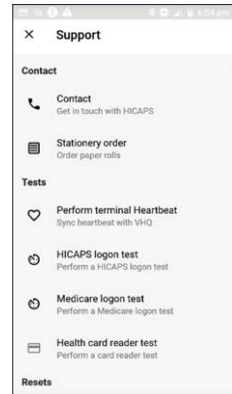
STEP 1

From the Home screen, tap on the **Support** icon.

STEP 2

From the **Support** page, tap on **HICAPS logon test** to perform a HICAPS logon test.

The terminal will display the **Communication Type** and a message from NAB, **Contacting GSC Successful** if the terminal can communicate.

STEP 3

Tap CLOSE to return to the **Support** menu.

5.2.4 Manager passcode

An administration passcode is used to modify some terminal settings and to set and change manager passcodes used for refunds etc. The admin and manager passcodes will be set up at installation of the terminal. The Manager passcode can only be changed by contacting the Merchant Help Desk on 1300 650 852.

Passcodes cannot repeat the same digit more than 3 times.

Passcodes cannot enter digits in sequential order.

Manager passcode can be 4 or 6 characters in length. For PMS users, the passcode **MUST** be set to 4 characters to enable a PMS refund.

Users should only provide the administration passcode to individuals on a need-to-know basis.

The terminal will enforce a temporary lockout after three or more unsuccessful passcode attempts.

5.2.5 Changing Camera Permissions

When you tap on **Scan QR**, and you tap on **DENY** when the terminal asks permission to **Allow HICAPS to take pictures and record video?** and tick **Don't ask again** you will be unable to use the camera to scan a QR code.
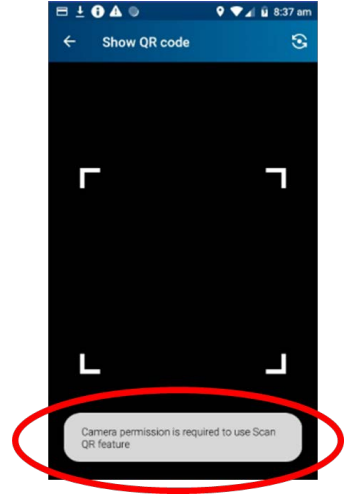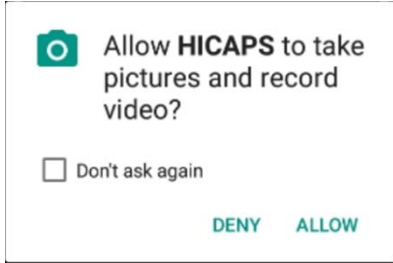
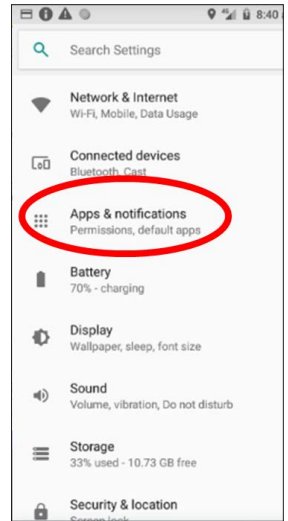To re-enable the camera to use the QR option, follow the steps below.

STEP 1

From the **HICAPS Home screen,** drag your finger from top of the screen to display the Android 'quick settings' panel. Tap on the **Settings Cog**.
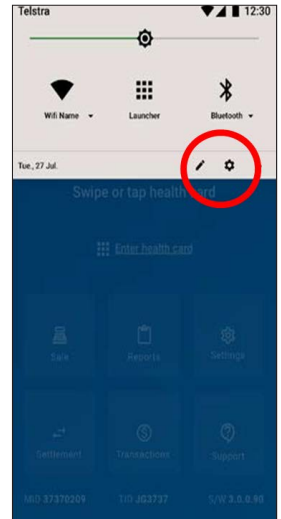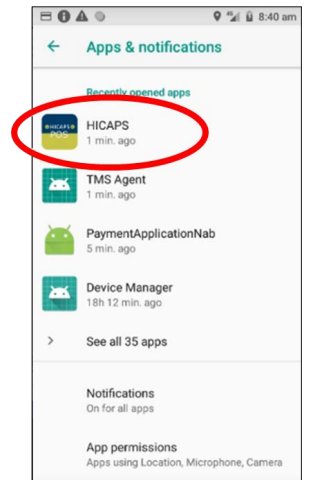
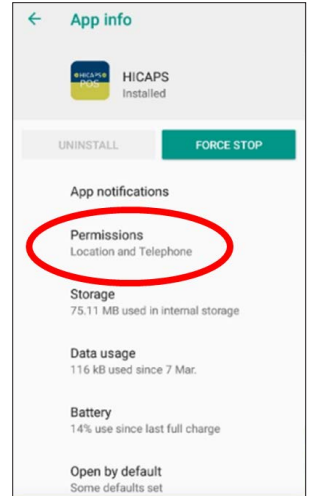**STEP 2**
Tap on **Apps & notifications**

STEP 3
From the **App & notifications** screen, tap on **HICAPS**.

STEP 4

This will take you to the **App info** screen for HICAPS. Tap on **Permissions**

STEP 5

To allow the terminal to use the camera to scan QRs, turn on **Camera** by tapping on the button on the right-hand side of **Camera**.

Tap on home button at the bottom of the terminal to save camera permissions and return to the HICAPS Home screen. You will now be allowed to scan a QR code.
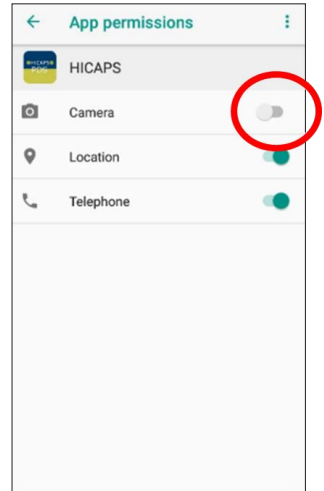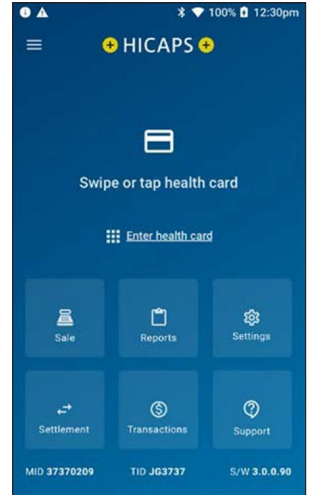
5.2.6 Reprinting Receipts

To reprint receipts of transactions by Merchant (EFTPOS), Provider (Health Funds), Medicare or reprint a Previous Settlement.

5.2.6.1 Reprint an EFTPOS receipt of a transaction completed by a Merchant
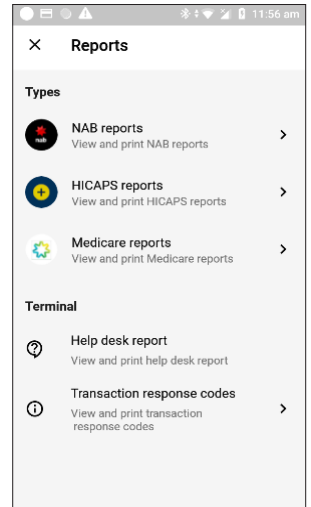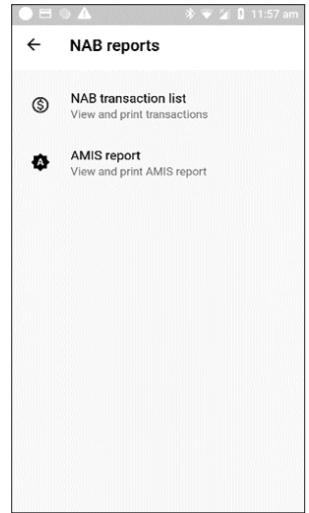
STEP 1
From the **HICAPS Home page**, tap on **Reports**.

STEP 2
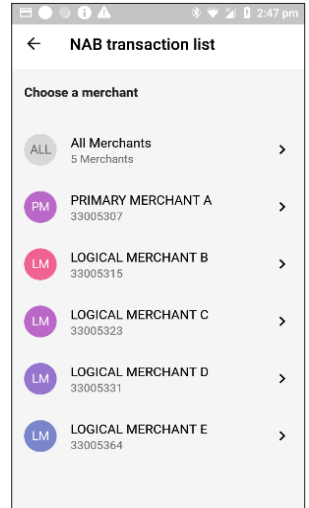From the **Reports** page, tap **on NAB Reports**.

STEP 3

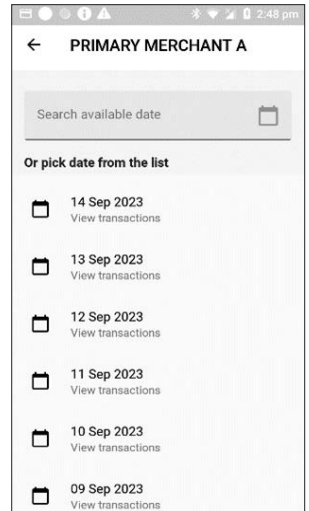From the **NAB Reports** page, tap on **NAB transaction** list.

STEP 4

From the **NAB transaction list** page, select the **required merchant**.
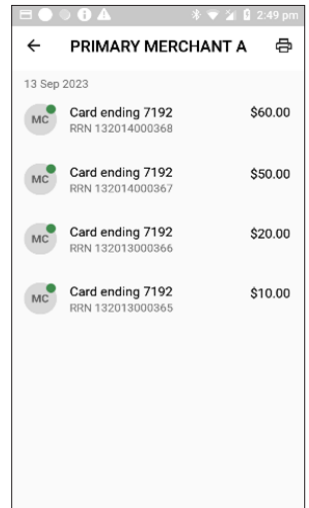
STEP 5

Enter a date or select the **desired date** of the transaction you require.

STEP 6

A list of transactions for that date will be displayed.

Tap on the transaction you want to reprint.

STEP 7

The **transaction details** of the selected transaction will be displayed. If this is the correct receipt that you wish to reprint, tap on the **printer icon** to reprint.

The terminal will print the MERCHANT COPY. Tap **OK** for a customer copy.

5.2.6.2 Reprint receipts of a Health Fund transaction completed by Provider

STEP 1
From the **HICAPS Home** page, tap on **Reports**.
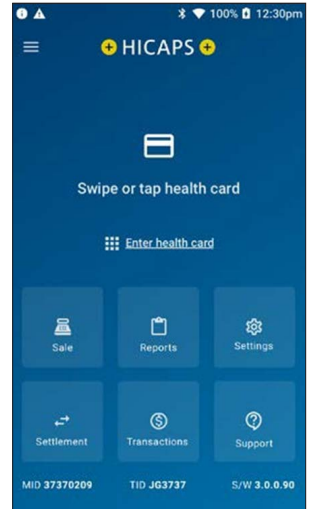
STEP 2
From the **Reports** page, tap on **HICAPS Reports**.
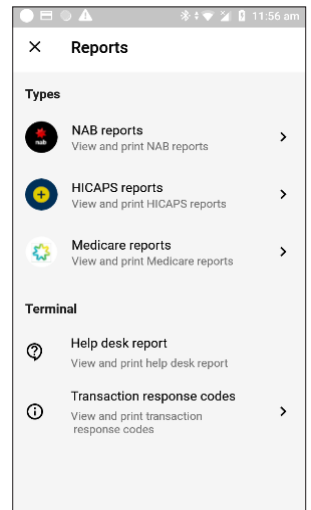
STEP 3

From the **HICAPS reports** page, tap on **HICAPS transaction list**.
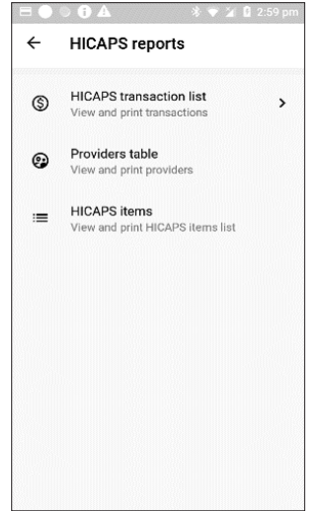
STEP 4

From the **HICAPS transaction list** page, select the required **Provider**.

STEP 5

Enter a date or select the **desired date** of the transaction you require.
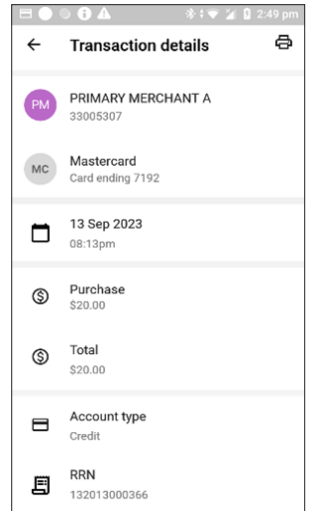
STEP 6

A list of transactions for that date will be displayed.

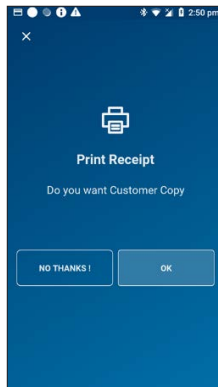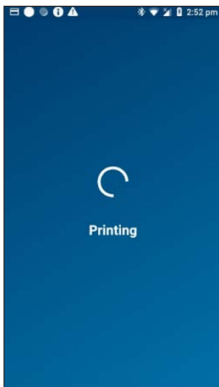Tap on the transaction you want to reprint.
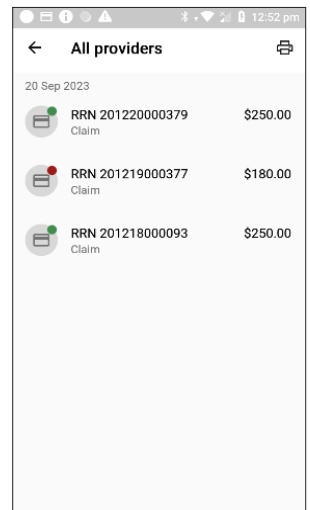
STEP 7

The **transaction details** of the selected transaction will be displayed. If this is the correct receipt that you wish to reprint, tap on the **printer icon** to reprint.
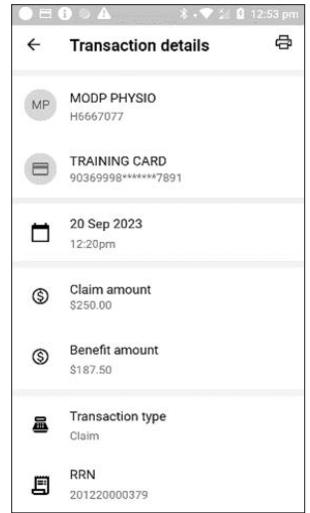

The terminal will print the MERCHANT COPY.
Tap **OK** for a customer copy.
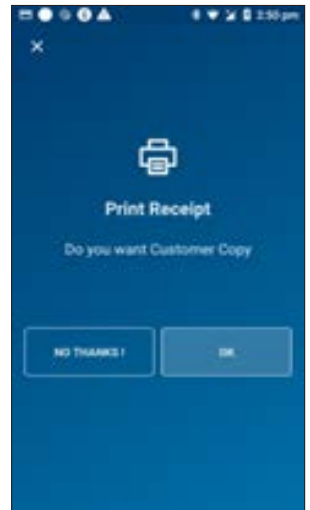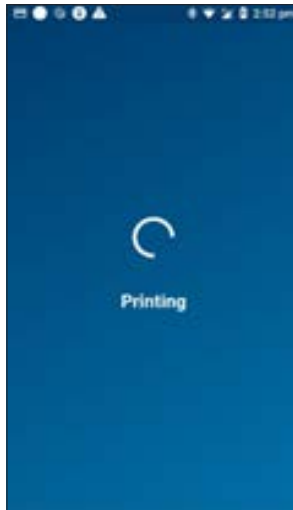
5.2.6.3 Reprint transactions for Medicare

STEP 1
From the **HICAPS Home page**, tap on **Reports**.
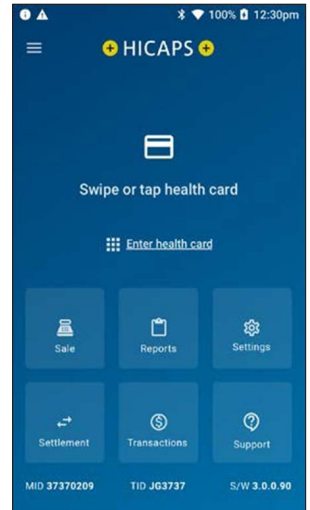
STEP 2
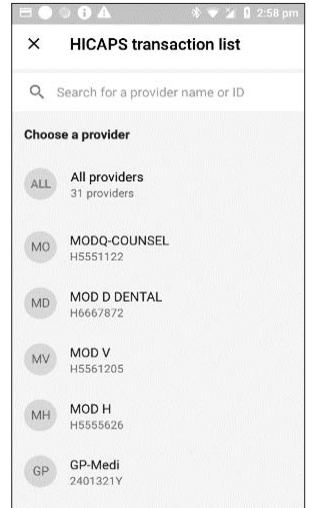From the **Reports** page, tap on **Medicare reports**.
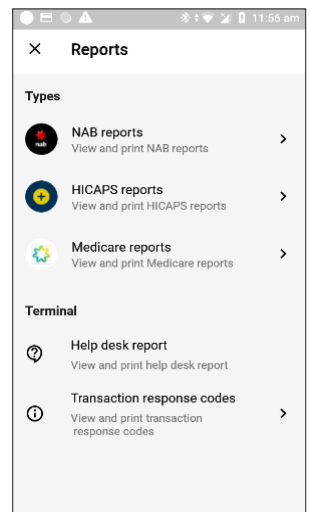
STEP 3

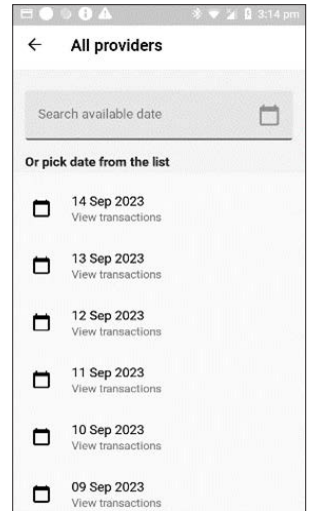From the **Medicare reports** page, tap on **Medicare transaction list**.

NOTE: If **Medicare reprint receipt** is selected, the last approved transaction will be printed.
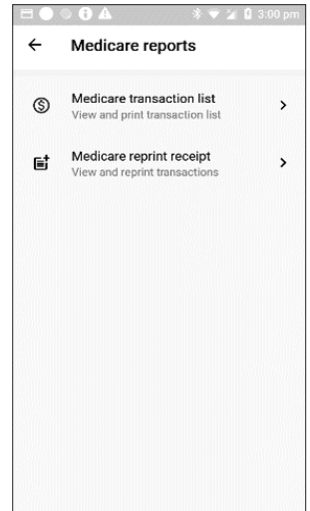
STEP 4

Enter a date or select the **desired date** of the transaction you require.
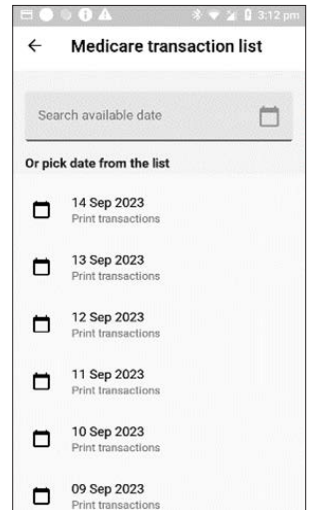
STEP 5

Once the date is selected, select either **PRINT** or **CANCEL** to proceed. Selecting **PRINT**.
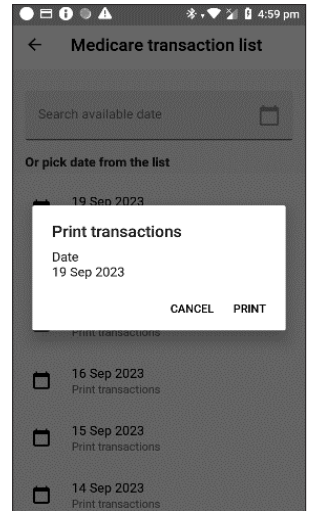
STEP 6

Selecting **PRINT** will start the printing process and print all the transactions for the selected date.
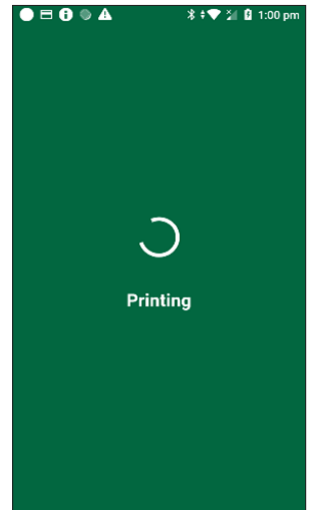
5.2.6.4 Reprint Previous Settlement

STEP 1

From the **HICAPS Home page**, tap on **Settlement**.
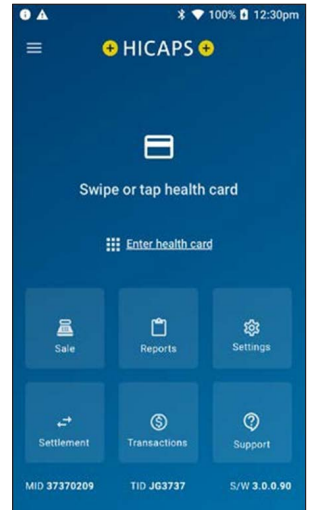
STEP 2

From the **Settlements** page, tap on **Previous settlements**.
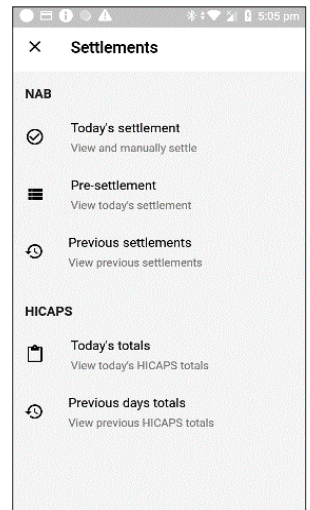
STEP 3

From the **Previous settlements** page select the required **Merchant**.
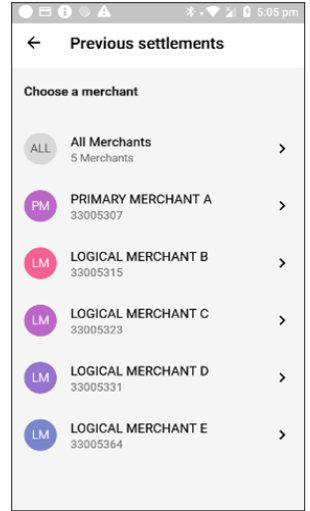
STEP 4

From the selected **Merchant** page select the desired **Date**.
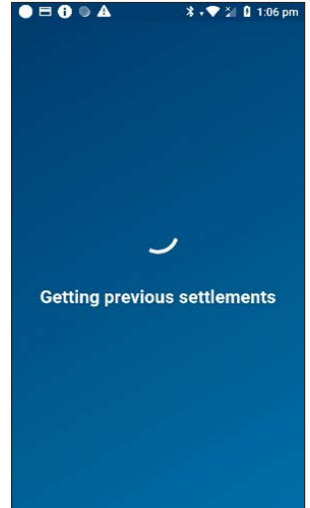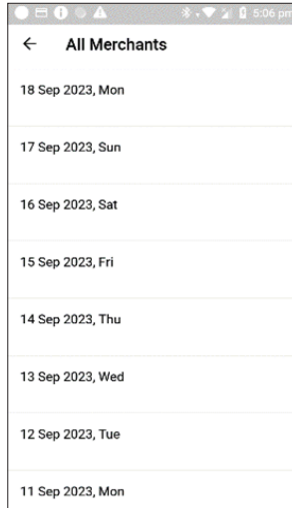
STEP 5

A summary for the settlement date will appear on the screen. Tap **Print** to print the previous settlement report.

←	**14 Sep 2023, Thu**	🖨

PM PRIMARY MERCHANT A
33005307

Terminal ID	SE0GCA
Settlement date	14 Sep 2023

🖳	Purchase 2 transactions	$59.90
💲	Refund 0 transactions	$0.00
🖃	Cash Out 0 transactions	$0.00

Net amount	**$59.90**

PRINT

Confirm that you want to print by tapping **YES**, the previous settlements will start to print.

Ready to print

Do you want to print a transaction listing for this settlement?

NO   YES

Printing previous settlements
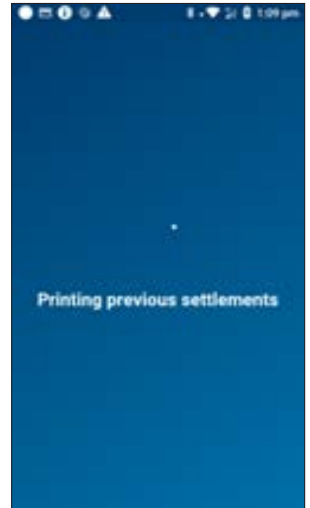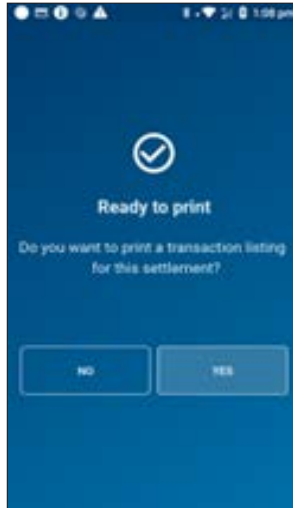
6. TERMINAL COMMUNICATIONS

6.1 Terminal communication methods

The HICAPS Trinity terminal supports a number of different communications methods for processing claims and will process transactions in the following priority: Ethernet (via Bluetooth® pairing to base), Wi-Fi and mobile.

Claims must only be processed at registered practice locations for which you have a location specific provider number. Please ensure that you use the provider number specific to the location at which the treatment has been provided and the HICAPS claim is processed.

6.1.1 Connectivity

The strength of the Bluetooth® and Wi-Fi connectivity on your terminal will depend on several factors but can be affected by physical obstructions, other electronic devices and distance. If your Bluetooth® or Wi-Fi connection strength is low, attempt to keep a clear line of sight with the Wi-Fi Router and or terminal base, with a maximum distance of 5m.

We recommend that every terminal should be paired with a terminal base upon setup, and that the terminal is returned to its base overnight. Leaving the terminal on its base allows for the terminal to receive important security updates and to maintain optimal charge levels.

6.1.2 Claims processing and communications on the HICAPS Trinity terminal

Claims processing is supported by all participating health funds when the terminal is connected by Ethernet (via Bluetooth® pairing to the base).

Some participating health funds will not support claiming via Wi-Fi or mobile. In these cases the terminal will display an error message that the health fund does not support Wi-Fi/mobile claiming when the patient's membership card is swiped. A list of the participating health funds that support Wi-Fi or mobile transactions is available at hicaps.com.au/participating health funds.

To ensure you can process claims from health funds that do not support Wi-Fi or mobile, your terminal needs to connect via Ethernet. If your terminal has lost Ethernet connection, an error message will appear when you try to process a health fund claim.

Should an error occur, check the notifications bar for the Bluetooth® paired symbol. (See section 6.2.2). If the Bluetooth® paired symbol is not displaying, swipe down from the top of the screen. Hold down the Bluetooth® symbol located to the right of the drop down bar. Turn the Bluetooth® toggle off and on again.

If the Bluetooth® paired symbol is displayed, attempt the transaction again.

If the problem persists, please call the HICAPS Help Desk on 1300 650 852.

6.2 Communications identifiers

6.2.1 Mobile signal

The mobile signal strength is displayed in the notifications bar in the top right hand corner of the terminal screen. Signal strength of 50% or more will provide a more stable connection, less than 50% strength may result in an unsuccessful transaction.

6.2.2 Bluetooth®

The Bluetooth® symbol is displayed in the notifications bar in the top right hand corner of the terminal screen. It will be displayed when Bluetooth® is turned on, but the terminal is not paired with a base or within range of a base. This means that transactions will not be processed via Ethernet when this is displayed.

When the Bluetooth® symbol displays triangles on either side, the terminal is paired to the base via Bluetooth®. Transactions will be processed via Ethernet, provided the terminal base has an ethernet cable plugged in.

6.2.3 Wi-Fi

The Wi-Fi strength is displayed in the notifications bar, in the top right hand corner of the terminal screen. When the Wi-Fi symbol is white, it indicates that both the terminal is connected via Wi-Fi and the approximate Wi-Fi connection strength. If half the symbol is white, this indicates signal strength of approximately 50%. Signal strength of 50% or more will provide a more stable connection, less than 50% strength may result in an unsuccessful transaction. If the Wi-Fi symbol is completely greyed out, you may not be able to process a claim and will most likely need to move closer to your modem router. If a transaction cannot be processed via Wi-Fi, the terminal will attempt to process the transaction using Mobile communications.

6.2.4 Terminal battery charge

The battery level is displayed in the notifications bar. The terminal battery will last up to 8 hours (depending on terminal usage). As often as possible we encourage you to charge your HICAPS terminal on the base, rather than directly via a USB Type C power pack to the wall. Leaving the terminal on its base allows for the terminal to receive important security updates. Once your battery contains less than 15% charge you may not be able to process a claim or print from your terminal. The use of a non-supplied charger or cable could damage either the terminal or the base.

6.2.5 Powering and restarting the terminal – On/Off/Restart

The terminal can be switched off using the power button. The power button is the top button located on the left hand side of the terminal, above the volume buttons. The power button allows you to turn the machine off (and on again) as well as to perform a restart. After pressing the power button, tap the option required, to **Power off** or **Restart**. Tap elsewhere on the screen to cancel the options and return to the home screen.

If a hard reset is required, hold the power button down for approximately 10 seconds to turn off the terminal. The power button will need to be held down again for another 10 seconds to restart.

6.3 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 hicaps.com.au and view the HICAPS Terminal Communications flyer.

6.4 Bluetooth Pairing

Bluetooth pairing with the base is required to process transactions through the Ethernet communications on the base. If the base already has a solid blue light on the left-hand side, the base has an existing pairing.

NOTE:

• Multiple terminals can pair to one dock, but each terminal can only ever be paired to one dock at any time

• Each terminal is paired to a specific dock at installation

If the base has not paired with the terminal, use the following steps below:

STEP 1

Plug the base into the power supply and turn on the power. A blinking white light on the left-hand side of the base will indicate that the base is powering up and a solid white light will indicate the base is ready. Place the terminal into the dock when the white light is solid to start the pairing process.

• The message **Pair to FFBase** will appear ➜ Tap **OK**.
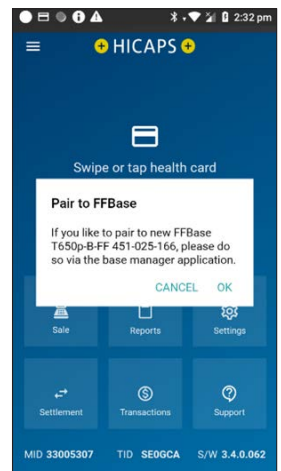
- Tapping **OK** will take you to the Base Manager screen
  → Tap **Pair A new Dock**.

A **blinking blue light** on the left-hand side of the base will indicate pairing is in progress. A solid blue light will indicate Bluetooth pairing has been completed and enabled.
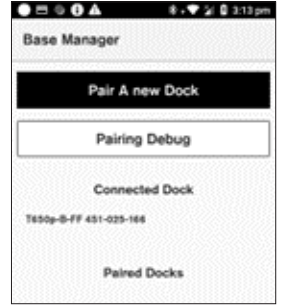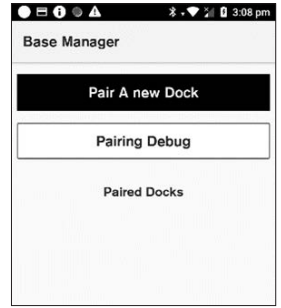
Connected Dock in the **Base Manager** will show the **serial number** of the paired base.

Tap on the **home** Button to return to the **HICAPS Home page.**

STEP 2
To confirm if Bluetooth is **On** or **Off**.

From the HICAPS home screen, drag your finger from top of the screen to display the Android 'quick settings' panel.
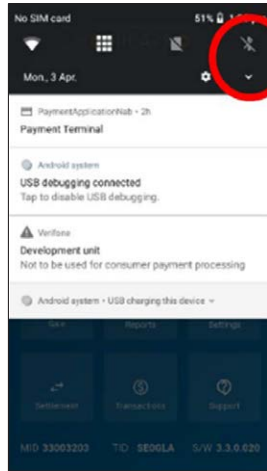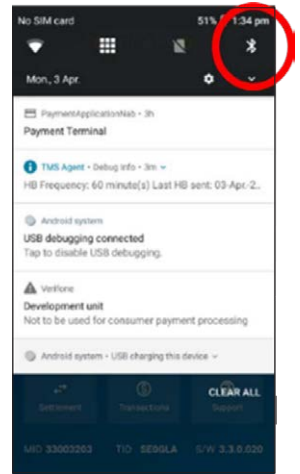
STEP 3

Tap on the **Bluetooth** symbol; This will toggle **Bluetooth ON** or **OFF**.

Bluetooth 1 image indicates **Bluetooth** is **OFF** and **Bluetooth 2** image indicates **Bluetooth** is **ON**.

Bluetooth 1 – OFF
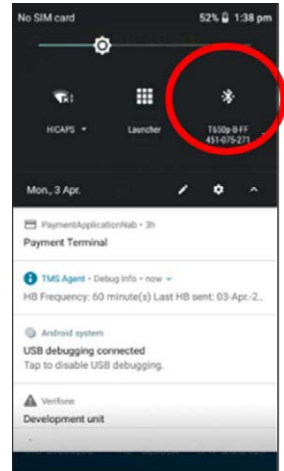

Bluetooth 2 – ON

Alternatively, **dots** on either side of the Bluetooth Symbol will also indicate **Bluetooth** is **paired**.

NOTE:

To confirm the Bluetooth pairing: From the HICAPS home screen, drag your finger from top of the screen to display the Android 'quick settings' panel tap on the dropdown below the Bluetooth symbol - the **base serial number** will appear here to indicate it is paired to this terminal.

The **Serial Number** of the base can be found on the underside of the unit.

6.4.1 Bluetooth Pairing – Multiple Terminals to One Base

A terminal is allowed to pair to another base.

If you intentionally or unintentionally place a terminal to a dock that it is not paired to, the following message will appear.

Tapping **OK** will take you to the **Base Manager** screen. Tap on **Pair A new Dock**. This will start the automatic pairing process.

A **Completed** message **Paired Successfully** will appear when the terminal has paired to the dock.

NOTE: This is important if you want to use this terminal on this dock for PMS transactions.

Tapping **Cancel** will mean this terminal will not pair to this dock and PMS transactions will not work on this terminal.

On the PMS system this Terminal ID will not appear. Where the terminal ID does appear, this may be because the terminal may have paired previously to this dock and PMS i.e., the Terminal ID has been cached in the PMS and has not been cleared. Your PMS will say "**Could not find Terminal in Network**". You will need to clear the cache to stop the Terminal ID from appearing in the future.
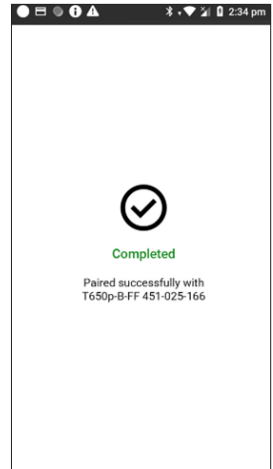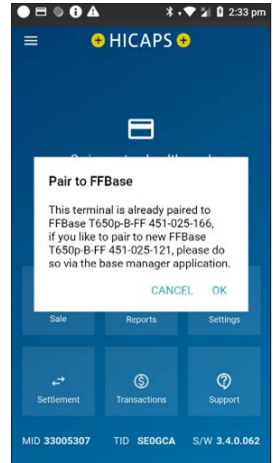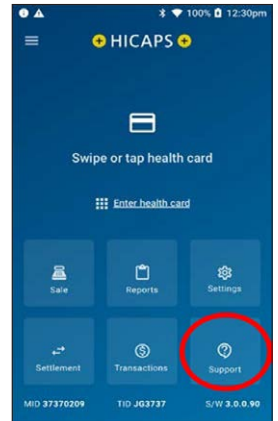
6.5 Configuring Static IPs

STEP 1

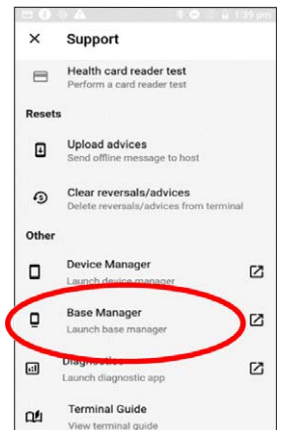Ensure and confirm the **Ethernet Cable** is plugged into the base.

STEP 2

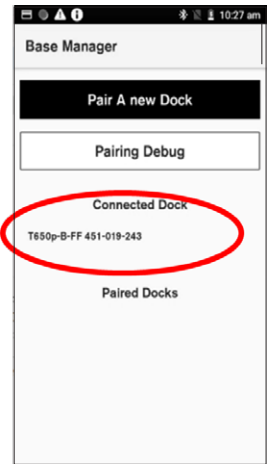From the HICAPS Home page, Tap on **Support**.

STEP 3

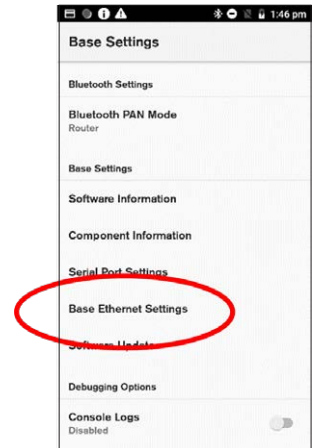From the Support page, Tap on **Base Manager**.

STEP 4

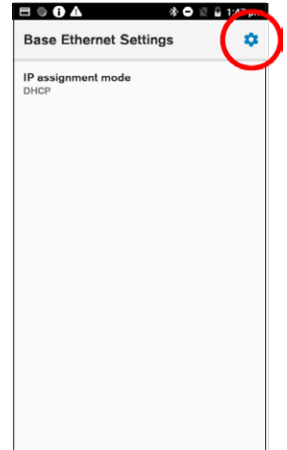From the **Base Manager** page Tap the **Base serial number**.

STEP 5
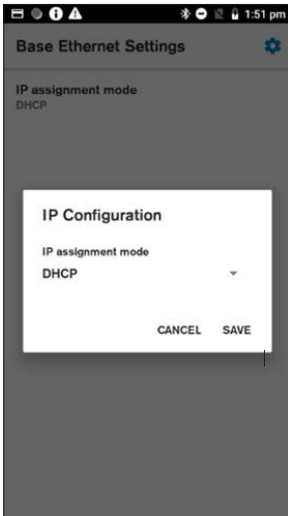
Tap on **Base Ethernet Settings**.

STEP 6

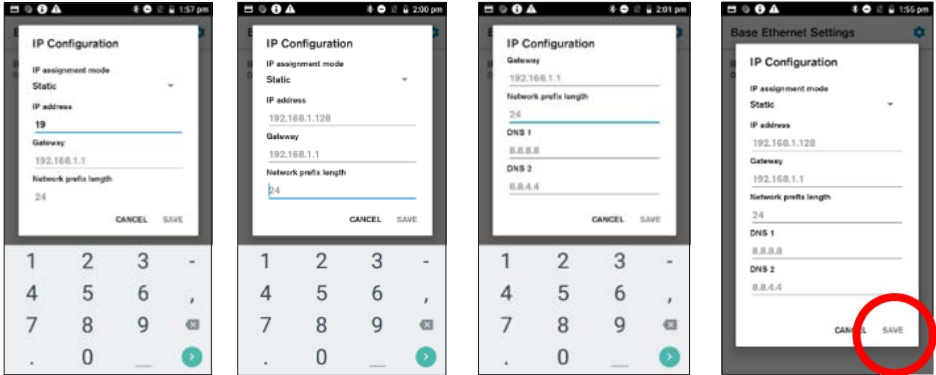From **Base Ethernet Settings,** tap on the Settings Icon
(**cog**).

STEP 7

From the **IP Configuration,** tap on the dropdown next to
DHCP then tap on IP assignment mode **Static**.

STEP 8

Enter the **Static IP address** and click **Save** button.

STEP 9

Restart the terminal to apply these changes. The power button allows you to turn the machine off (and on again) as well as to perform a restart. After pressing the power button, tap the option to **Power off** and then press the **power button** to **power back on** or just tap **Restart**.

Please refer to **Section 6.2.5 Powering and restarting the terminal – On/Off/Restart** if you need further instructions.
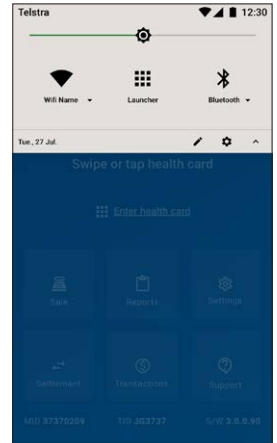
STEP 10

To confirm the **Static IP** entered, from the HICAPS page tap on **Reports** tap on **helpdesk report** tap on **communication setting**. This will show the IP address entered.
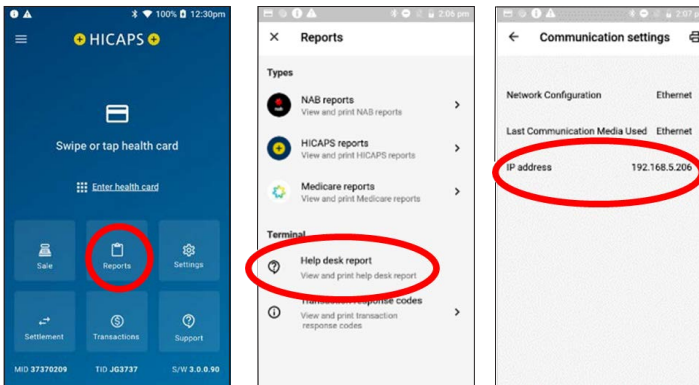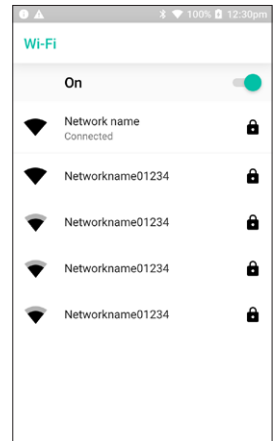
6.6 Configuring Wi-Fi

STEP 1

From the HICAPS home screen, drag your finger from top of the screen to display the Android 'quick settings' panel.
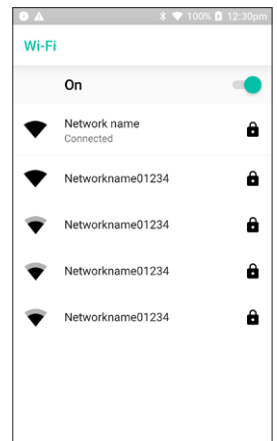
STEP 2

Hold the Wi-Fi icon, until the Wi-Fi configuration screen is open.

STEP 3

Confirm Wi-Fi is enabled with the toggle facing right (On) and select the desired Wi-Fi Name. HICAPS recommends that each device is connected to a secure Wi-Fi network with a strong password.
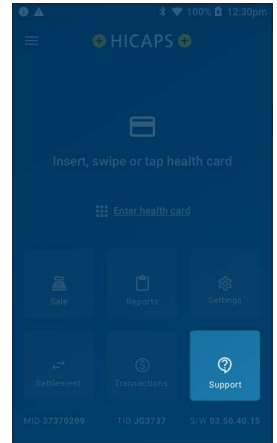
6.7   Completing a heartbeat

Terminals automatically send a heartbeat every hour to check for terminal updates. 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.
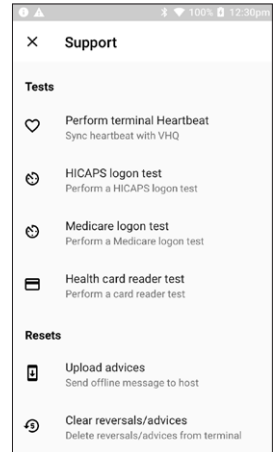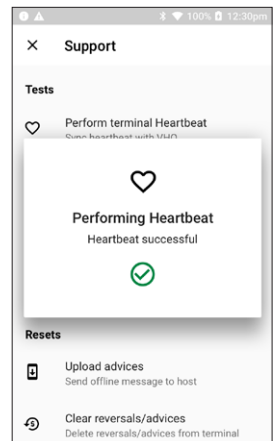
STEP 1
From the HICAPS Home Screen, select **Support**.

STEP 2
Under the 'Tests' menu, tap **Perform terminal Heartbeat**.

STEP 3
The terminal will perform a heartbeat and display a screen showing the heartbeat was successful.
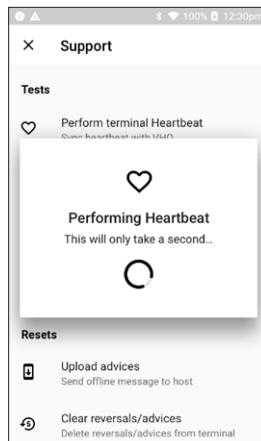
7. HICAPS RESPONSE CODES

7.1 Accessing HICAPS response codes

You can find HICAPS response codes on the HICAPS Trinity terminal and on the HICAPS website.

To access the HICAPS response codes on the HICAPS Trinity terminal, follow the steps below:

STEP 1
From the Home Screen, tap **Reports**.

STEP 2
Tap **Transaction response codes**

STEP 3
Tap **HICAPS response codes**

STEP 4
Scroll through the list of codes or use the search bar to enter numbers or letters to display the code you're searching.
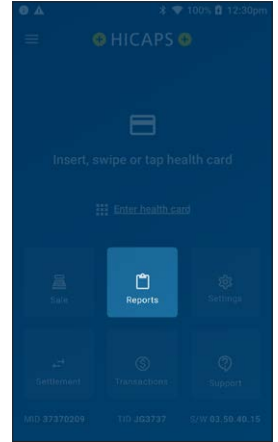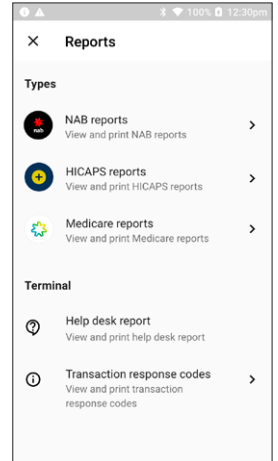
Note: You can print a list of HICAPS response codes by tapping the **print** icon in the top left corner while on the HICAPS response codes screen and tap **OK** on the confirmation screen.

HICAPS response codes – Click for a full and current list of transaction level HICAPS response codes.

7.2   Accessing item level HICAPS response codes

To access the item level HICAPS response codes on the HICAPS Trinity terminal, follow the steps below:

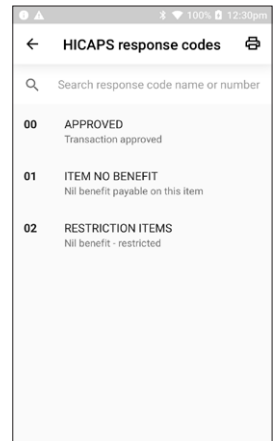**STEP 1**
From the Home Screen, Tap on **Reports**

STEP 2
Tap **Transaction response codes**
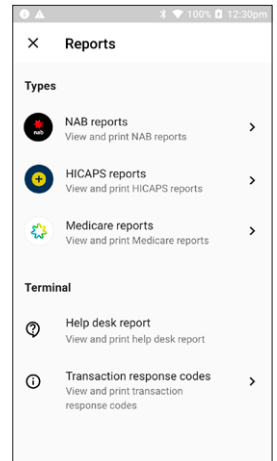
STEP 3
Tap **Gap response codes**
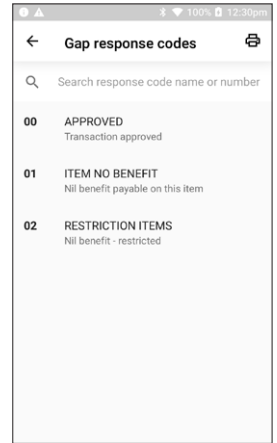
STEP 4
Scroll through the list of codes or use the search bar to enter numbers or letters to display the code you're searching.

Note: You can print a list of item level HICAPS response codes by tapping the print icon in the top left corner while on the HICAPS response codes screen and tap **OK** on the confirmation screen.
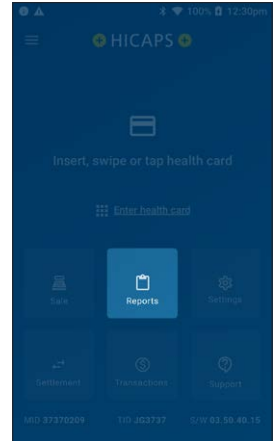
Item level HICAPS response codes – Click for a full and current list of item level HICAPS response codes.

Note: Item codes in the range P0 – P9 and PA – PZ indicate that an item has been declined by the Health Fund for a specific reason. These items must be followed up directly with the Fund.

8. PAYMENT TRANSACTIONS ERROR MESSAGES AND CORRECTIVE ACTIONS

8.1 Payment error messages

You can find EFTPOS error messages on the HICAPS website.

EFTPOS error messages – Click for a full and current list of EFTPOS error messages.

9. MERCHANT REQUIREMENTS TO ENSURE EFTPOS TRANSACTIONS ARE VALID

9.1 Manual transactions

1. For all manual transactions.

    a. Always try the transactions through the PIN pad first.

    b. Check the card is being used after its 'valid from' date and before its 'valid to' date.

    c. Ensure the card is not recorded on any warning bulletin.

    d. Ensure that the card imprint is legible and complete.

    e. Obtain authorisation for above floor limit transactions.

2. For any signature based transaction verify the cardholder's signature matches the signature on their card. If the signature does not match, or you are suspicious of the sale, contact the appropriate credit or debit card help number listed on the last page of this guide.

3. Ensure the accuracy of any card information keyed into the PIN pad.

4. Retain your electronic transaction receipts and manual transaction vouchers for a period of not less than 12 months.

If any of these conditions are not met, it is possible that the transaction may be invalid and the merchant account debited for the value of the disputed transaction.

10. TERMINATION OF EFTPOS MERCHANT SERVICE

Should you decide to terminate your HICAPS EFTPOS merchant service, you need to notify HICAPS using the online form on the HICAPS website. Click here for account amendment forms.

Following completion of the forms, our HICAPS installation team will call you to advise when the terminal and any additional equipment will be collected.

Failure to complete this process means fees will continue to be charged in accordance with the Merchant Agreement and Letter of Offer.

Terminal rental fees are charged per calendar month or part thereof. There are no refunds or pro rata calculation of terminal rental fees should you return a terminal or terminate your Merchant Agreement part way through a billing period.

11.   CONTACTS – HICAPS/EFTPOS

11.1 HICAPS Help Desk

HICAPS Help Desk phone number is **1300 650 852**.

For HICAPS Help Desk hours of operation, <u>click here</u>.

For authorisations:

- Credit Card (Credit) Account
  This is an Australia-wide number **13 25 15**

- Debit Card (Cheque) or (Savings) Account
  This is an Australia-wide number **1300 369 852**

- American Express **1300 363 614**

- Diners Club **1800 331 112**

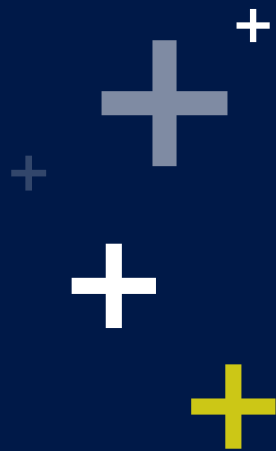Authorisation services are available 24 hours a day, 7 days a week.

For lost or stolen cards:

Please call the above authorisation line appropriate for the card type used (credit or debit). Call 1800 033 103 about lost or stolen credit cards.

11.2 Access Trinity Support Guides

For the most up to date version of this full Trinity Terminal user guide, Quick reference guide and the Medicare Easyclaim user guide, please scan the QR code below.

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