Getting started

A guide to using
the key features of
HICAPS Accounts Online
Welcome

HICAPS Accounts Online assists in the fast reconciliation of health fund payments and has the flexibility to suit practices, large and small.

Whether you use it once a week, once a day or just once in a while, you’ll find yourself familiar with the system in no time. Even so, as with any new task, it’s better to be shown the right way from the outset.

That’s why we prepared this guide, and why we encourage every HICAPS Accounts Online user to read what follows before going to www.hicaps.com.au and logging in for the first time. We also encourage you to keep the booklet handy for future reference should the need arise.

Should you have any questions, remember that support from the HICAPS Help Desk is only ever a phone call away. Just call 1300 650 852.
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1. Your first login

To bring up the login screen, click the **Login to HICAPS Accounts Online** menu option, which is located on HICAPS home page at www.hicaps.com.au.

HICAPS will issue you with a unique User ID and temporary password.

If you are a health service provider, your User ID will be your 8-character HIC or Medibank Private Provider Number registered with HICAPS for the practice this information was mailed to. If not, your User ID will be an 8-character alphanumeric identifier allocated by HICAPS. Your User ID and password are both case sensitive.

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

Changing your temporary password

Your temporary password can only be used for your first login. Having accepted HICAPS’ Terms of Use you will be taken automatically to the **Change Password** page. You may now choose your own password according to the format detailed on the opposite page. Key it into the **New Password** field and again into the **Confirm** field.

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

After every login be sure to log out by clicking on the Log Out link in the top right hand corner of the screen. You should never end a HICAPS Accounts Online session simply by closing your web browser.

2. Passwords

Format

HICAPS Accounts Online passwords are case sensitive, so if your password is ‘1234abcd’ but you enter ‘1234ABCD’, your login attempt will fail. The other key points to remember when choosing/using your password are:

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

Changing your password

To change your password, select User Administration, then choose Personal Details and click Change Password at the bottom of the screen. For security purposes, you must enter your current password before keying your new password into both the New Password and Confirm fields.

If you forget your password

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

Should this occur, a colleague with Level 3 access (see page opposite) can reset your password by following the procedure outlined on page 14.

Alternatively, you can call the HICAPS Help Desk on 1300 650 852. For security purposes, the HICAPS Help Desk will use the security information you have previously provided to verify your identity (see page 3).
3. Access Levels

Which level is right for you?

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

**Level 1** allows users to view a provider’s transactions and carry out non-financial administrative functions. If access to statements is required to assist with reconciliation, Level 2 access is required.

**Level 2** allows users to view statements to assist with reconciliation, to view the transactions of all providers attached to the bank account ID (Settlement Account) and carry out non-financial administrative functions.

**Level 3** allows users to access to all current system features.

The table on page 7 provides a breakdown of the key features and functions available at each access level.

**Changing a user’s access level**

User access levels can be changed as required by Level 3 users within the practice (see page 14), or by the HICAPS Help Desk.

**NOTE:** Please ensure roles are in sequential order, ie. from highest access level to lowest. For example, to allocate a user Level 2 access, move ‘Level 2’ and ‘Level 1’ across to ‘assigned roles’, with ‘Level 2’ positioned above ‘Level 1’. Use the [▲] and [▼] buttons to reorder if necessary.

**CAUTION:** Careful consideration should be given before upgrading a user to a higher access level as it will enable them to access additional functionality.
**HICAPS Accounts Online Functionality by User Access Level**

<table>
<thead>
<tr>
<th>Provider/s transactions</th>
<th>Access Level 1</th>
<th>Access Level 2</th>
<th>Access Level 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>View &amp; download</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transactions for all providers attached to an account ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>View &amp; download</td>
</tr>
<tr>
<td>Access Level 1: ✓; Access Level 2: ✓; Access Level 3: ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Previous HICAPS statements &amp; previous HICAPS daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Level 1: ✓; Access Level 2: ✓; Access Level 3: ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request to add and modify providers to HICAPS database system*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Level 1: ✓; Access Level 2: ✓; Access Level 3: ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manage statement frequency, type &amp; delivery method and mailing address details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Level 1: ✓; Access Level 2: ✓; Access Level 3: ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Create and upgrade additional HICAPS Accounts Online Users &amp; ID’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Level 3: ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Modify own user details (mailing address, e-mail etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Level 1: ✓; Access Level 2: ✓; Access Level 3: ✓</td>
</tr>
</tbody>
</table>

* HIC letter required.

**NOTE:** This table is correct at the time of printing. However, over time, HICAPS Accounts Online functionality will be extended/enhanced.
4. Key Level 1 Features

As a Level 1 user, you are able to view transactions for a single provider. You can also update your personal details.

To reveal all the menu options available to you, simply click on the menu headings.

To view transactions for a single provider

Select View Transactions from the Providers menu.

You can only view transactions relating to the provider displayed in the Provider Number field. To tailor the report to your needs, choose from the options presented in each of the other five fields: Fund, Start Date, End Date, Membership Number and Terminal Number. By default your report will be displayed on screen. If you wish to save this information on your PC for future analysis, select CSV Download. When you are ready to start, click Next at the bottom right of the screen.

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

With Level 2 access, you can view and download statements for reconciliation, daily total reports and transactions for all providers attached to one bank account, as well as performing the non-financial administrative functions.

To view statements

Select View Statements from the Accounts menu, then nominate the statement required.

To display daily totals

Select View Daily Totals from the Accounts menu, then nominate the account and day required. Information will be displayed on screen but it can also be saved to your PC by clicking Download.

To view transactions for a single provider

Select View Transactions from the Providers menu. You can tailor the report to your exact needs by choosing from the options presented in each of the six fields: Provider Number, Fund, Start Date, End Date, Membership Number and Terminal Number. By default your report will be displayed on screen. If you wish to save this information on your PC for future analysis, select CSV Download. When you are ready to start, click Next at the bottom right of the screen.

To add a provider

Select Add Provider from the Providers menu. You will need to key in the relevant account id or account number.

NOTE: You may only add a new provider if you are a Level 2 or Level 3 user.
Complete the fields on the Create New Provider screen as appropriate. Fields marked with an asterisk (*) are mandatory. If the new provider will also be a HICAPS Accounts Online user, select yes at the bottom of the screen before clicking Create Provider.

You will also need to fax a copy of either the provider’s HIC letter or their Medibank registration letter to HICAPS for registration on 1300 725 726. We will advise you once the provider is activated by our participating health funds, and direct you on how to load their details onto your HICAPS terminal(s).

6. Key Level 3 Features

Level 3 access is the highest available, and gives you access to all HICAPS Accounts Online features.

To modify statement frequency

Select Modify Statementing from the Accounts menu. Select required Online Statement Type – summary, transaction or detail, then select Statement Frequency – daily, weekly, fortnightly, monthly or quarterly.

To add a provider

Select Add Provider from the Providers menu. You will need to key in the relevant account id or account number.

NOTE: You may only add a new provider if you are a Level 2 or Level 3 user.
To view statements
Select View Statements from the Accounts menu, then nominate the statement required.

To display daily totals
Select View Daily Totals from the Accounts menu, then nominate the account and day required. Information will be displayed on screen but it can also be saved to your PC for later analysis by clicking Download.

To modify provider details
Select View/Modify Provider from the Providers menu. Key in the User ID (ie. the Provider Number) of the provider in question, then modify the appropriate fields on the Modify Provider Details screen. Fields marked with an asterisk (*) are mandatory.

NOTE: Changes made in this screen automatically update HICAPS’ registered information on the provider. The relevant fields on the provider’s user details will also be automatically updated if the provider is a HICAPS Accounts Online user within the practice. However, changes made via the Modify User Details screen DO NOT update the HICAPS registered information.

7. User Administration for Level 3 Users.

To create a new user
Select Add User from the User Administration menu and complete the fields on the New User Details screen as appropriate. Fields marked with an asterisk (*) are mandatory.

NOTE: For further instructions please contact the HICAPS Help Desk on 1300 650 852.
To reset a user’s password

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

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

To suspend a user

You can prevent practice staff under your supervision from logging in to Accounts Online by suspending their access. Select Suspend User from the User Administration menu, then key in the User ID, Effective Date and End Date. A user will be able to suspend their access for a specific duration of time e.g. on annual leave.

To assign user roles (Access Level)

To change a user’s access level, click on Modify User Roles from the User Administration menu. Key in the User ID, then add or remove roles as appropriate. For example, to upgrade a User from access Level 1 to access Level 2, you would click on access Level 2 in the Selectable column, click [►] then finally, to confirm the update click Next. The change becomes effective when the user next logs in.

NOTE: Please ensure roles are in sequential order, ie. from highest access level to lowest.
For example, to allocate a user Level 2 access, move ‘Level 2’ and ‘Level 1’ across to ‘assigned roles’, with ‘Level 2’ positioned above ‘Level 1’. Use the [▲] and [▼] buttons to reorder if necessary.

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

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

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

Only same case letters can be used in User IDs.

Passwords are case and space sensitive. Passwords may contain both upper and lower case letters, but if your password is ‘UPdown’ and you enter ‘upDOWN’, your login will fail. Similarly, ‘ready 2 go’ will be rejected if your password is ‘ready2go’.

The system has locked me out.

After three unsuccessful login attempts, HICAPS Accounts Online will automatically lock you out. To access the system, ask a colleague with Level 3 access to reset your password (see page 14). Or call the HICAPS Help Desk on 1300 650 852.

I changed my phone number through “Personal Details” in the User Admin Section, but the old one is still showing on my “Provider Details”

Changes made on the View/Modify Provider Details screen automatically update the relevant fields on your Personal Details, but not the reverse. Only Level 2 and Level 3 users can access the View/Modify Provider Details screen.

The system says I’m already logged on

This will occur if you do not click the Log Out link on the tools menu to log out at the end of a session, and means you will be unable to access the system for the next 20 minutes. If you require access within that timeframe, a colleague with Level 3 access can ‘/’ your User ID by using the Suspend User option on the User Administration menu. Alternatively, you can call the HICAPS Help Desk on 1300 650 852.
If you have any questions phone the HICAPS Help Desk on 1300 650 852.