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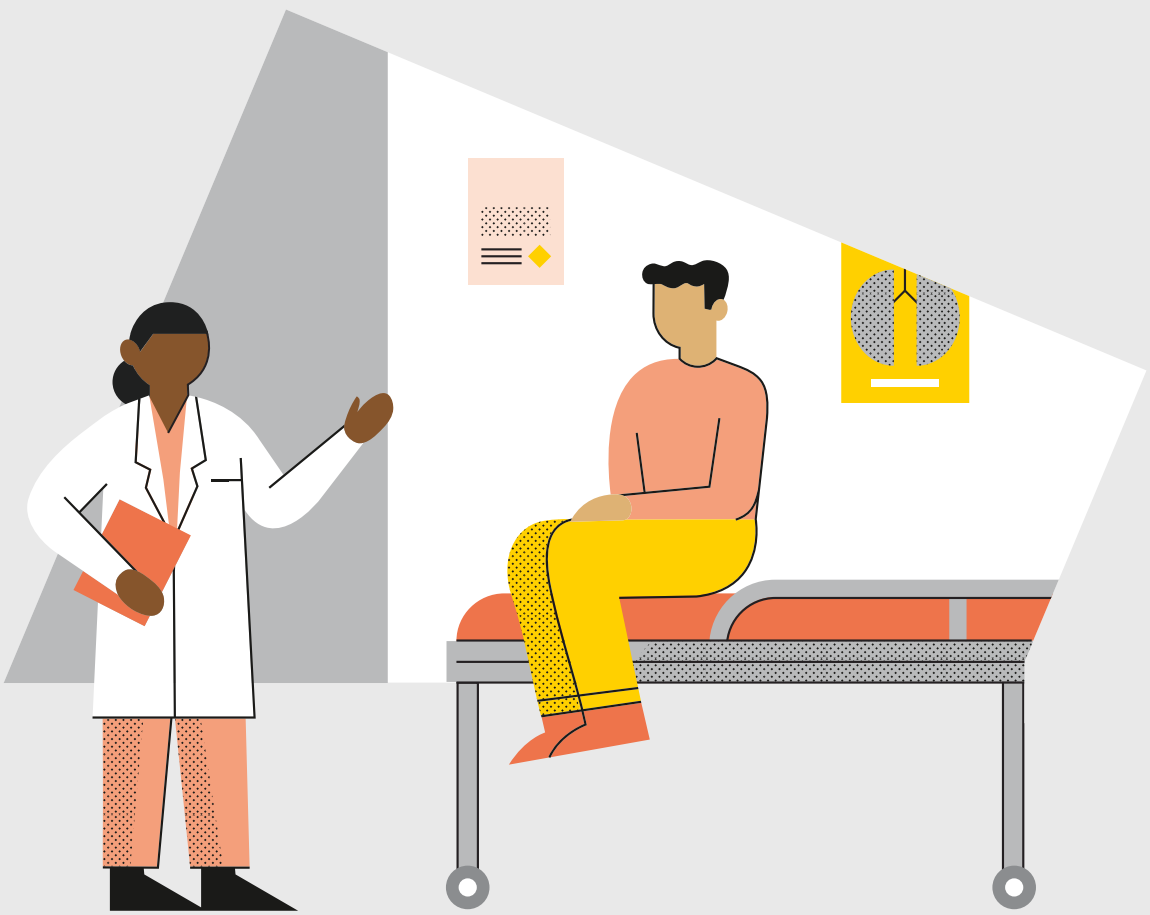
Date: April 2025

CommBank Smart Health Hub User Guide



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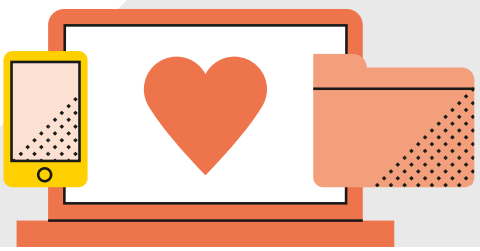
Glossary

HPOS	Health Professional Online Services. Simple and secure way for providers to do business with Services Australia.
Item Code	A specific code used by healthcare practitioners to record the type of treatment provided e.g. Medicare item 23 is a short consult.
Medicare Easyclaim	A government service providing a secure connection via EFTPOS terminals to transmit bulk bill and patient claims to Medicare (integration with a PMS is optional).
Practice Administrator	Role provided in the hub to be able to process claims and payments.
Practice Management Software (PMS)	Software used by practices to manage patient booking, clinical notes and payments.
PRODA	Provider Digital Access. PRODA is an online identity verification and authentication system.
Reconciliation/Reconcile	The process of validating that a patient claim has been paid or processed.
Reporting	Data provided from the portal on historical claims and payments made to the practice.
Tenant Administrator	The role that can assign Practice Administrator access within a business to additional users.



About CommBank Smart Health

What is the Smart Health Terminal?

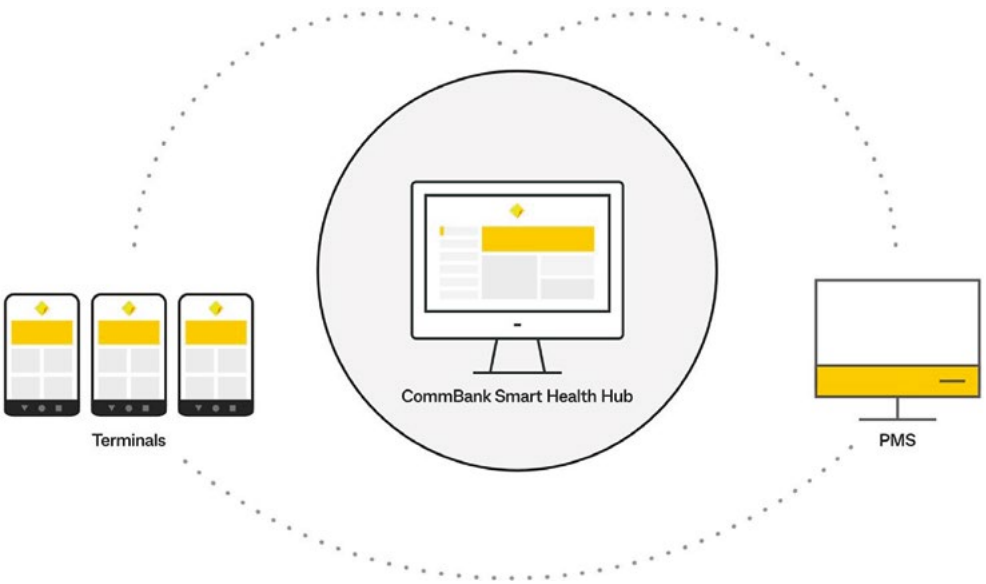
The CommBank Smart Health Terminal is the physical device which can process health claims and payment transactions.

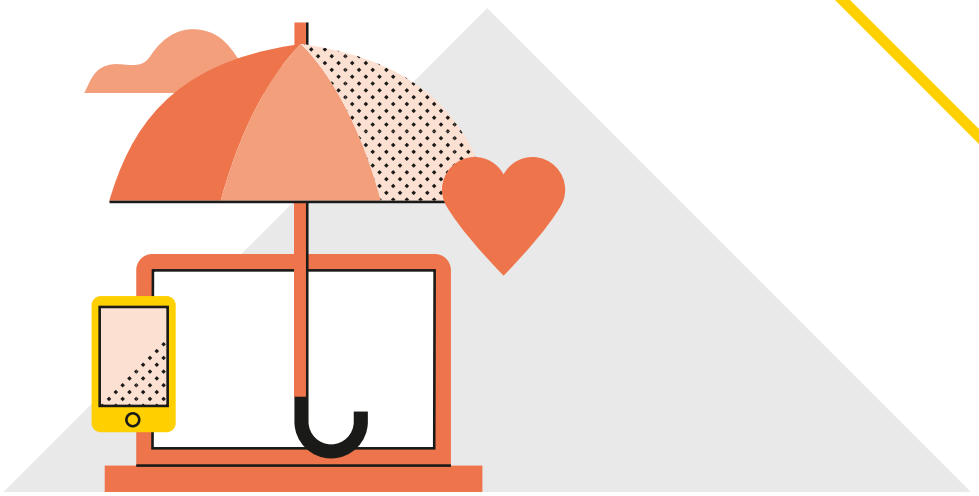
What is the Smart Health App?

The Smart Health App runs on the Smart Health Terminal and provides the interface for the payments and claiming features on the device. The app is linked to the Smart Health Hub.

What is the Smart Health Hub?

The CommBank Smart Health Hub is a web application accessed through your web browser. This is the central point of access and navigation for administrators and practice users and can be integrated with your PMS. The Hub displays detailed transaction listings and digitally stored copies of your private health insurance declarations.





Support

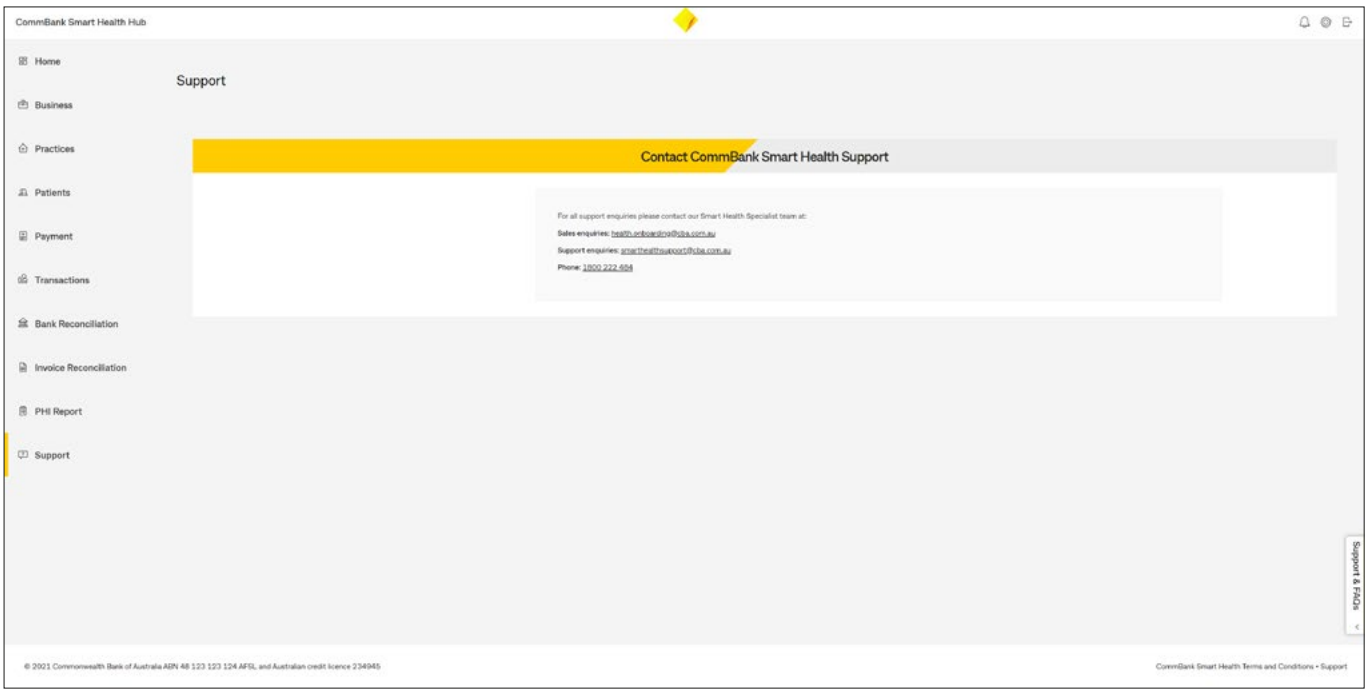
How to get help

For questions about the CommBank Smart Health Hub

You can get help in three easy ways:

Support page

You'll find our Support page by clicking the ***Support*** tab in the hub (this is the last tab in the menu at left). You will find the contact details of CommBank Smart Health specialist team.



Support and FAQs tab

At the bottom right of every page in the hub, you'll find a drop-down menu called Support and FAQs. This contains further information (and user guides) on how to use the CommBank Smart Health Hub.

Within this menu, a "walk me through" tool will guide you through the initial setup steps and can be accessed at any time.

Help Desk

You can call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday or email **smarthealthsupport@cba.com.au**.

For questions related to your PMS

For help with any transactions involving the use of your PMS, please see your PMS User Guide or call your PMS Help Desk. For example, you may need help with:

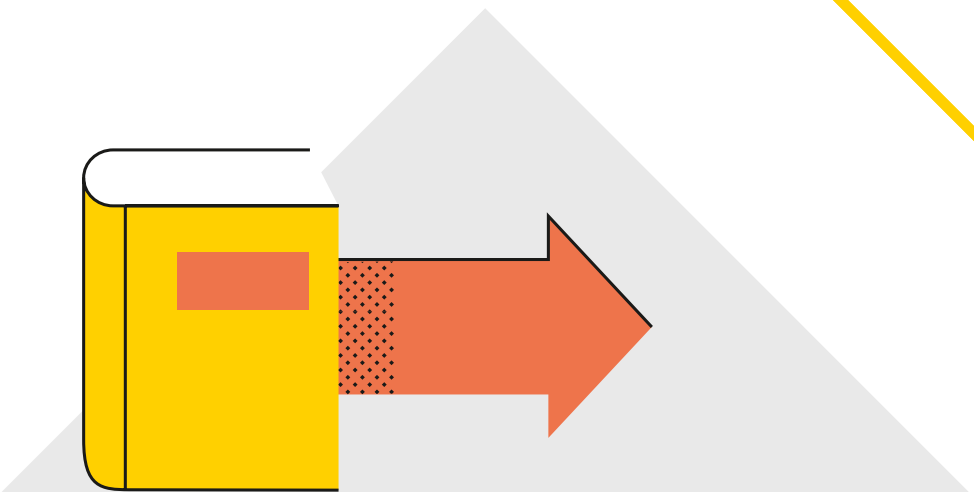
- Initiating or processing transactions in integrated mode via your PMS
- Finding out where to paste your User Key, PIN and PMS Integration Key when connecting the CommBank Smart Health Hub to your PMS, and
- Handling PMS error messages.

If you use any of the following PMSs below, you can also access help through these links and phone numbers:

Dental 4 Windows – **https://www.centaursoftware.com.au/contact-us/** or 1300 855 966

Optomate – **https://www.monkeysoftware.com.au/contact** or 1300 650 295

Best Practice – **https://bpsoftware.net/contact/** or 1300 401 111



Quick start guide

1

Logging in for the first time

1. Welcome email sent to your registered email address, containing:
   a. username
   b. temporary password
2. One of the following for each practitioner:
   a. Medicare Provider Letter
   b. HPOS Screenshot
   c. Association Letter
   (for Massage Therapists only)

See page 10 for further information

2

The CommBank Smart Health Hub dashboard

Visit the Smart Health login page at
www.commbank.com.au/smarthealth

or type
https://merchant.whitecoat.com.au/login
in a browser.

See page 13 for further information

3

Reviewing your details

1. Enter the CommBank Smart Health Hub Home page
2. Through the Business tab, look at the pre-loaded details about your business to check they are correct

If any incorrect details appear call 1800 222 484 between 8am and 8pm AEST Monday to Friday or email smarthealthsupport@cba.com.au

See page 15 for further information

4

Adding Administrators

1. Click on the Practices tab and select the appropriate practice
2. Existing Administrators will appear in the Administrators tab
3. For new Administrators, click on the Add Administrators link and provide unique email address and details
4. Each new Administrator will only be able to access this specific practice, and will be sent an email with login details

See page 18 for further information

5

Adding Providers

1. Search for providers by Medicare Provider Number or add details manually
2. Complete all fields and upload Medicare Provider Number Letter or screenshot from PRODA or HPOS (with time and date)
3. Click on the Save Provider Details button
4. New providers are verified by the CommBank Smart Heath Team, then show as “Active” in the Hub
5. Once Active, Medicare claiming begins. Allied claiming begins within 72 hours

See page 20 for further information

6

Linking terminals

1. Press and hold power button on right side of terminal
2. Generate your terminal pairing code found in the CommBank Smart Health from the Practice menu under the Terminal tab
3. On the Smart terminal, within the Smart Health app enter the above pairing code
4. Assign each terminal a nickname so you can identify each one, remembering to keep a record of your Terminal ID

See page 23 for further information

7

Integrating with your PMS For Dental4Windows

1. From the Practices tab, select the appropriate practice and click on the PMS Integrations tab
2. Select your PMS system from the available integrations list
3. Type in a PMS nickname
4. Create your own PMS integration key
5. Click Save to complete the process

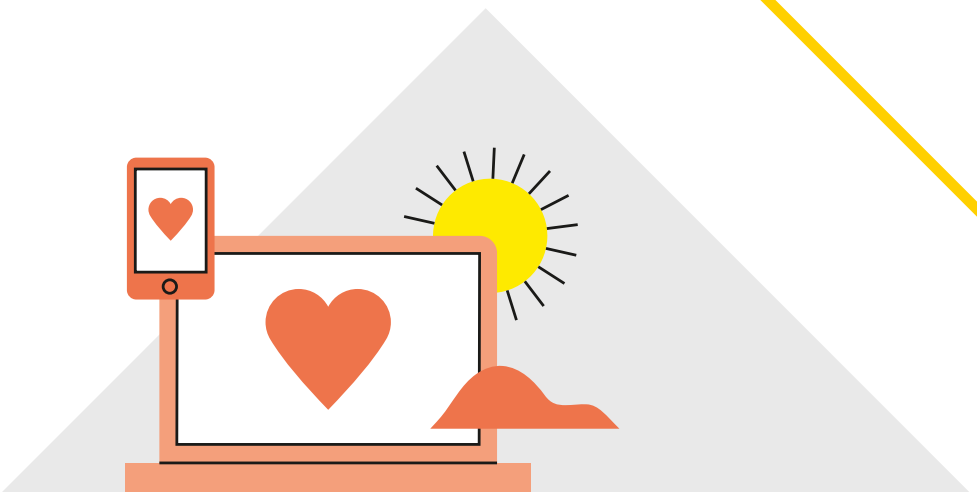
See page 29 for further information

8

Integrating with your PMS For Best Practice and Optomate

1. From the Practices tab, select the relevant practice and click on the PMS integrations tab
2. Select your PMS from the list of available integrations
3. Your PMS integration key will be displayed, which you can copy and paste into your PMS to integrate with Smart Health
4. The PMS will be listed under the Created integrations list on the PMS integrations tab

See page 29 for further information



Setting up CommBank Smart Health

1. Logging in for the first time

Where do you get your credentials to log in?

Thank you for choosing CommBank Smart Health.

Now you're registered as a Commonwealth Bank of Australia merchant, we upload your details into the Smart Health Hub, and you will receive a welcome email.

Your welcome email includes:

- URL for CommBank Smart Health Hub
- Your username, and
- Temporary password. **Note**: You will be required to change the password at first login.

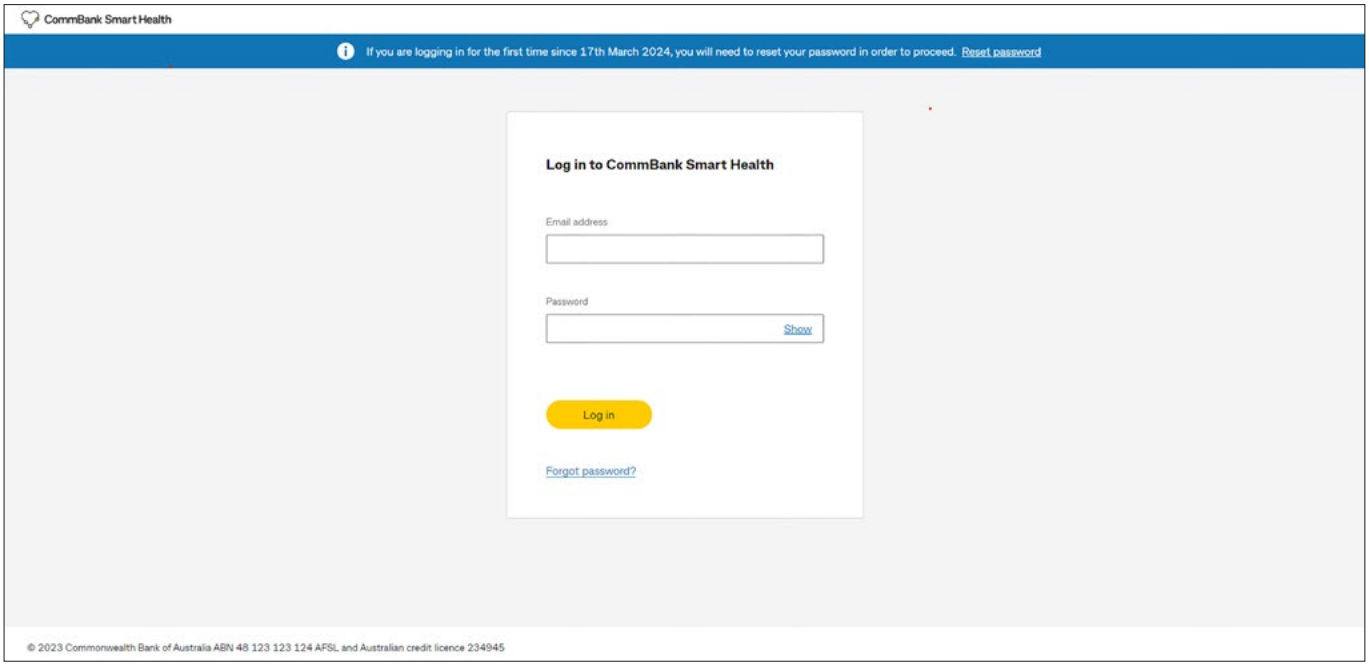
Note: Your username and password will expire after 28 days.

Who should log in to complete setup?

Setup can be completed by business owner their delegate. They will have full access to log in and set up everything you need to use the CommBank Smart Health Hub and CommBank Smart Terminal/s. Setup can also be completed by person nominated on the application form, who will have received the welcome email.

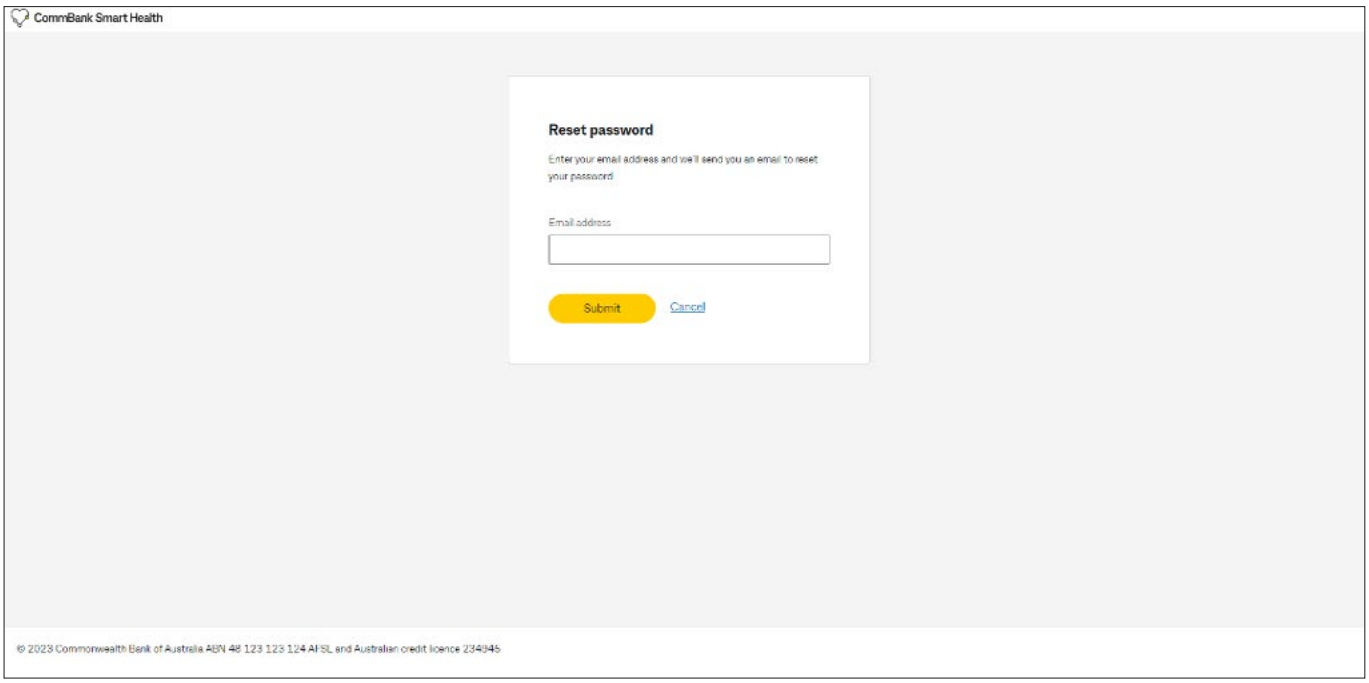
How do you log in?

Simply visit the Smart Health Hub login page, and log in using the username and temporary password you received in the email, shown below, then click ***Login***. You must then change your password.



How do you change your password?

You'll receive a prompt after you first log in. Your new password must contain six characters, including one upper and one lower case letter, one number and a special character (e.g. !@#$%^&*).



Once your new password is created, click ***Next*** to read and accept HealthPoint Terms and Conditions.

How do you reset your password?

At a later date, should you wish to reset your password, go to the CommBank Smart Health login page then click the ***Forgot Password*** link, shown in the previous image.

How do you accept the Terms and Conditions?

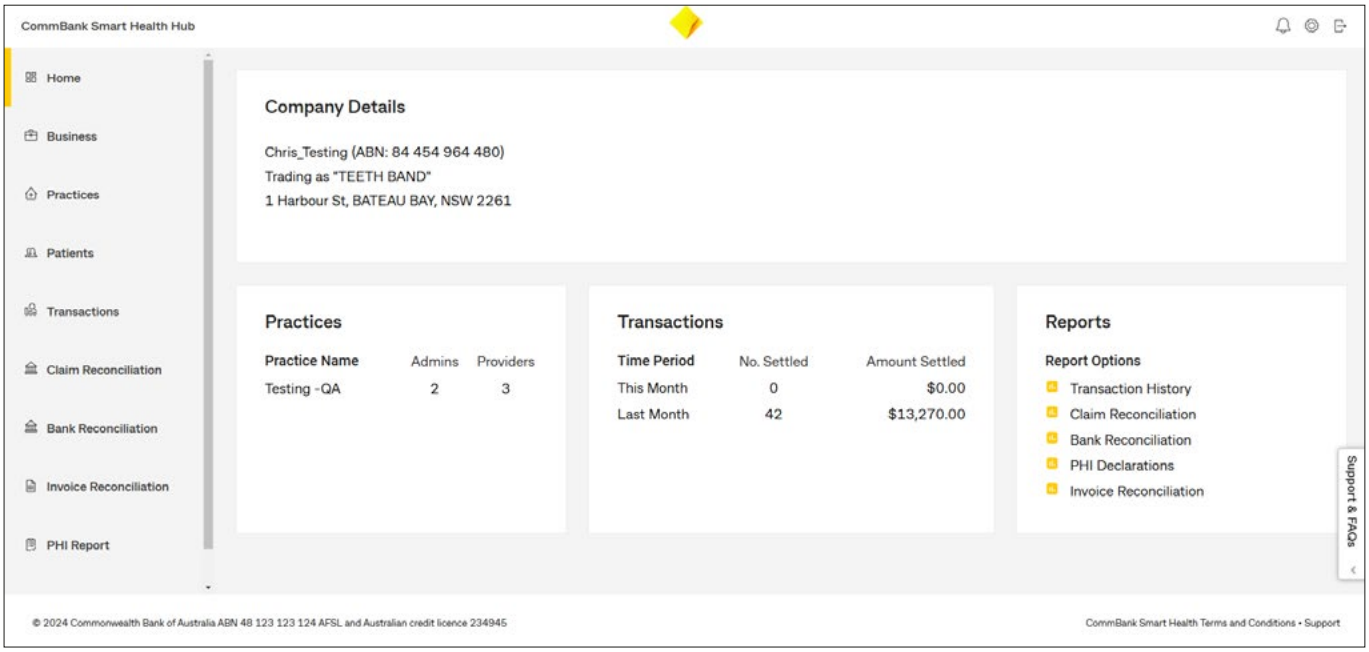
After reading the Terms and Conditions, scroll to the end, check the boxes and click ***Accept***. You can access a copy of the Terms and Conditions via a link in the bottom right-hand corner of the hub's footer at any time, or via the Support page in the hub.

What's your next step?

Getting to know the CommBank Smart Health Hub Dashboard

2. The CommBank Smart Health Hub dashboard

Once logged in, you're on the CommBank Smart Health Hub Home page. This is the central dashboard from which you can navigate to all features, and shows you:



1. **Your Company Details** (provided at Application)
2. **Practices** (provided at registration)
3. **Transactions** (this will be blank at first log in)
4. **Reports** (this will be blank at first login but shows the report names).

You can navigate directly to the underlying pages by clicking on the dashboard panels, or using the tabs running vertically down the left-hand side of the home page, including:

1. **Business** – where you can view your company details
2. **Practices** – where you can view your practice details
3. **Patients** – where you can view your patient details
4. **Transactions** – where you can view your transaction history and details
5. **Claim reconciliation** – where you can view the daily Private Health Insurance settlements and any adjustments made on a weekly basis
6. **Bank Reconciliation** – where you can view the amount sent to bank account. It shows whether money received from patients, from the terminal or card not present transactions, has arrived in your bank account
7. **Invoice Reconciliation** – where you can view a summary of transactions at an invoice level. It itemises the money your practice received from health funds or patients yesterday. You can compare this report with the Bank Reconciliation Report to identify payment gaps
8. **Report PHI Declaration** – where you can view your Private Health Fund declarations and signed receipts from your patients, and
9. **Support** – where you find information about how to use CommBank Smart Health, including user definitions, terms and conditions, or contact the CommBank Smart Health Help Desk.

What is the Bell icon in the top right-hand corner of the Smart Health App?

This is a global messaging service notifying users of:

- Systems outages or upgrades, or
- Enhancements or additions to the platform, for example, when new health funds become available for claiming.

What's your next step?

Reviewing your details

3. Reviewing your details

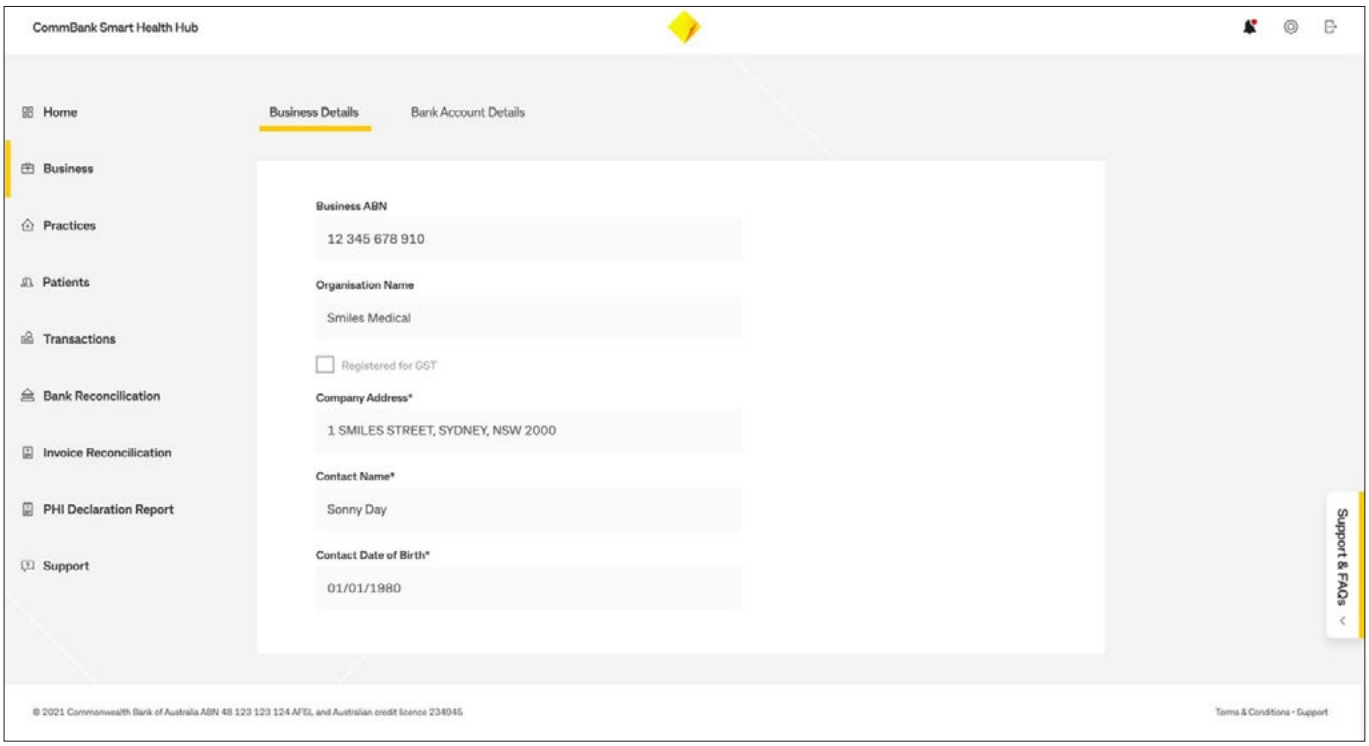
What should you do first?

Please review the pre-loaded company details you used to register to check they appear correctly, including:

- Business details
- Practice details

How do you check your business details?

From the Home page, click the ***Business*** tab on the menu at left or the Company Details panel on the dashboard. This takes you to the Business page. Now click the ***Business Details*** tab from the menu at the top left of this page.



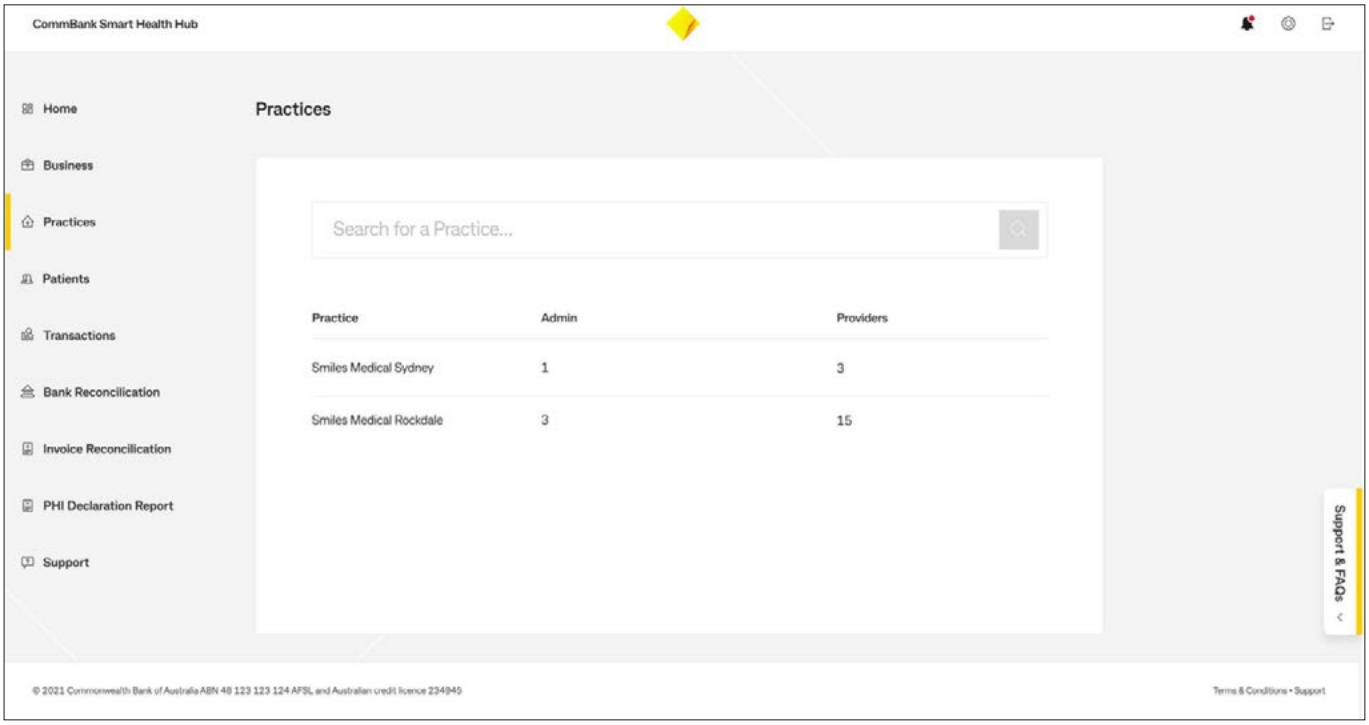
On the Business Details page, check that the pre-loaded details in all fields are correct. This includes Business ABN, Organisation Name, Company Address, Contact Name and Contact Date of Birth (optional).

Note: Business Details relate to the portal owner (or master administrator) so may be a Group-level business rather than an individual practice name.

If anything is incorrect, please call our CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

How do you check your practice details?

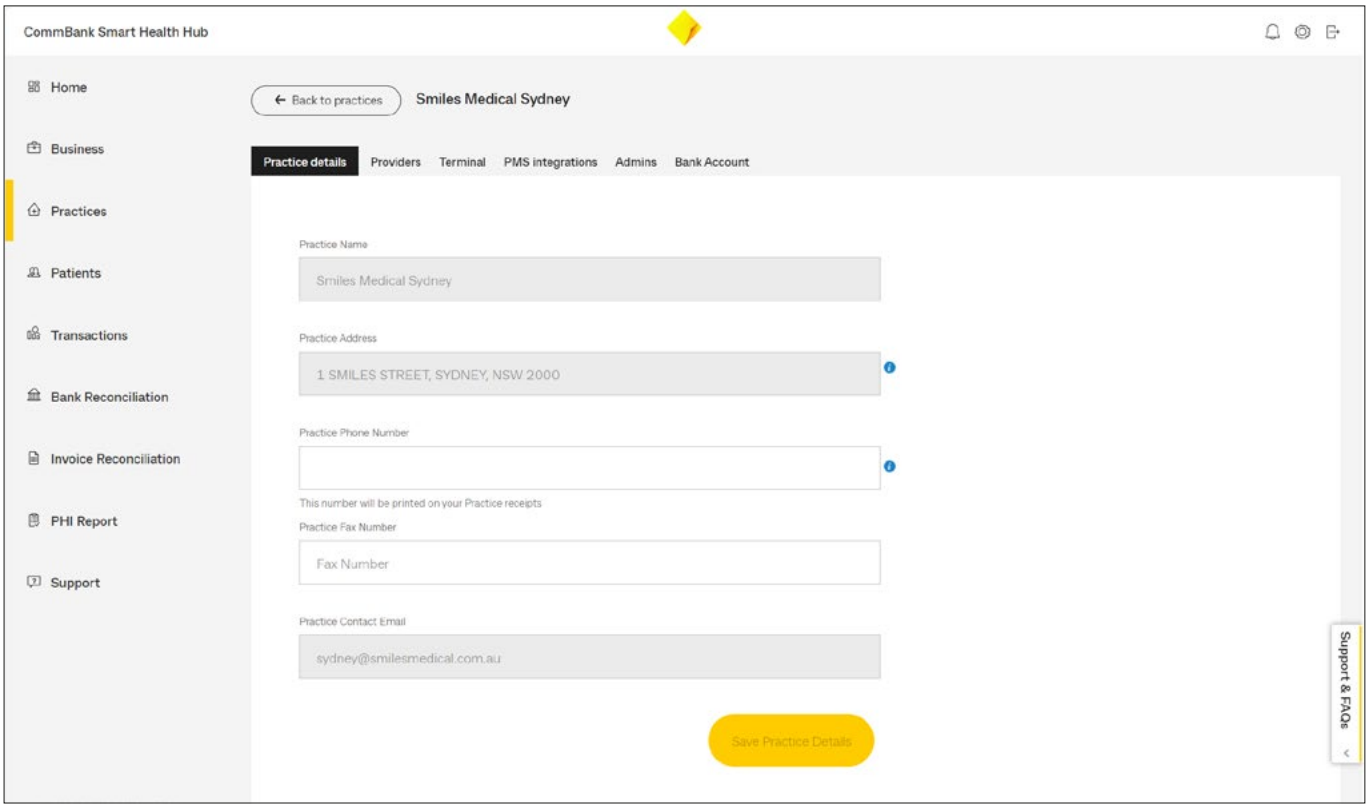
To check the accuracy of the practice details you provided to CBA with your new merchant application, click the ***Practices*** tab on the menu. You are now on the Practices page. This is what it may look below. You can also go straight to a specific practice by clicking its name on the dashboard's Practice panel.



For current practice information: To check that the Practice Details you provided at registration are correct, click on the relevant practice name.

Note: Only the practice phone number and fax number fields can be edited. If they are incorrect or blank, edit or add those fields, then click Save Practice Details, as shown below. If anything else is incorrect, call our CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Here is an example of what you will see on the Practice Details page when viewing current practice information:



To add a new practice: You must complete a new merchant application. Please contact your CBA Relationship Manager or the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday. They will help you complete an application. Please have the practice name, address, phone number, fax number, and contact email for this call.

Once your application is approved by our team, please allow up to three working days for new practice details to appear within the Practices tab in the CommBank Smart Health Hub. Once they appear, check for accuracy on the Practice Details page and, if required, call the CommBank Smart Health Help Desk to change any details (remember you can edit the practice phone number and fax number on-screen).

Note: Only Head Office Administrator/s will have access to view all practices.

What's your next step?
Adding Administrators (Users)

4. Adding Administrators

Who can be added to use the CommBank Smart Health Hub and Smart Health App?

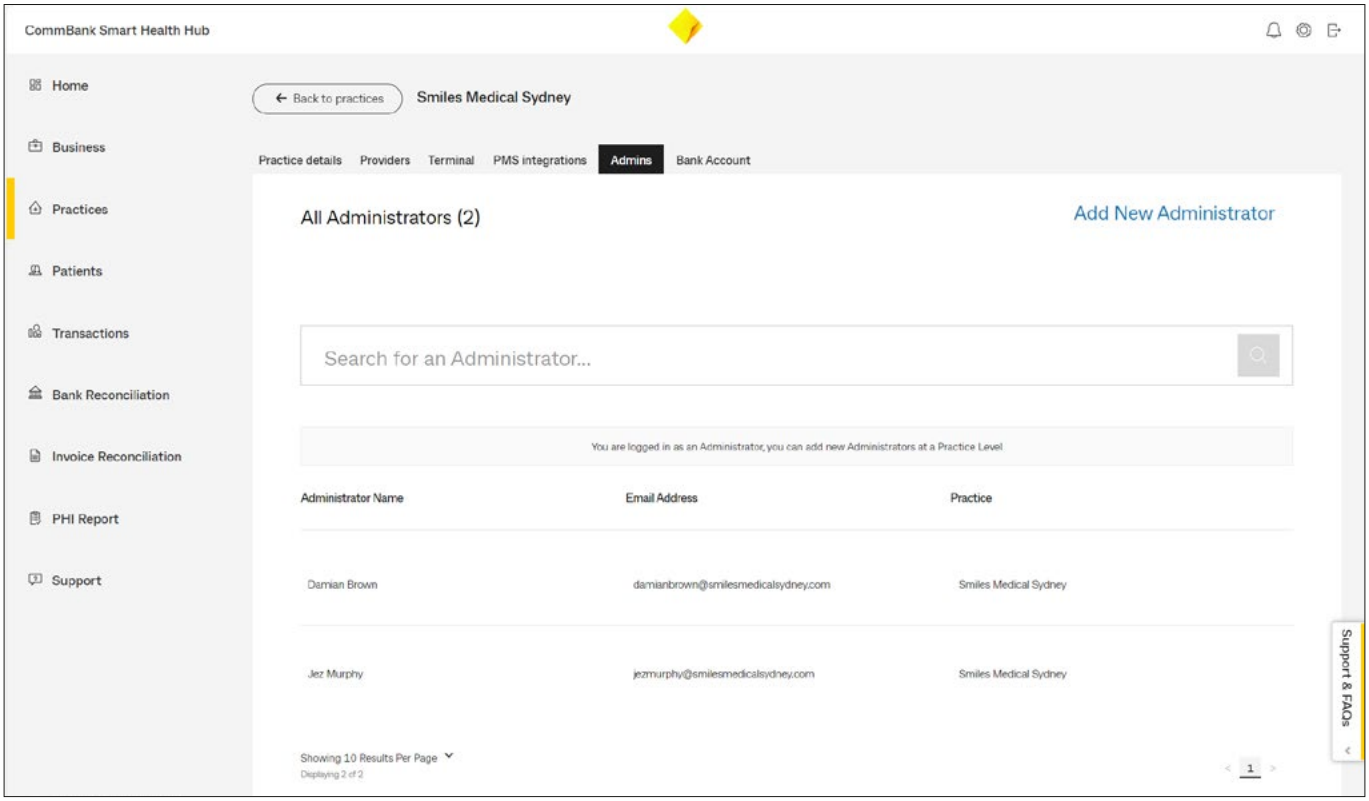
Users are called Administrators. Two types of users can log in, manage and use your CommBank Smart Health account, with a tiered level of access:

Head Office Administrator/s: You, as business owner or director, an area manager, authorised single-site or group practice manager, or your CEO, CFO or accountant, are authorised to have full access to view transactions and reports across multiple practices, and add providers and administrators (users) to practices. To add a new Tenant Administrator, contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Practice Administrators: Practice managers and other authorised personnel that can view add providers for their practice only.

How do I assign Administrators?

From the Home page, click the ***Practices*** tab on the menu at left. Then select the appropriate practice on the Practices page. Now click the ***Administrators*** tab in the top menu.



Details of any administrators you provided at registration will appear here. Please check all details and if anything is missing or incorrect, call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

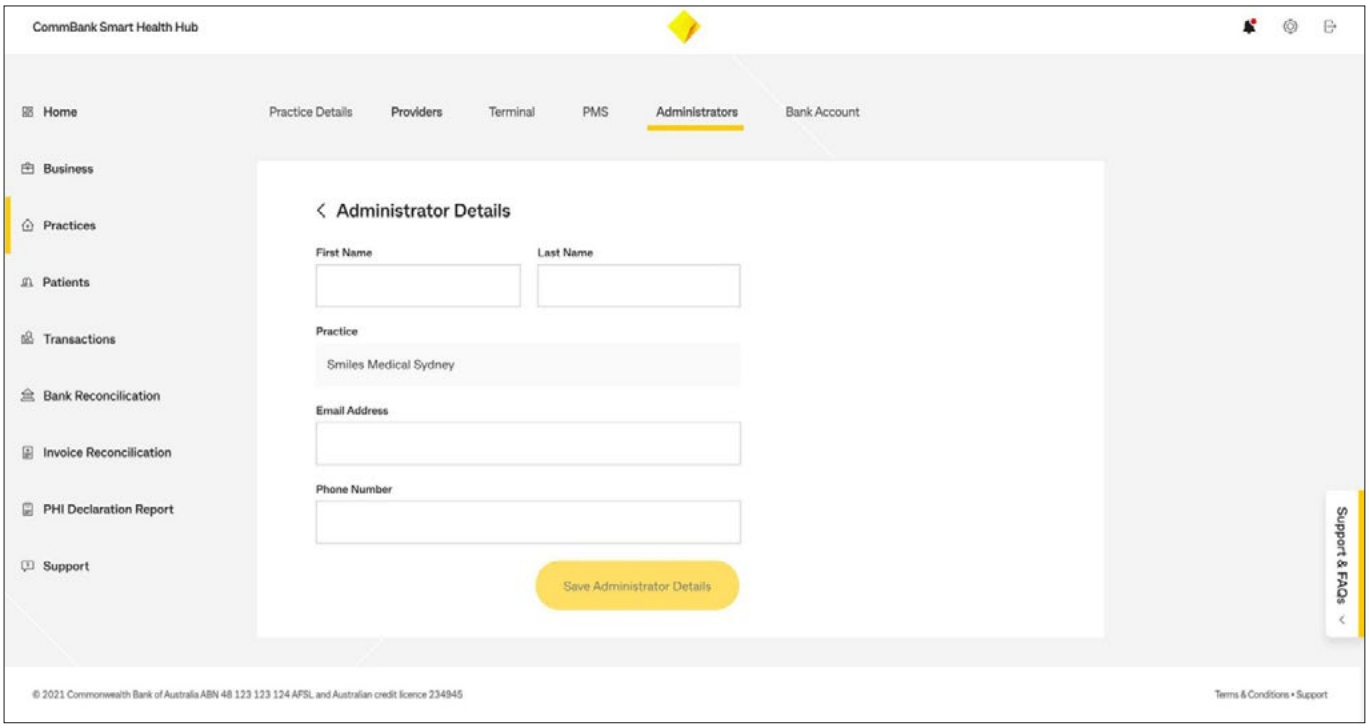
How do you edit existing Administrator details?

If you need to change the details of current administrators, please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

How do you add new administrators to your account?

To add new administrators, click ***Add Administrator*** to the right of the Administrators page, shown in the image above.

Once on the Administrator Details page, enter the new administrator's First Name, Last Name, Email Address and Phone Number, and click ***Save Administrator Details***. **Please note**: Every new administrator must have a unique email address.



New administrators receive a welcome email from a HealthyPay email address providing their login details and asking them to change their password on their first visit.

How do you remove an administrator?

Should practice administrator access no longer be required, click ***Block Administrator*** in the top right of the ***Administrator Details*** page to suspend access. Access can be reinstated by clicking ***Unblock Administrator***.

To completely delete an Administrator, please call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What's your next step?

Adding Providers

5. Adding Providers

A provider is a health practitioner who delivers services to your patients, for example, dentists, general practitioners, physiotherapists, optometrists and osteopaths.

How do you add a provider?

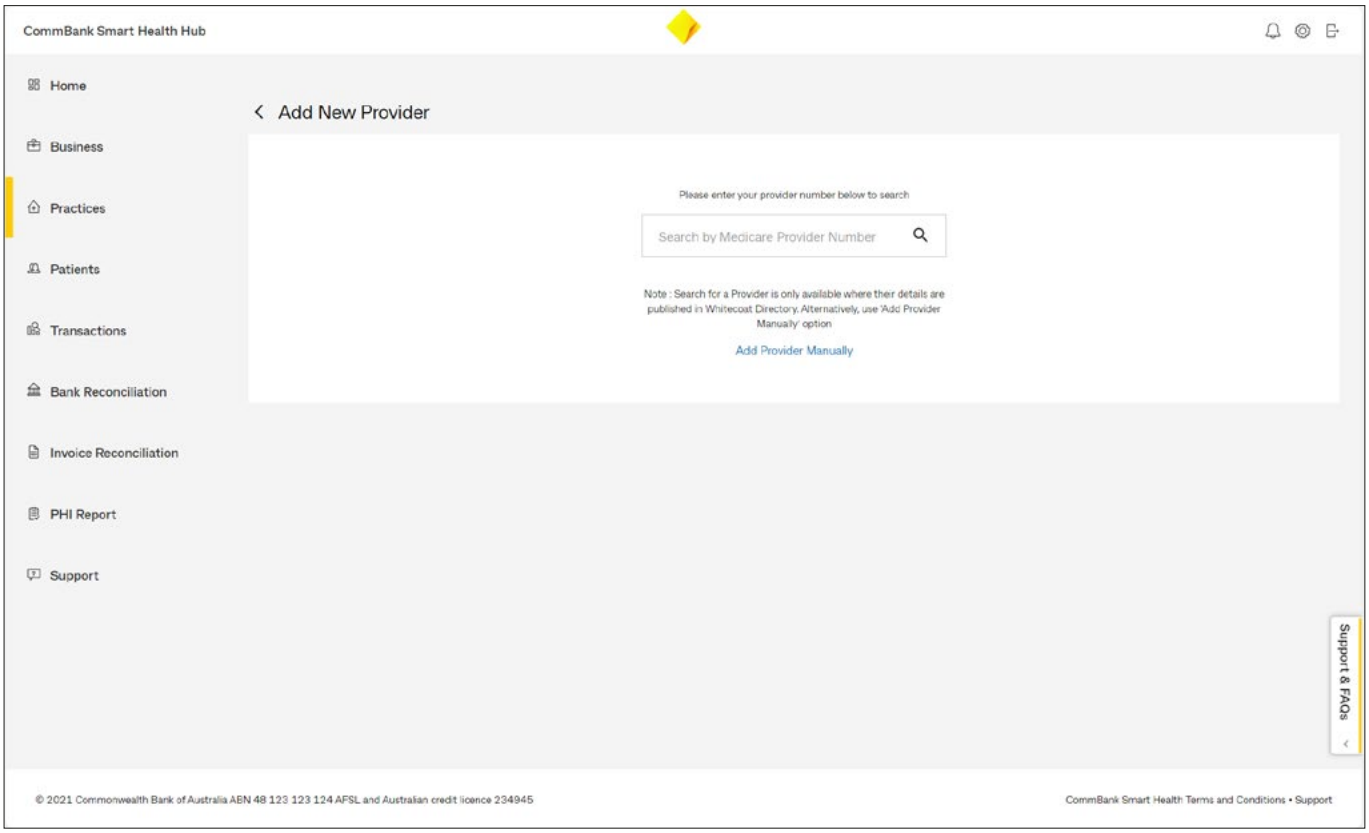
From the Home page, click the ***Practices*** tab on the menu at left. You are now on the Practices page. Select the provider's practicing location from the dropdown list, or if there are multiple sites use the search function for a faster result.

Note: You can also click a specific practice from the Practices panel on the Home page dashboard.

Now click on the ***Providers*** tab.

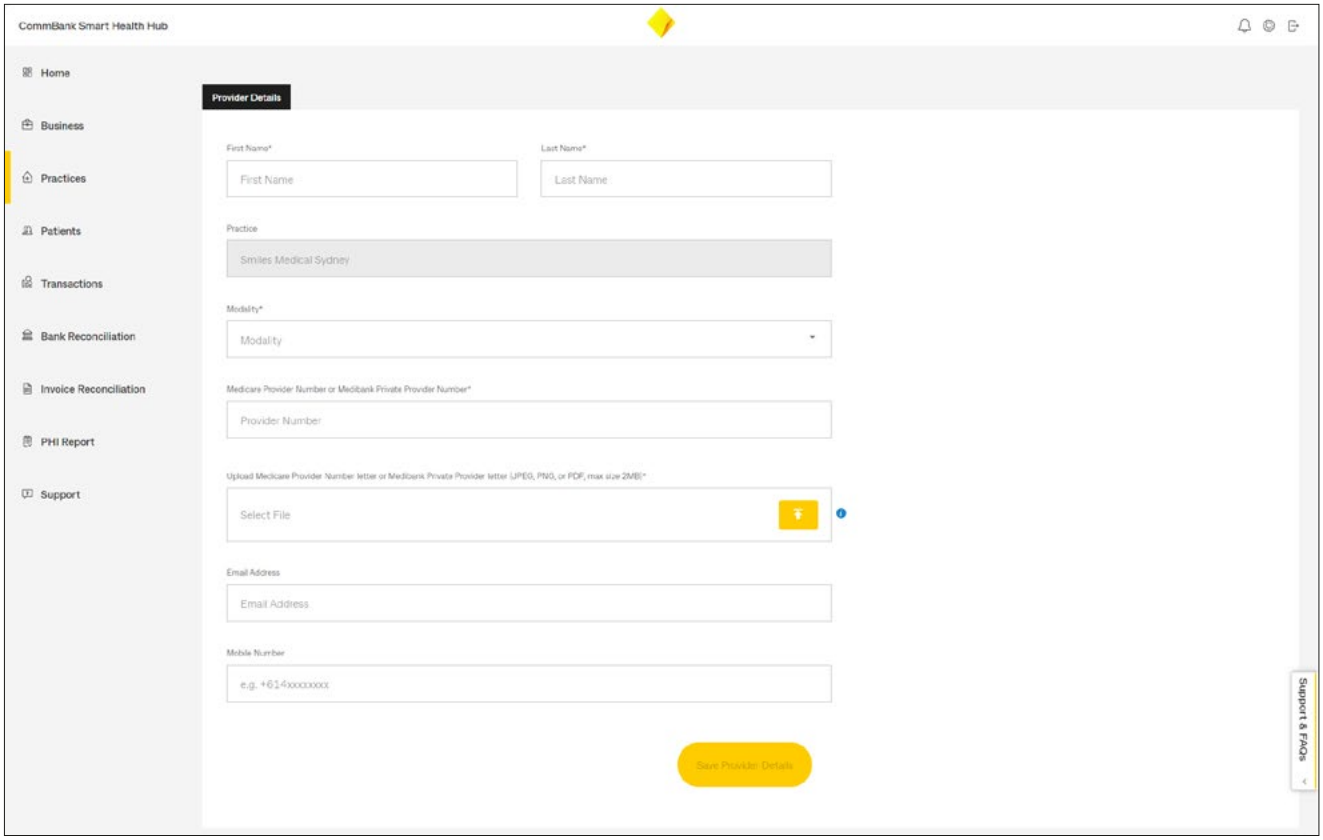
On your first visit, the Providers page is blank. To add a provider:

1. Click Add New Provider in the top right corner.
2. Search for a provider by typing the Medicare Provider Number into the field, as shown below. This will return matches for relevant practitioners.



3. Once selected, certain details will be pre-loaded.
4. Providers can also be added manually by clicking ***Add Provider Manually*** located under the search box, shown above.

5. Complete all details shown at right, including First and Last name, provider Modality[1] from the dropdown menu, Medicare Provider Number or Medibank Private Provider Number.



6. Attach a copy of each Provider's confirmation of registration for this practice and modality via one of the following acceptable methods.
   a. A Medicare Australia Provider Letter for the Registered Address of the Practice, or
   b. A Printout of the HPOS Medicare Registration Status for the Registered Address of the Practice with Date/Time of access visible or
   c. A Medibank Private Provider Letter for the Registered Address of the Practice AND a current Certificate of registration from each Provider's professional association.

   Medicare Australia Provider Letter/HPOS Printout is required for the following modalities/service types: Audiology, Chiropractors, Dentists, Dental Prosthetists, Dietitians, Exercise Physiotherapists, Podiatrists, Psychologists and Speech Pathologists.

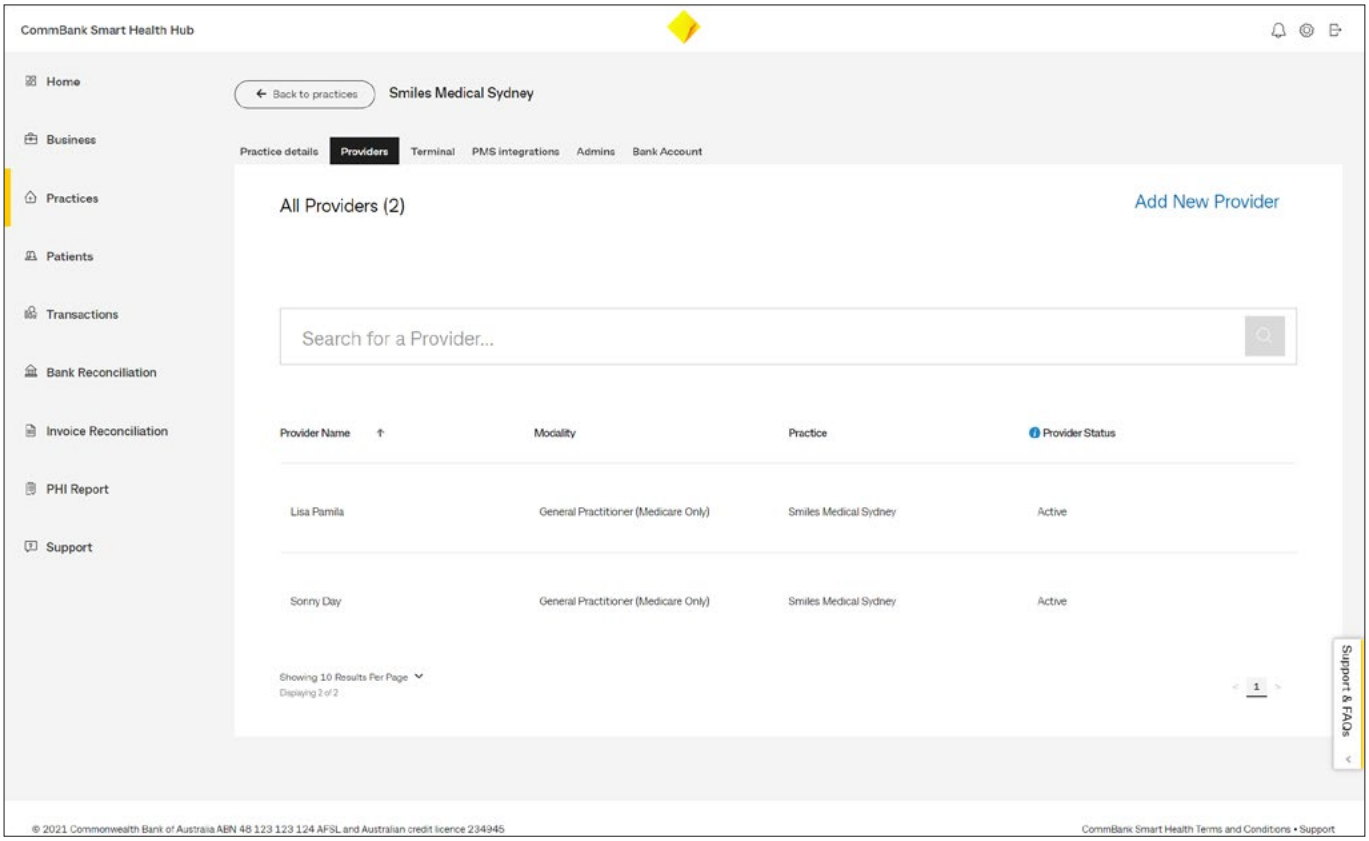
   Note: For General Practitioners and Nurses, select "Medical" as modality. If 'General Practitioner (Medicare Only)' is selected, Medicare Australia Provider Letter/HPOS Printout is not required.

   Medibank Private Provider Letter is required for modalities/service types: Acupuncturists, Counsellors, Myotherapists and Remedial Massage Therapists.

7. Add Email Address and Mobile Number.
8. Click ***Save Provider Details***.

1 Note: If you are a provider with more than one modality, you need a provider number for each modality you service in each practice location. This means each practitioner will have a different provider number, per practice, per modality. Where providers have more than one modality and provider number, each will need to be added to each practice separately. For example, Dr Smith is a registered Dentist and Orthodontist at Sydney Smiles, so needs to be added as a Dentist with one provider number and an Orthodontist with a separate provider number at the Sydney Smiles practice.

Once details are saved, you will be taken to the All Providers page within the Providers tab. The status field for the newly added provider will change to “Provider Pending,” then “Active,” as shown below. This means the new provider registration has been received and is being verified by CBA. Once Active, providers can immediately begin Medicare claiming. For Private Health fund, registration with funds is completed progressively over a 72-hour period, so please allow up to 72 hours for CBA to register you with all participating funds, and verify your documents, before claiming is permitted.



What happens if you try to claim before a provider is approved?

If you try to claim before provider registration is successful, you will receive the following error message: “Creating Invoice Unsupported Claim Type Error code:400” with a ***Cancel*** button. If this occurs, please wait the full 72 hours before claiming. If Error code:400 is received post 72 hours from provider registration, please contact the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What happens if you change address of practice and providers are issued with a new provider number?

When you change your practice address, a new Medicare provider number will be issued to you. In order to continue claiming with your new provider number, you will need to request change of address by contacting the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday, to update your address. Once we process your request, all existing provider details will be deleted. You will need to add provider details by following steps in 5. Adding Providers on page 21 of this user guide.

What’s your next step?
Linking your CommBank Smart Terminals

6. Linking terminals

This step links your CommBank Smart Terminal to the CommBank Smart Health Hub so they can connect to each other.

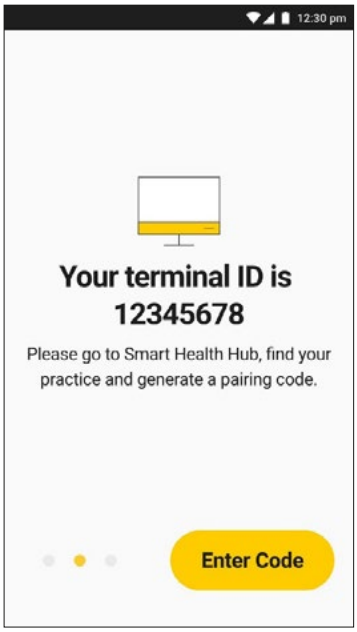
Terminals are added to your CommBank Smart Health Hub at registration. Once a terminal is approved for use, it automatically appears in the Terminal tab (accessed from the Practices page, then by clicking on a specific practice to get to the Practice Details page).

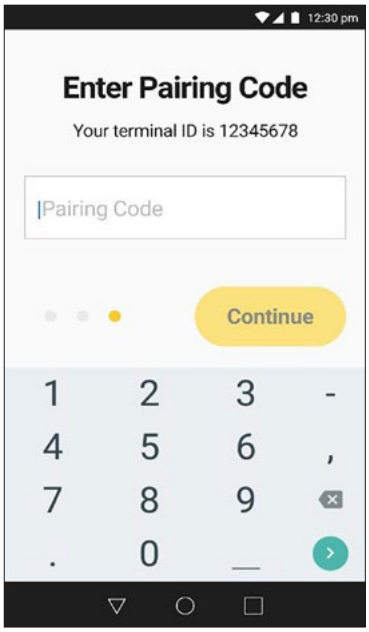
If you need more terminals than have been approved, please contact the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What does the terminal home screen look like when you start it up?

The first time you launch the Smart Health app you will be greeted with the “Welcome” screen. Swipe left to reveal to “Terminal ID” screen followed by the “Enter Pairing Code” screen.

You use this screen to link your terminal to the CommBank Smart Health Hub.

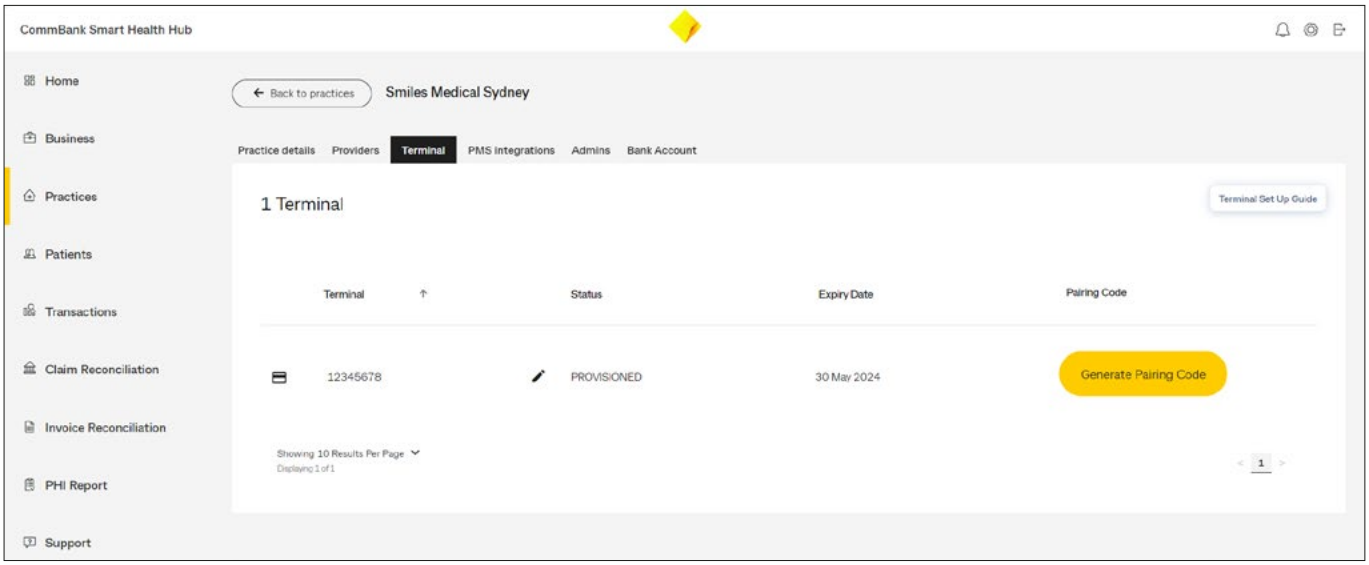


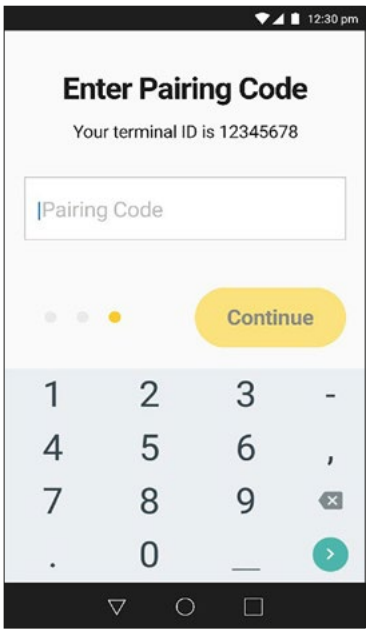


How do you link your terminal to the CommBank Smart Health Hub?

You only need to do this step once.

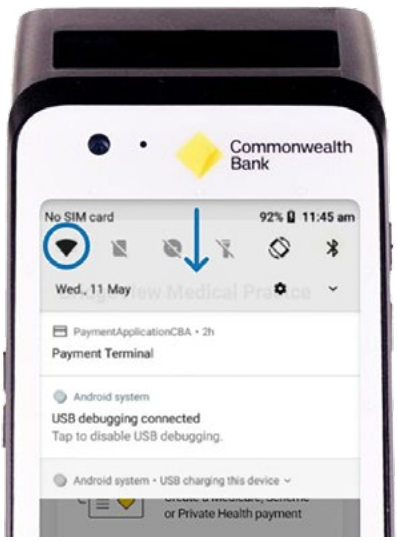
1. In the CommBank Smart Health Hub, navigate to the practice where the terminal is located by clicking on the Practices menu at left, clicking on the specific practice, and then clicking the Terminal tab. Identify the terminal in front of you using the Terminal ID which is displayed in the Smart Health app on the terminal (refer to screen shots on the previous page).



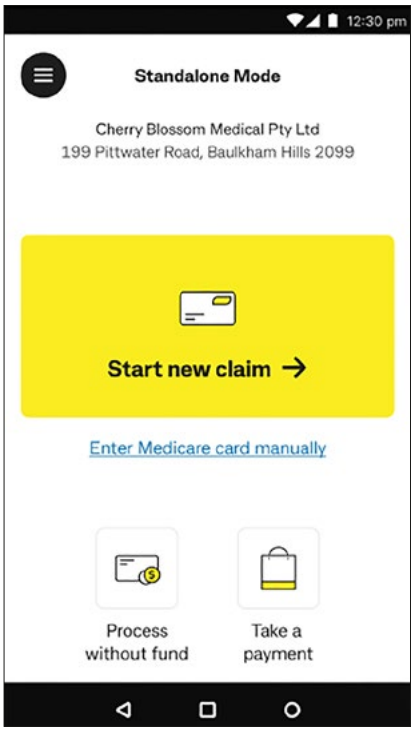


2. In the CommBank Smart Health hub click on the “Generate pairing code” associated with the terminal in front of you.
3. On your terminal, within the Smart Health app enter this pairing code you have just created on the “Enter pairing code” screen and press “continue”.
4. When prompted tap “yes” to allow location services.

   Note: Even if not connected via Wi-Fi please ensure this is turned “On”. To do this swipe down from the top of the terminal screen and tap the Wi-Fi icon as pictured.



5. Follow this process for every terminal you have been allocated.



6. Once download is successful and you're connected to the hub, an "Initiating system" message appears and you land on the terminal home screen, which will look like this:

   Practice Name: Cherry Blossom Medical Pty Ltd

   Practice Address: 199 Pittwater Road, Baulkham Hills 2099

   Start new claim: Tap to start a new payment and claim with fund card.

   Enter Medicare card manually: Tap to enter Medicare card number manually.

   Process without fund: Tap to process a full payment transaction without fund card.

   Take a payment: Tap to process a sale transaction such as stock item etc.

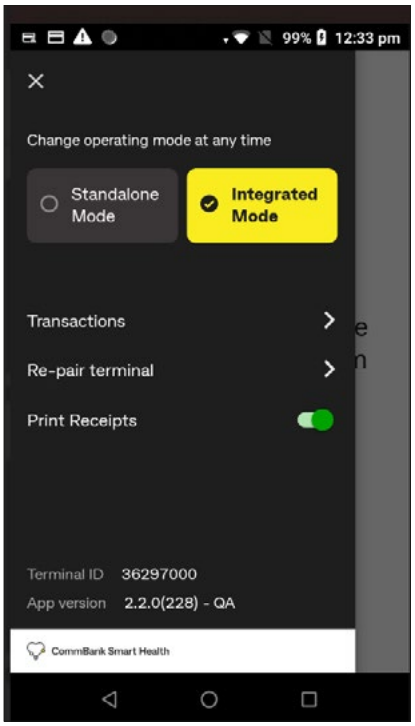
Congratulations, your terminal is now linked to the CommBank Smart Health Hub.

If the download is unsuccessful, an error will display "Invalid id/PIN". Please try again by re-inserting your ID and PIN, and if you're still having trouble, please contact the CommBank Smart Health Help Team on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

How do you navigate the Terminal?

The Smart Health App is already pre-loaded on the terminal. Its three most-used menu items are Claim, Patients and History. You access these via the home screen, shown above.

You can also access two additional menu items from the app's Hamburger menu, at top left. This menu is shown below.



The terminal's hamburger menu at top left also includes:

Change Mode selection: Tap to switch between Standalone Mode or Integrated Mode.

Transactions: Tap to view history of claims and payment transactions.

Re-pair terminal: Access to the Setup Client Certificate Screen to connect the terminal to the hub.

Print Receipts: Tap toggle button to turn on (green)/off (grey) automatic receipt printing for claim, purchase, cancellation and refund transactions.

Terminal ID: Your terminal ID.

App version: Installed version of Smart Health app.

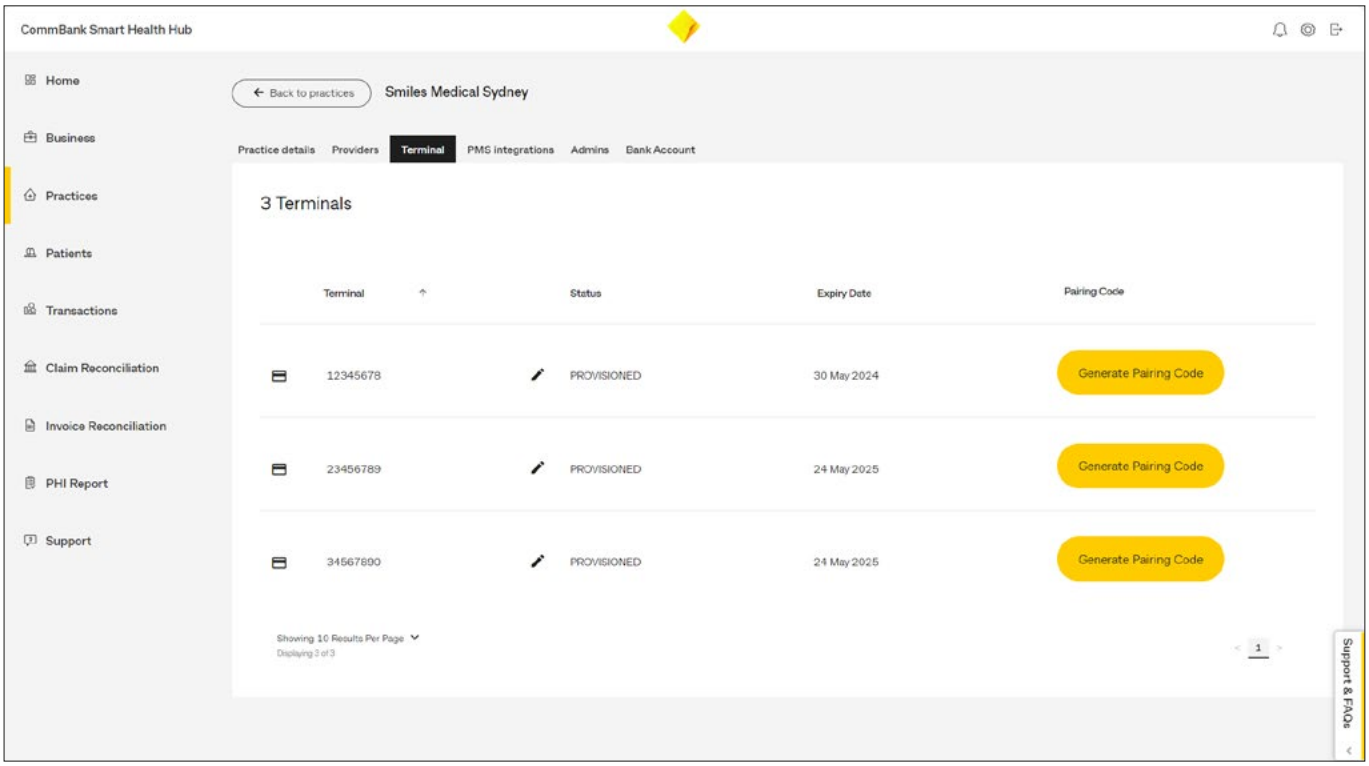
Should you give each terminal a nickname?

Yes, especially if you have more than one terminal linked to your account. This avoids confusion by helping practice users identify which terminal they are sending transactions to.

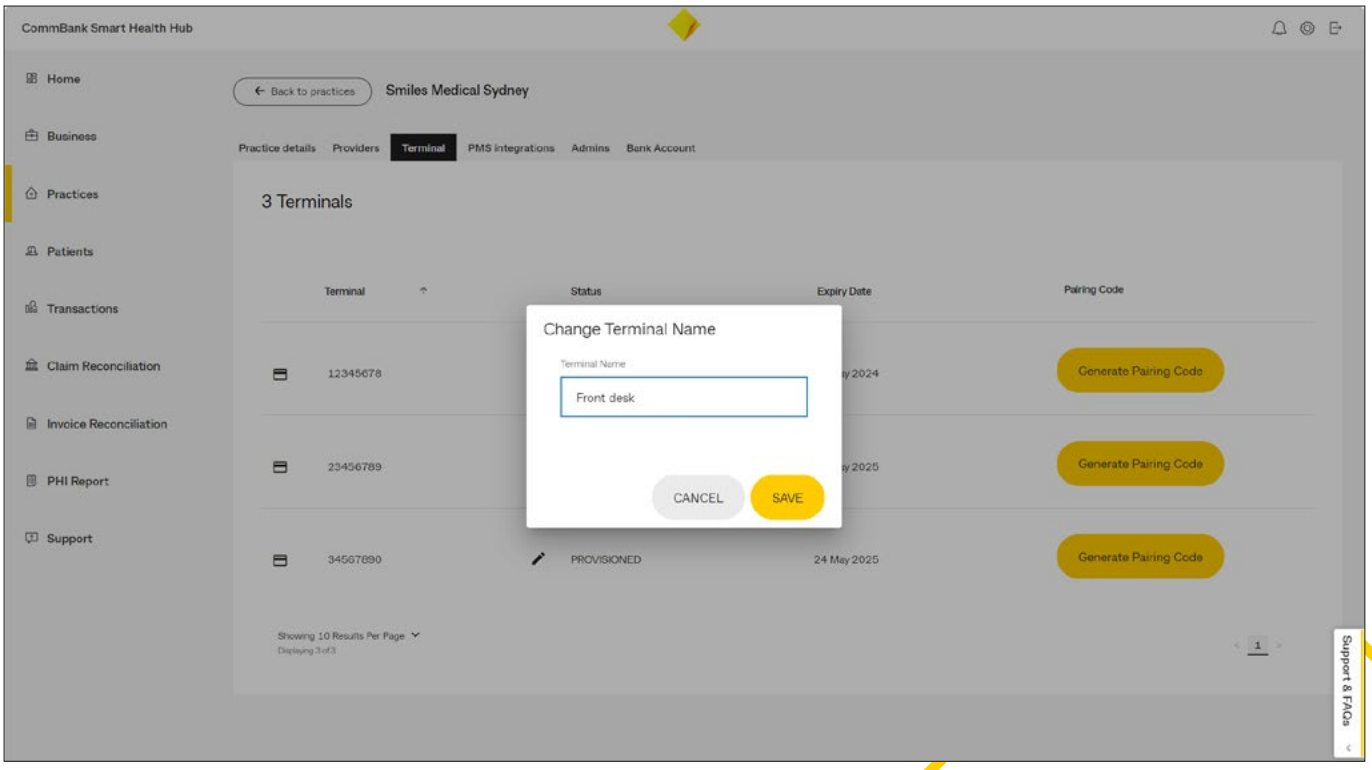
Helpful Tip: When renaming, keep the original terminal number and add a nickname to that. For example, Northern Rivers front desk, 1204765412. This is because your Terminal ID number is printed on all terminal receipts. So, if you need to replace a terminal, you must be able to quote the original Terminal ID number to the CommBank Smart Health Help Desk.

How do you create a terminal nickname?

1. Click on the Edit icon next to the Terminal ID.



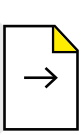
2. The Change Terminal Nickname popup appears, containing a free format field. Type in your nickname.



3. Click ***Save*** (or ***Cancel*** if you do not wish to add a nickname).

What should you do if you have more terminals than login details?

If you have, for example, two terminals and can only see one Terminal ID on the Terminal page, please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.



What's your next step?

Integrating with your Practice Management System (PMS)

7. Integrating with your Practice Management System (PMS)

Do you have to link your PMS to the Smart Health Hub to use the Smart Health App?

No. There are two ways you can use our CommBank Smart Health Hub:

- **Integrated mode** – the Smart Health Hub and Associated Terminals ***are linked*** to your PMS, or
- **Standalone mode** – the Smart Health Hub and Associated Terminals ***are not linked*** to your PMS.

The Smart Health Hub works equally well in both modes. The difference is in how you get to the point of invoice creation:

In integrated mode, you initiate all transactions from your PMS:

- Saving you time in transaction processing
- Reducing the risk of typing in transactions incorrectly and
- Enhancing reconciliation efficiency.

In standalone mode you initiate all transactions from the terminal, and type in all details manually. Once the invoice is raised, the next steps are identical for both modes.

How do you link your PMS to our CommBank Smart Health Hub?

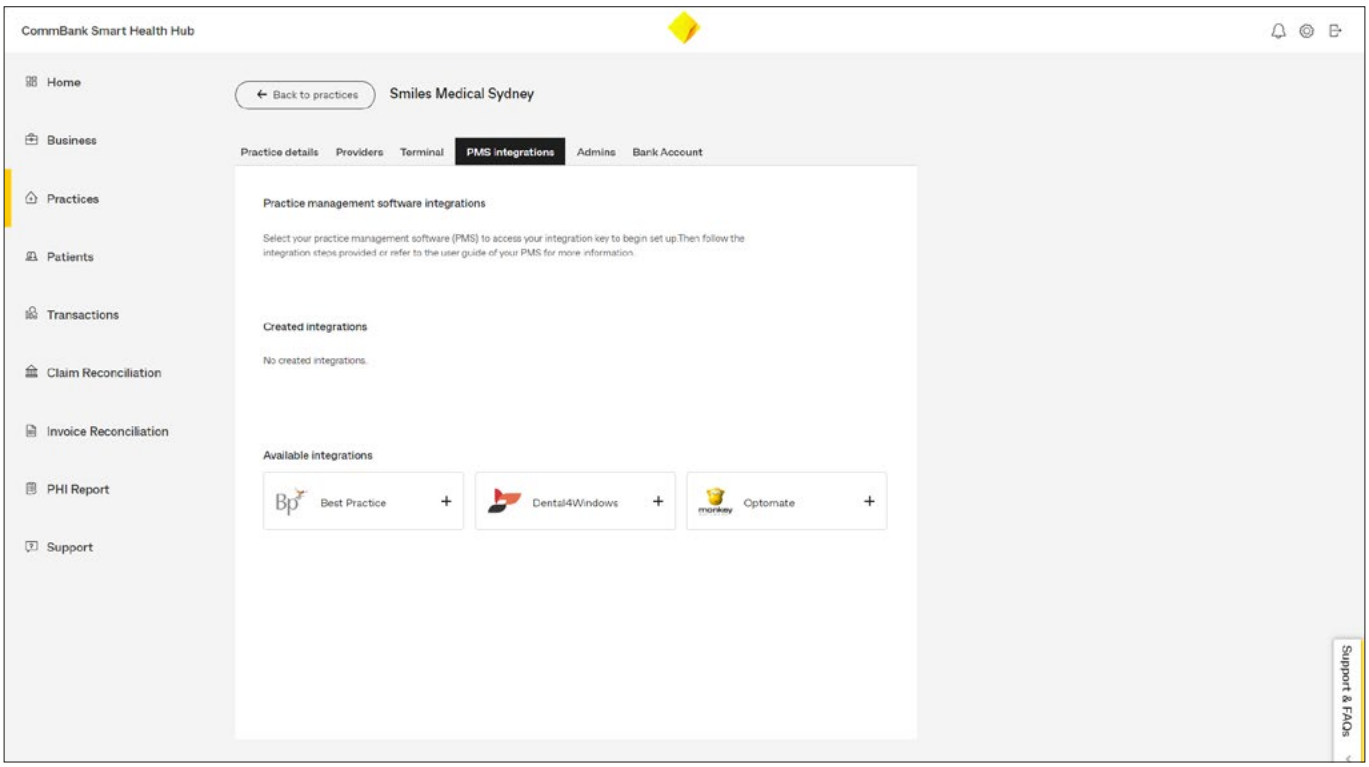
From the Home page, click the ***Practices*** tab on the menu at left. You are now on the Practices page.

On the Practices page, select the relevant practice from the dropdown menu, or from the practice list below the search bar, then click the ***PMS Integrations*** tab on the top menu. This screen will show all CommBank Health accredited PMS systems that are available for integration and those which have already been integrated.

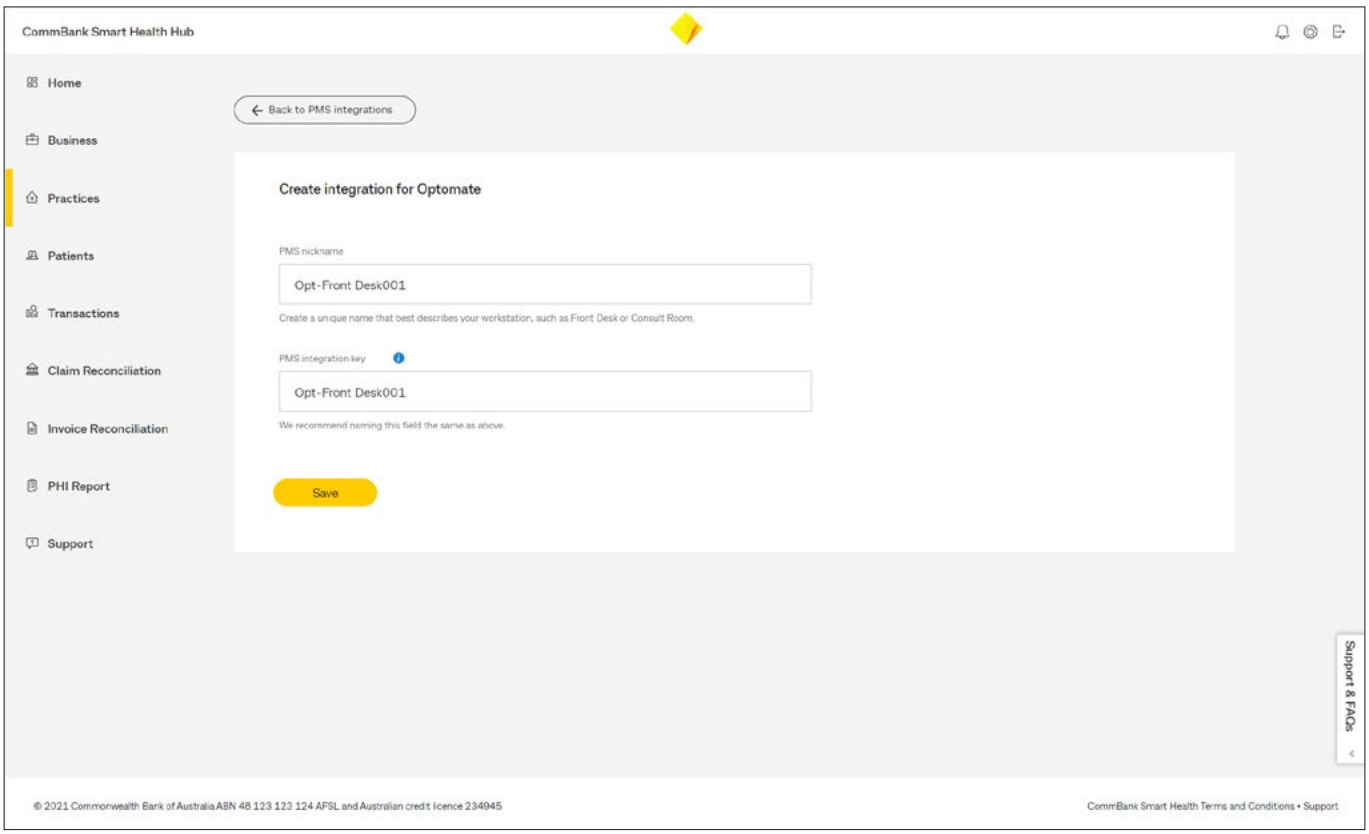
For Dental4Windows

First, you have to create a PMS certificate via the CommBank Smart Health Hub by:

1. Selecting your PMS system from the available integrations list, as shown below.



2. Typing in a PMS nickname into the blank field as shown below.

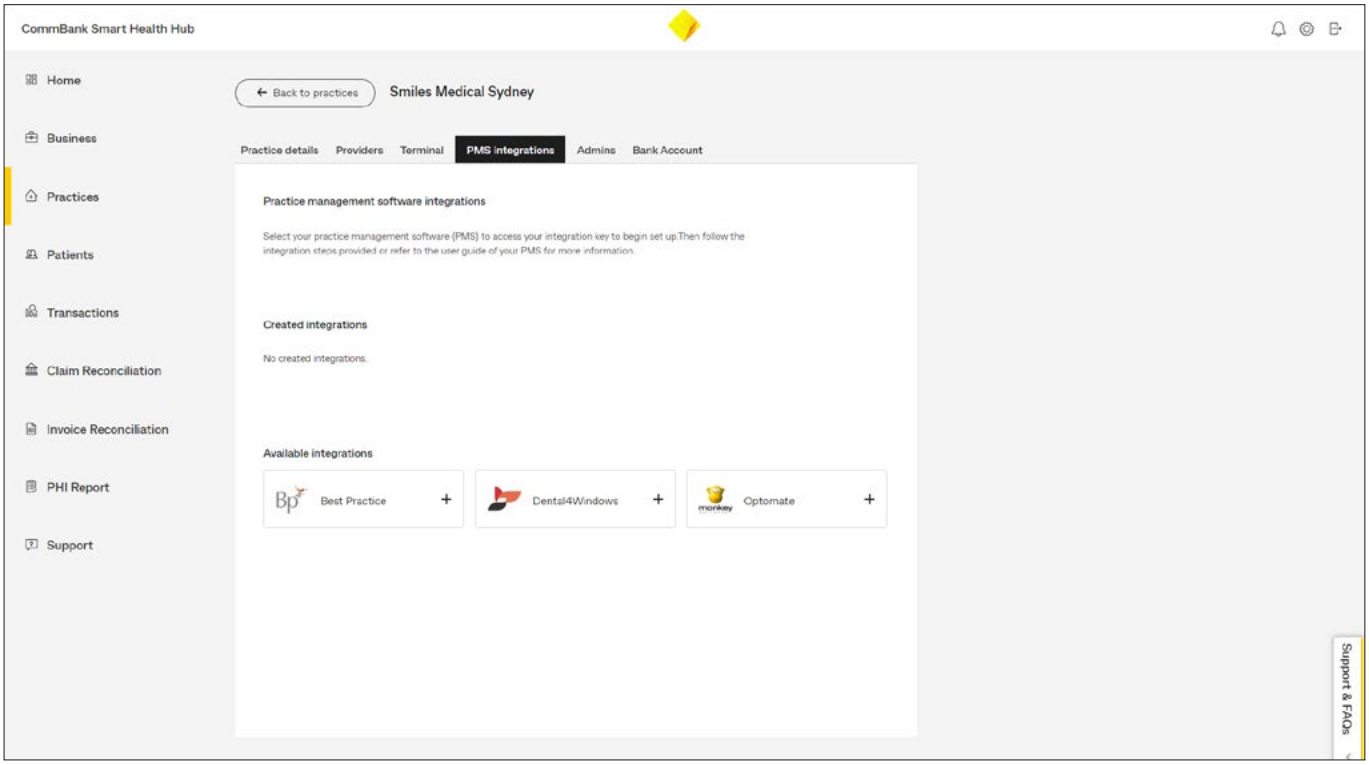


3. Creating and entering a PMS integration key of your choice in the PMS integration key field. To keep things simple, we recommend using your PMS nickname as your PMS integration key.
4. Clicking Save.
5. You are now taken back to the PMS Integrations tab.
6. The Status of the created PMS certificate will show as “Provisioned”.
7. Copy and paste your PMS Integration Key, User Key (this is automatically generated for you) and PIN into your PMS. Please refer to your PMS User Guide to find out where to paste them.

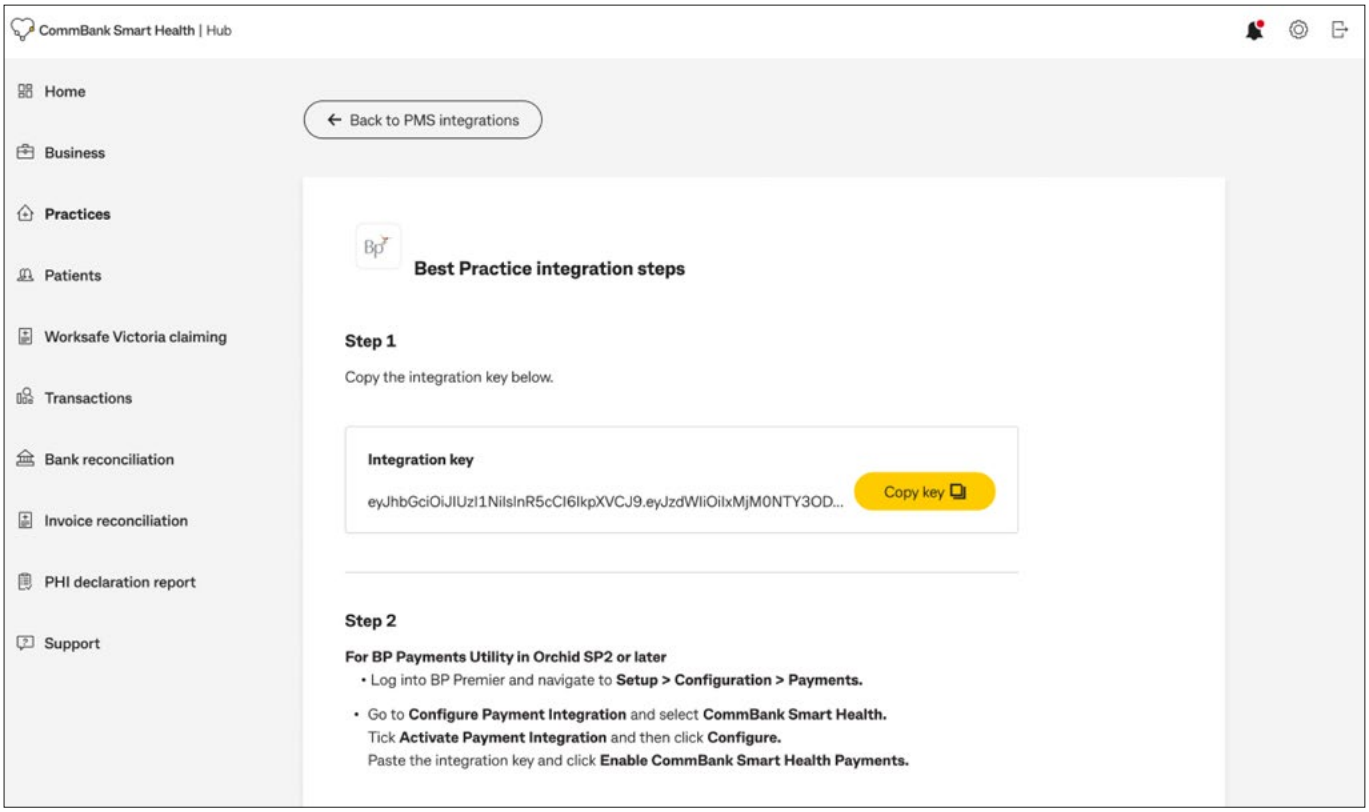
For Best Practice and Optomate

First, you must generate your PMS integration key via the CommBank Smart Health Hub by:

1. Selecting your PMS system from the available integrations list, as shown below:



Your PMS integration key and the steps you need to follow to complete the integration will be displayed.

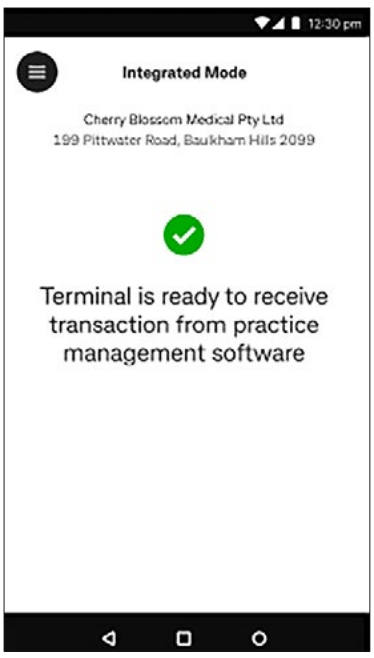


The PMS will be listed in the Created integrations section under the PMS integrations tab.

Copy and paste the PMS integration key into your PMS by following the instructions provided by your PMS to integrate with CommBank Smart Health.

How do you know your PMS is successfully integrated?

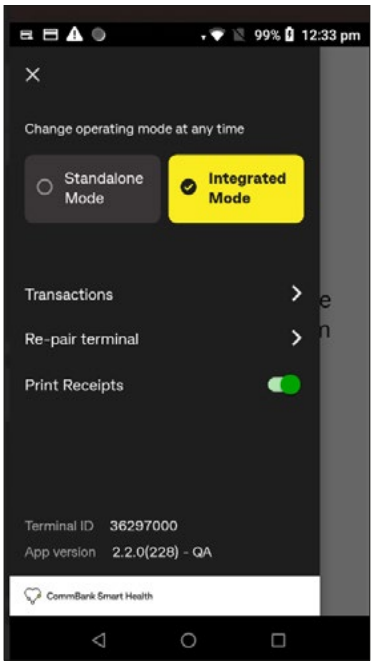
Your PMS is successfully integrated with the CommBank Smart Health Hub when:



1. ***You see this message on the terminal screen***:

   "Terminal is ready to receive transaction from practice management software".

   It will always say this until a transaction is sent to it from your PMS.



2. ***The terminal's hamburger menu now looks like this***:

   The terminal's hamburger menu at top left also includes:

   Change Mode selection: Tap to switch between Standalone Mode or Integrated Mode.

   Transactions: Tap to view history of claims and payment transactions

   Re-pair terminal: Access to the Setup Client Certificate Screen to connect the terminal to the hub.

   Print Receipts: Tap toggle button to turn on (green)/off (grey) automatic receipt printing for claim, purchase, cancellation and refund transactions.

   Terminal ID: Your terminal ID

   App version: Installed version of Smart Health app

Congratulations, you're ready to process payments and claims.

Transactions and invoices will now run straight from your PMS, through the CommBank Smart Health Hub, to the terminal and back again.

For how long is my PMS Certificate valid?

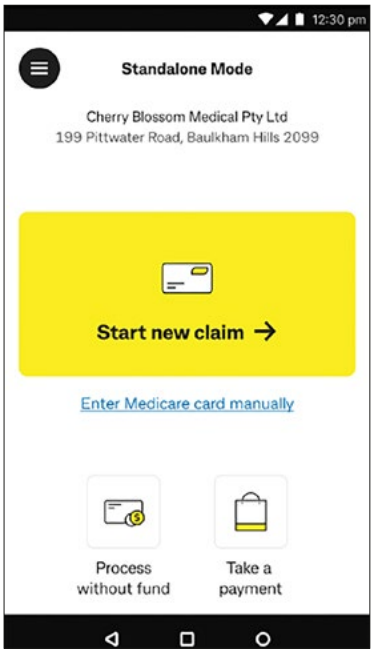
It's valid for one year. To renew it, please call the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

Can you use the terminal in standalone mode, even if it's integrated?

Yes. If you're a practitioner, for example, wanting to treat an overseas visitor or student or a person visiting from interstate, and don't want to add their details to your PMS.

To move from integrated to standalone mode:

You can toggle between modes by clicking "Standalone mode" at the top of the Hamburger menu, shown in the image above.

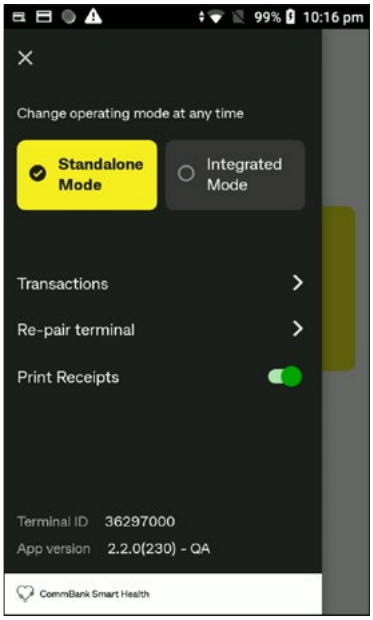


You're now on the practice home screen in standalone mode, which looks like this, at left.

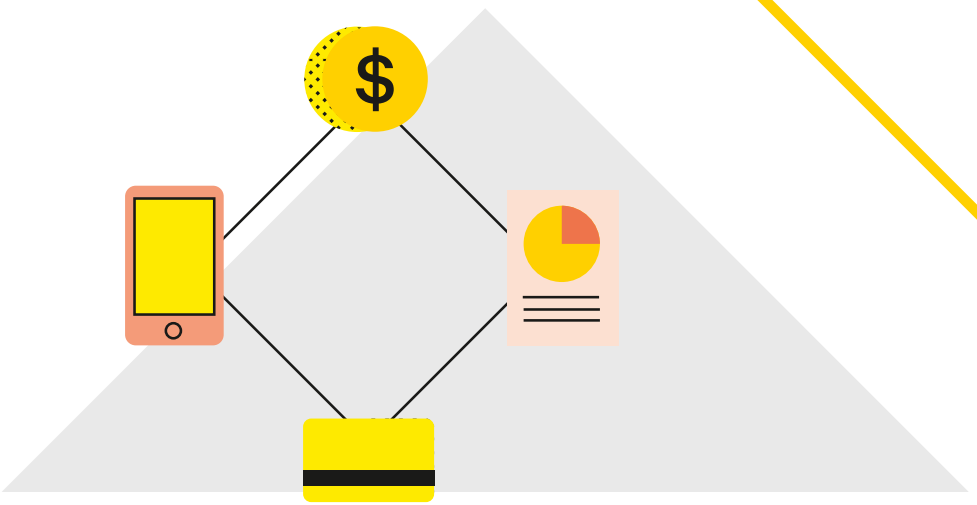
To process the transaction, refer to the detailed user guides available at **commbank.com.au/smarthealth** under 'Resources' section.

How do you know if the integration hasn't worked?

The terminal screen looks like this:



The terminal's hamburger menu still looks like it does in a standalone terminal, at left.



Or

You will receive errors when you try to initiate the invoice. Specifically, an error code will appear, advising that integration has failed. If this happens:

- Check your credentials and try again
- Ensure that your PMS Certificate has not expired, and/or
- Contact your PMS provider for assistance.

Who can you contact for error messages?

If you have any questions on where to paste your PMS Integration Key or where to paste your User Key and PIN in your PMS, please contact your PMS provider:

Dental 4 Windows – https://www.centaursoftware.com.au/contact-us/ or 1300 855 966

Optomate – https://www.monkeysoftware.com.au/contact or 1300 650 295

Best Practice – https://bpsoftware.net/contact/ or 1300 401 111

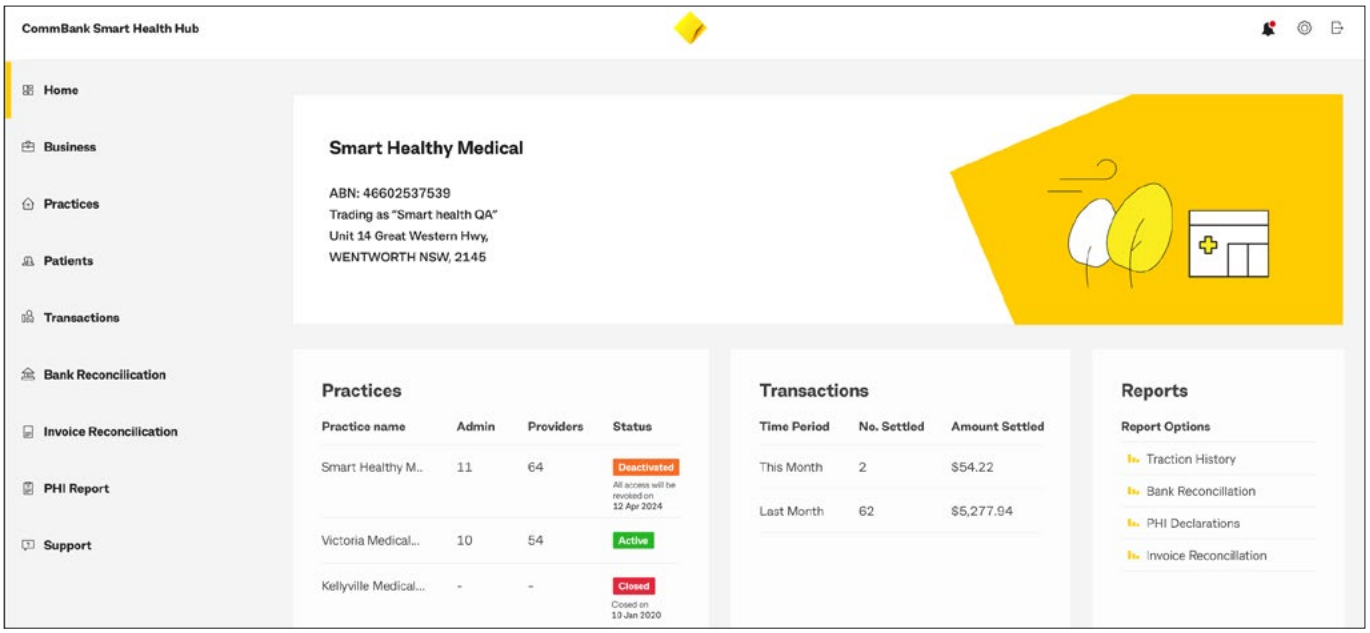
You've now completed your onboarding process and are ready to process transactions.

8. Accessing practice data after closure

How do I access my practice data after closure?

1. When your practice has been closed, you will have 30 days of ***view-only*** access. This means that you can only view and download practice data during this time but cannot perform any actions.

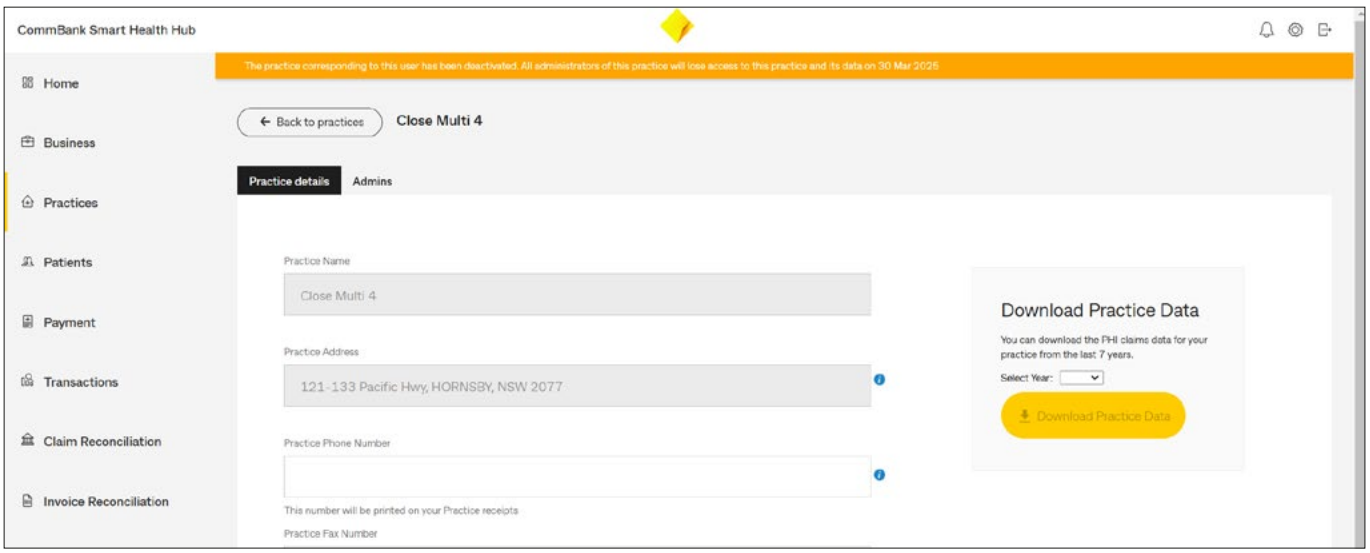
   The practice status will display as ***Deactivated*** on the Home page as shown below.



Status definitions

- Active: The practice is open and can operate with Smart Health.
- Deactivated: The practice has been approved for closure and is currently within the 30-day view-only access period.
- Closed: The practice has been closed.

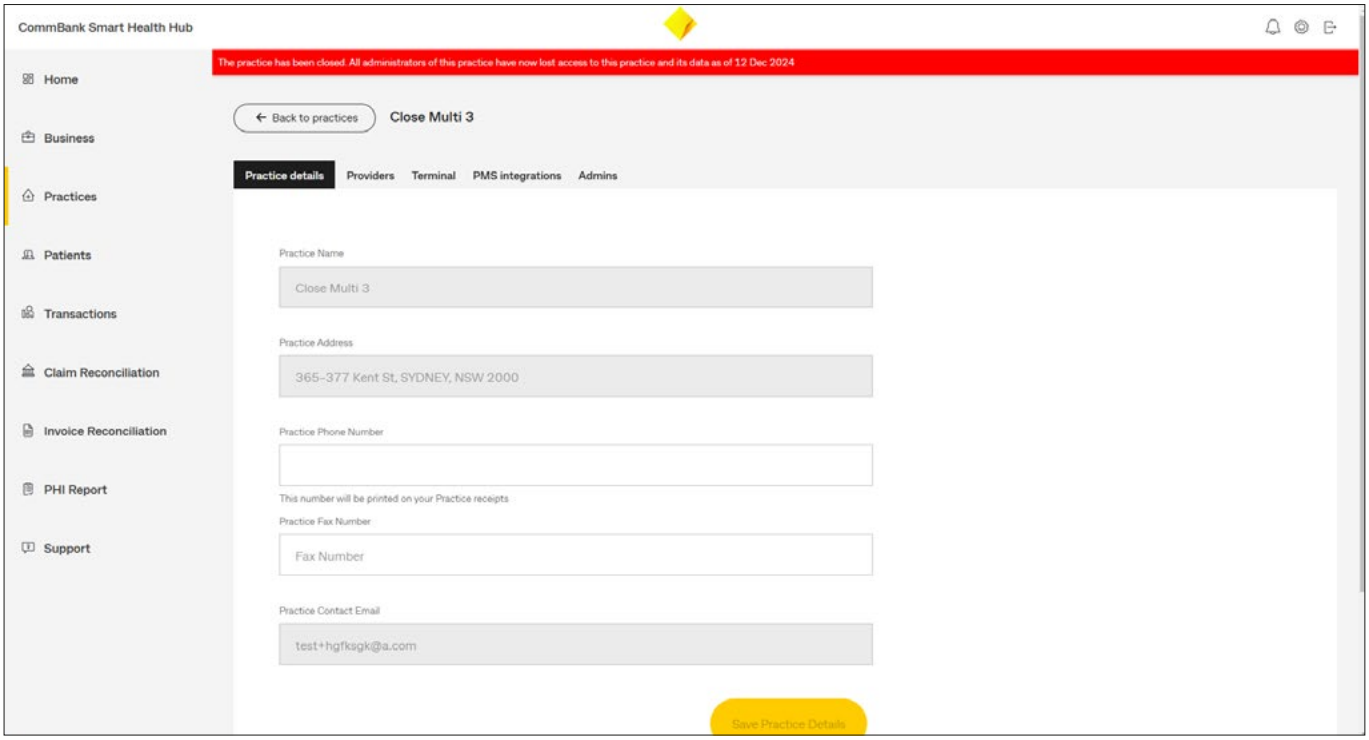
During this time when a practice is Deactivated, an orange-coloured banner message will be displayed on the Practices page, indicating the last day of the 30-day data access period.



You can download practice data by clicking on the **"Download Practice Data"** button.

2. After the 30-day period has ended, the banner message will be in red colour and will indicate that the practice is **Closed**.

   You will not be able to download practice data in this instance.



If you wish to download practice data after the practice is Closed, contact our Help Desk on 1300 222 484 between 8am and 8pm AEST Monday to Friday, or email **smarthealthsupport@cba.com.au**.

Transaction reporting and reconciliation

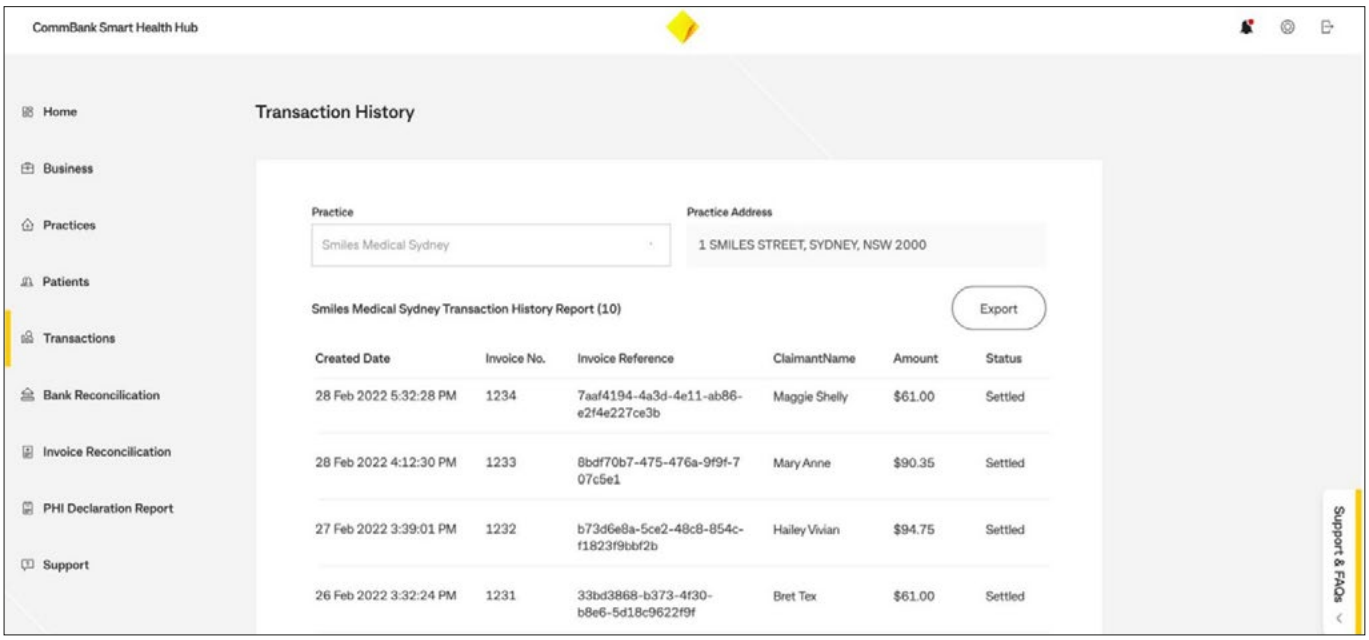
Viewing transaction history

You can view transactions from the CommBank Smart Health Hub or via the Smart Terminal.

How do you view transactions on the CommBank Smart Health Hub?

Via the Transactions page. It shows all transactions completed by the practice *the day before*. Simply:

1. Click the ***Transactions*** tab at left on the home page. It looks like this:



2. On the Transactions page, select the practice you'd like to view using the dropdown menu.
3. Select the transaction date or dates you'd like to see.
4. A list of relevant transactions appears on screen.

This provides a live view of your terminal, showing the status of your transactions. Data includes Created Date, Invoice Number, Invoice Reference, Claimant Name, Amount and Status.

How do you export transactions?

Once a list of your selected transactions appears:

1. Click ***Export*** in the right-hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

How do you view transactions on the CommBank Smart Health Terminal?

From the Home page tap the Hamburger menu and tap “Transactions”.

End of day reporting

What is settlement?

Settlement is the transfer of funds received from your terminal to your nominated settlement account.

At the end of each day, you can see money coming into each practice from patients, and the money received from health funds via the:

- CommBank Smart Health Hub (via Claim reconciliation)

There are three types of settlements per day:

- EFTPOS payments (Gap and Stock items)
- Private Health Insurance settlements, and
- Medicare Bulk Bill settlements.

When are funds settled?

Funds received by Commonwealth Bank of Australia on your behalf are settled on the same day, at around 9:45 pm AEST (or AEDT). So, any money collected from the CommBank Payment App via Visa Card, Mastercard or EFTPOS are received that day. Transactions occurring after this time may appear in the next settlement period.

Funds received by a private health fund are settled the next day – that is, one day after the transaction occurred.

What happens if you miss settlement?

If you're using a standalone terminal and missed your settlement, for instance if the machine disconnected and you don't have a settlement on the terminal, it won't be reflected in the Claim reconciliation. If this happens, please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday.

What reports can you create on the CommBank Smart Health Hub?

You can generate three reports from the CommBank Smart Health Hub:

1. Claim reconciliation
2. Bank reconciliation report
3. Invoice Reconciliation Report
4. PHI Report

Claim reconciliation

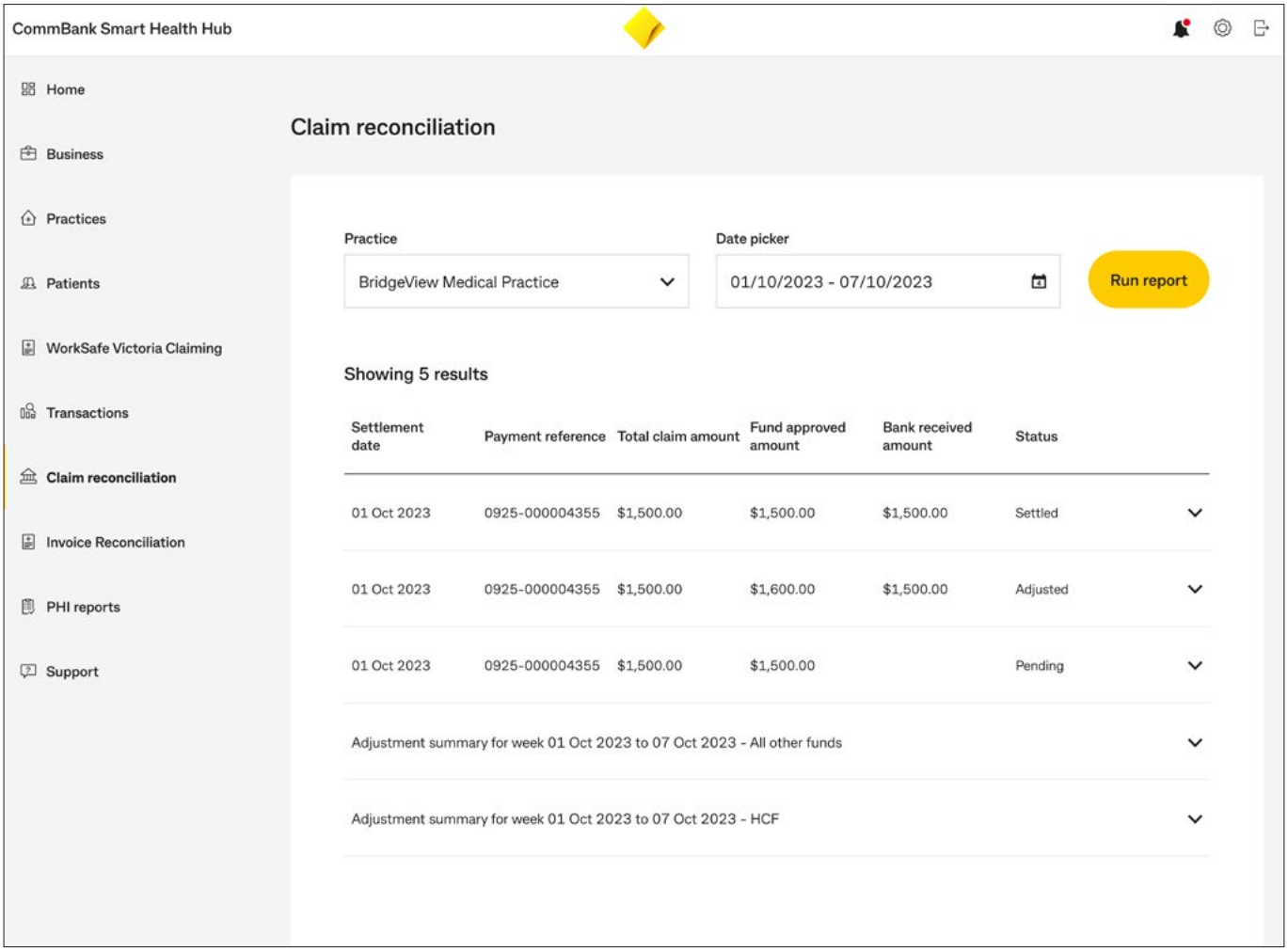
What is the Claim reconciliation used for?

The Claim reconciliation report displays the amount sent. That is, the amount sent in a particular day to the provider's bank account from your terminal or Card Not Present (member app). It shows whether money received from patients – from the terminal or card not present transactions – has arrived in the bank account.

How do you create a Claim reconciliation?

Click on the ***Claim reconciliation*** tab at left on the home page.

1. Choose the practice you'd like to report on, from the dropdown menu.
2. Select the reporting date.
3. Click ***Run Report***.
4. The Claim reconciliation appears on screen.



How do you export a Claim reconciliation?

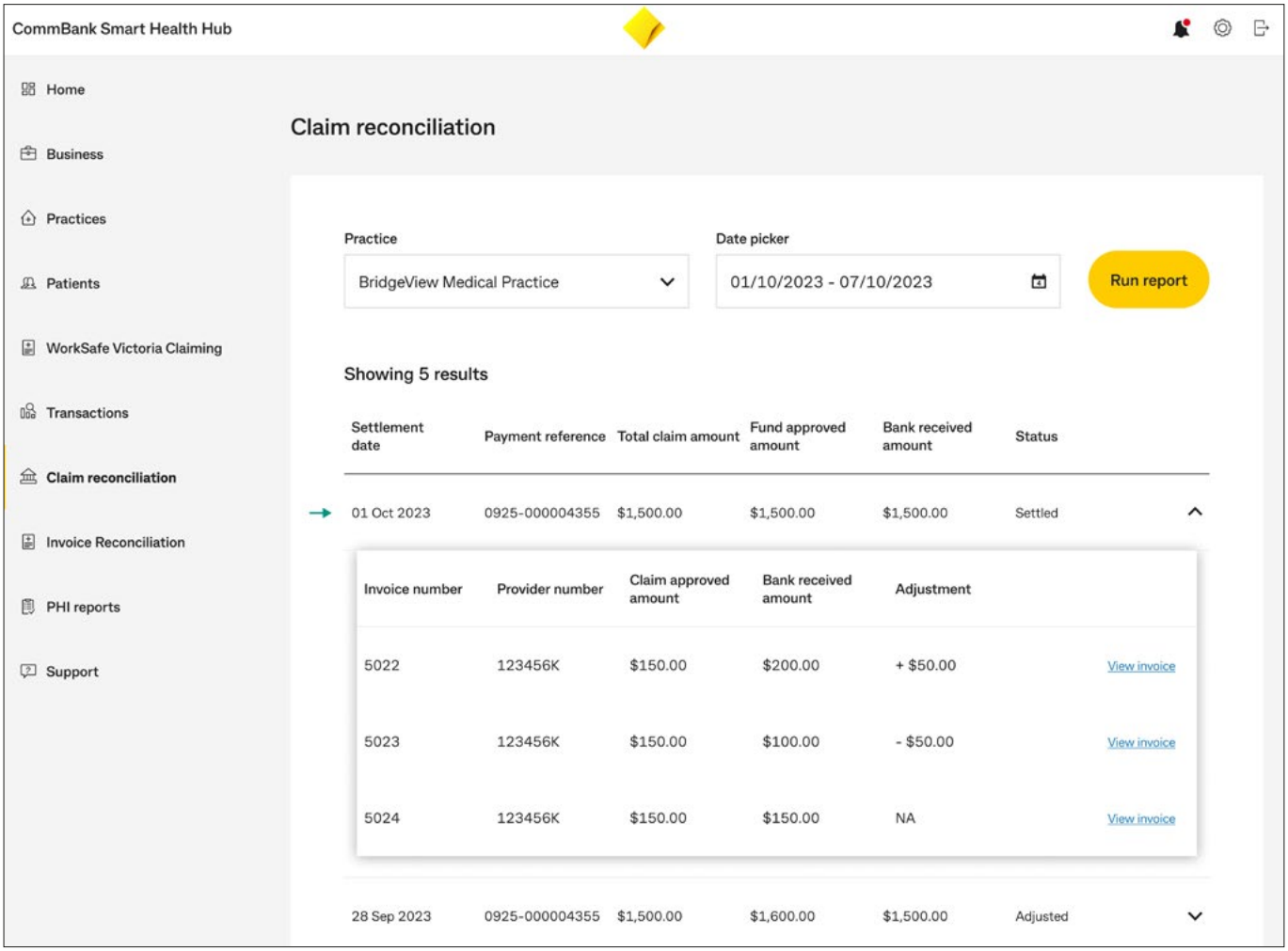
Once your Claim reconciliation appears:

1. Click ***Export*** in the right-hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

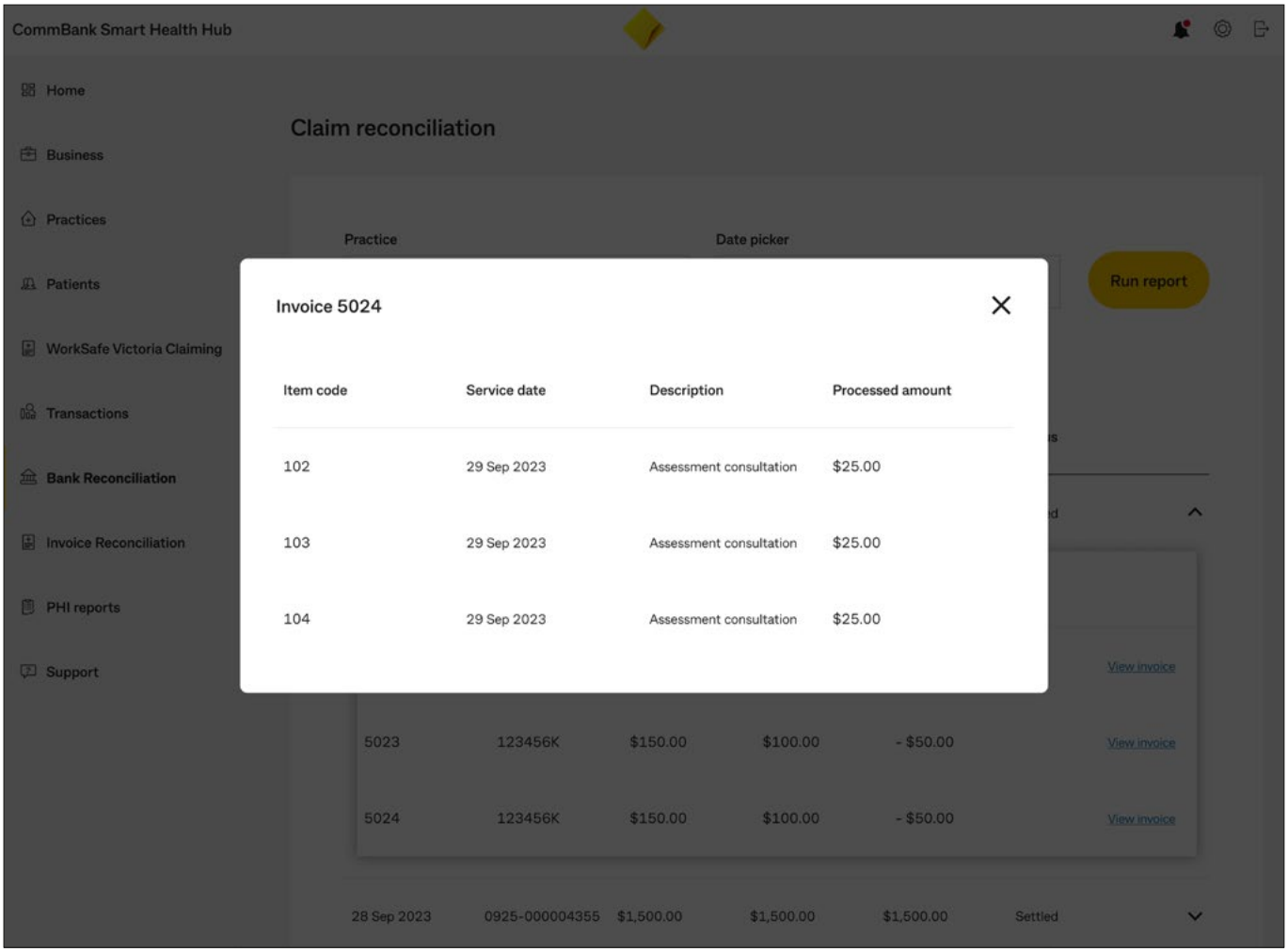
How to navigate daily fund Claim reconciliation?

Once your Claim reconciliation appears:

1. Each row represents the amount processed and received by the Bank for a day.
2. Click on any of the rows to view invoices processed on that day.



3. Click on ***View invoice*** to view items processed in an invoice.

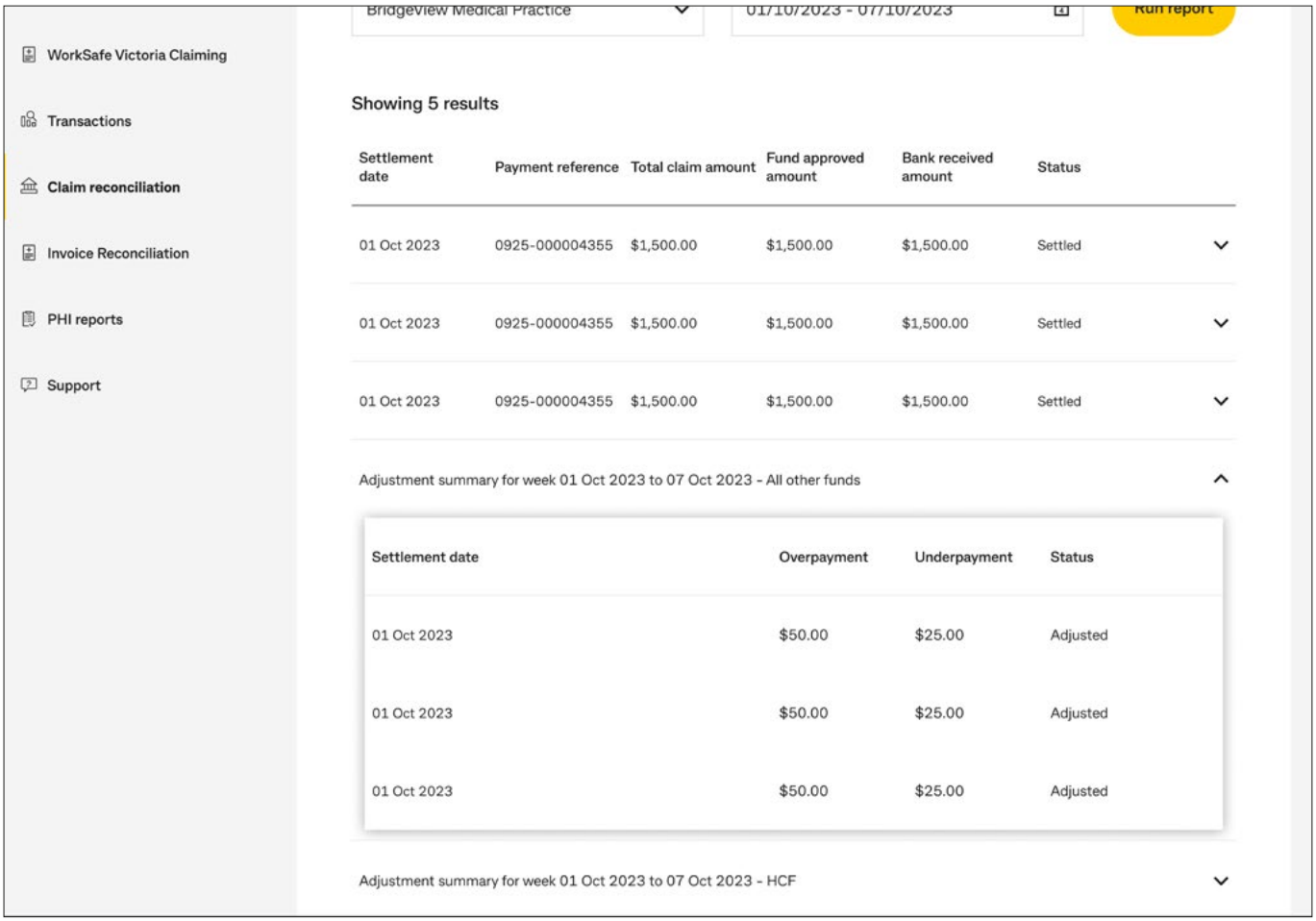


Note: "Bank received amount" means the amount received by the Bank through our reconciliation of Paid Claim Amounts against amounts reimbursed to us by the private health insurer or Health Scheme.

How to navigate summary of all funds Claim reconciliation?

Once your Claim reconciliation appears:

1. It shows the weekly summary for the search criteria as “Adjustment summary for week <start date> to <end date> – All other funds”.
2. Click on the summary to view the weekly summary for all funds (except funds which are not processed via Combined Settlement System like HCF).

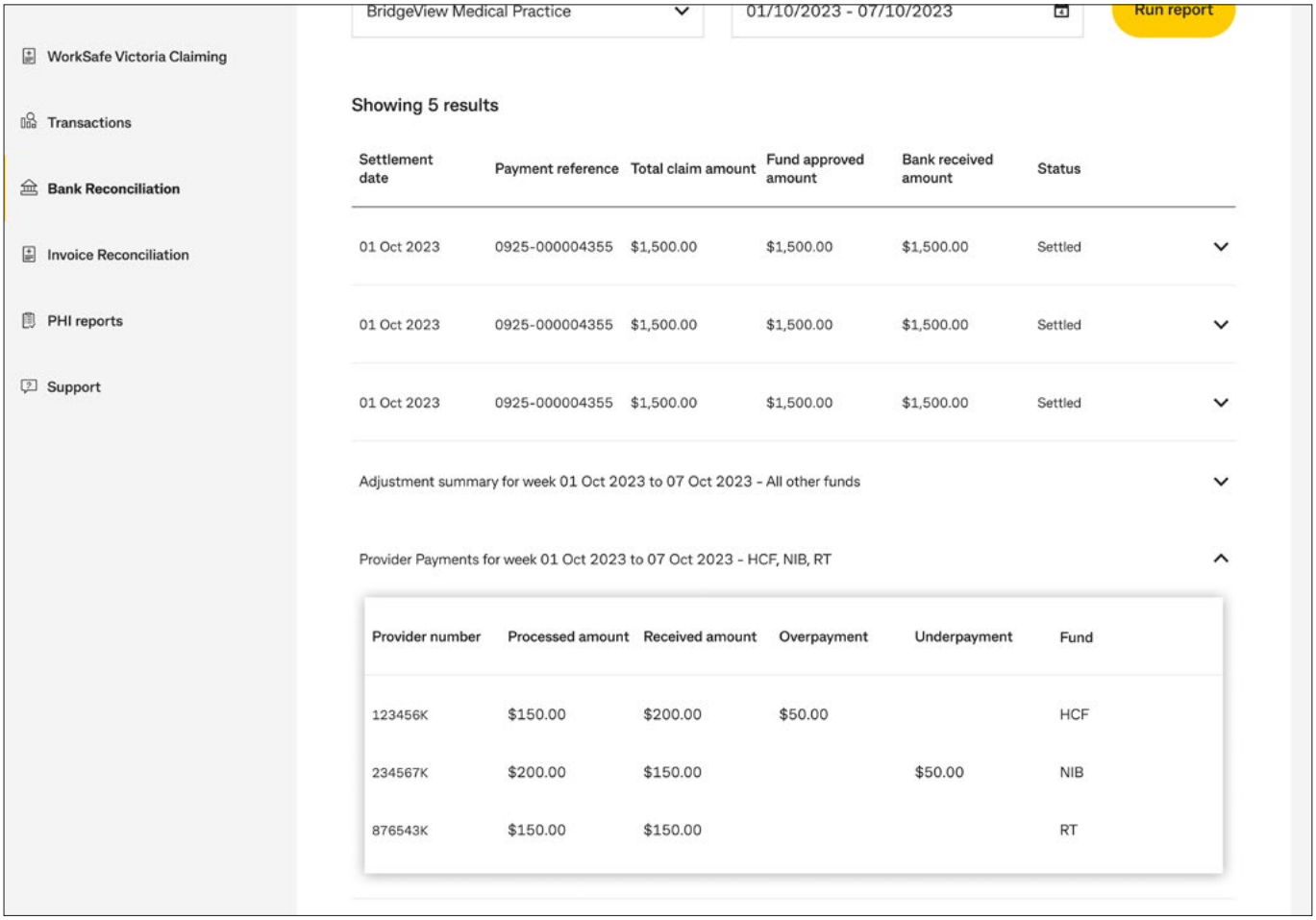


Note: All funds summary displays transactions processed per the selected search period.

How to navigate summary of provider payments reconciliation?

Once your Claim reconciliation appears:

1. It shows the weekly claim summary for the search criteria as “Adjustment summary for week <start date> to <end date> – <funds name like HCF>”.
2. Click on the summary to view the weekly claim summary for Non-Combined Settlement System.



Note: Non-Combined Settlement System summary displays only transaction processed for the provider as per the selected search period.

What are the different types of settlement status?

Settled: It means the amounts sent to your primary bank account (merchant account) for all invoices in a day is equal to claims approved amounts for all invoices in that day.

Adjusted: It means any adjusted Claim Amount through our reconciliation of Paid Claim Amounts against amounts reimbursed to us by the private health insurer or Health Scheme.

Pending: It means the claims approved amounts for the selected date is not received by the Bank.

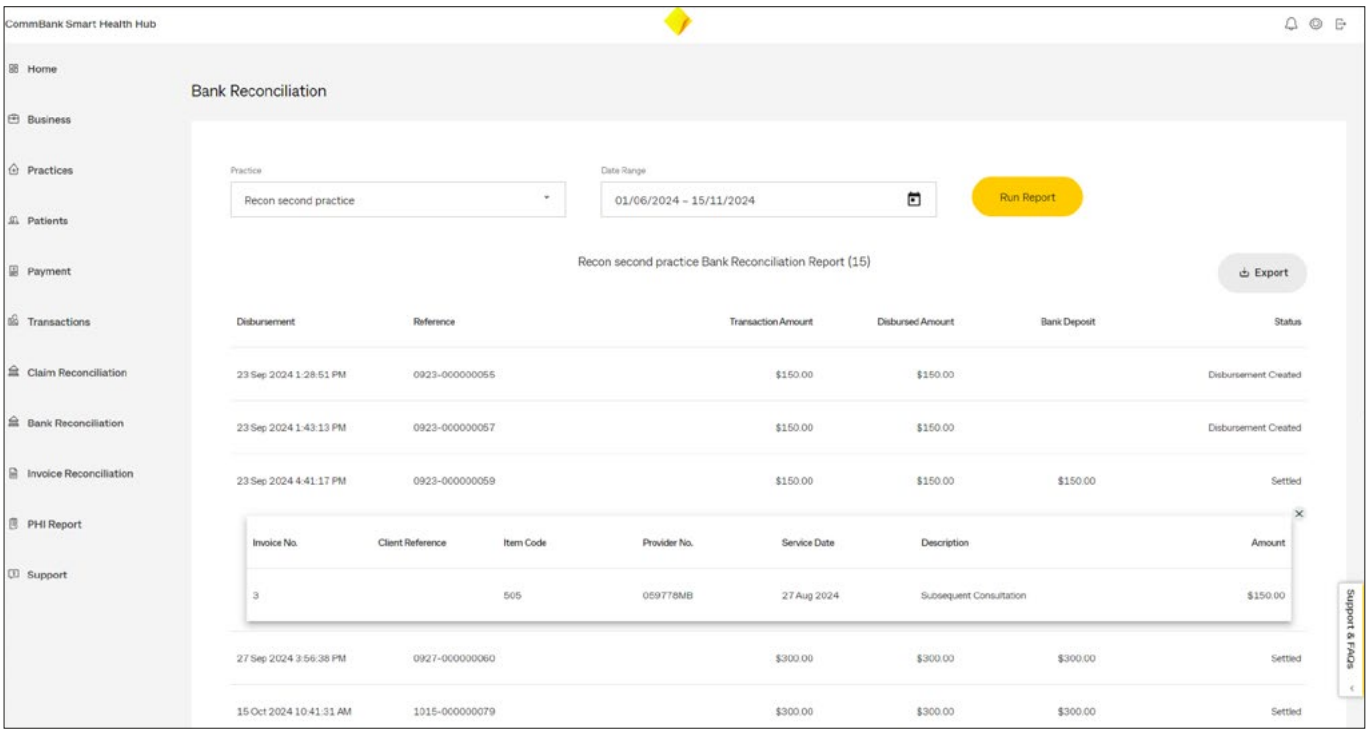
Bank reconciliation reporting

What is the Bank Reconciliation Report used for? This report shows bank settlement. That is, the amount sent in a particular day to the provider's bank account from your terminal or Card Not Present (member app). It shows whether money received from patients – from the terminal or card not present transactions – has arrived in your bank account.

How do you create a Bank Reconciliation Report?

Click on the ***Bank Reconciliation*** tab at left on the home page.

1. Choose the practice you'd like to report on, from the dropdown menu.
2. Select the reporting date.
3. Click ***Run Report***.
4. The Bank Reconciliation Report appears on screen.



How do you export a Bank Reconciliation Report?

Once your ***Bank Reconciliation*** Report appears:

1. Click ***Export*** in the right-hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

Invoice reconciliation reporting

What is the Invoice Reconciliation Report used for?

This report gives a breakdown of the payment at the invoice level. It itemises the money your practice received from health funds or patients yesterday. You compare this report with the Bank Reconciliation Report to identify payment gaps.

What are the different types of invoice status?

What is a settled claim?

Settled means the amount has been sent to your primary bank account (merchant account) or has been received in "Cash/Other".

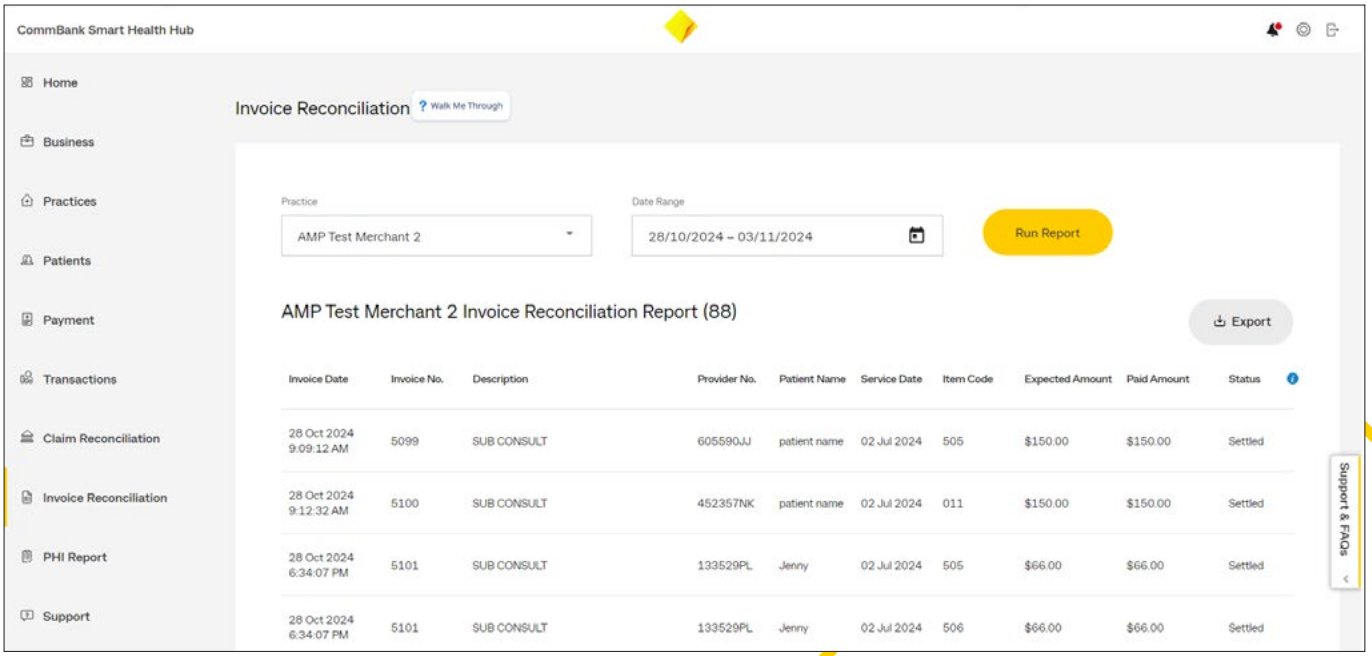
What is the difference between a matched or unmatched claim?

You will only see matched or unmatched claims when there is a gap payment or private health payment:

- **Matched** means that the amount received by your primary bank account is the amount that was expected to be paid.
- **Unmatched** means the amount that has been paid your primary bank account from a health fund is not the amount that was expected to be paid. This could occur when a claim is completed outside of the App. For example, when a gap payment of $30 is processed outside of the App, the CommBank Smart Health Hub identifies that money was received, and it will appear as an unmatched claim.

How do you create an Invoice Reconciliation Report?

1. Click on the ***Invoice Reconciliation*** tab at left on the home page.
2. Choose the practice you'd like to report on, from the dropdown menu.
3. Select the date range.
4. Click ***Run Report***.
5. The Invoice Reconciliation Report appears on screen.



How do you export an Invoice Reconciliation Report?

1. Click Export in the right-hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

PHI declaration reporting

In PHI reporting you can run two types of reports:

- Daily claims report
- PHI declaration report

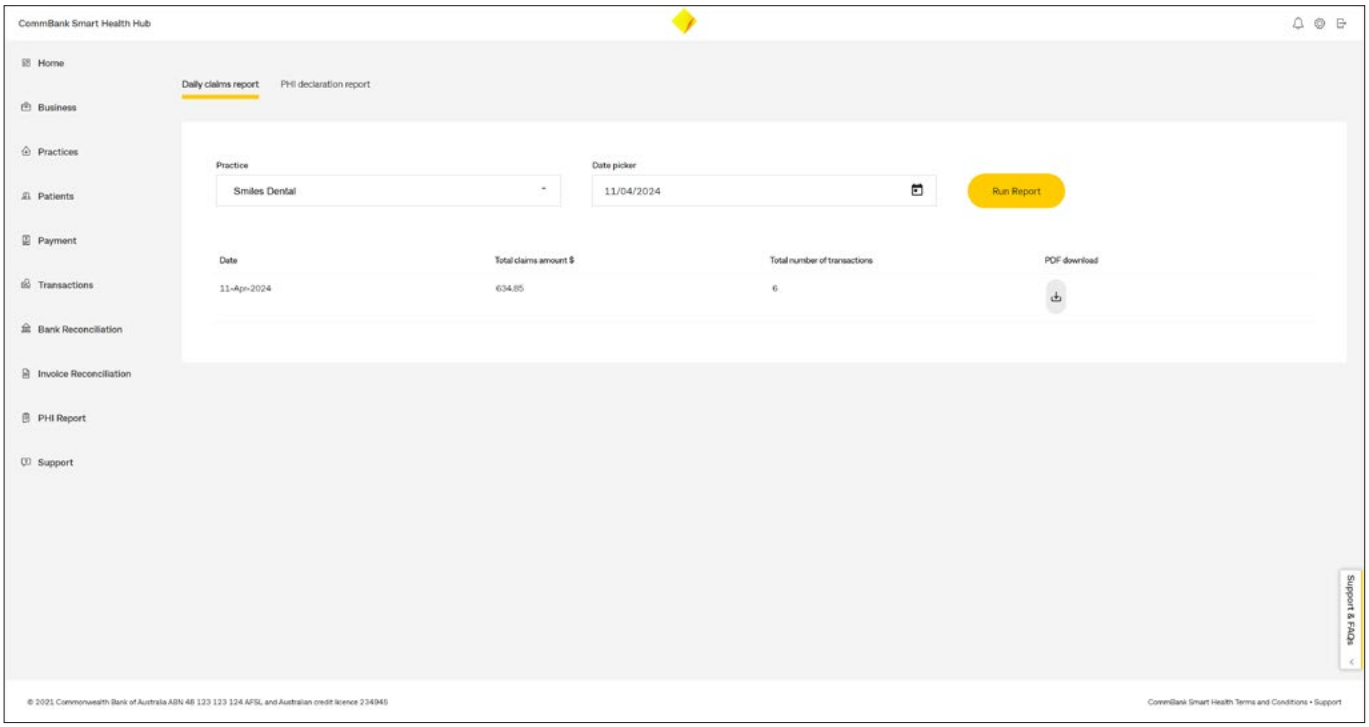
What is the Daily claims report used for?

This report provides a daily summary of PHI claims processed on a given day.

How to

To run this report, follow the below steps:

1. Select the practice.
2. Select the date for which the daily PHI claim summary is required. Default date is set to the current day. Click on the calendar icon to select a different date.
3. Select ***Run Report***.
4. The screen will display Date (of report), Total claims amount $, Total number pf transactions and PDF download.
5. Click on the download icon for a pdf copy of the report.
6. The downloaded report will contain daily total dollar value and count of claims processed for each health fund on the selected date.

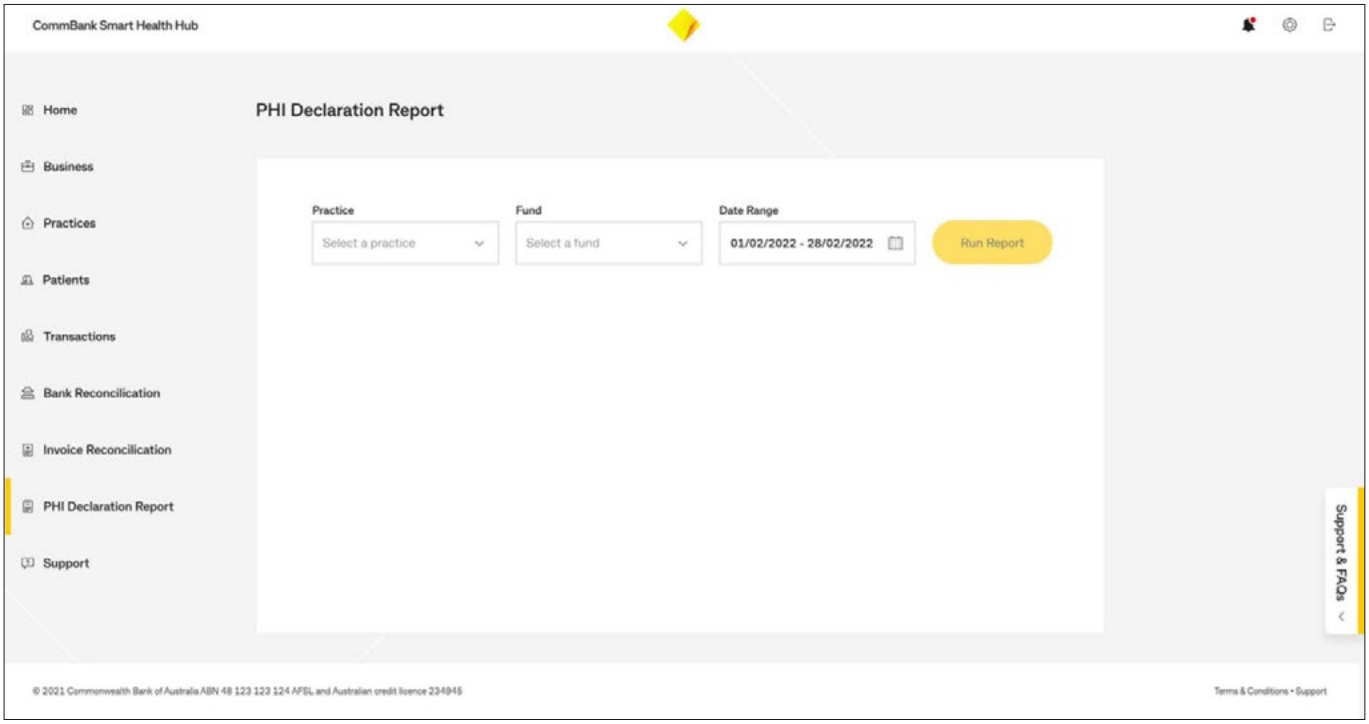


What is the PHI Declaration Report used for?

This report stores digital copies of every patient PHI Declaration or signature for seven years. This means your practice no longer has to keep physical copies of PHI acknowledgement/declaration. It's an easy and efficient way to meet the mandatory obligation to keep patient acknowledgement/ declaration. And it's an easy point of reference when patients enquire about past services received, for example, to compare costs and refunds received over time.

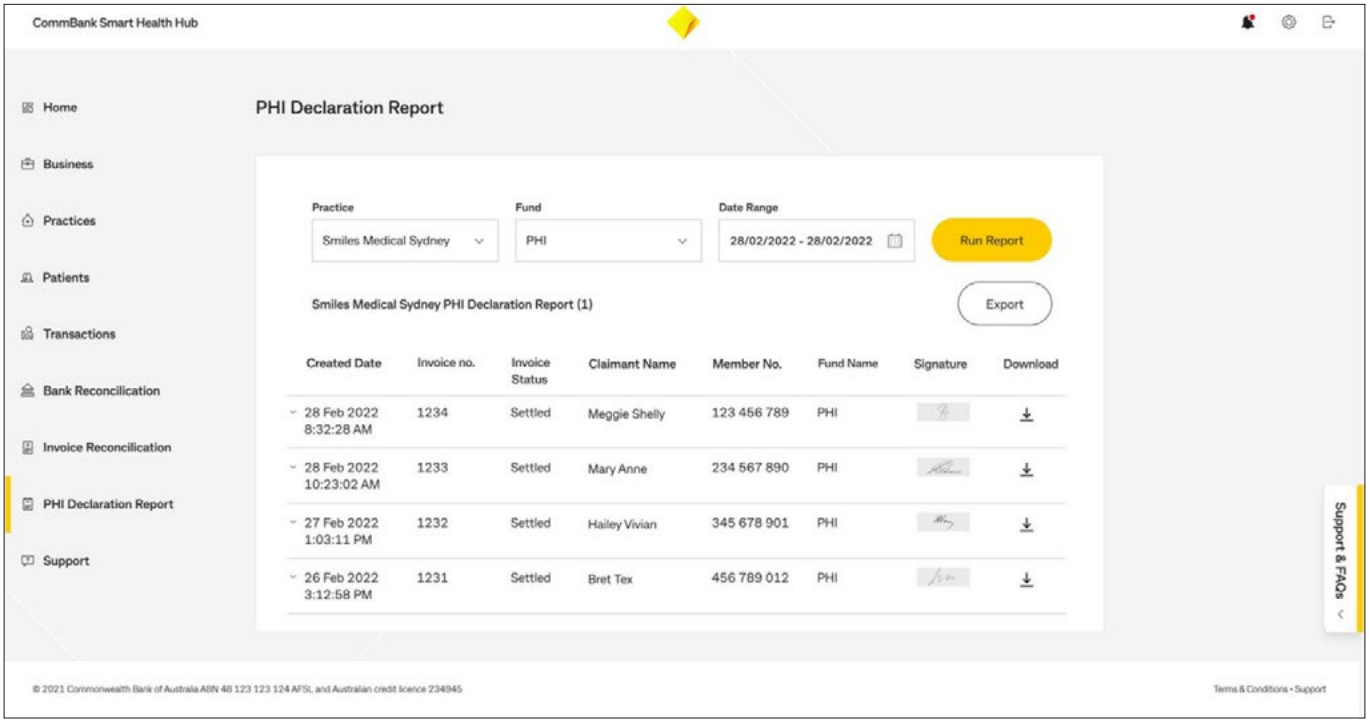
How do you view a PHI Declaration?

1. Click on the ***PHI Declaration Report*** tab at left on the home page.
2. Choose the practice you'd like to report on, from the dropdown menu.



3. Select a fund or leave it open to see all funds.
4. Select the date range and click ***Run Report***.

5. A list of patient declarations appears and may be downloaded individually by clicking on the PDF Download icon to the right, as shown below.



How do you export a PHI Declaration Report?

Following the above steps, once your PHI Declaration Report appears:

1. Click ***Export*** in the right-hand corner of the screen.
2. Select either Excel or CSV file types.
3. Transactions are exported to print, share or save to your Mac or PC.

Identifying gaps in app claim and pay transactions

For various reasons, you may find a difference between the Bank Reconciliation Report and the Invoice Reconciliation Report. This may occur, for example, if the payment was partially taken or taken as cash/other, so an “unmatched payment” may appear.

What should you do?

Please contact the CommBank Smart Health Help Desk on 1800 222 484 between 8am and 8pm AEST Monday to Friday. They will be able to explain why these differences occur and what to do.

This information is intended to provide general information of an educational nature only. It does not have regard to the financial situation or needs of any reader and must not be relied upon as financial product advice. You should consider seeking independent financial advice before making any decision based on this information. The information in this user guide and any opinions, conclusions or recommendations are reasonably held or made, based on the information available at the time of its publication but no representation or warranty, either expressed or implied, is made or provided as to the accuracy, reliability or completeness of any statement made in this article. Commonwealth Bank of Australia ABN 48 123 123 124. AFSL and Australian Credit Licence 234945.

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