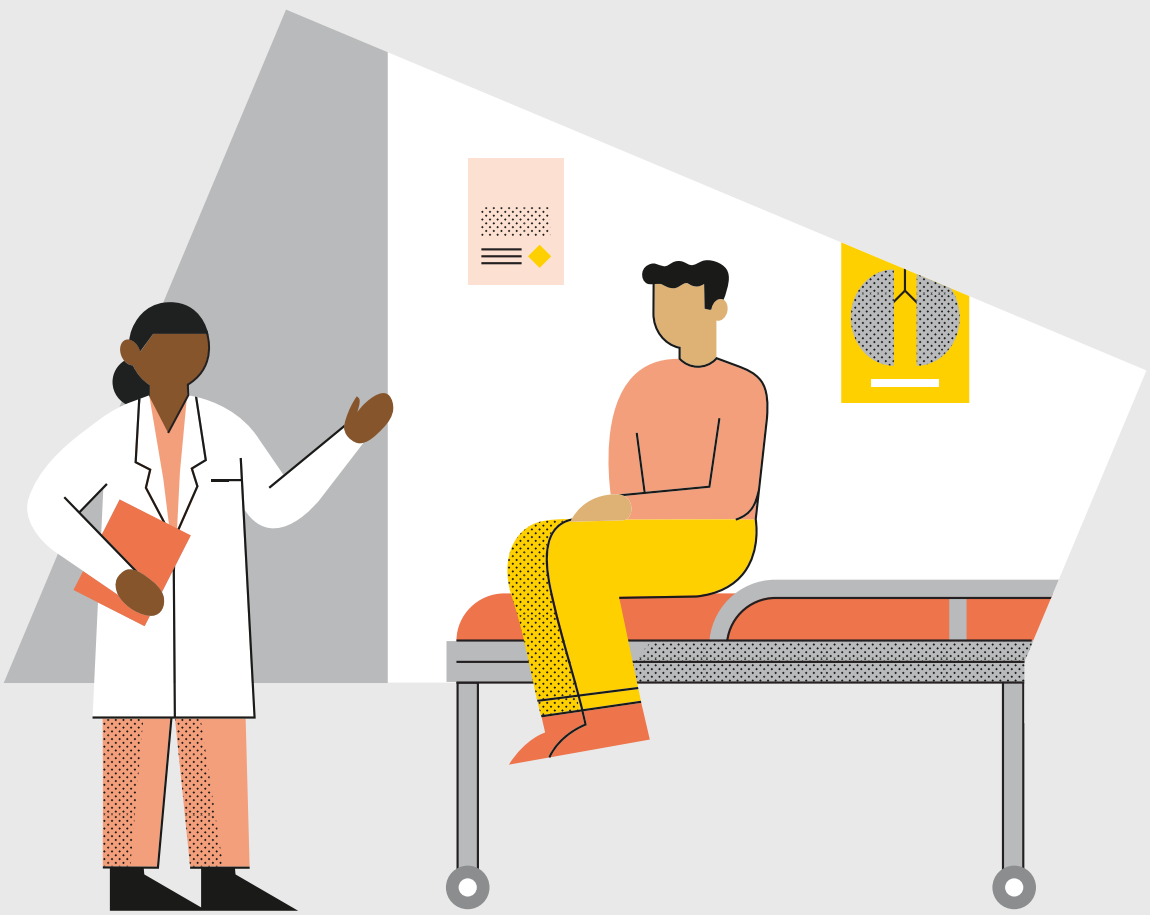
Version: 1.8
Date: October 2026

CommBank Smart Health User Guide

Integrated



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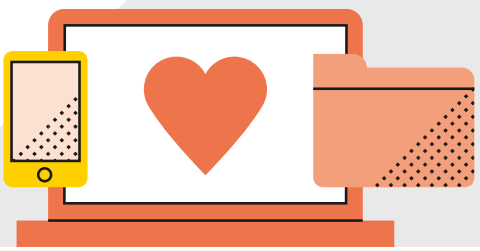
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Glossary

Bulk bill	Payment option under Medicare that covers a range of healthcare services prescribed under the Medicare Benefits Schedule.
Cancel	To void an existing transaction on the Smart Health terminal.
Claims	An application for reimbursement on healthcare services in Australia from Medicare or Private Health Insurance funds.
Claimant	An individual actively making the Medicare claim. In most cases the patient and claimant are usually the same individual.
CommBank Smart Health	A Smart Health terminal that manages payments for healthcare practices, allowing businesses to streamline payments and process claims.
Gap payment	Payment amount remaining after a rebate has been provided for specified healthcare services.
Individual Reference Number (IRN)	A number on the front of an existing Medicare or Private Health Fund card identifying the position of an individual on that card.
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.
MOTO payments	Mail Order/Telephone Order transactions.
Paid-patient claim	The patient pays for the full invoice and claims back the Medicare benefit.
Passcode	Six-digit cashier or manager passcode used to authenticate refund access to the Smart Health terminal.
Patient	Individual receiving professional healthcare treatment.
Standalone mode	The terminal operates independently to complete a claim and payment.
Rebate	A limited refund for the cost of a healthcare service. Rebates can be claimed from Medicare or Private Health Insurance funds.
Reconciliation/Reconcile	The process of validating that a patient claim has been paid or processed.
Reports	Data provided from the portal on historical claims and payments made to the practice.



About CommBank Smart Health

What is the Smart Health terminal?

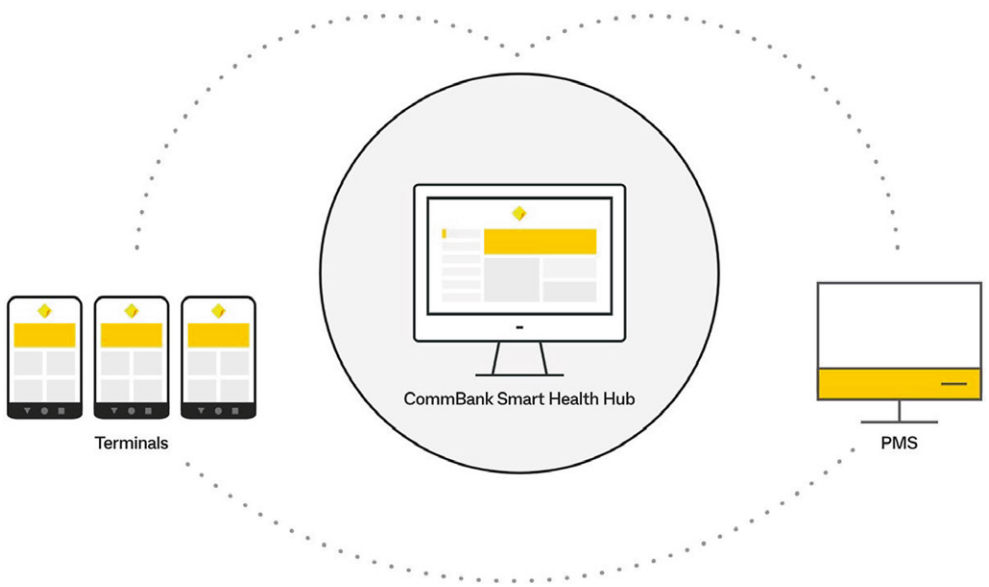
The CommBank Smart Health terminal is the physical device that processes health claims and payment transactions.

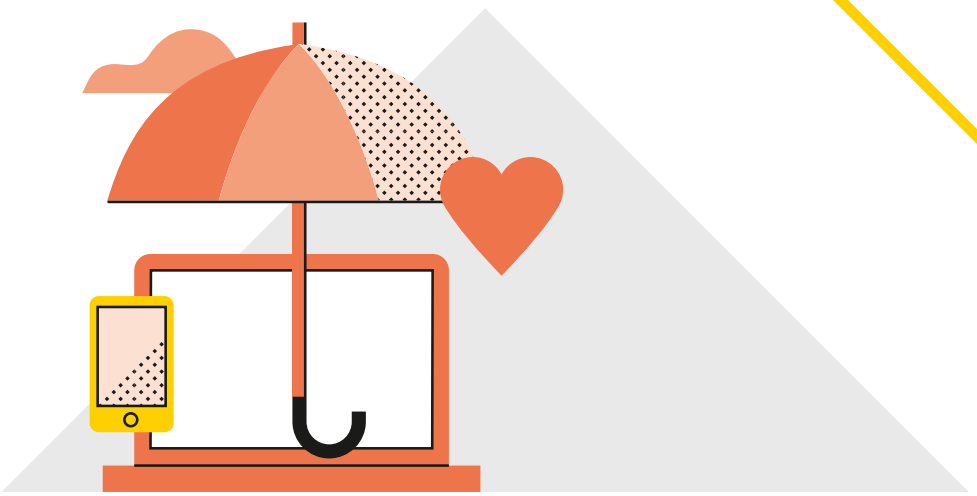
What is the Smart Health app?

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 Practice Management Software (PMS). The hub displays detailed transaction listings and digitally stored copies of your Private Health Insurance (PHI) declarations. You can use reports to assist with reconciling payments and claims.



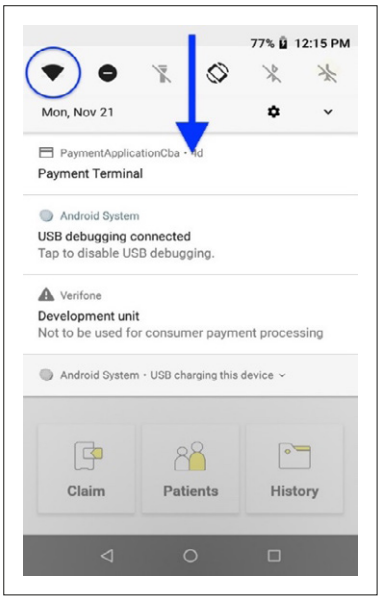


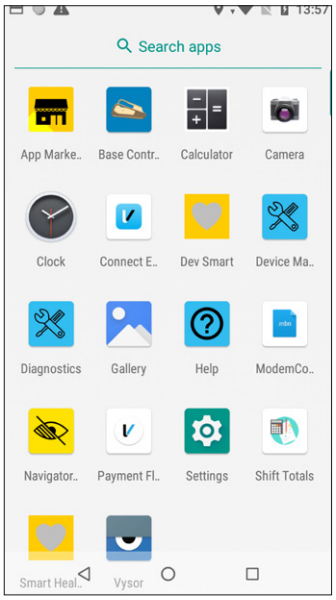
Support

Before you start

Please make sure that:

1. Your staff know that the terminal will be delivered, so that delivery occurs at the scheduled date and time
2. When the Smart Health terminal arrives:
   2.1. You will need to ensure that the terminal's Wi-Fi setting is enabled (see the image below to determine your terminal's Wi-Fi status)
   2.2. Find the Smart Health app by scrolling through the apps installed on your terminal.





3. You must complete the set-up instructions (including adding providers) by following the Smart Health Hub User Guide, available in 'Resources' section at CommBank Smart Health webpage at www.commbank.com.au/smarthealth or in '**Support and FAQs**' section in Smart Health Hub.

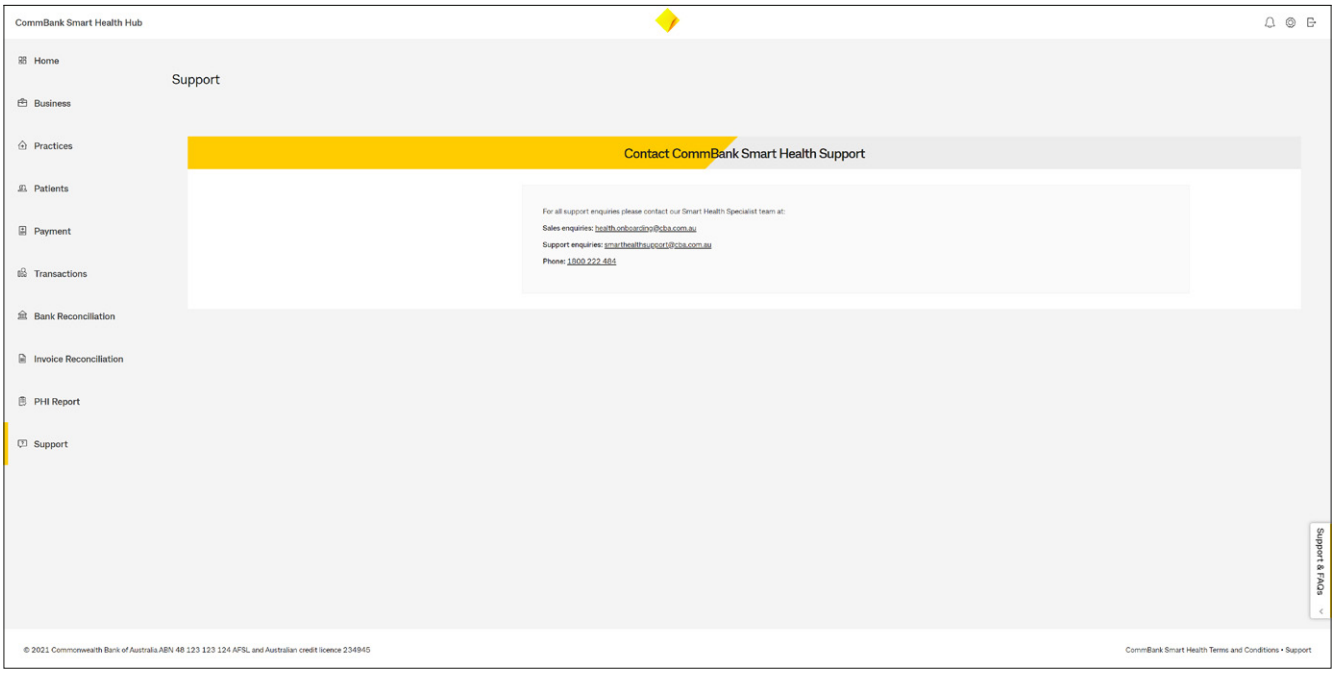
How to get help

For questions about the CommBank Smart Health hub or terminal

You can get help in three easy ways:

Support page

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



Support and FAQs tab

At the bottom right of every page in the hub, you will 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**.

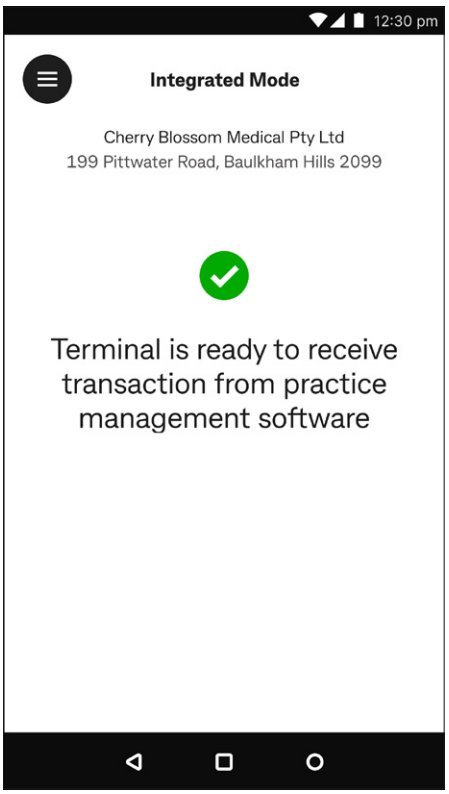


Processing payments and claims

Using Integrated mode

How do you initiate and process transactions in Integrated mode?

In Integrated mode, your Smart Health terminal is connected to your PMS and will start processing a claim as soon as your PMS sends the request. You start via the Smart Health app home screen, which looks like this:

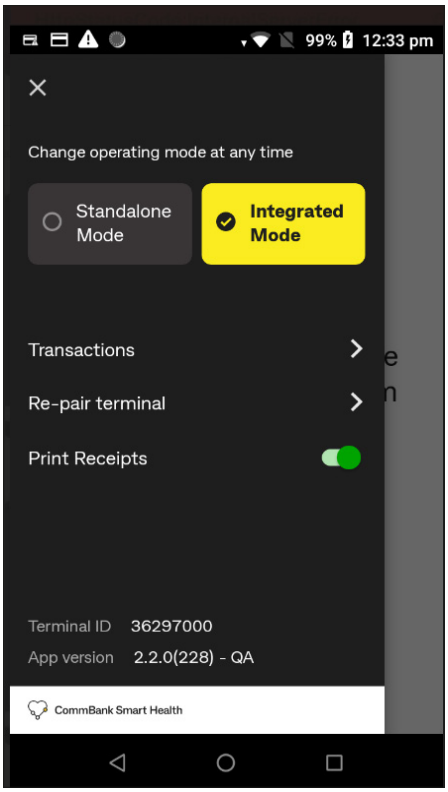


Smart Health terminal's homepage includes:

Mode: Integrated mode

Practice name: Cherry Blossom Medical Pty Ltd
Practice address: 199 Pittwater Road, Baulkham Hills 2099

A green tick and "Terminal is ready to receive transaction from practice management software": Shows that the Smart Health app is in "Integrated mode" and is awaiting a claim from your PMS.



Switching app mode

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

Change mode selection: Tap to switch between Standalone mode or Integrated mode. Once you are connected with a PMS, the default selection will be 'Integrated Mode'.

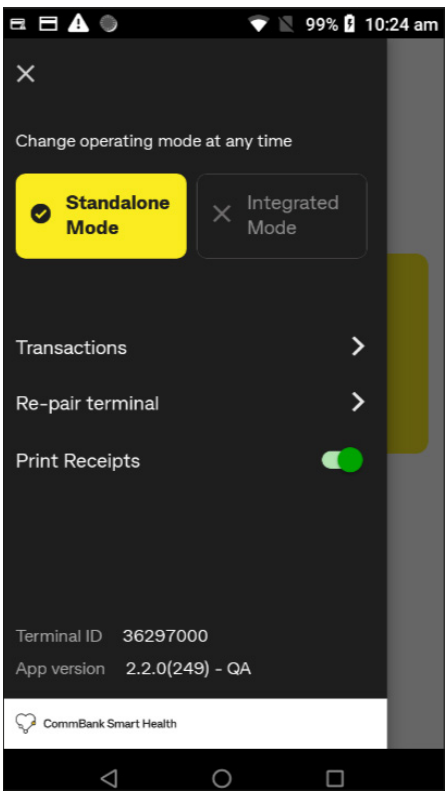
Transactions: Tap to view history of claims and payment transactions.

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 the Smart Health app.

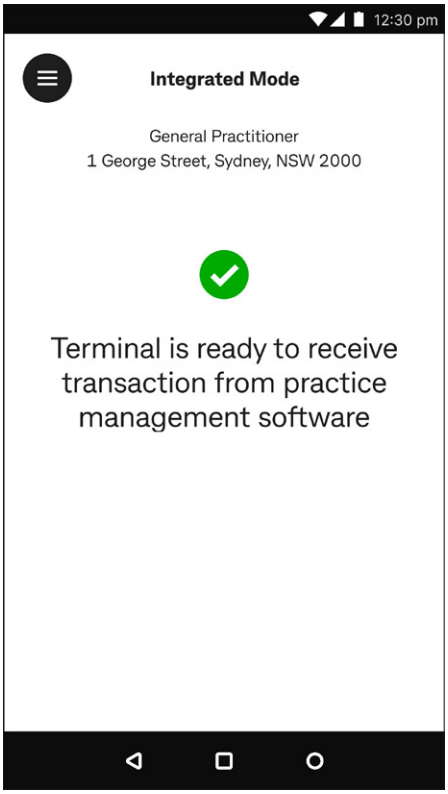


If your terminal is not connected to your PMS

In the top left menu ☰, your Smart Health app shows the two mode buttons. The **Integrated mode** button is selectable if you have connected your practice's PMS with the Smart Health app.

If you cannot select **Integrated mode**, (see image at left), then your practice's PMS is not yet configured for Smart Health integration. Please follow the integration guide for your PMS, which you will find in the Support and FAQs section of the Smart Health hub.

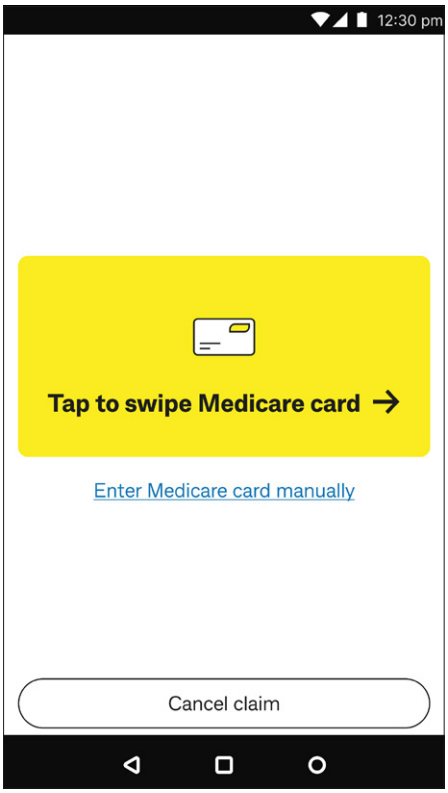
For further assistance, please call the CommBank Smart Health Help Desk on 1800 222 484, between 8am and 8pm Monday to Friday AEST or email smarthealthsupport@cba.com.au.



Processing a Medicare Bulk Billing Claim

Step 1: Check you are in Integrated mode.

See **Switching app mode** on page 8 to set the Smart Health app to Integrated mode.



Step 2: Continue the claim.

When a claim is created in your Practice Management Software (PMS), it is automatically sent to the Smart Health app.

If Medicare card details are available in the PMS, go to Step 7, otherwise; provide patient's Medicare card detail.

Tap either:

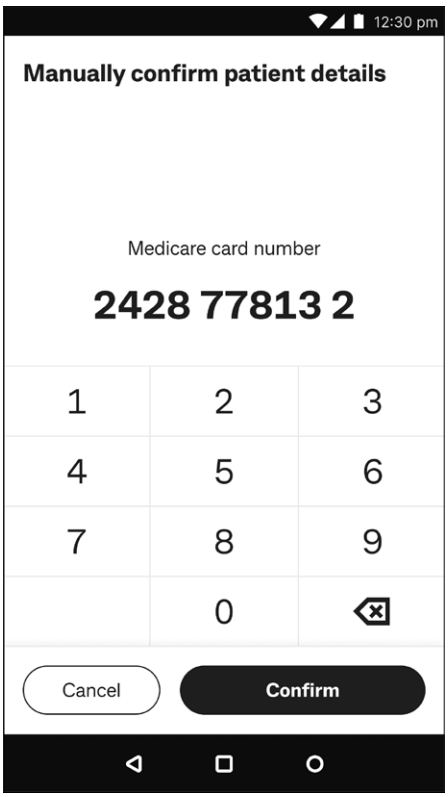
1. **Tap to swipe Medicare card**, then go to Step 3, or
2. **Enter Medicare card manually** to type it in, then go to Step 4, or
3. **Cancel claim**, to cancel the claim.



Step 3: Swipe the patient's Medicare card to start the transaction.

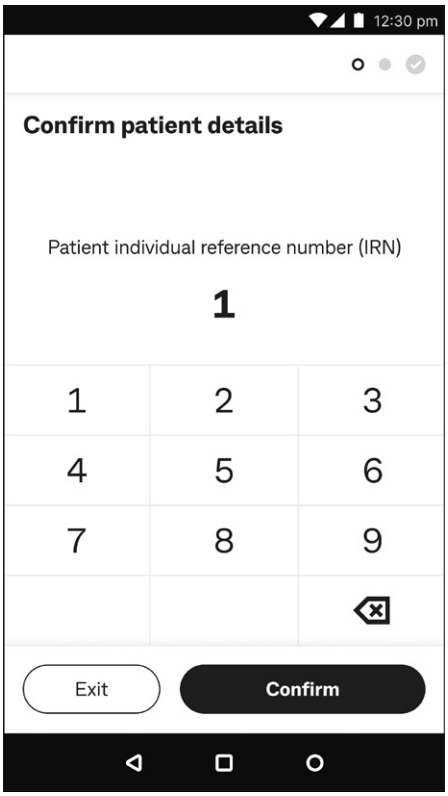
After swiping successfully, the screen automatically goes to Step 6 to confirm the IRN.

↳ **Tip:** Select the yellow accessibility icon to enable accessibility options if the customer has issue with navigating the touch screen to process a transaction. For further information, go to **www.commbank.com.au** and search for Accessibility.



Step 4: Manual card entry.

Type in the Medicare card number and tap **Confirm**.

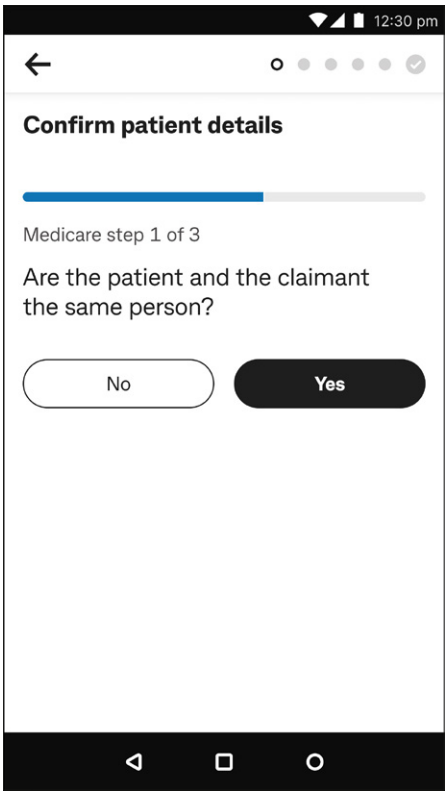


Step 5: Enter the IRN.

Type in the patient's IRN and tap **Confirm**.

↳ **Tip:** Default selection is always one.

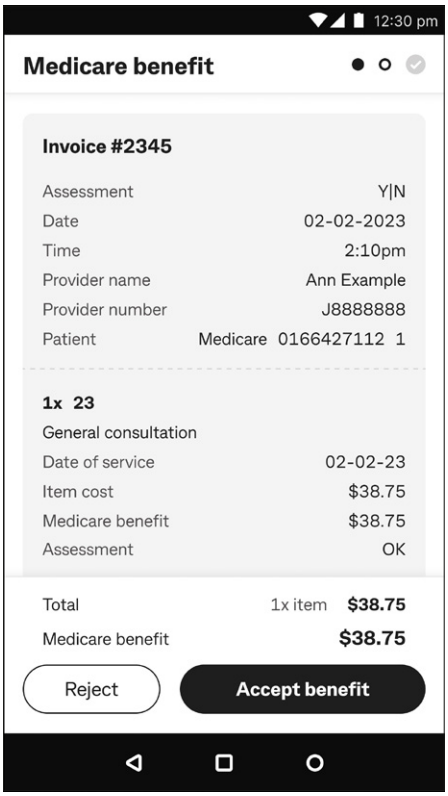
Note: If prompted to confirm patient and claimant are different, refer to section **Patient and claimant are different**.



Step 6: Confirm patient details.

On this screen, you must confirm whether the patient is the one claiming, so tap:

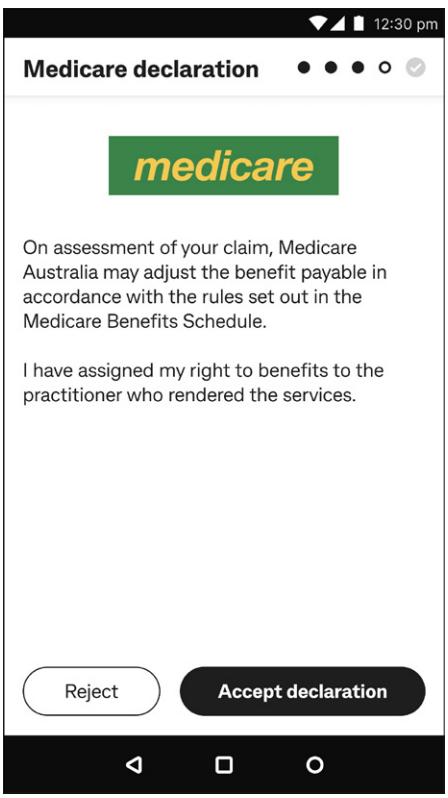
1. **Yes** if the patient is the claimant, then go to Step 7, or
2. **No** if the patient isn't the claimant (see page 36 **Patient and claimant are different**) then go to Step 7.



Step 7: Review the Medicare benefit.

The Smart Health app automatically checks the rebate with Medicare and provides an assessment summary. Review the benefit on the screen then tap:

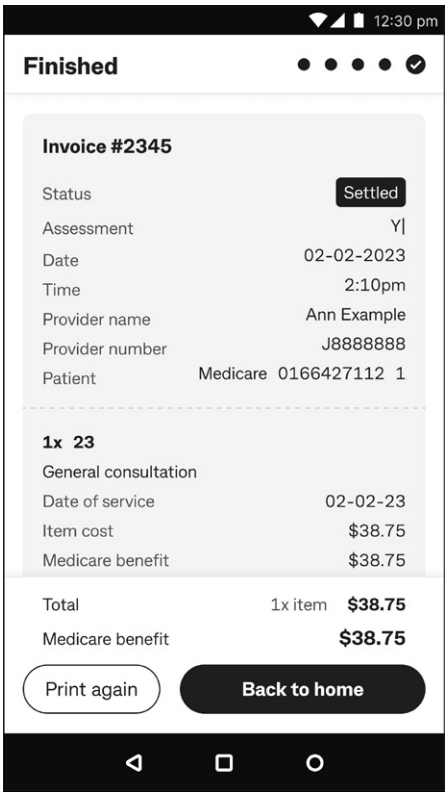
1. **Accept benefit**, or
2. **Reject** to cancel the claim.



Step 8: Medicare declaration.

Read the Medicare declaration, then tap:

1. **Accept declaration** to assign the benefit, or
2. **Reject** to cancel the claim.

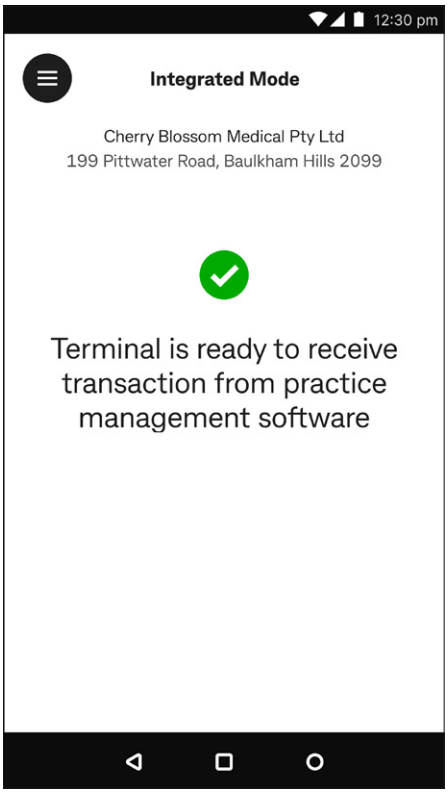


Step 9: Completed claim.

The claim is now completed, and a receipt will be printed automatically if the Print Receipts functionality is turned on. You can change this setting via the main menu on the home page. Then tap:

1. **Print again** if you'd like to print another receipt, or
2. **Back to home** to return to the home screen.

↳ **Tip:** You can print a receipt at any time from the **Transactions** menu in the Smart Health app (see page 42 **Viewing settled and incomplete transactions** for more detail).

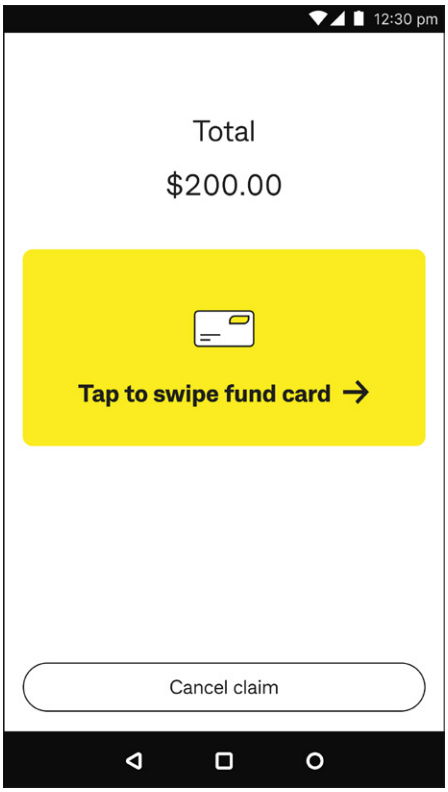


Processing a PHI fund claim

Step 1: Check you are in Integrated mode.

See **Switching app mode** on page 8, to set the Smart Health app to Integrated mode.

Once you are in Integrated mode, when you create a claim from your PMS it is automatically sent to the Smart Health app.



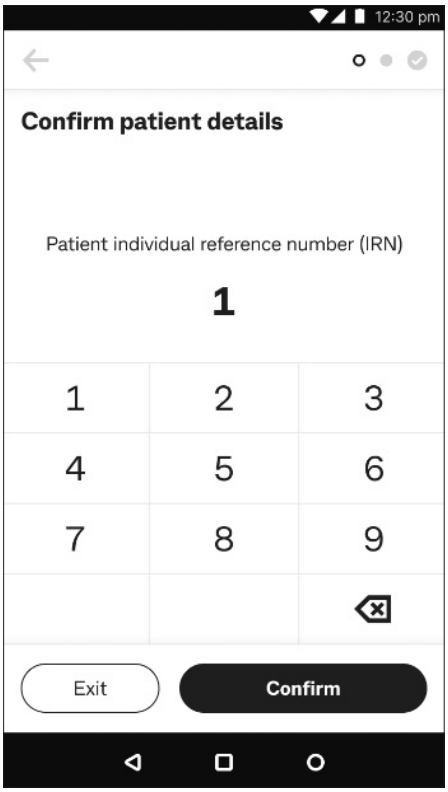
Step 2: Select **Tap to swipe fund card** or tap **Cancel claim** to cancel the claim.

Note: The screen will show the total amount. If this amount is incorrect, you can tap 'Cancel claim' to exit without processing.



Step 3: Swipe or tap the patient's PHI fund card to start the transaction.

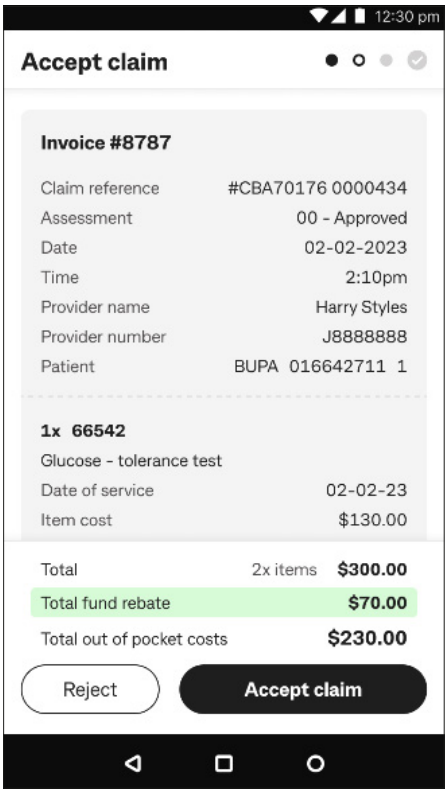
After successfully swiping or tapping, the terminal identifies the health fund, and the screen automatically moves to the next step.



Step 4: Confirm patient details.

Enter the patient's Individual Reference Number (IRN) and tap **Confirm**.

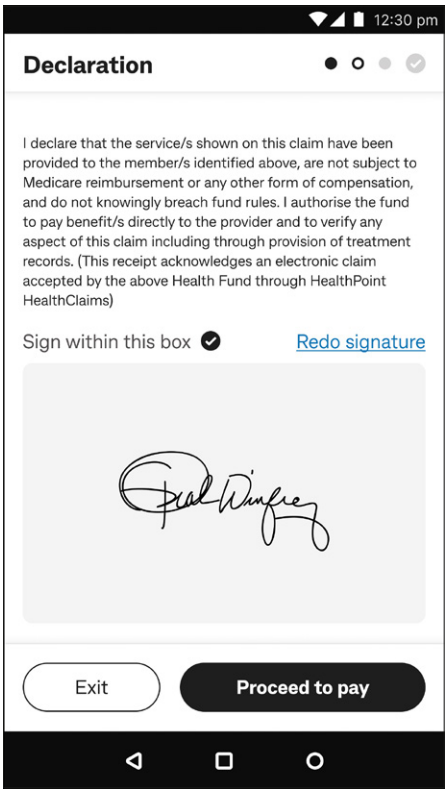
↳ **Tip:** Default selection is always 1.



Step 5: Accept claim.

The terminal connects to the PHI fund and provides a claim summary. Review the claim, then tap:

1. **Accept claim** to proceed, or
2. **Reject** to see more options including cancelling the claim and printing a rebate estimate. See **Rejecting a PHI fund rebate** on page 24 for more details.

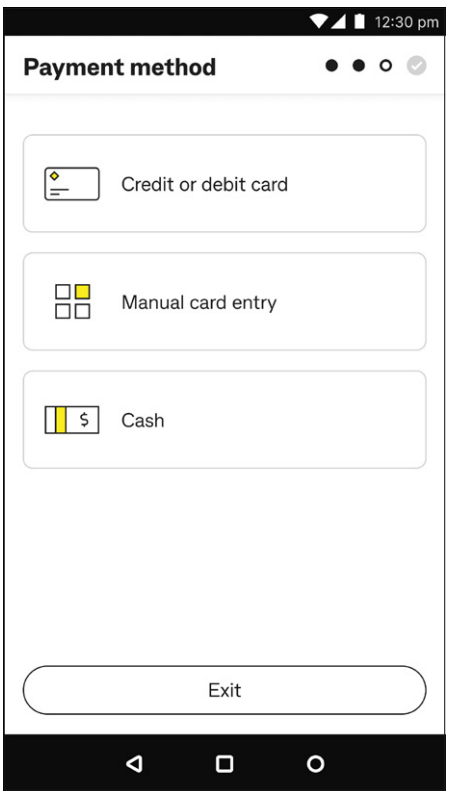


Step 6: Declaration.

Ask the patient to sign within the box on screen and tap **Proceed to pay**.

Or tap **Exit** to save the claim and resume it later from the **Transactions** menu on the home screen (accessed by tapping ☰).

↳ **Tip:** If a patient wants to re-do their signature, tap **Redo signature** at right above the signature box.

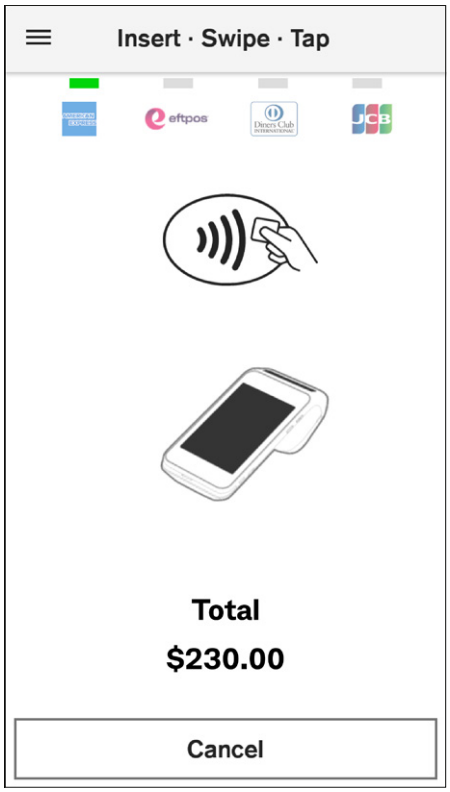


Step 7: Payment method.

Tap either:

1. **Credit or debit card**, then go to Step 7a
2. **Manual card entry**, then go to Step 7b, or
3. **Cash**, then go to Step 7c.

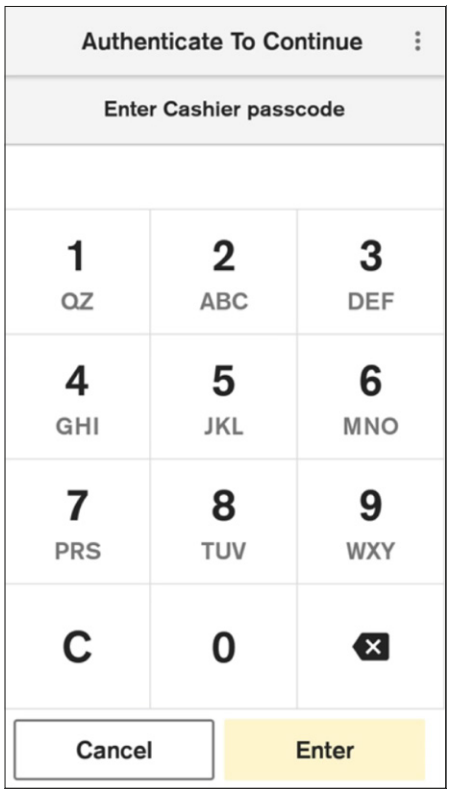
↳ **Tip:** If you tap **Exit** on an Integrated claim or invoice, it is cancelled. You can still view this claim in the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.



Step 7a: Credit or debit card.

Ask the patient to present their payment card to finalise the transaction and follow the prompts to process the payment. See **Processing a payment** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 7.



Step 7b: Manual card entry.

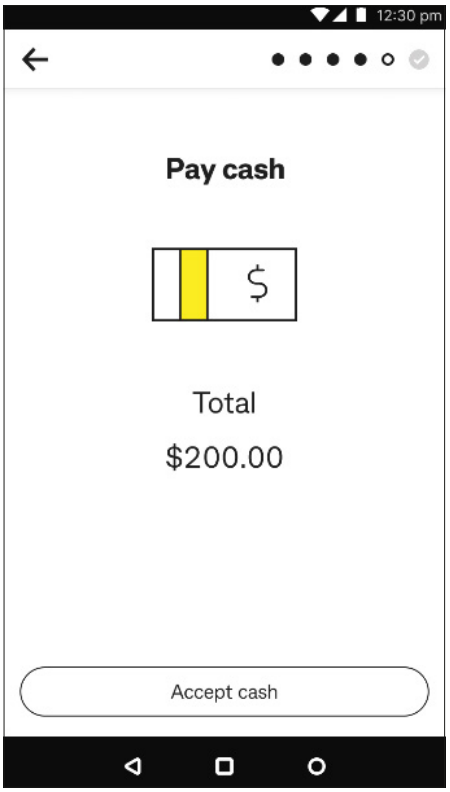
Enter the cashier or manager passcode to proceed with the transaction. See **Processing a payment** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 7.

↳ **Tip:** Depending on the payment amount, the screen on the left may say **Enter Manager passcode.** The current default settings for MOTO payments are:

- Cashier – $0.01 – $250
- Manager – above $250

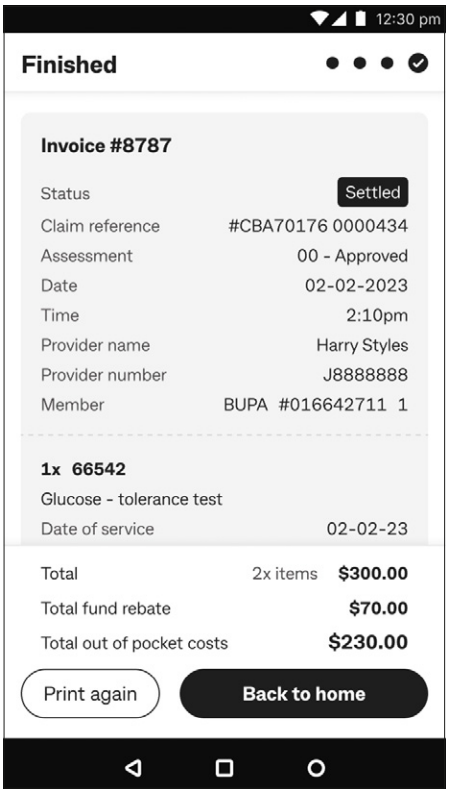
These limits are currently fixed. Contact Smart Health support team on 1800 222 484 for enquiries.



Step 7c: Cash.

Tap **Accept Cash** when you receive the cash payment.

↳ **Tip:** To select a different payment method, tap ← back arrow at top left and follow Step 7.

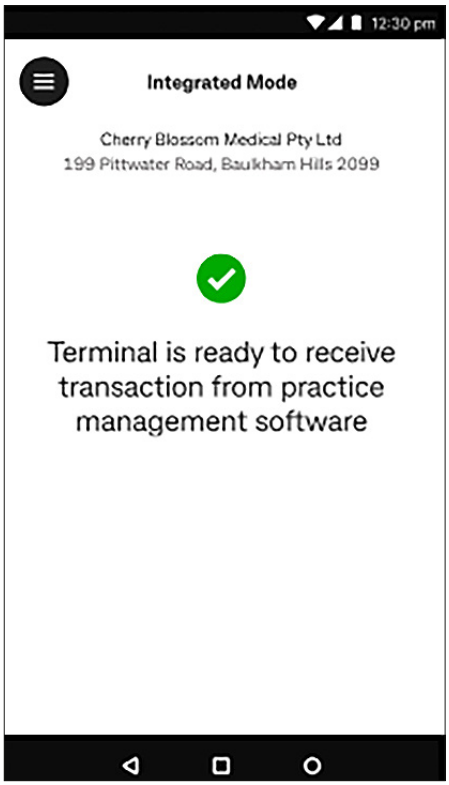


Step 8: Review and print receipt.

The claim is now complete, and a receipt will be printed automatically if the Print Receipts functionality is turned on. You can change this setting via the main menu on the home page. Now tap:

1. **Print again**, to print another receipt, or
2. **Back to home** to return to the home screen.

↳ **Tip:** You can also print the receipt from the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.



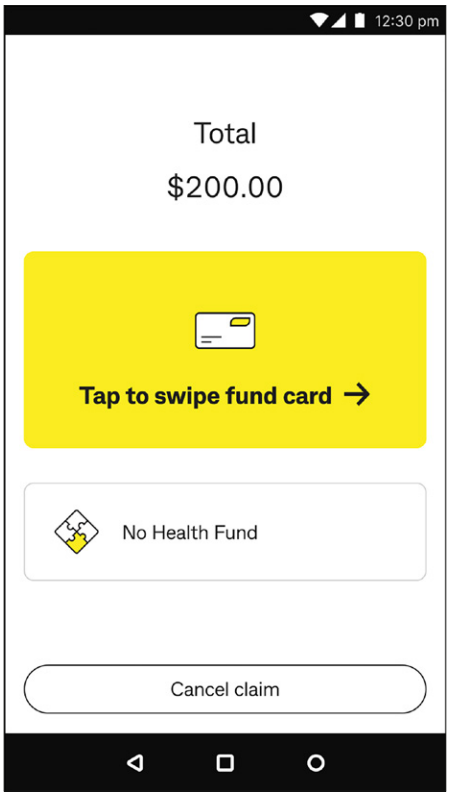
Processing a No Health fund invoice

With No Health fund option, you can process an invoice for payment of items without completing a private health fund claim.

Step 1: Check you are in Integrated mode.

See **Switching app mode** on page 8, to set the Smart Health app to Integrated mode.

Once you are in Integrated mode, when you create a claim from your PMS it is automatically sent to the Smart Health app.



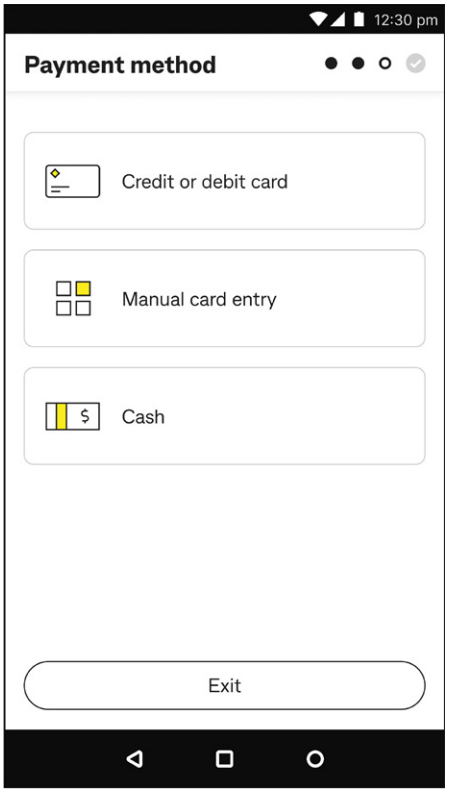
Step 2: Select **No Health Fund** or tap **Cancel claim** to cancel the claim.

Note: The screen will show the total amount. If this amount is incorrect, you can tap 'Cancel claim' to exit without processing.

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 the terminal in standalone mode to process a No Health Fund claim or check with your PMS.

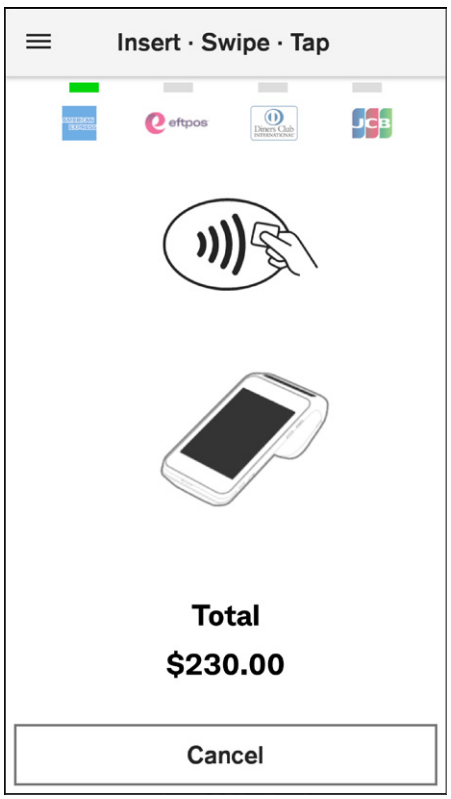
Refer to page 4555 to learn more about **Transaction mode**.



Step 3: Payment method Tap either:

1. **Credit** or **debit card**, then go to Step 3a
2. **Manual card entry**, then go to Step 3b, or
3. **Cash**, then go to Step 3c.

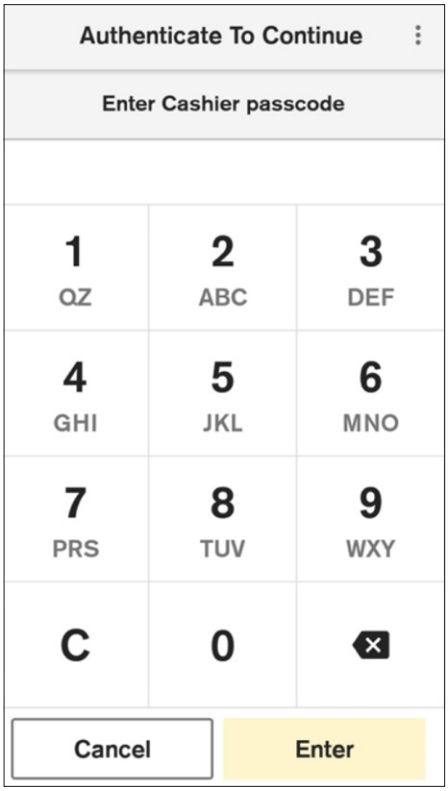
↳ **Tip:** If you tap **Exit** on an Integrated claim or invoice, it is cancelled. You can still view this claim in the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.



Step 3a: Credit or debit card.

Ask the patient to present their payment card to finalise the transaction and follow the prompts to process the payment. See **Processing a payment** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 3.



Step 3b: Manual card entry.

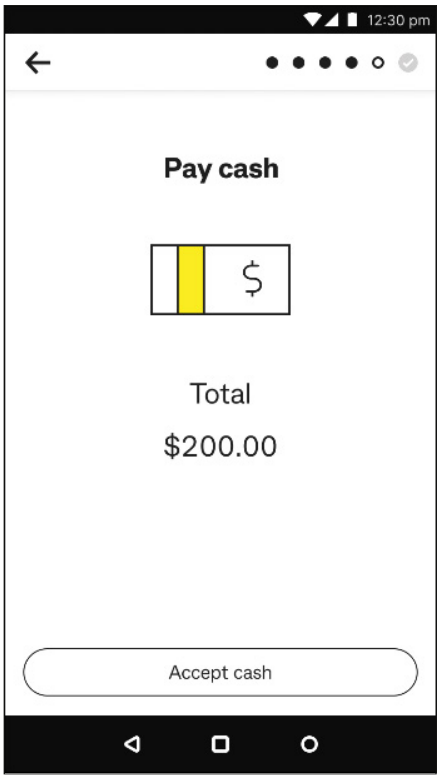
Enter the cashier or manager passcode to proceed with the transaction. See **Processing a payment/Manual card entry** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 3.

↳ **Tip:** Depending on the payment amount, the screen on the left may say **Enter Manager passcode**. The current default settings for MOTO payments are:

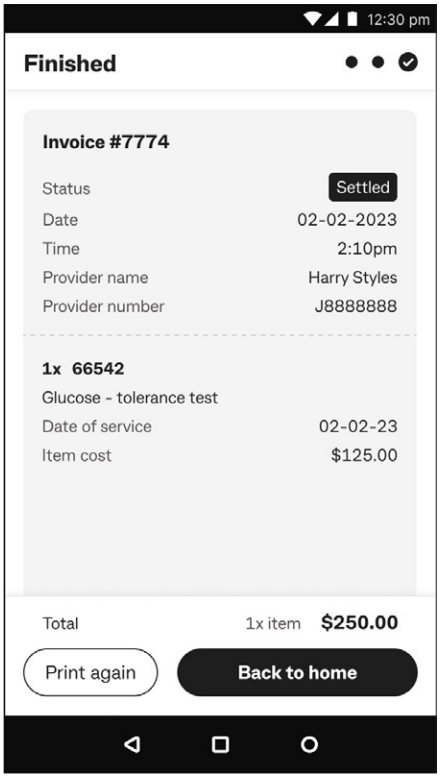
- Cashier – $0.01 – $250
- Manager – above $250

These limits are currently fixed. Contact Smart Health support team on 1800 222 484 for enquiries.



Step 3c: Tap **Accept Cash** when you receive the cash payment.

↳ **Tip:** To select a different payment method, tap ← back arrow at top left and follow Step 3.

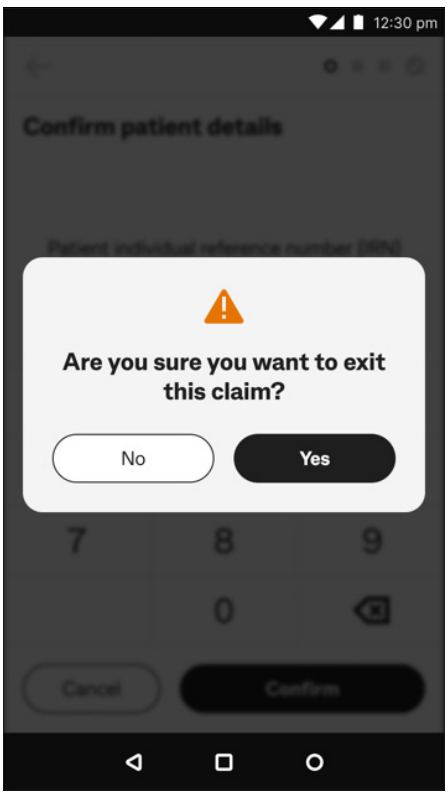


Step 4: Review and print receipt.

The claim is now complete, and a receipt will be printed automatically if the Print Receipts functionality is turned on. You can change this setting via the main menu on the home page. Now tap:

1. **Print again**, to print another receipt, or
2. **Back to home** to return to the home screen.

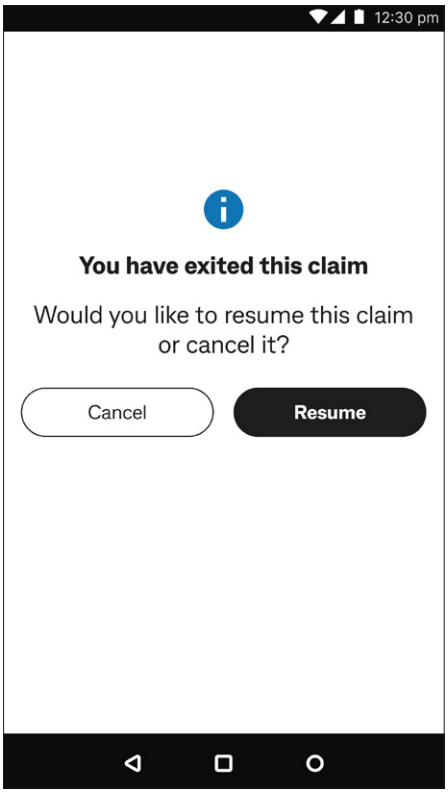
↳ **Tip:** You can still view this claim in the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.



Exiting a claim

Step 1: When you tap **Exit** during a claim, you will be asked to confirm that you want to exit the claim. So tap:

1. **Yes** to continue exiting the claim, or
2. **No** to return to the claim.

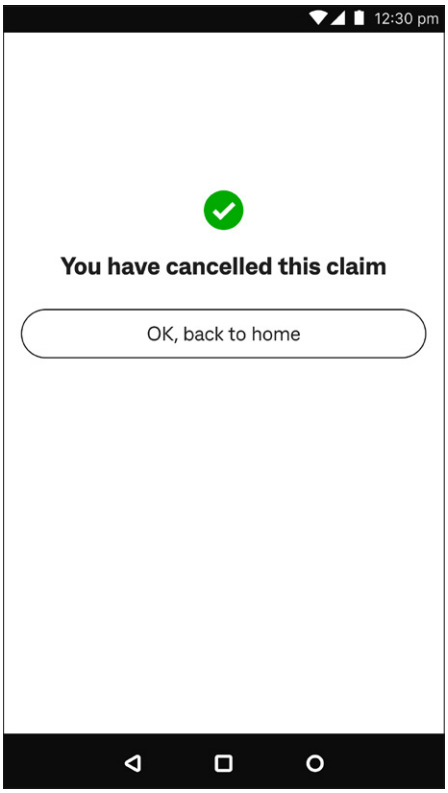


Step 2: Resume or cancel.

Exiting a claim while in Integrated mode (before you pay) will cause the claim to be cancelled. If you tap **Yes** in Step 1 above, you must confirm whether you would like to resume the claim or cancel it.

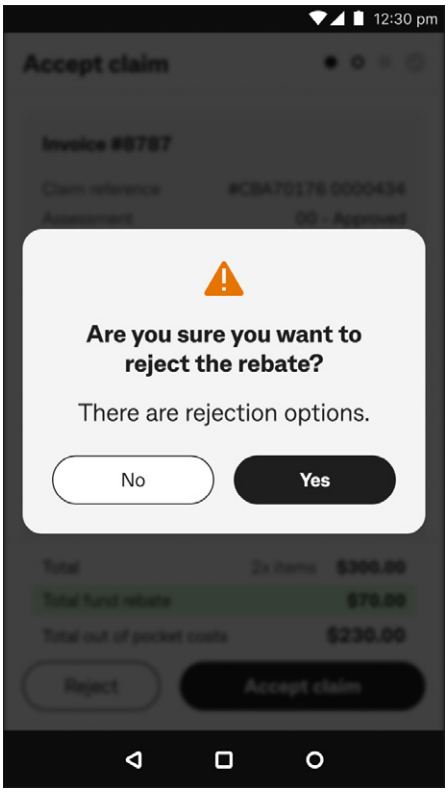
So tap either:

1. **Resume** to continue processing the claim, or
2. **Cancel** to confirm the cancellation.



Step 3: Cancellation confirmation.

After you tap **Cancel** (in Step 2 above), a green tick confirms the claim is cancelled. Tap **OK, back to home** to return to the home screen.



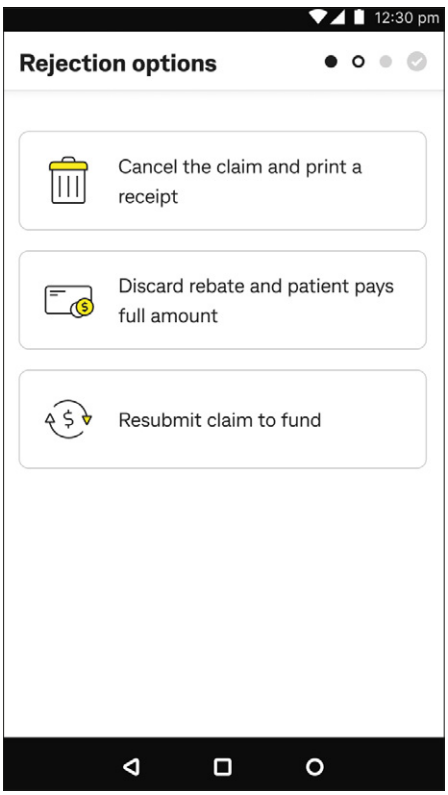
Rejecting a PHI fund rebate

If a patient chooses to reject a PHI fund's rebate assessment (rather than accept a claim at Step 5 on page 15) you are given a number of options:

1. Cancel the claim and print a receipt
2. Continue to pay for the invoice without any rebate from the PHI fund, or
3. Resubmit the claim to the PHI fund for re-assessment.

Step 1: When you tap on **Reject**, the question "Are you sure you want to reject the rebate?" appears. You can either tap:

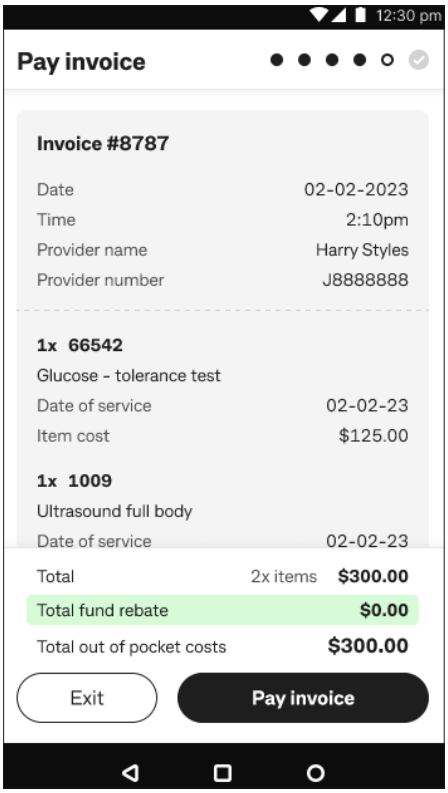
1. **Yes** to reject the claim, then go to Step 2, or
2. **No** if you want to accept the claim, which takes you back to the previous screen.



Step 2: Rejection options.

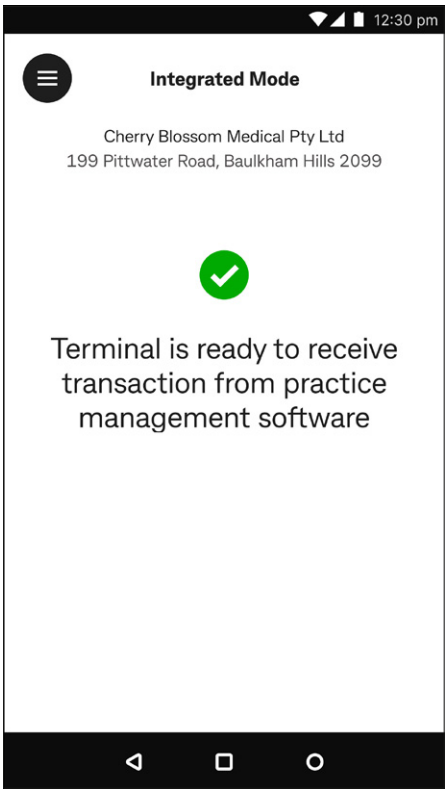
Ask the patient what they would like to do, then tap:

- **Cancel the claim and print a receipt** to get an estimate of PHI fund rebate.
- **Discard rebate and patient pays full amount** – the rebate isn't claimed, and the patient covers the total cost **Go to Step 3**, or
- **Resubmit claim to fund** so it can be re-assessed for fund benefits, and the patient can then review them and accept it.



Step 3: Pay invoice.

Tap **Pay invoice** if the user selects to pay the full amount and proceed to pay full amount.



Cancelling a PMS-generated claim or invoice

Claims originating from PMS can only be cancelled via PMS. Settled PHI fund claims can only be cancelled the day the service was provided, that is, the day of the original transaction. If patient would like a refund after day of claim, the provider must contact the patient's PHI fund.

When you initiate a cancellation via your PMS, the Smart Health terminal automatically starts the process.

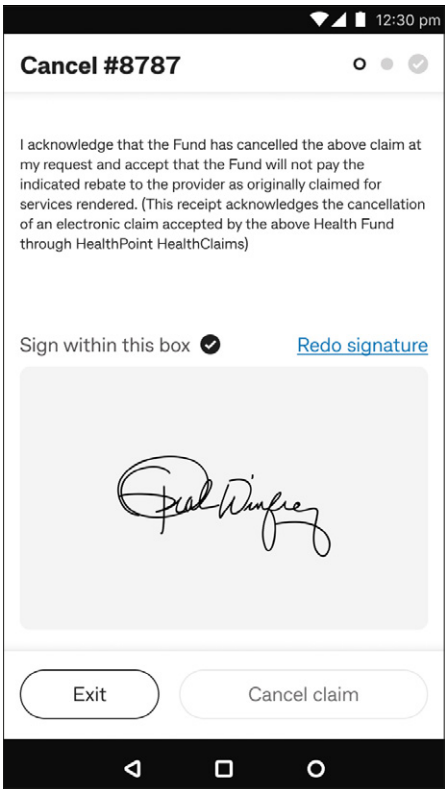
Step 1: Check your terminal is in Integrated mode before starting a cancellation from your PMS.

A green tick confirms you are in Integrated mode, as at left.

See **Switching app mode** on page 8 to change your terminal's mode.

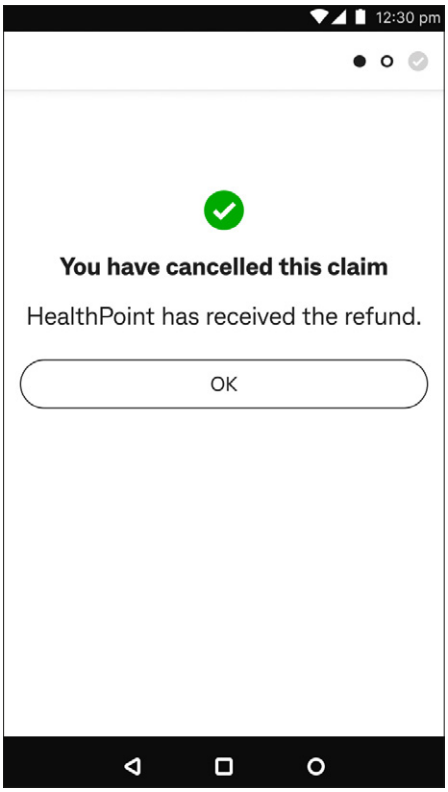


Step 2: The Smart Health app automatically prompts you to swipe or present the patient's member card once you've requested to cancel a claim via your PMS.



Step 3: Cancel the claim.

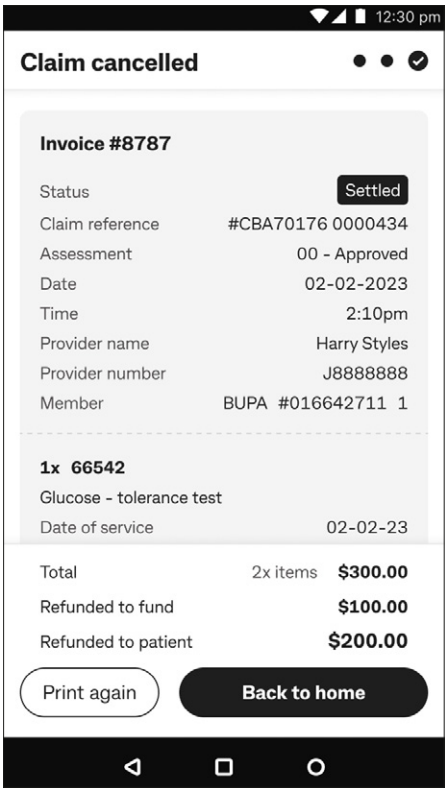
Ask the patient to sign-on screen, to acknowledge their agreement to cancel the claim, and tap **Cancel claim**.



Step 4: Confirming cancellation.

If there was no gap payment, the claim cancellation is complete, so tap **OK**. A claim summary is then automatically printed.

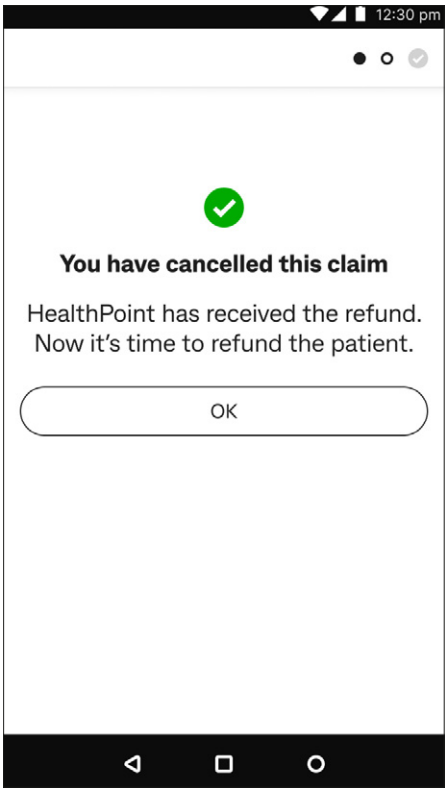
If there was a gap payment related to the cancelled claim go to Step 6.



Step 5: Viewing claim cancellation.

You can view the cancellation summary, then tap:

1. **Back to home**, to go back to the home screen, or
2. **Print again**, to print out another claim cancellation summary.



Step 6: Refunding the gap payment.

A green tick confirms the claim has been cancelled.
Tap **OK** to refund the gap payment.



Step 7: Cashier or Manager passcode.

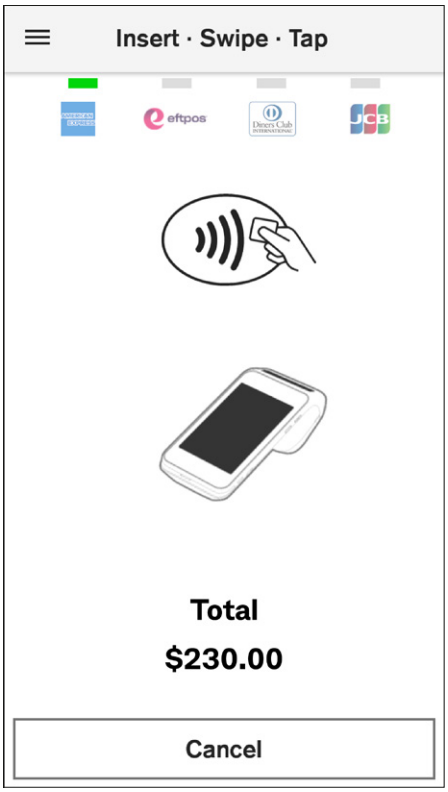
Type in the cashier or manager passcode on the keypad, then tap **Enter**.

↳ **Tip:** Depending on the refund amount, the screen on the left may say **Enter Cashier passcode**. The current default settings for refund limits are:

- Cashier – $500
- Manager – $1000

The Manager passcode will be prompted for all cash refunds.

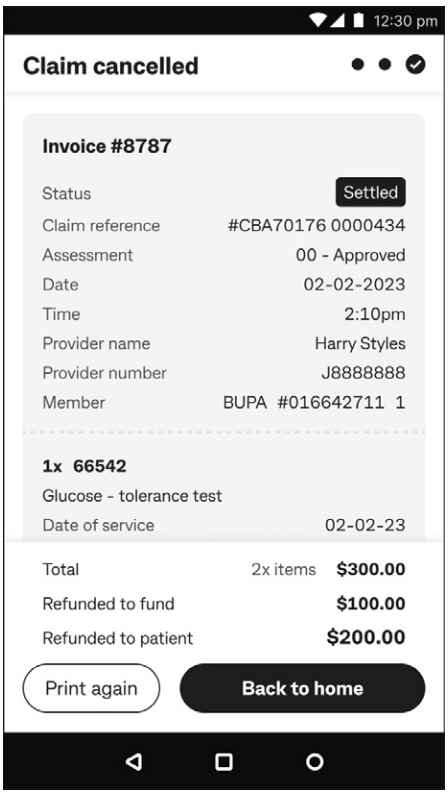
To change these limits, contact Smart Health support team on 1800 222 484.



Step 8: Processing refunds.

Refunds are processed using the original payment method, so tap, insert, or swipe the payment card used for the original transaction.

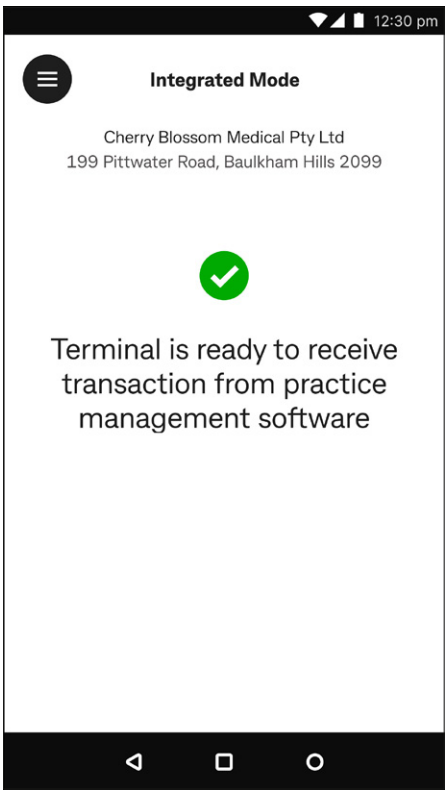
Follow the prompts through Terminal's card refund process steps. Consult the Smart Terminal user guide, available in Support section at **www.commbank.com.au/smart**, for further information.



Step 9: Claim cancellation and refund details.

The refund is now complete. The cancellation summary shows a breakdown of the refund, and a receipt will be printed automatically if the Print Receipts functionality is turned on. You can change this setting via the main menu on the home page. You can tap:

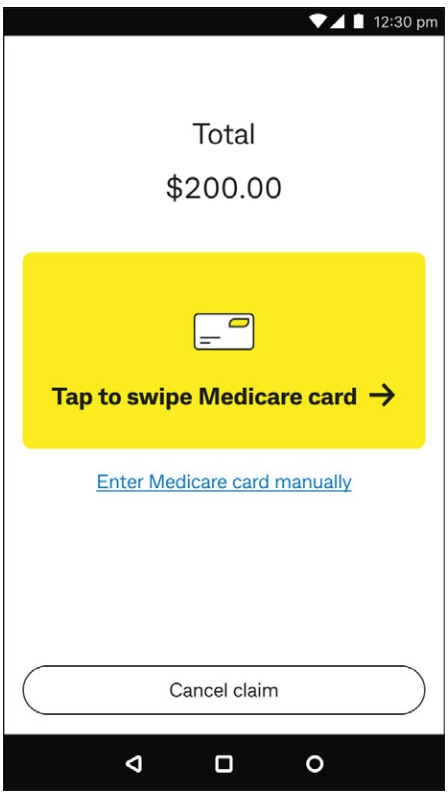
1. **Back to home** to return to the home screen, or
2. **Print again** to print another receipt.



Processing a Medicare paid-patient claim

Step 1: Check you are in integrated mode.

See **Switching app mode** on page 8, to set the Smart Health app to Integrated mode.



Step 2: Continue the claim.

When you create a claim from your PMS it is automatically sent to the Smart Health app.

Tap either:

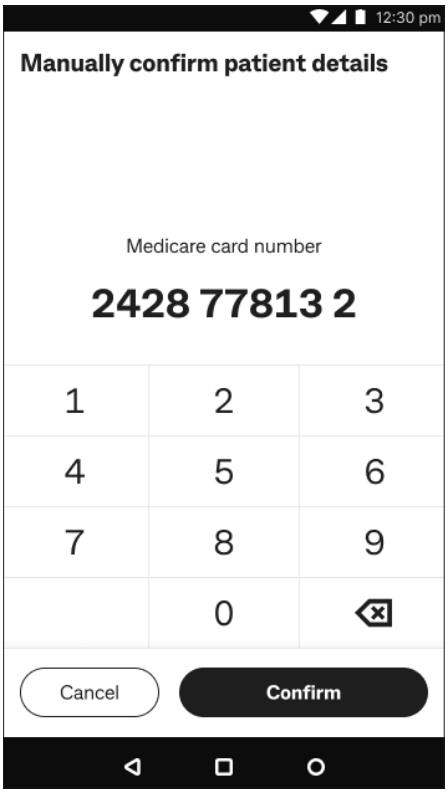
1. **Tap to swipe Medicare card**, then go to Step 3
2. **Enter Medicare card manually** to type it in, then go to Step 4, or
3. **Cancel claim**, to cancel the claim.



Step 3: Swipe the patient's Medicare card to start the transaction.

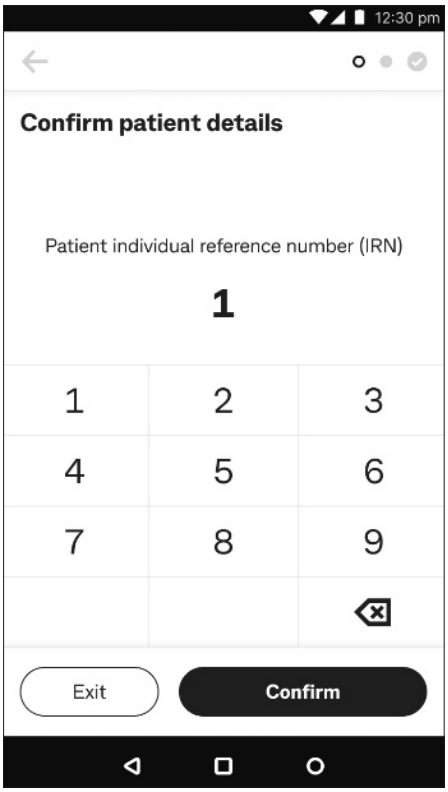
After swiping successfully, the screen automatically goes to the next step, either go to:

1. Step 4 and 5, if the card number and IRN are needed, or
2. Step 6 if the card number and IRN have been sent by your PMS.



Step 4: Manual card entry.

Type in the Medicare card number and tap **Confirm**.

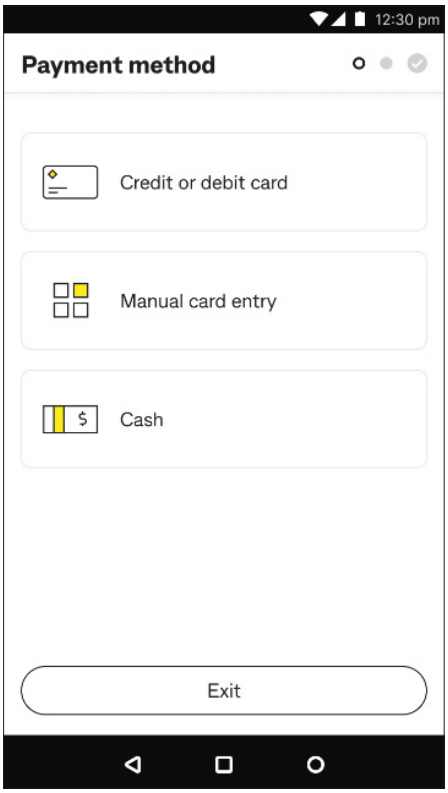


Step 5: Enter the IRN.

Type in the patient's IRN and tap **Confirm**.

↳ **Tip:** Default selection is always one.

Note: If prompted to confirm patient and claimant are different, refer to section **Patient and claimant are different**.

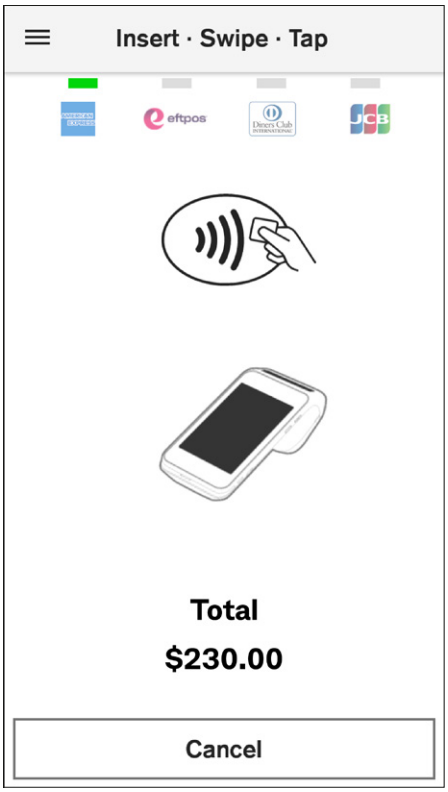


Step 6: Select payment method.

Either tap:

1. **Credit or debit card**, then go to Step 7a
2. **Manual card entry**, then go to Step 7b, or
3. **Cash**, then go to Step 7c.

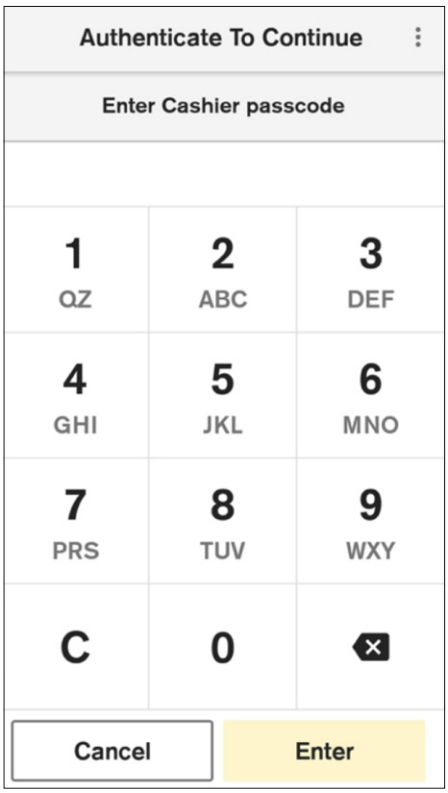
↳ **Tip:** If you tap **Exit** on an Integrated claim or invoice, it is cancelled. You can still view this claim in the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.



Step 7a: Credit or debit card.

Tap, insert, or swipe your payment card and complete payment as directed on screen. See **Processing a payment** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 6.



Step 7b: Manual card entry.

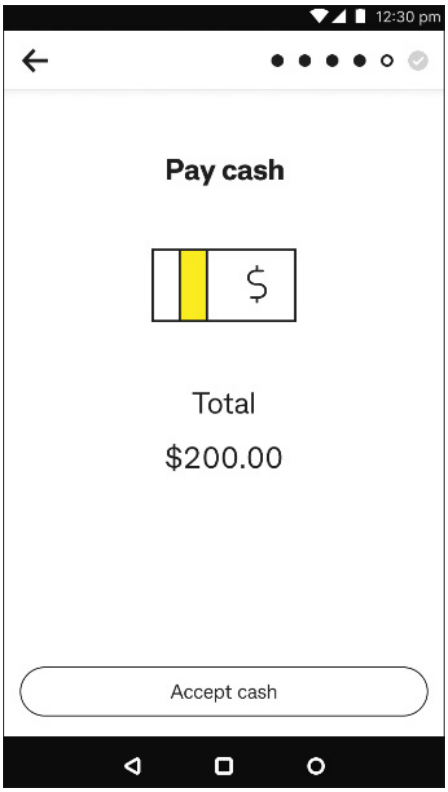
Enter the cashier or manager passcode to proceed with the transaction. See **Processing a payment** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 6.

↳ **Tip:** Depending on the payment amount, the screen on the left may say **Enter Manager passcode**. The current default settings for MOTO payments are:

- Cashier – $0.01 – $250
- Manager – above $250

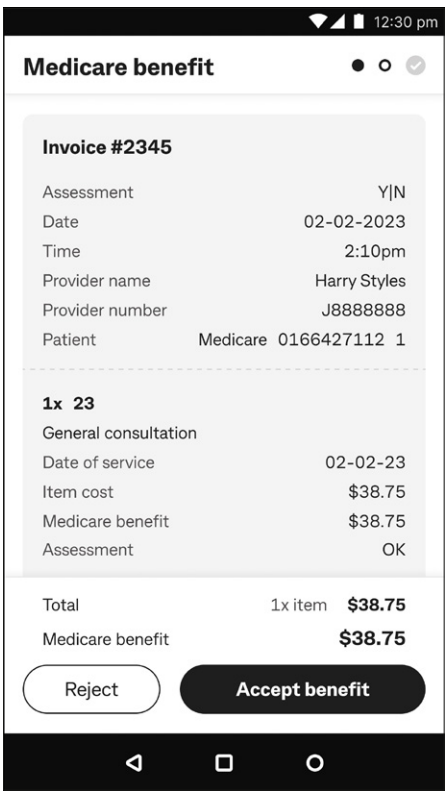
These limits are currently fixed. Contact Smart Health support team on 1800 222 484 for enquiries.



Step 7c: Cash.

Tap **Accept cash** once you have received a cash payment.

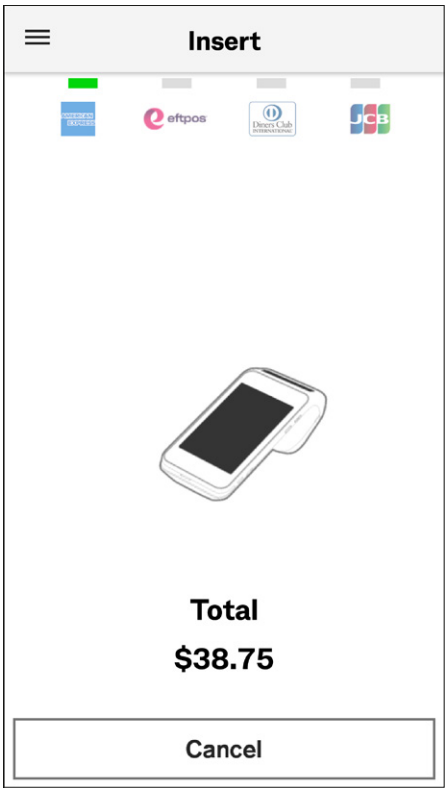
↳ **Tip:** To select a different payment method, tap ← back arrow at top left and follow Step 6.



Step 8: Review the Medicare benefit.

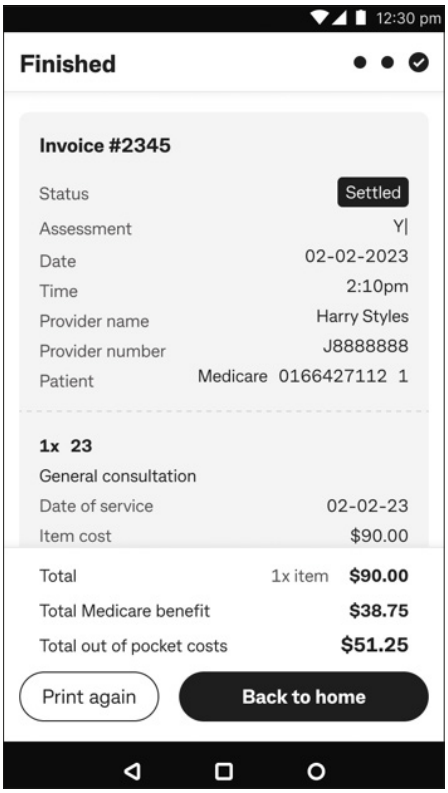
The Smart Health app automatically checks the rebate with Medicare and provides an assessment summary. Review the benefit on screen then tap:

1. **Accept benefit** to receive rebate, then go to Step 9, or
2. **Reject** if the patient does not want to receive the rebate through the Smart Health app. Go to Step 10.



Step 9: Receiving the rebate.

Medicare rebates are only paid to patients using an eftpos card. Ask the patient to tap or insert their eftpos card.

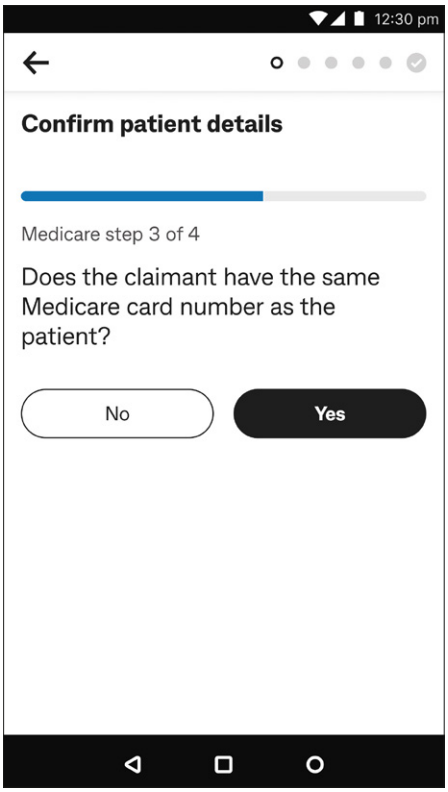


Step 10: Finished.

The claim is complete, and a receipt will be printed automatically if the Print Receipts functionality is turned on. You can change this setting via the main menu on the home page. Then tap:

1. **Back to Home** to return to home screen, or
2. **Print again** to print another receipt.

↳ **Tip:** You can re-print the receipt at any time from the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.

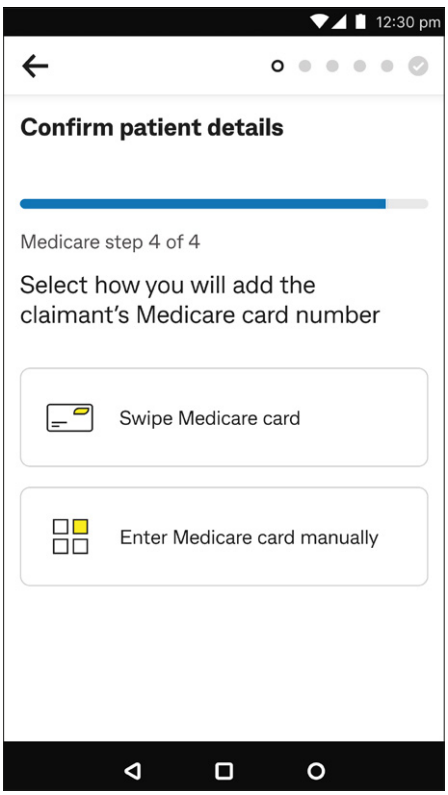


Patient and claimant are different

Step 1: Confirm patient details.

Either tap:

1. **Yes** if the patient is on the same Medicare card, then go to Step 5, or
2. **No** if the patient is on a ***different*** Medicare card, then go to Step 2.



Step 2: Adding the claimant's Medicare card number.

You can add the Medicare card number by tapping:

1. **Swipe Medicare card** if the claimant has their Medicare card with them, then go to Step 3, or
2. **Enter Medicare card manually** if they do not have the card with them or you cannot swipe it, then go to Step 4.



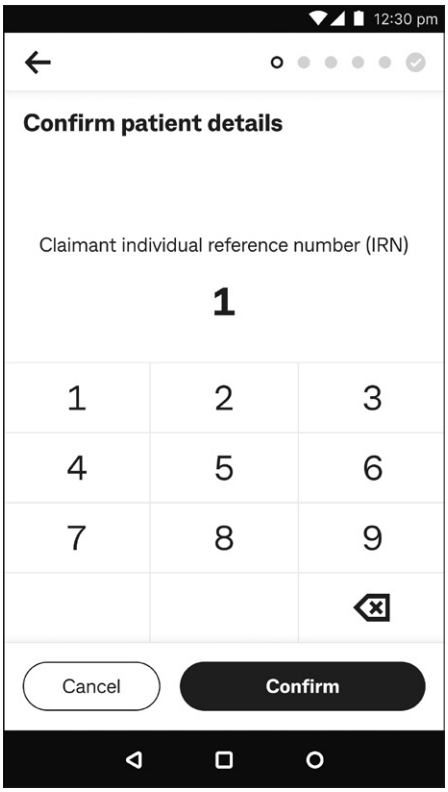
Step 3: Swipe the claimant's Medicare card, then go to Step 5.



Step 4: Manually add a new Medicare card number.

Enter the claimant's Medicare card number on screen and tap **Confirm**.

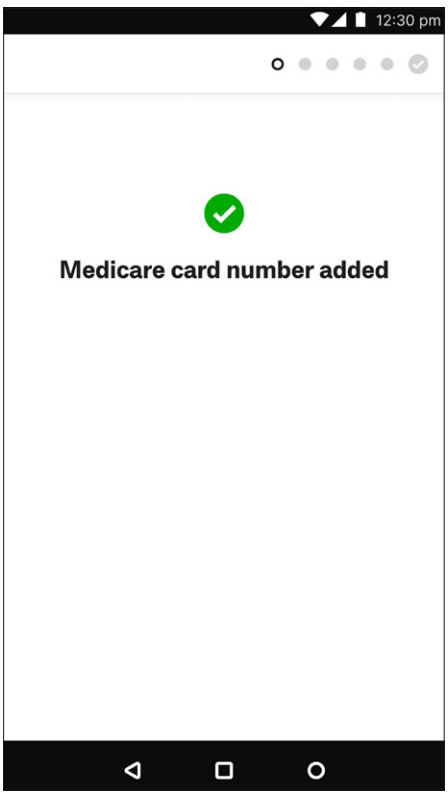
Tap **Cancel** if you wish to cancel manual entry. You will be taken back to the Smart Health Home screen.



Step 5: Confirm patient details.

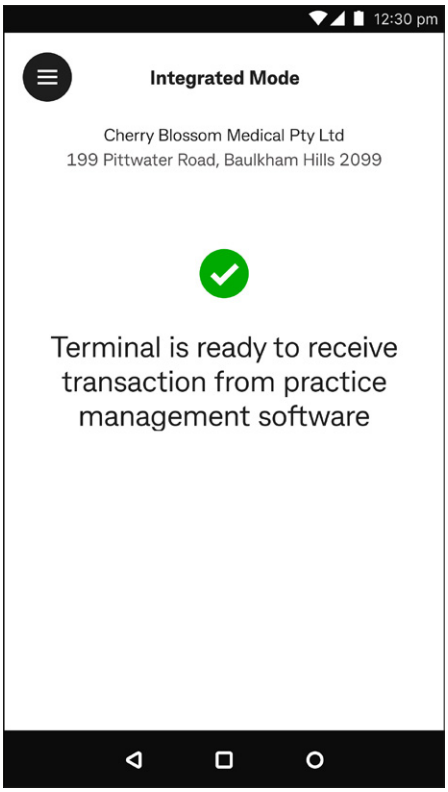
Enter the claimant's IRN and tap **Confirm** to resume the claim.

Tap **Cancel** if you do not want to continue this step. You will be taken back to the Smart Heath Home screen.



Step 6: Medicare card number added.

A green tick appears on screen confirming that the claimant's Medicare details are successfully added. The screen automatically goes to the next step of the claim.

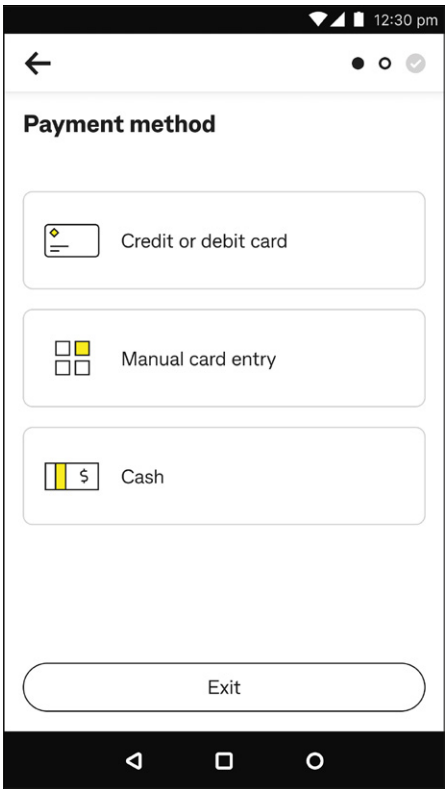


Processing a purchase

Use the following steps to process sale payments for non-claim items.

Step 1: Check you are in integrated mode and start a purchase (stock sale) transaction in your PMS.

If the screen does not look like it does at left, see **Switching app mode** on page 8, to set the Smart Health app to Integrated mode.

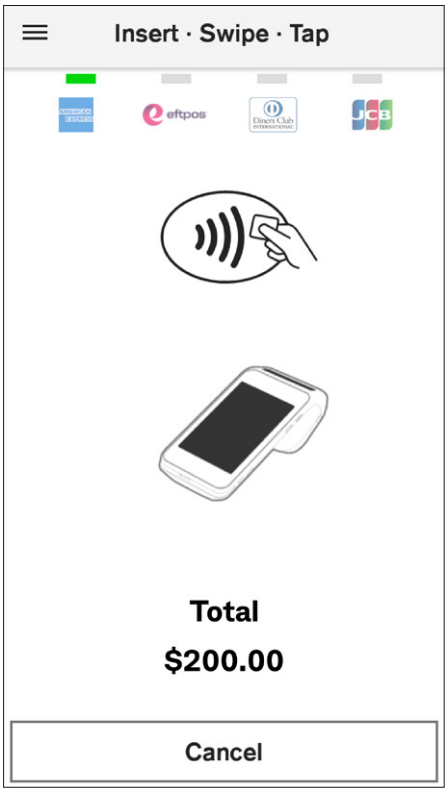


Step 2: Select payment method.

You can either tap:

1. **Credit or debit card**, then go to Step 3a
2. **Manual card entry**, then go to Step 3b, or
3. **Cash**, then go to Step 3c.

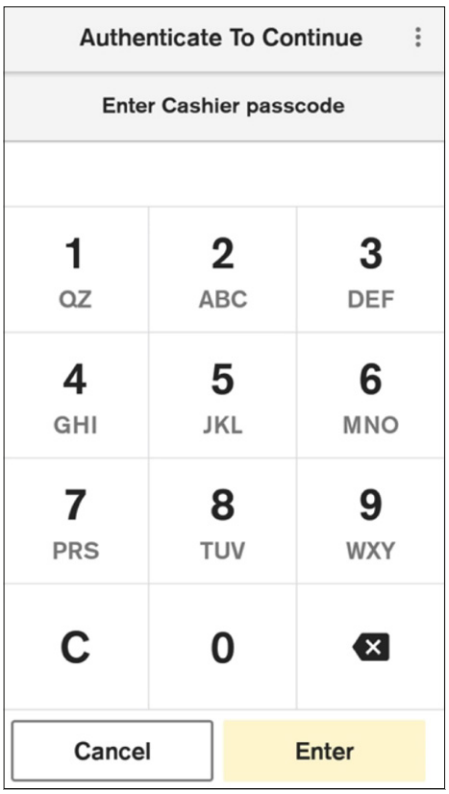
↳ **Tip:** If you tap Exit on an Integrated claim or invoice, it is cancelled. You can view this claim in the **Transactions** menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42224 for details.



Step 3a: Credit or debit card.

Ask the patient to present their payment card to finalise the transaction. See **Processing a payment** on page 46 for detailed steps, then go to Step 6.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 2.



Step 3b: Manual card entry.

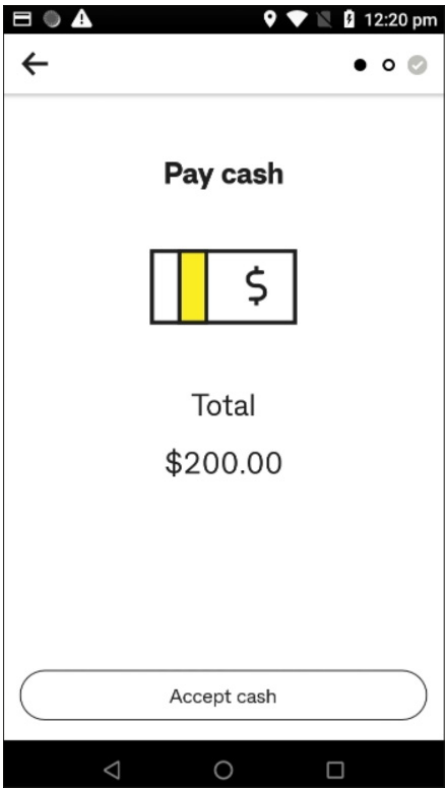
Enter the cashier or manager passcode to proceed with the transaction. See **Processing a payment** on page 46 for detailed steps.

↳ **Tip:** To select a different payment method, tap **Cancel** and follow Step 2.

↳ **Tip:** Depending on the payment amount, the screen on the left may say **Enter Manager passcode**. The current default settings for MOTO payments are:

- Cashier – $0.01 – $250
- Manager – above $250

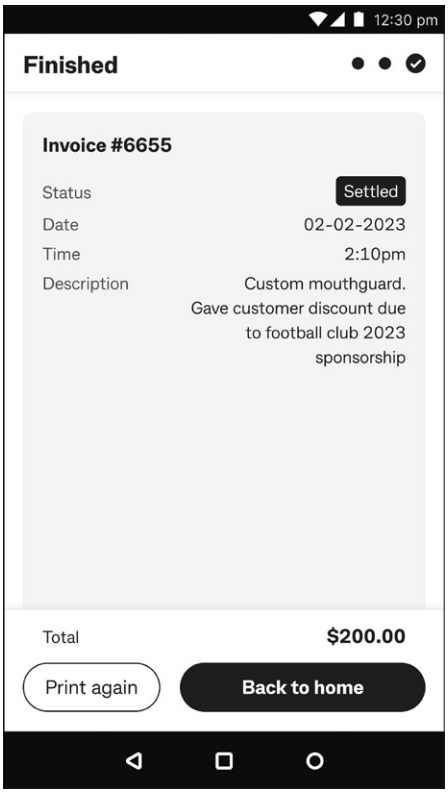
These limits are currently fixed. Contact Smart Health support team on 1800 222 484 for enquiries.



Step 3c: Cash.

Tap **Accept cash** once you have received the cash payment.

↳ **Tip:** To select a different payment method, tap ← back arrow at top left and follow Step 2.

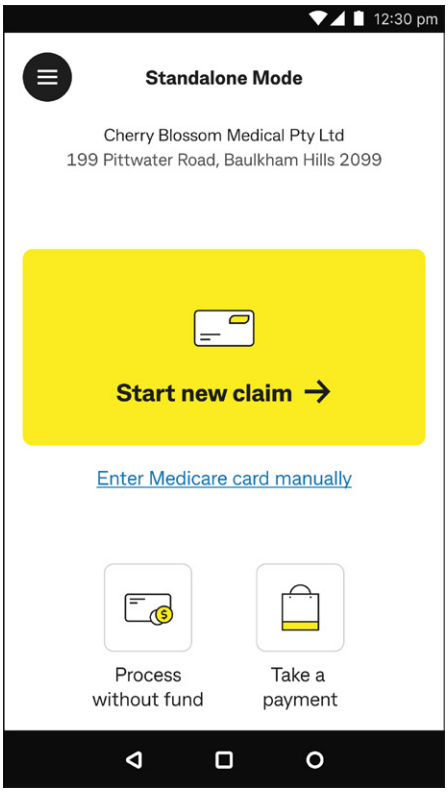


Step 4: Finished.

The transaction is complete, and a receipt will be printed automatically if the Print Receipts functionality is turned on. You can change this setting via the main menu on the home page. Then tap:

1. **Back to home** to return to home screen, or
2. **Print again** to print another receipt.

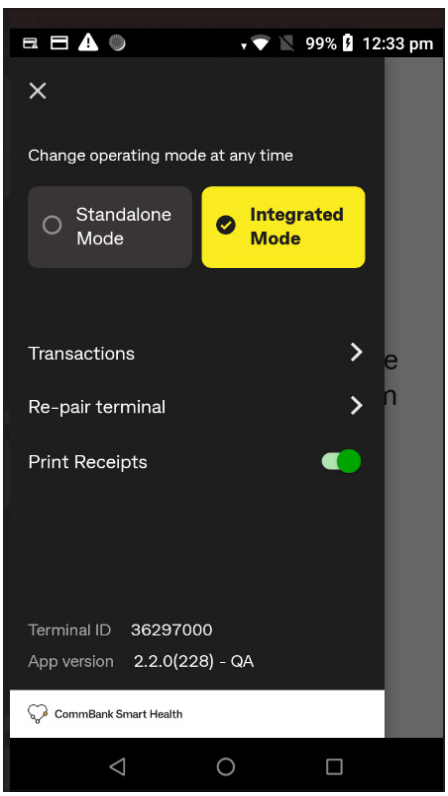
You can view this purchase in the Transactions menu in the Smart Health app. See **Viewing settled and incomplete transactions** on page 42 for details.



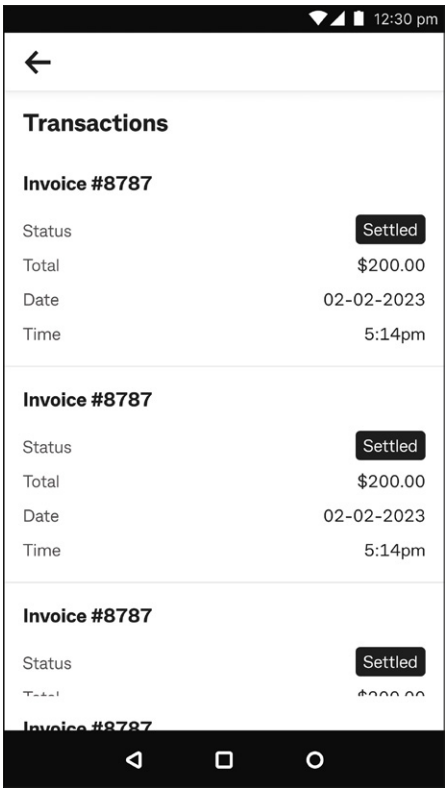
Viewing settled and incomplete transactions

Step 1: Navigate to the transactions screen.

From the Home screen, tap the menu at top left.



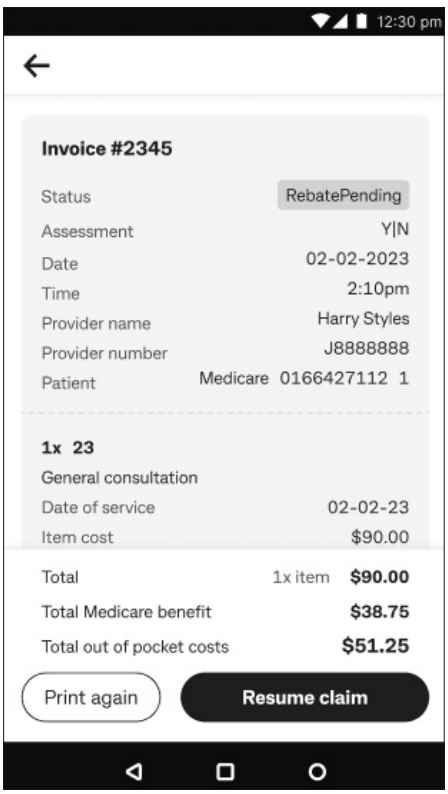
Step 2: Tap **Transactions.**



Step 3: Viewing transactions.

Scroll through the list of transactions to view by invoice number and tap on the one you are looking for.

↳ **Tip:** The Smart Health app only lists the last few days of transactions. The Smart Health hub lists all transactions.



Step 4: Viewing an invoice.

View the invoice details on screen. From here you can tap:

1. **Resume claim** if the claim has not been accepted (that is, not finished, so it is pending), or
2. **Print again** if you want to print another receipt at any time.

Processing a PHI fund claim refund

When you generate claims via your PMS, you must start the cancellation from your PMS, then Smart Health will help you complete any refunds. See **Cancelling a PMS-generated claim or invoice** on page 25557 for details.

Voiding transactions

Many practices raise invoices to use as rebate estimates, to let patients know, for example, how much private health services will cost and what their gap payment will be. Once raised, the invoice can then be cancelled.

When you cancel a claim or when the patient rejects it (voids the claim), the PHI fund sends a response, which is displayed on the receipt that is automatically printed by the terminal (see **Rejecting a PHI fund rebate** on page 24445 for more details).

Once the claim is rejected by the user, the claim status is updated as **Cancelled** in the Smart Health hub PHI Declaration Report page.

Auto-voiding transactions

Auto-voiding (cancelling) transactions occurs when a payment is expected on the Smart Health terminal, but nothing happens. So, the system auto-voids the claim (just like a system time out). This varies by claim type as follows:

- PHI fund claim in about 10 mins
- Medicare claim in about 30 mins.

Transaction mode

Transaction mode is for Integrated Smart Health customers and is only applicable if it is also supported by your PMS. Check with your PMS service provider to confirm it is available. Transaction mode provides key operations that are decoupled from the regular Integrated "claim and payment" process. It provides the PMS vendor, and subsequently customers, with more control and flexibility in their PMS solution. The key operations are:

1. Claiming only
2. Cancel a claim
3. Request a payment, and
4. Refund an amount.

Claiming only

This transaction mode follows Steps 1-6 of **Processing a PHI fund claim** on page 13. The Smart Health terminal returns control to your PMS for additional operations.

Cancel a claim

This transaction mode follows Steps 1-5 of **Cancelling a PMS-generated claim or invoice** on page 25. The Smart Health terminal returns control to your PMS for additional operations.

Request a payment

This transaction mode prompts for payment via Verifone's payment system. The Smart Health terminal returns control to your PMS for additional operations.

Refund an amount

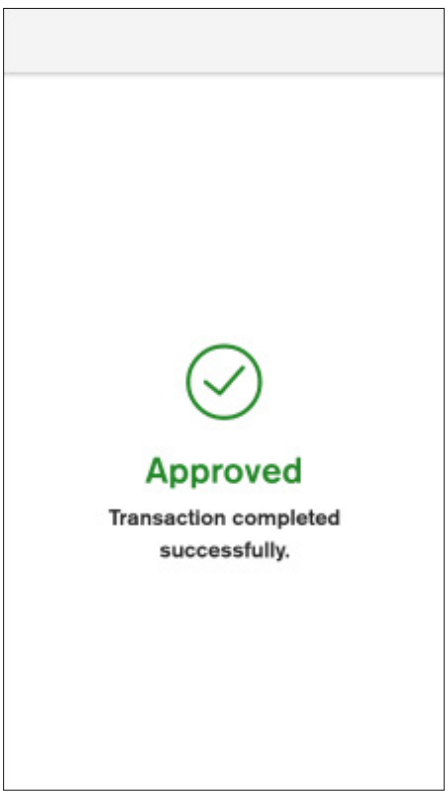
This transaction mode prompts for a refund with a cashier or manager passcode via Verifone's payment system. The Smart Health terminal returns control to your PMS for additional operations.



Processing a payment

Credit or debit cards

Step 1: Ask the patient to enter their PIN, then tap **Enter**.

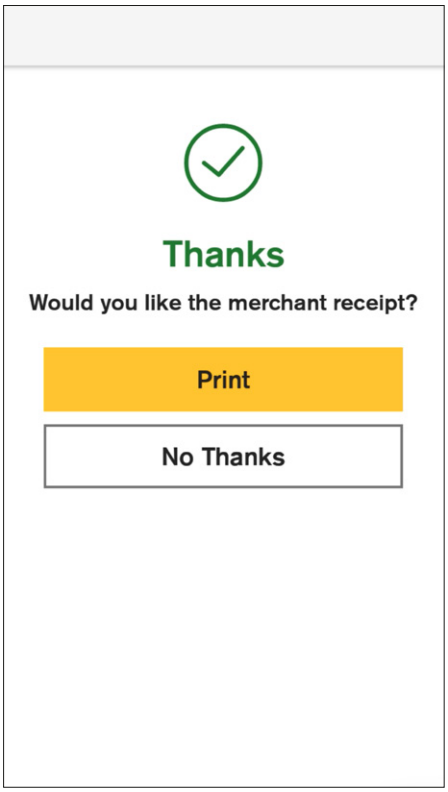


Step 2: Transaction processing.

The transaction processed by the bank is either approved or declined.

A green tick indicates an approved transaction, as at left. Always check the screen and receipt to confirm whether it is approved or declined.

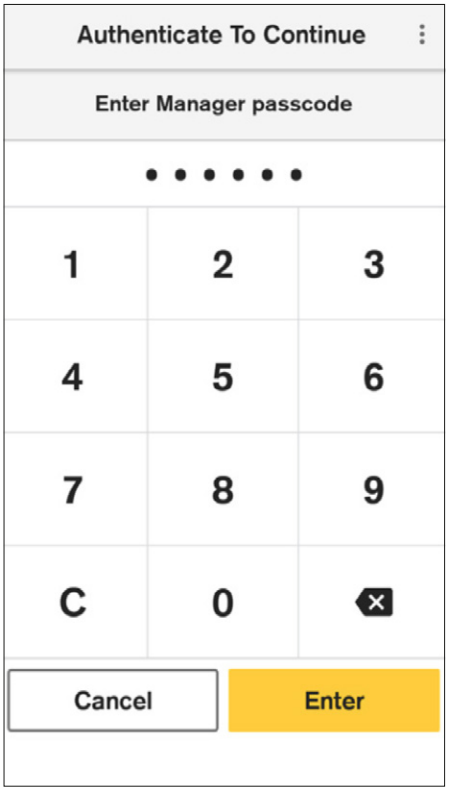
If it is declined, tap **Yes** to try again with a valid card or tap **No** to select a different payment method.



Step 3: Option to print a receipt.

By default, the merchant receipt is automatically printed, and the next screen appears.

↳ **Tip:** Tap **Print** to print another receipt or **No Thanks** to proceed without waiting for automatic screen navigation.

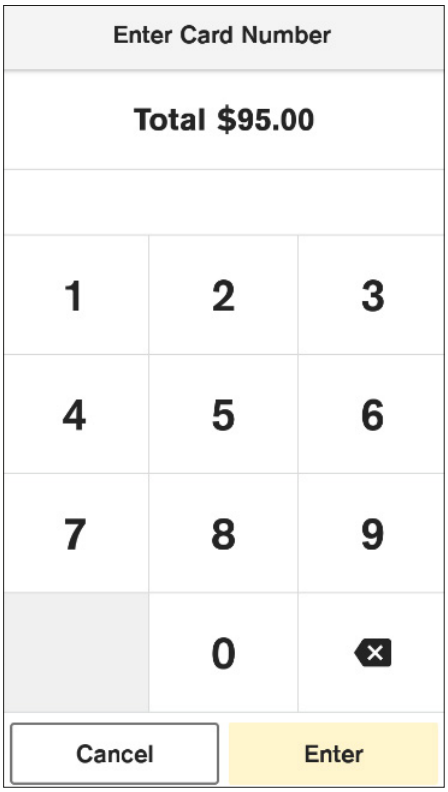


Step 1: Enter the cashier or manager passcode and tap **Enter**.

↳ **Tip:** Depending on the payment amount, the screen on the left may say **Enter Manager passcode**. The current default settings for MOTO payments are:

- Cashier – $0.01 – $250
- Manager – above $250

These limits are currently fixed. Contact Smart Health support team on 1800 222 484 for enquiries.



Manual card entry

Step 2: Type in the card number and tap **Enter**.

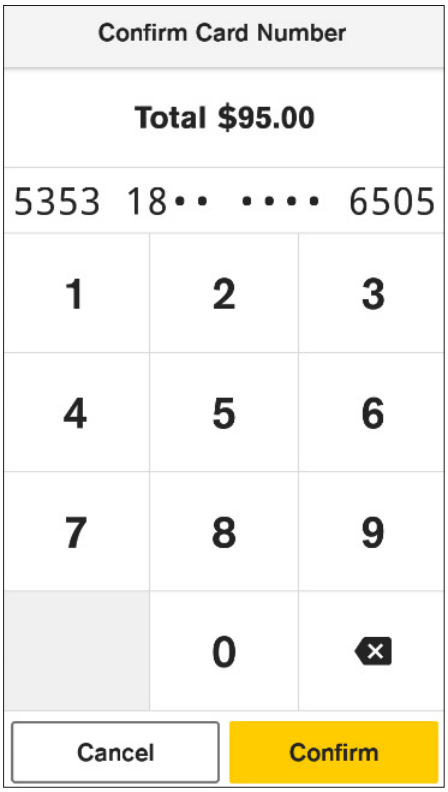
↳ **Tip:** For your patient's security, your Smart Health terminal will not display the full card number on screen.



Step 3: Confirming the card number.

Tap **Confirm** once the full card number is entered.

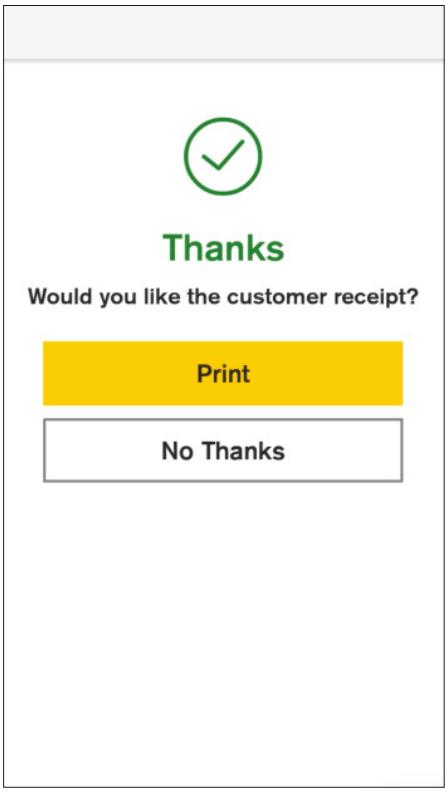
↳ **Tip:** For your patient's security, your Smart Health terminal will not display the full card number on screen.



Step 4: Type in the card expiration date in MM/YY and tap **Confirm**.



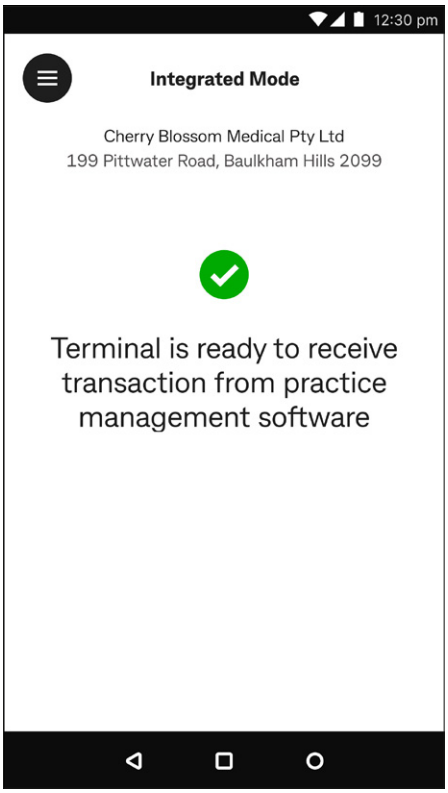
Step 5: Type in the card security number and tap **Enter**.



Step 6: Option to print a receipt.

By default, the merchant receipt is automatically printed, and the next screen appears.

↳ **Tip:** Tap **Print** to print another receipt or **No Thanks** to proceed without waiting for automatic screen navigation.

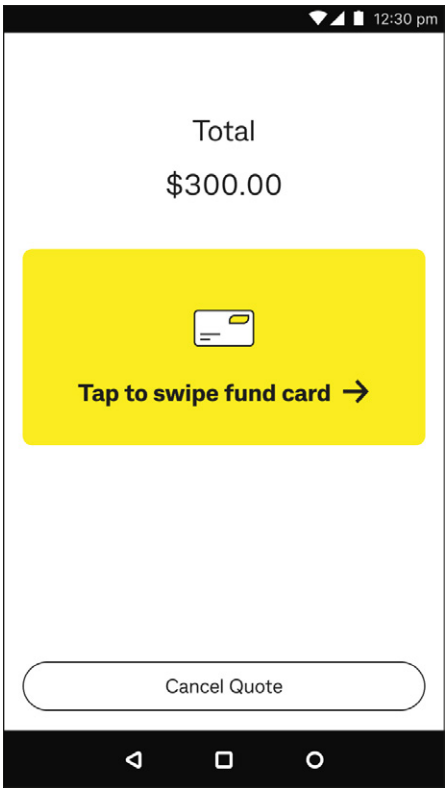


Quotes Feature

Step 1: Check you are in Integrated mode.

See **Switching app mode**, to set the Smart Health app to Integrated mode.

Once you are in Integrated mode, when you create a Quote from your PMS it is automatically sent to the Smart Health app.



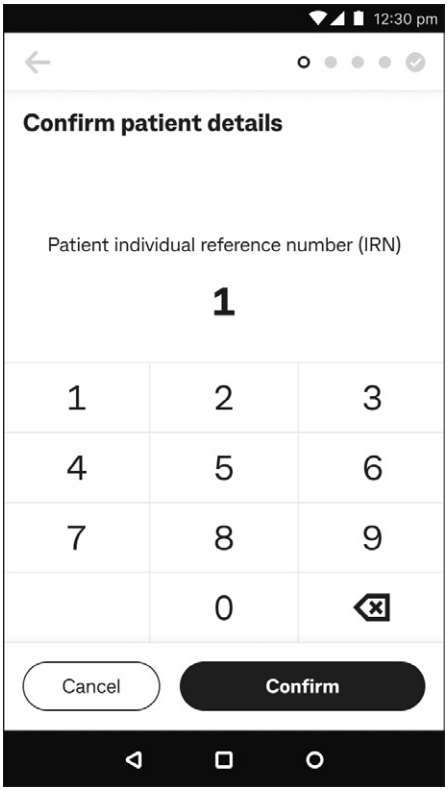
Step 2: **Select Tap to swipe fund card** or tap **Cancel quote** to cancel the Quote.

Note: The screen will show the total amount. If this amount is incorrect, you can tap 'Cancel Quote' to exit without processing.



Step 3: Swipe or tap the patient's PHI fund card to start the Quote process.

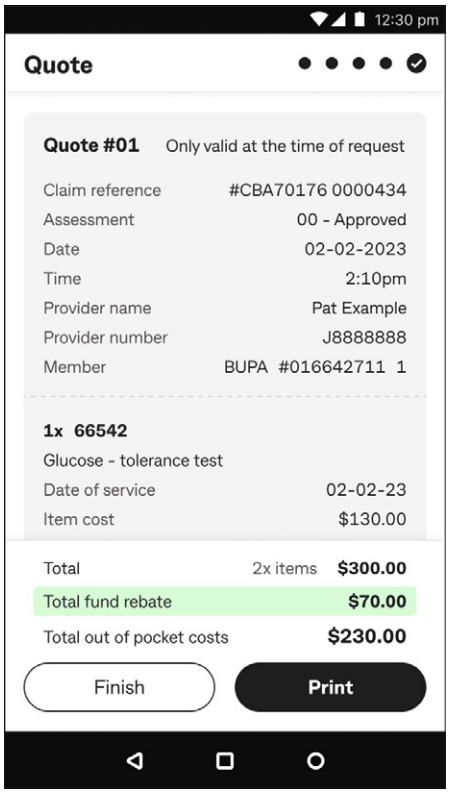
After successfully swiping or tapping, the terminal identifies the health fund, and you can now begin processing a Quote.



Step 4: Confirm patient details.

Enter the patient's Individual Reference Number (IRN) and tap **Confirm**.

↳ **Tip:** Default selection is always 1.



Step 5: Review patient Quote and print receipt.

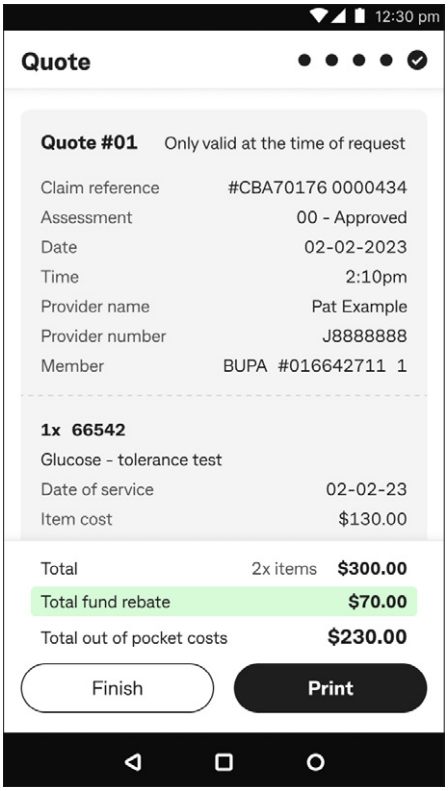
The Quote is now complete and ready for review. A receipt will be printed automatically.

You can change this setting via the main menu on the home page.

Now tap:

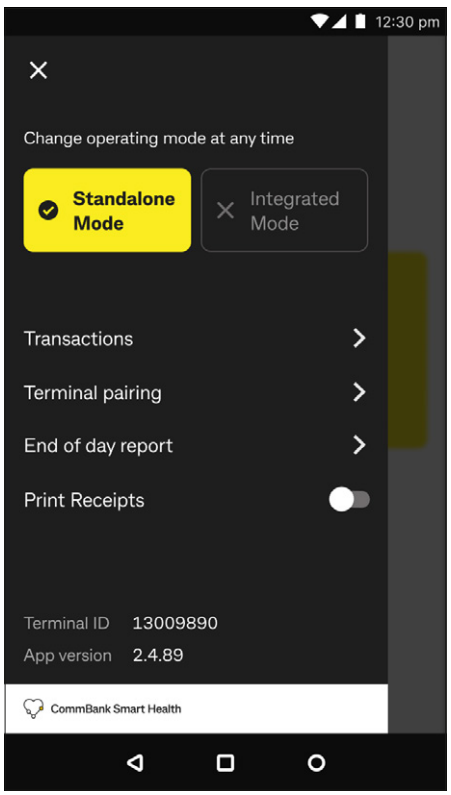
– **Print**, to re-print the Quote

– **Finish**, to return to the home screen.



Step 6: Finished.

Tap **Finish** to go back to the homepage.

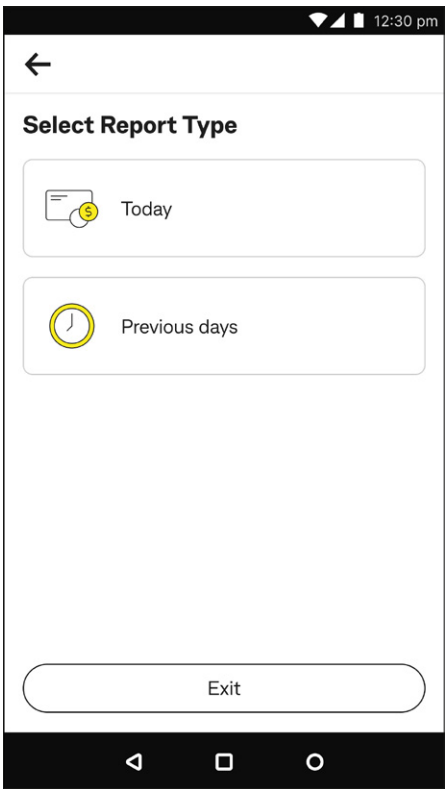


End of Day Report

The End of day report provides a summary of card payment transactions completed on the Smart Health terminal. This report can be used to check your credit and debit card transaction summary throughout the day and for settlement in your end-of-day processes.

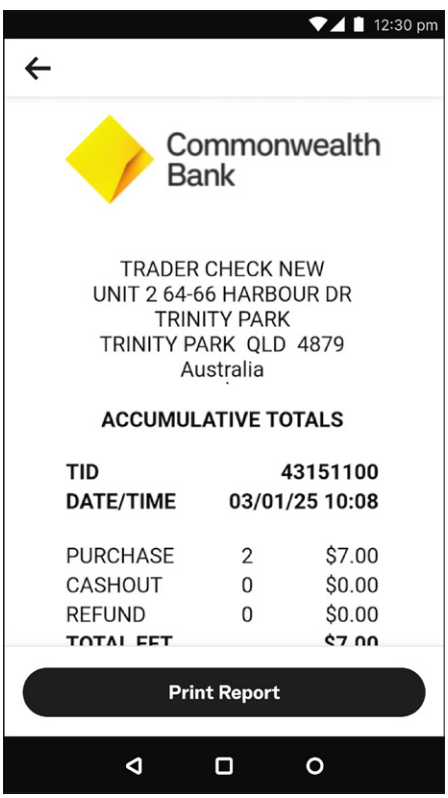
To generate an End of day report:

Step 1: Select the menu icon on the top left of the terminal screen. Select **End of day report**.



Step 2: Select **Today**.

↳ **Tip:** By selecting **Previous days** you can choose the day for which you want to generate the report for using the date selector or see the last settled day by selecting **Last Settle**.



Step 3: Review your end of day totals and optionally print the receipt by clicking **Print Report**.

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