CommBank Smart Health Quick Reference Guides
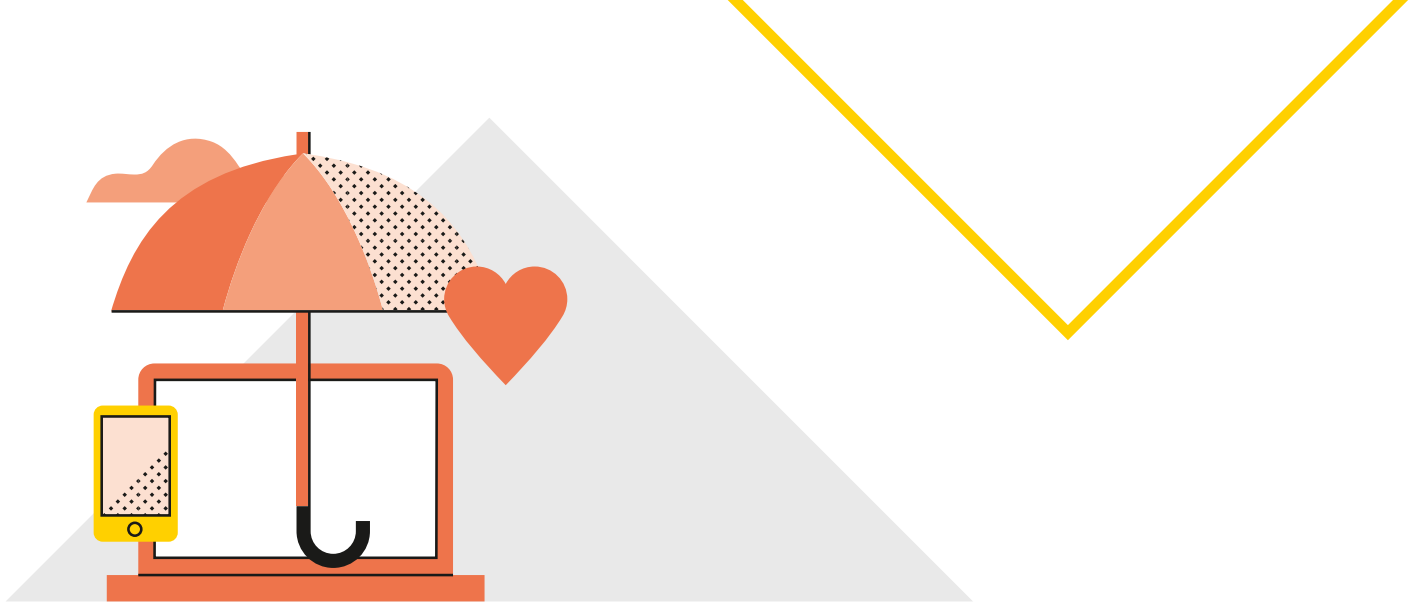
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Please print a copy of each user guide and keep it next to your Smart Health terminal for easy reference.

Contents

Quick Reference Guides for Standalone mode

Standalone mode means the Smart Health terminal works by itself to complete payments, without any system connections.

Quick Reference Guides for Integrated mode

Integrated mode means the Smart Health terminal is connected to your Practice Management System to complete payments.

Smart Health Quick Reference Guide – Medicare Bulk Bill claim (Standalone)

Processing a claim

1. On the Home screen, tap **Start new claim** and swipe the Medicare card or tap **Enter Medicare card manually** if the patient doesn't have a card. Then tap **Confirm**.

2. Enter the patient's individual reference number (IRN), then tap **Confirm**.

3. On the Confirm patient details screen:

   i. Tap **Bulk-billed**, and

   ii. Select **Yes** or **No** to confirm a patient's concession entitlement.

4. Search for a provider name or number, tap "O" next to the provider's name to select it, then tap **Next**.

5. Tap on the appropriate referral option. **No referral required, Add referral details** or **Override referral** if the patient doesn't have a referral.

6. Search for the **claim item** code, tap "+" to select it, then tap **Add to claim**.

   Note: To add more items, tap ← at the top of the screen. To remove an item, tap 🗑 next to the item.

7. Review the claim and if all ok, tap **Submit claim**.

8. Ask the patient to review the Medicare benefit and if all ok, tap **Accept benefit**.

9. Tap **Accept declaration** to assign the benefit to the practitioner. A receipt will be printed automatically if the Print Receipts functionality is turned on.

   Note: Change this setting via the main menu on the home page.

10. Tap **Back to home** to finish the claim and return to the Home screen.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

4. Tap the invoice number you wish to view to see the claim detail. Tap **Resume claim** to re-start an unsettled claim or tap **Print again** to print another receipt.

Cancelling a Bulk Bill claim

Medicare Bulk Bill transactions cannot be cancelled on the Smart Health terminal. Please contact Medicare for assistance.

Where to get more help

If you need support with Medicare Bulk Bill claim payments, contact Medicare.

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

You can also visit **commbank.com.au/smarthealth** and consult our detailed user guides in the 'Resources' section.

Smart Health Quick Reference Guide – Medicare Paid-patient claim (Standalone)

Processing a claim

1. On the Home screen, tap **Start new claim** and swipe the Medicare card or tap **Enter Medicare card manually** if the patient doesn't have a card. Then tap **Confirm**.

2. Enter the patient's individual reference number (IRN), then tap **Confirm**.

3. On the Confirm patient details screen:

   i. Tap **Paid-patient claim,** and

   ii. Select **Yes** or **No** to confirm claimant.

   Note: To add a different claimant, select No and you will be prompted to enter the claimant's Medicare card details.

4. Search for a provider name or number, tap "O" next to the provider's name to select it, then tap **Next**.

5. Tap on the appropriate referral option. **No referral required**, **Add referral details** or **Override referral** if the patient doesn't have a referral.

6. Search for **item code to claim**, tap "+" to select it, then tap **Add to claim**.

   Note: To add more items, tap ← at the top of the screen. To remove an item, tap 🗑 next to the item. To edit item details, tap **Edit** next to the item.

7. Tap **Pay claim** to proceed with the claim.

8. Select the payment method and follow prompts to complete payment (or see Smart Health User Guide – Standalone for more detailed help).

   Note: The Smart Health app automatically checks the rebate with Medicare and provides an assessment summary.

9. Tap **Accept benefit** to receive the rebate shown.

   Note: Tap **Reject** if the patient doesn't want to claim through Smart Health.

10. Swipe the patient's eftpos card to receive the rebate. A receipt will be printed automatically if the Print Receipts functionality is turned on.

    Note: Medicare rebates are only processed with debit cards. Change this setting via the main menu on the home page.

11. Tap **Back to home** to return to the Home screen.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

4. Tap the invoice number you wish to view to see the claim detail. Tap **Resume claim** to re-start an unsettled claim or tap **Print again** to print another receipt.

Cancelling a Paid-patient claim

You cannot cancel a Medicare Paid-patient claim once the Medicare rebate has been processed.

Where to get more help

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

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Smart Health Quick Reference Guide – Private Health Insurance (PHI) claim (Standalone)

Processing a claim

1. From the Home screen, tap **Start new claim**, then swipe the PHI card or tap the patient's mobile device.[1]

   Note: The terminal recognises, and displays the name of the PHI fund.

2. Enter patient's individual reference number (IRN), then tap **Confirm**.

3. Search for a provider name or number, tap "O" next to provider's name to select it, then tap **Next**.

4. Search for an item code or item name, tap "+" to select it, then tap **Add to claim**.

   Note: Tap **Edit** to change the item cost, enter details or change date of service. To add more items, tap ← at the top of the screen. To remove an item, tap 🗑 next to the item.

5. Review the PHI claim shown on screen. Tap **Submit claim** to proceed or **Cancel**.

6. The PHI fund claim and benefit assessment is shown. If all ok, tap **Accept claim**.

   Note: If the patient rejects the claim, tap **Reject** to display the options. For example, if the patient wants a Rebate Estimate, tap **Cancel the claim and print a receipt**. A receipt prints automatically.

7. On the Declaration screen, ask the patient to read and sign the screen then tap **Proceed to pay**.

8. Select the payment method (credit or debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Standalone for more detailed help).

9. On the Finished screen the invoice appears and a receipt will be printed automatically if the Print Receipts functionality is turned on. Tap **Back to home** to return to the Home screen.

   Note: Change this setting via the main menu on the home page.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

4. Tap the invoice number you wish to view to see the claim detail. Tap **Resume claim**[2] to continue an unsettled claim or tap **Print again** to print another receipt.

Cancelling a claim

PHI claims may be cancelled on the same day prior to terminal settlement time at 9:45pm AEST.

To process a cancellation:

1. Tap ☰ on the top left corner of the Home screen.

2. Tap **Transactions** and select the invoice to be refunded.

3. Tap **Cancel claim**.

   Note: If no Cancel claim button appears, you may refer the patient to discuss with PHI fund.

4. Tap **Yes** to confirm claim cancellation.

5. Swipe the PHI card or tap the patient's mobile device.[1]

6. Ask the patient to sign on screen then tap **Cancel claim**. Then tap **OK**.

7. Follow the prompts to complete the refund (or see Smart Health User Guide – Standalone for more detailed help).

Where to get more help

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

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1. Apple Wallet or Android NFC supported. **2.** When available.

Smart Health Reference Guide – No fund/Purchase (Standalone)

Processing a No fund invoice

1. From the Home screen, tap **Process without fund**.

2. Select a provider, or search for a provider name or number, then tap **Next**.

3. Search for item code or item name to claim, select it, then tap **Add to invoice**.

   Note: Tap Edit to change item cost, enter details, or change date of service. To add more items, tap ← at the top of the screen. To remove an item, tap 🗑 next to the item.

4. To proceed, tap **Pay invoice**.

5. Select the payment method (credit or debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Standalone for more detailed help).

6. On the Finished screen the invoice appears and a receipt will be printed automatically if the Print Receipts functionality is turned on. Tap **Back to home** to return to the Home screen.

   Note: Change this setting via the main menu on the home page.

Processing a purchase

1. From the Home screen, tap **Take a payment**.

2. Enter the amount to be charged ($)

3. Tap **Add description** to enter item details in the space provided then tap **Add description** again.

4. Tap **Pay**.

5. Select the payment method (credit or debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Standalone for more detailed help).

6. On the Finished screen the invoice appears and a receipt automatically prints. Tap **Back to home** to return to the Home screen.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

4. Tap the invoice number you wish to view to see the claim detail. Tap **Resume claim** to re-start an unsettled claim or tap **Print again** to print another receipt.

Processing an invoice refund

1. Tap ☰ on top left corner of terminal.

2. Tap **Transactions** and select the invoice to be refunded.

3. Tap **Refund invoice**, then tap **Yes** to confirm you want to refund and cancel the invoice.

4. Type in the cashier or manager passcode, then tap **Enter**.

5. Follow the prompts to complete the refund via the original mode of payment (or see Smart Health User Guide – Standalone for more detailed help).

Where to get more help

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

You can also visit **commbank.com.au/smarthealth** and consult our detailed user guides in the 'Resources' section.

Smart Health Reference Guide – Paid Patient claim (Integrated)

Processing a claim

On the Smart Health terminal, check you're in Integrated mode (screen says "Terminal is ready to receive transaction from PMS").

Follow the prompts in your Practice Management Software (PMS) to generate the invoice and select the appropriate option to initiate payment.

The Smart Health terminal displays the total invoice amount.

1. From the Home screen, tap Tap to **swipe Medicare card**, then swipe the card
   or
   Tap **Enter Medicare card manually** for manual entry. Then tap **Confirm**.

2. Enter the patient's IRN or tap **Confirm**.

3. Confirm Patient details. Select **Yes** to confirm or **No** to add claimant's Medicare details.

4. Select the payment method (credit/debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Integrated for more help).

5. Smart Health app automatically checks the rebate with Medicare, and a summary is displayed on screen. Tap **Accept benefit** to receive the rebate

   Note: Tap **Reject** if the patient doesn't want to claim through Smart Health.

6. Swipe the patient's eftpos card and follow the prompts to process the rebate. A receipt will be printed automatically if the Print Receipts functionality is turned on.

   Note: Medicare rebates are only processed with debit cards. Change this setting via the main menu on the home page

7. Tap **Back to home** to finish the claim and return to the Home screen.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

4. Tap the invoice number you wish to view to see the claim details. Tap **Print again** to print another receipt.

Cancelling a Paid-patient claim

You cannot cancel a Medicare Paid-patient claim once the Medicare rebate has been processed.

Where to get more help

For questions about your PMS, please consult your PMS user guide or contact the provider.

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

You can also visit **commbank.com.au/smarthealth** and consult our detailed user guides in the 'Resources' section.

Smart Health Reference Guide – Private Health Insurance (PHI) claim (Integrated)

Processing a claim

On the Smart Health terminal, check you're in Integrated mode (screen says "Terminal is ready to receive transaction from PMS").

Follow the prompts in your Practice Management Software (PMS) to generate the invoice and select the appropriate option to initiate payment.

The Smart Health terminal displays the total invoice amount. To complete the claim:

1. From the Home screen, tap **Tap to swipe fund card**, then swipe the PHI card or tap the patient's mobile device.[1]

   Note: The terminal recognises, and displays the name of, the PHI fund.

2. Enter the patient's IRN and tap **Confirm**.

   Note: The terminal will check and display claim benefit assessment from PHI fund.

3. The PHI fund claim and benefit assessment is shown. If all ok, tap **Accept claim**.

   Note: If the patient rejects the claim, tap **Reject** to display the options. For example, to get a Rebate Estimate, tap **Cancel the claim and print a receipt**, or tap **Discard rebate and patient pays full amount,** or tap **Resubmit claim to fund** to enable the claim to be reassessed for fund benefits.

4. On the Declaration screen, ask the patient to sign the screen, then tap **Proceed to pay**.

5. Select the payment method (credit or debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Integrated for more detailed help).

6. On the Finished screen, the invoice appears and a receipt will be printed automatically if the Print Receipts functionality is turned on. Tap **Back to home** to return to the Home screen.

   Note: Change this setting via the main menu on the home page.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

   Note: The Smart Health app lists the last few days of transactions. To view all, see the Smart Health hub.

4. Tap the invoice number you wish to view to see the claim details, tap **Print again** to print another receipt.

Processing a refund

PHI claims can be refunded on the same day prior to terminal settlement time of 9:45pm AEST.

Follow the prompts on your PMS to initiate the refund. On the terminal:

1. Swipe the PHI fund card or tap the patient's mobile device.[1]

2. Ask the patient to read the declaration and sign on screen, then tap **Cancel claim**.

3. To refund any gap paid, type in the cashier or manager passcode, then tap **Enter**.

4. Tap, swipe or insert the original payment card to complete the refund (follow the prompts through card refund process).

5. A cancellation summary is shown onscreen. Tap **Back to home** to return to the Home screen or tap **Print again** to print a receipt.

Where to get more help

For questions about your PMS, please consult your PMS user guide or contact the provider.

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

You can also visit **commbank.com.au/smarthealth** and consult our detailed user guides in the 'Resources' section.

1. Apple Wallet or Android NFC supported.

Smart Health Reference Guide – No Health Fund invoice (Integrated)

Use the below steps to process an invoice without a private health fund claim.

Processing a No Health Fund invoice

On the Smart Health terminal, check you're in Integrated mode (screen says "Terminal is ready to receive transaction from PMS").

Follow the prompts in your Practice Management Software (PMS) to generate the invoice and select the appropriate option to initiate payment.

The Smart Health terminal displays the total invoice amount. To complete the invoice without the health fund claim:

1. Tap **No Health Fund**.
2. Select the payment method (credit or debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Integrated for more detailed help).
3. On the Finished screen, the invoice summary appears, and a receipt will be printed automatically if the Print Receipts functionality is turned on. Tap **Back to home** to return to the Home screen.

   Note: Change this setting via the main menu on the home page.

Viewing transactions

1. Tap ☰ on top left corner of the Home screen.
2. Tap **Transactions**.
3. Scroll through transactions to view the summary by invoice number.

   Note: The Smart Health app lists the last few days of transactions. To view all, see the Smart Health hub.

4. Tap the invoice number you wish to view to see the claim details, tap **Print again** to print another receipt.

Processing a refund

Follow the prompts on your PMS to initiate the refund. On the terminal:

1. To refund any gap paid, type in the cashier or manager passcode, then tap **Enter**.
2. Tap, swipe or insert the original payment card to complete the refund (follow the prompts through card refund process).
3. A cancellation summary is shown onscreen. Tap **Back to home** to return to the Home screen or tap **Print again** to print a receipt.

   Note: If your PMS is integrated with CommBank Health using *Transaction mode*, the No Health Fund option will not be available on the screen.

   In this situation, you can use thje terminal in standalone mode to process a No Health Fund claimn or check with your PMS.

   Refer to page 41 on Smart Health User Guide – Integrated to learn more about *Transaction mode*.

Where to get more help

For questions about your PMS, please consult your PMS user guide or contact the provider.

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

You can also visit **commbank.com.au/smarthealth** and consult our detailed user guides in the 'Resources' section.

1. Apple Wallet or Android NFC supported.

Smart Health Reference Guide – Purchase transaction (Integrated)

Processing a Purchase transaction

1. Follow the prompts in your Practice Management Software (PMS) to generate the invoice and select the appropriate option to initiate payment.

2. On the Smart Health terminal make sure you're in Integrated mode (screen says "Terminal is ready to receive transaction from PMS").

3. Select the payment method (credit or debit card, manual card entry or cash) and follow the onscreen prompts to complete payment (or see Smart Health User Guide – Integrated for more help).

4. On the Finished screen the invoice receipt will be printed automatically if the Print Receipts functionality is turned on. Tap **Back to home** to return to the Home screen or tap **Print again** if the patient would like another copy.

   Note: Change this setting via the main menu on the home page.

Viewing transactions

1. Tap ⬛ on top left corner of the Home screen.

2. Tap **Transactions**.

3. Scroll through transactions to view the summary by invoice number.

   Note: The Smart Health app lists the last few days of transactions. To view all, see the Smart Health hub.

4. Tap the invoice number you wish to view to see the claim details, tap **Print again** to print another receipt.

Processing a refund

You cannot process a refund of a purchase transaction via the Smart Health app. Instead:

1. Exit the Smart Health app by tapping the square at the bottom of the terminal screen.

2. Open the Connect Express app.

3. Enter the transaction amount.

4. Tap **Other**.

5. Tap **Refund**.

6. Enter the cashier or manager passcode and tap **Enter**.

7. Follow the terminal prompts to complete the refund.

Where to get more help

For questions about your PMS, please consult your PMS user guide or contact the provider.

For help with the Smart Health terminal, call our CommBank Smart Health Help Desk on **1800 222 484** between 8am and 8pm Monday to Friday AEST.

You can also visit **commbank.com.au/smarthealth** and consult our detailed user guides in the 'Resources' section.