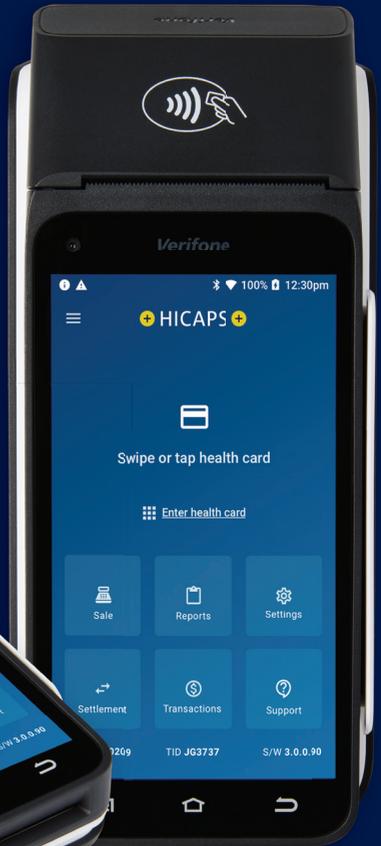
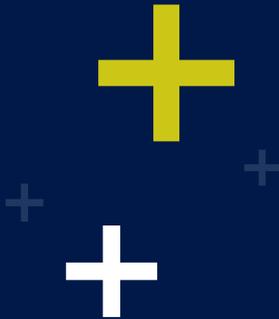


HICAPS TRINITY TERMINAL QUICK REFERENCE GUIDE



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Trinity terminal overview	4
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TRINITY TERMINAL OVERVIEW

Getting to know your terminal

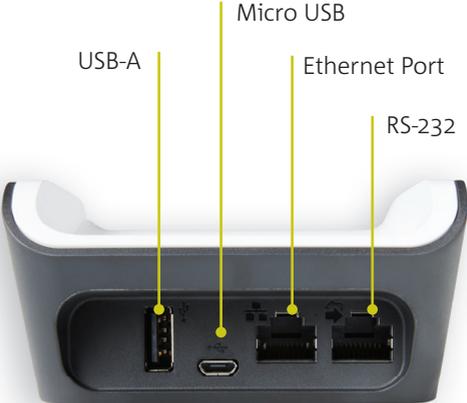
Trinity Features



Trinity Rear



Trinity Base



Trinity home screen



PROCESSING A HEALTH FUND CLAIM

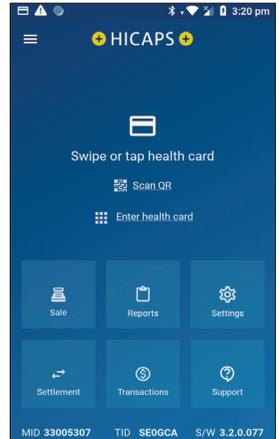
Follow these easy steps to process a claim:

STEP 1

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

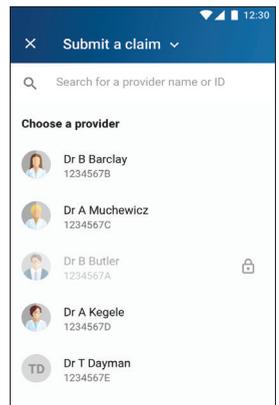
Note: Patients with digital health fund membership cards can use their Android or Apple devices to commence a claim.

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



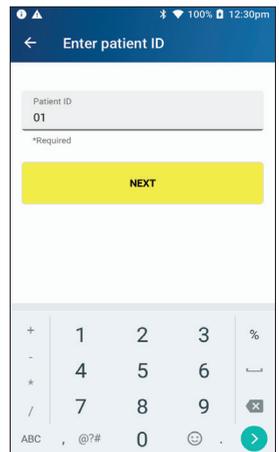
STEP 2

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



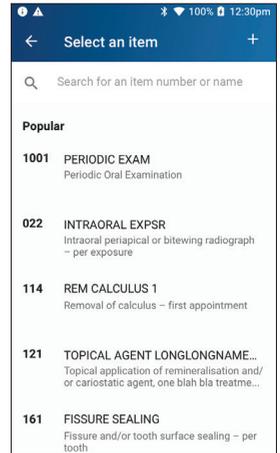
STEP 3

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



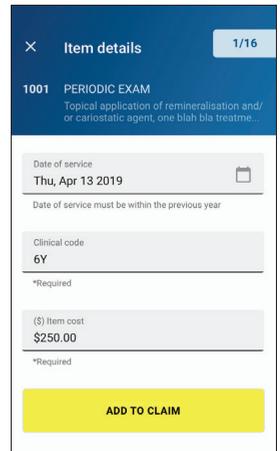
STEP 4

Select the claim item.



STEP 5

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



STEP 6

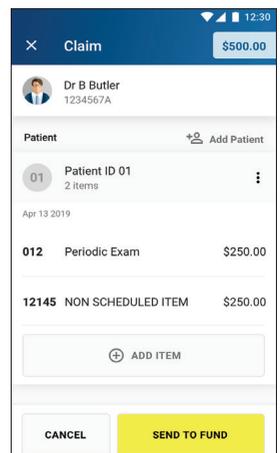
Before proceeding with approval to the health fund, a summary of the claim is shown.

To add additional items tap **“Add Item”** or select 3 dots on the right hand side of the patient to **“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

Press yes or no to print customer copy

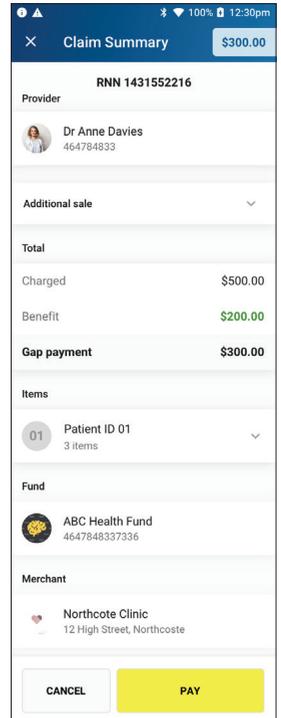


STEP 8

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 9).



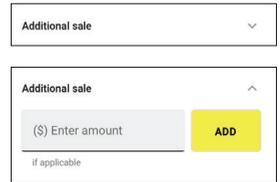
STEP 9

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.



STEP 10

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



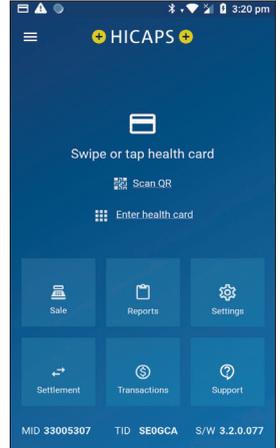
PROCESSING A HEALTH FUND QUOTE

STEP 1

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

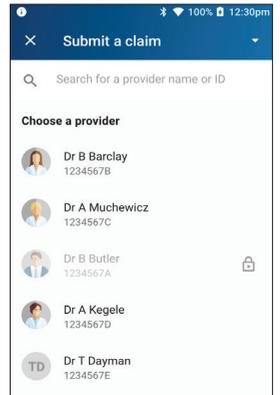
Note: Patients with digital health fund membership cards can use their Android or Apple devices to commence a quote.

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



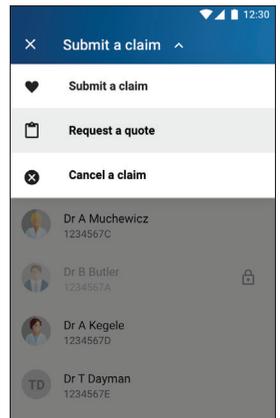
STEP 2

Tap on **“Submit a claim”** at the top of the screen to open the dropdown list.



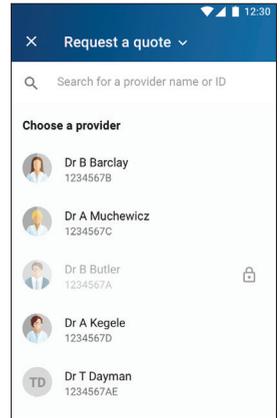
STEP 3

Select **“Request a quote”**.



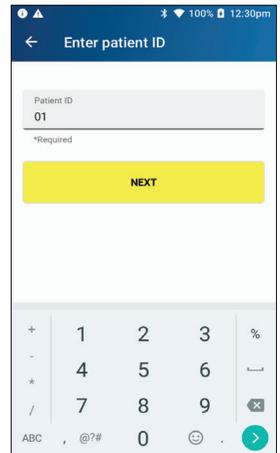
STEP 4

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



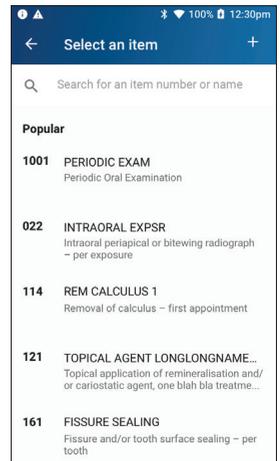
STEP 5

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



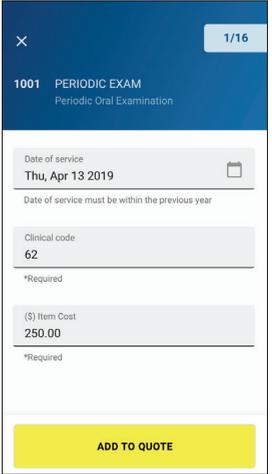
STEP 6

Select the item.



STEP 7

Enter clinical code if required, the amount for the item and tap  to proceed, followed by **“Add to Quote”**.

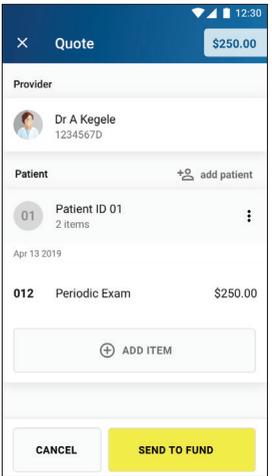


A screenshot of a mobile application form titled "1001 PERIODIC EXAM" with the subtitle "Periodic Oral Examination". The form includes a "Date of service" field with the value "Thu, Apr 13 2019" and a calendar icon. Below this is a note: "Date of service must be within the previous year". There is a "Clinical code" field with the value "62" and a "*Required" label. Below that is a "\$ Item Cost" field with the value "250.00" and another "*Required" label. At the bottom of the form is a yellow button labeled "ADD TO QUOTE".

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”**.



A screenshot of a mobile application screen titled "Quote" with a total amount of "\$250.00". The screen displays the following information:

- Provider:** Dr A Kegele, 1234567D
- Patient:** + add patient
- Item 01:** Patient ID 01, 2 items
- Date:** Apr 13 2019
- Item 012:** Periodic Exam, \$250.00

At the bottom, there is a button with a plus icon and the text "ADD ITEM". At the very bottom, there are two buttons: "CANCEL" and "SEND TO FUND".

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:

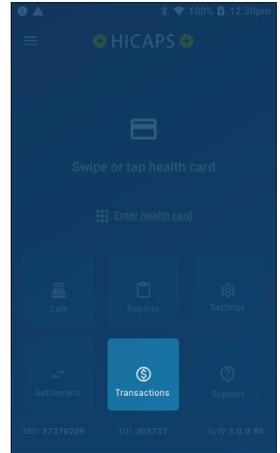
*****QUOTE ONLY*****

CANCELLING A HEALTH FUND CLAIM

If you need to cancel a health fund claim:

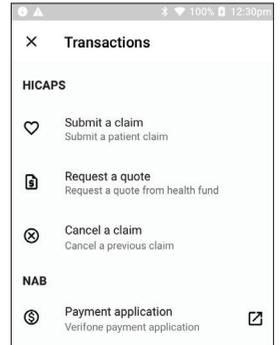
STEP 1

From the HICAPS home screen, tap **“Transactions”**.



STEP 2

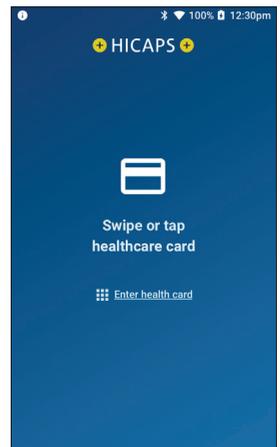
Tap **“Cancel a claim”**.



STEP 3

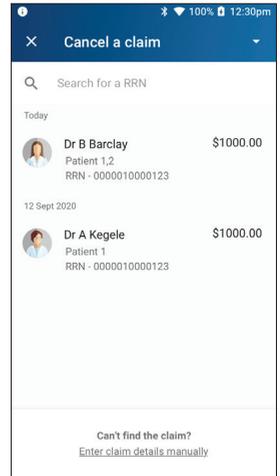
Swipe or tap the patient's membership card.

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



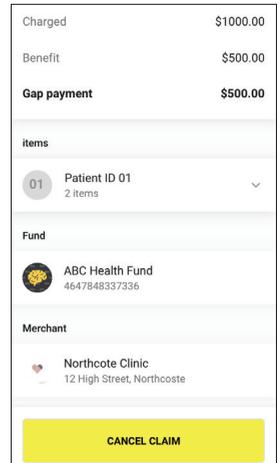
STEP 4

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

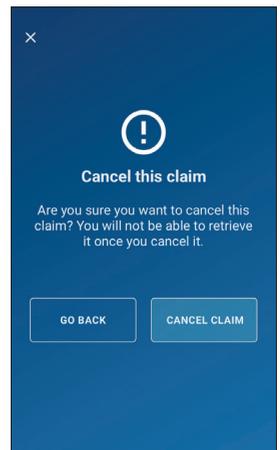


STEP 6

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"**.

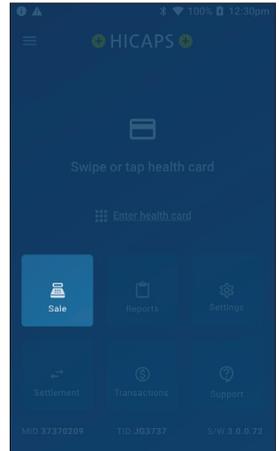


PROCESSING A PAYMENT TRANSACTION

To process a transaction without submitting a health fund claim:

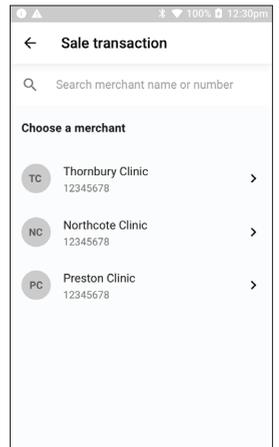
STEP 1

From the home screen, tap the “Sale” icon.



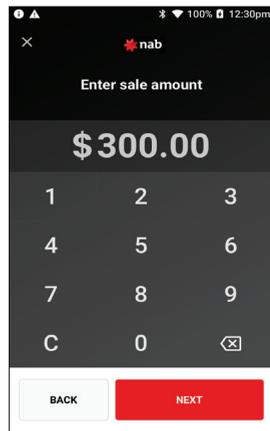
STEP 2

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.

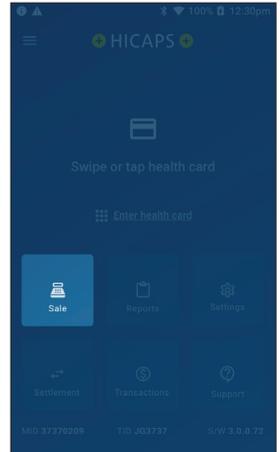


SALE – MANUAL CARD ENTRY

STEP 1

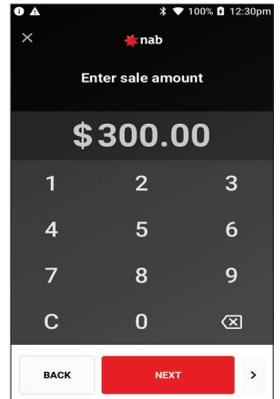
From the Home Screen, tap the “**Sale**” icon.

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



STEP 2

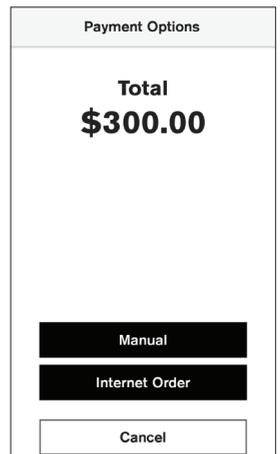
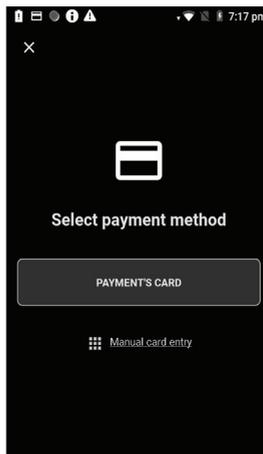
Enter the transaction amount and tap “>” in the bottom right-hand corner of the screen.



STEP 3

Select “**Manual Card Entry**” from the “**Select payment method**” screen.

When prompted for payment options, tap “**Manual**”.



STEP 4

Enter the card number using the onscreen keypad and select “Enter”.

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

If the card details are correct, tap “Confirm”.

Enter Card Number		
Total \$300.00		
5163 61•• •••• ••••		
1	2	3
4	5	6
7	8	9
	0	✕
Cancel	Enter	

Enter Card Number		
Total \$300.00		
5163 61•• •••• ••••		
1	2	3
4	5	6
7	8	9
	0	✕
Cancel	Enter	

Confirm Card Number		
Total \$300.00		
5163 61•• •••• 9717		
1	2	3
4	5	6
7	8	9
	0	✕
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.

Enter CVV		
Total \$300.00		
1	2	3
4	5	6
7	8	9
	0	⌫
Cancel		Enter

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.

 APPROVED TRANSACTION COMPLETED	
---	--

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.

Enter Signature	
<h1>Sign Here</h1>	
<small>Total: \$300.00</small>	
<small>I agree to pay the above total amount according to my card issuer agreement. MASTERCARD DEBIT card ending in 9717. Authorisation number 015031</small>	
Clear	Done

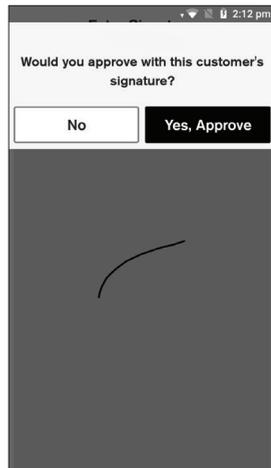
STEP 9

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.



PROCESSING A REFUND

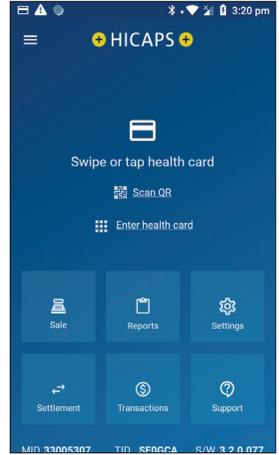
Refunds can be processed via two methods, as either a matched refund or an unmatched refund. HICAPS strongly suggests that a matched refund is used in all cases, as it ensures you are limiting your potential exposure to chargebacks.

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:

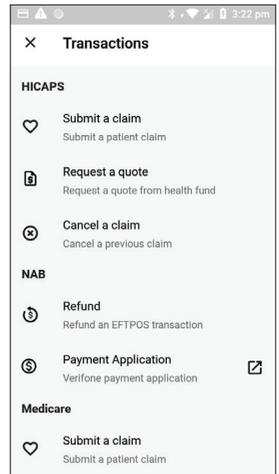
STEP 1

From the home screen, tap the “**Transactions**” icon.



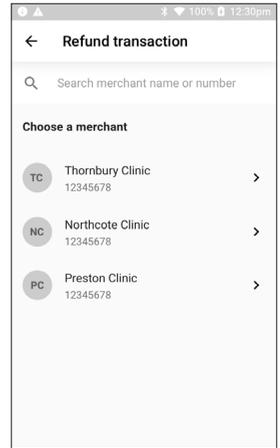
STEP 2

Tap “**Refund**”.



STEP 3

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

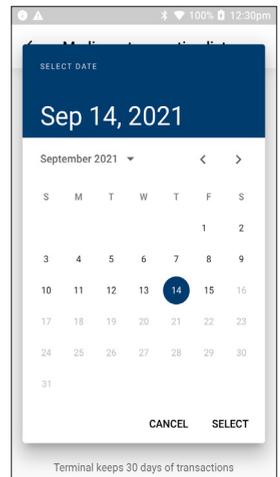
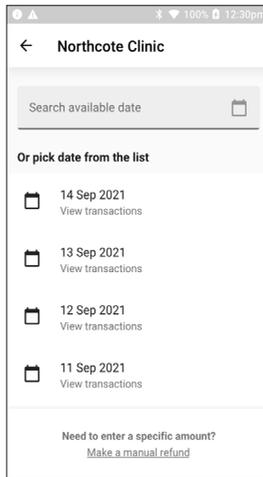


STEP 4

Tap the relevant date to view transactions.

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

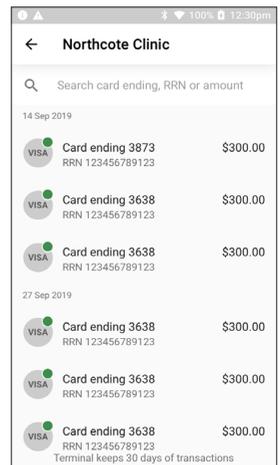
Alternatively tap the calendar icon and select a date.



STEP 5

Select a transaction to be refunded.

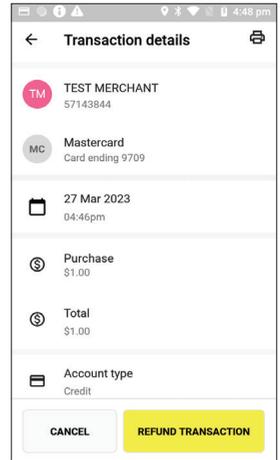
Note: The transaction can be identified by the card used in the original transaction. The amount and RRN (receipt reference number) are also displayed and can be used to verify the correct transaction is selected for refunding.



STEP 6

Confirm the details of the transaction and tap **“REFUND TRANSACTION”**.

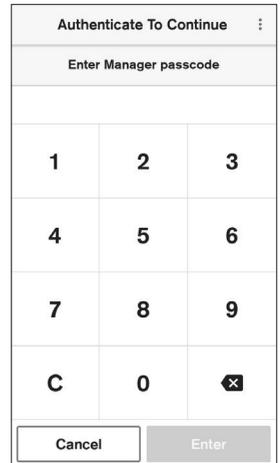
Tap ← to go back to the previous screen.



STEP 7

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

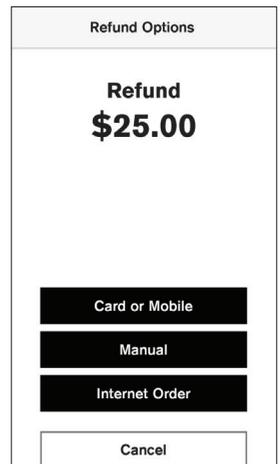
If you have forgotten your passcode, you will need to contact the HICAPS Help Desk on **1300 650 852**.



STEP 8

From the **Refund Options** screen, select **“Card or Mobile”**. Tap **“Cancel”** to go back.

Note: Tap **“Manual”** for card entry or **“Internet order”**.



STEP 9

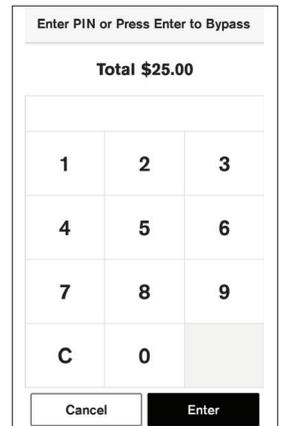
Tap, insert or swipe the card used in the original transaction to process the refund.



STEP 10

Enter PIN or Press Enter to Bypass

Customer has the option to enter the PIN or select Enter to bypass the PIN and sign the screen with the customers signature.



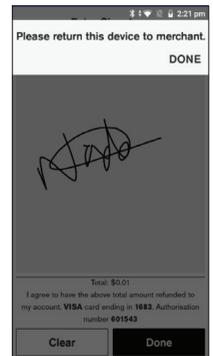
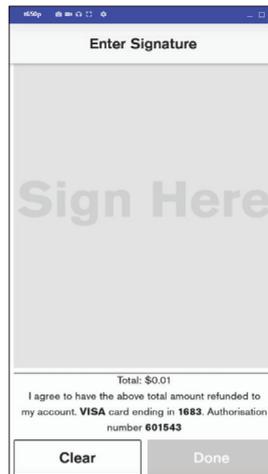
STEP 11

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”**.

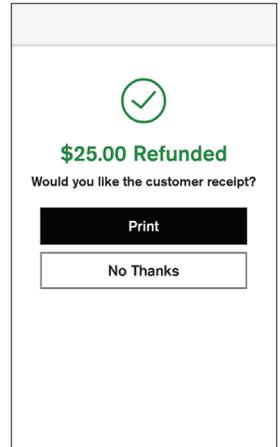
Once authorised the terminal will display the transaction as **“Approved”**.

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”**.



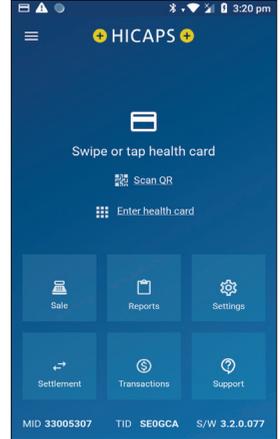
PROCESSING A REFUND

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:

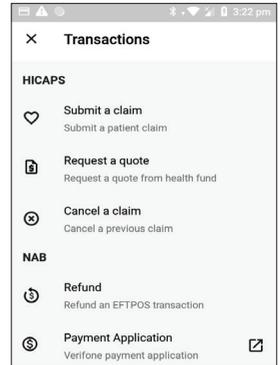
STEP 1

From the home screen, tap the “**Transactions**” icon.



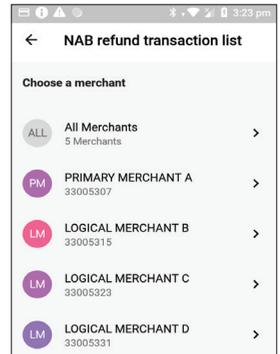
STEP 2

Tap the “**Refund**” icon.



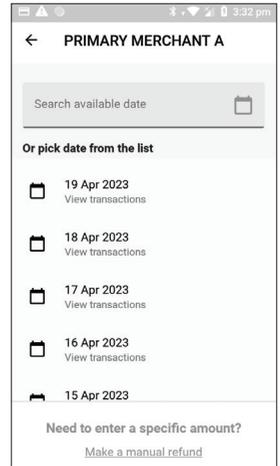
STEP 3

If you have multiple merchants, you will be prompted to select **one merchant** from the list.



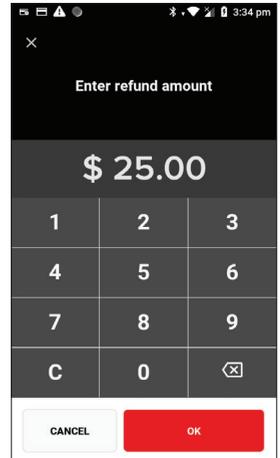
STEP 4

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 merchant passcode.

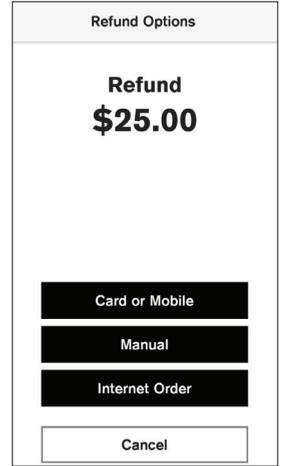
If you have forgotten the passcode, you will need to contact the HICAPS Help Desk on **1300 650 852**.



STEP 7

From the **Refund Options** screen, select **“Card or Mobile”**. Tap **“Cancel”** to go back.

Note: Tap **“Manual”** for card entry or **“Internet order”**.



STEP 8

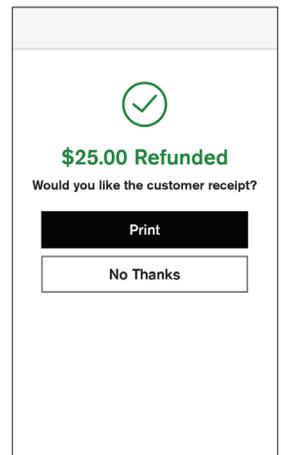
Ask the customer to present their card to finalise the transaction. The customer can enter **PIN** or **Press Enter to Bypass** and sign the screen with the customers signature.

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



STEP 9

To print the Refund, tap **“Print”** to print customer receipt or **“No Thanks”**.



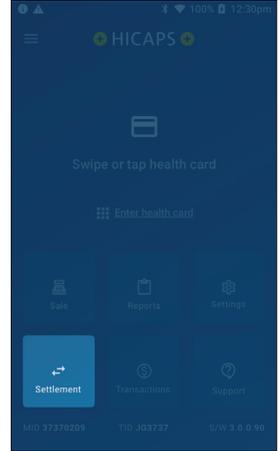
SETTLEMENTS

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:

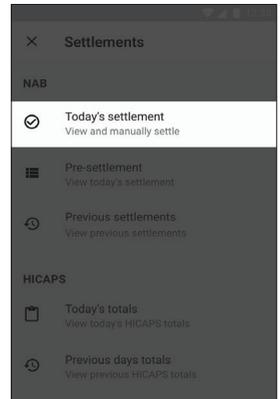
STEP 1

From the home screen, tap the **“Settlement”** icon.



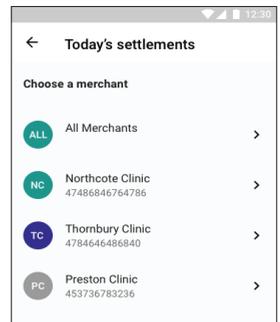
STEP 2

Tap **“Today's settlement”**.



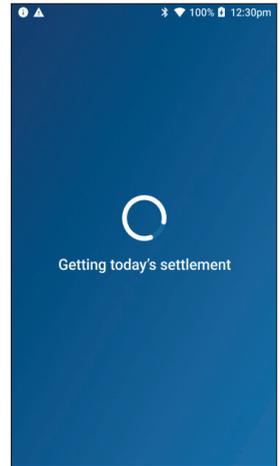
STEP 3

Choose the merchant account you wish to settle.



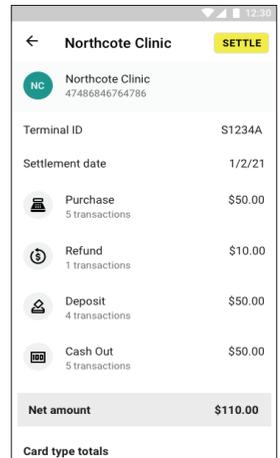
STEP 4

The terminal will download the latest settlement details.



STEP 5

Tap "Settle".



STEP 6

The terminal will print the settlement receipt.



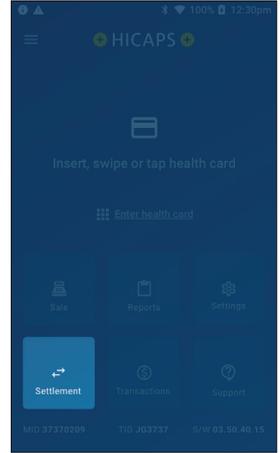
HICAPS TOTALS

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:

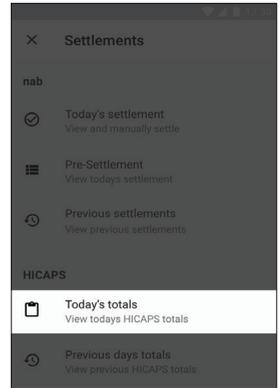
STEP 1

From the home screen, tap the **“Settlement”** icon.



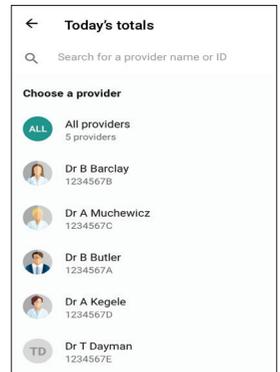
STEP 2

Under HICAPS, tap **“Today's totals”**.



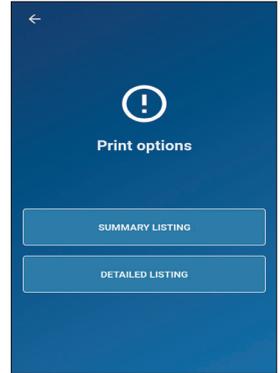
STEP 3

Choose a provider to view that provider's totals only, or **“All providers”** to view a breakdown of all provider totals.



STEP 4

Print reports (Summary listing or Detailed listing)



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

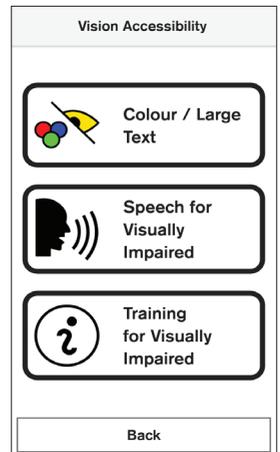
Three options are available for selection depending on the needs of the customer.

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.

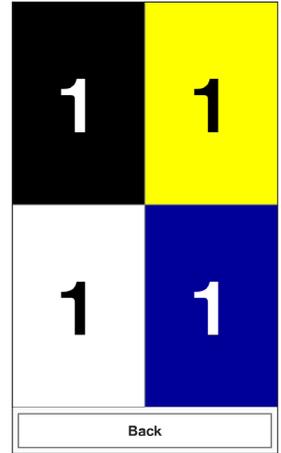
Note: Customers can connect using headphones via Audio Jack.



Colour / Large Text

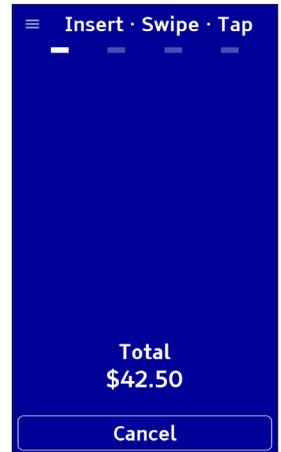
STEP 1

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



STEP 2

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



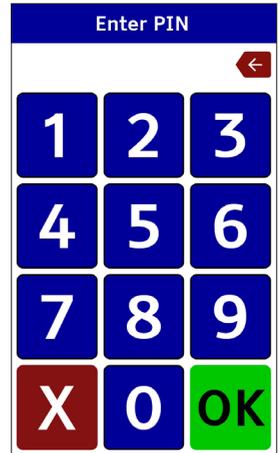
STEP 3

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



STEP 4

They will then be prompted to enter their PIN.

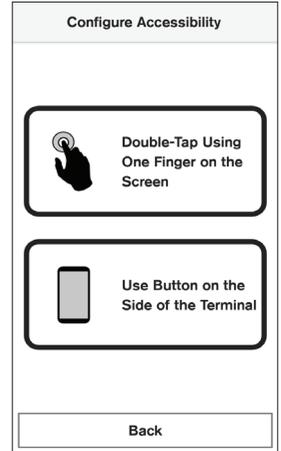


Speech for the Visually Impaired

STEP 1

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

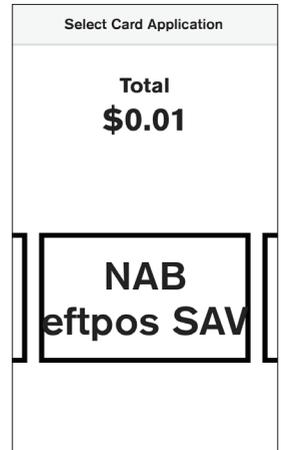
A voice prompt will advise the customer of the transaction amount and the locations of where to present the payment card.



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

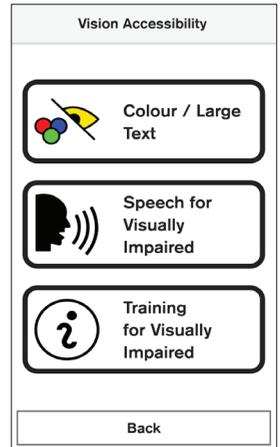
At the present card screen, tap the accessibility icon: 



STEP 2

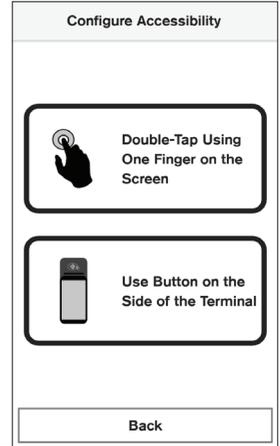
From the vision accessibility screen, select training for visually impaired.

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



STEP 3

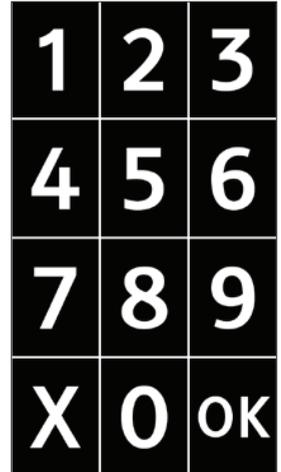
Ask the customer if they would prefer to use the side button to confirm selection, or double tap the screen to confirm their selection.



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.



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, the full Trinity terminal user guide and the Medicare Easyclaim user guide, please scan the QR code below.

To access the QR code from the Trinity terminal select:

1. Support
2. Terminal Guide
3. Then scan the QR code





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