

HCN Technical Support Knowledge Base Article: PS3-82

HCN Technical Support KBA:

Integrated EFTPOS - About and Usage

This article applies to Product(s):

- *PracSoft 3.7 and later*

Summary:

The following Knowledge Base Article contains information on Integrated EFTPOS for PracSoft 3.7 and later.

Information:

While you have been able to record EFTPOS transactions in PracSoft for some time, from PracSoft 3.7 – with the introduction of HCN's Integrated EFTPOS facility – you can process EFTPOS transactions seamlessly. PracSoft's Integrated EFTPOS facility is known as EFTPOS Auto, whereas non-Integrated EFTPOS is now referred to as EFTPOS Manual.

The key benefit of the Integrated EFTPOS solution is that transaction information is sent directly from PracSoft to the EFTPOS terminal without the need to re-key, resulting in faster, easier payments. With the integrated solution there are no more data entry errors and you also benefit from online real-time reporting.

Please note that in order to take advantage of the new Integrated EFTPOS facility, you will need to obtain an EFTPOS terminal from Tyro. The minimum Tyro Production software version compatible with Integrated EFTPOS is 07.01.09. At the time of this writing, the latest version is 07.07.01. The version information for your installed Tyro software can be accessed from the terminal via MENU > SETTINGS > TERMINAL INFO.

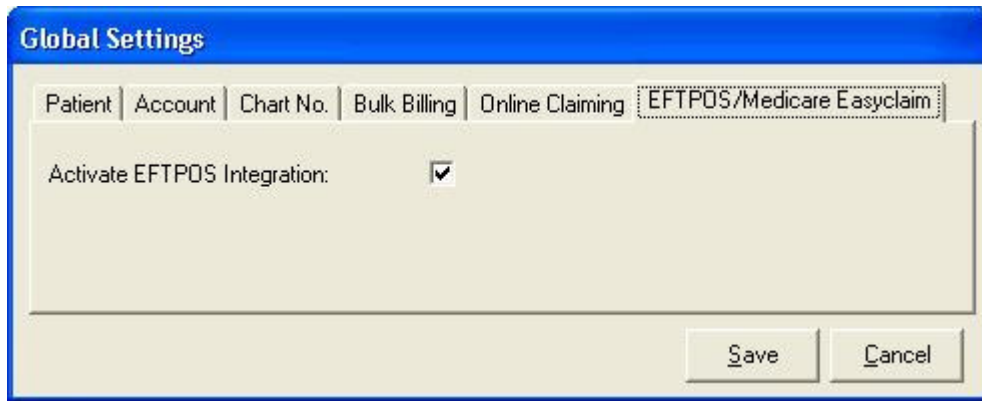
Please contact Tyro Payment Solution Sales, on (02) 8907 1780, to enquire about obtaining a Tyro EFTPOS terminal.

Initialising Integrated EFTPOS

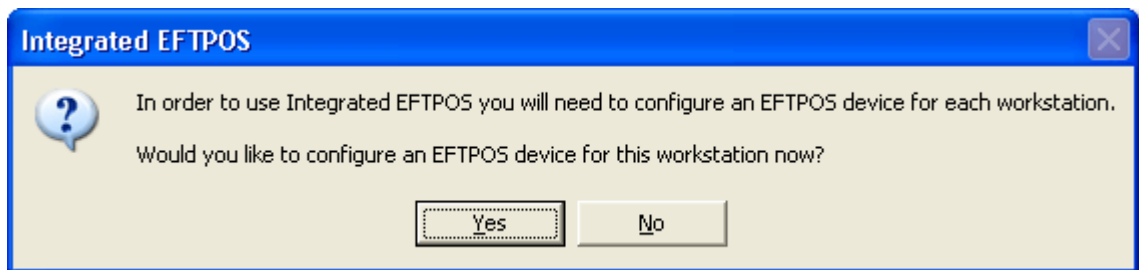
Important note for Windows 2000 Users:

In order to configure EFTPOS for the first time, you must be logged into Windows with Administrative privileges, after which you can login as a non-admin user to change the Integrated EFTPOS configuration settings later if required.

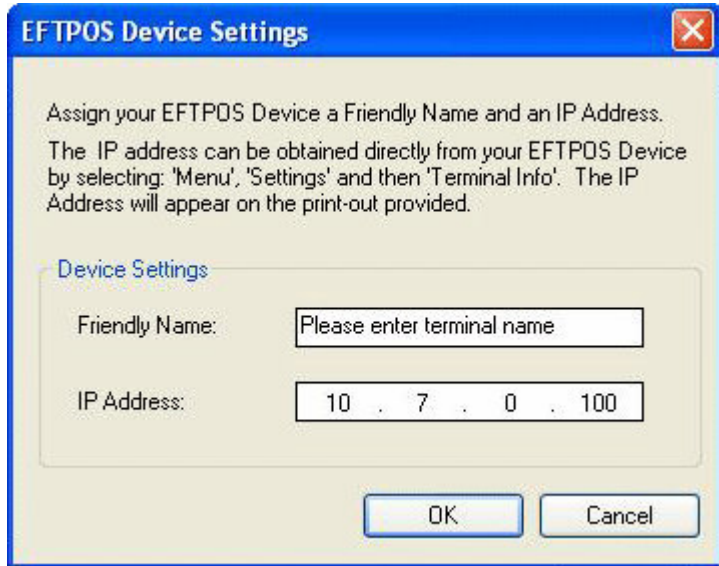
1. Select **Setup > Global Settings**. The **Global Settings** window appears.



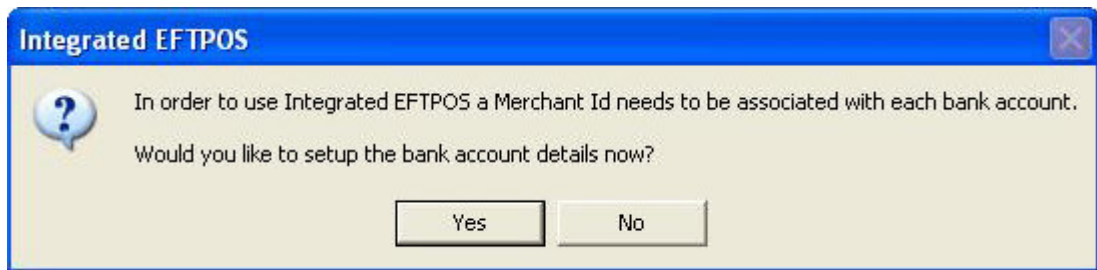
2. Select the EFTPOS/Medicare Easyclaim tab.
3. Enable the **Activate EFTPOS Integration** checkbox.
4. Click the **Save** button to continue. You will be prompted that, as this is a Global Settings change, it will affect all users. Click the **Yes** button to continue saving your preferences.
5. You will be prompted that in order to use Integrated EFTPOS you will need to configure an EFTPOS device for each workstation.



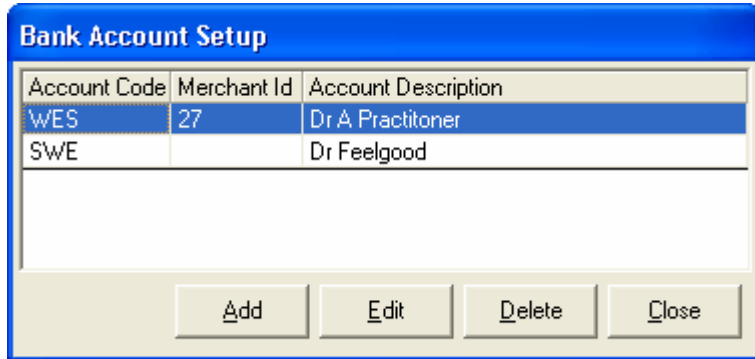
6. Click the **Yes** button to configure an EFTPOS device. The **EFTPOS Device Settings** window appears.



- o Make up and enter a 'Friendly Name' for the device. This is usually something that identifies this EFTPOS device from others, e.g. 'FrontDesk'.
 - o Enter the device's IP Address. The IP Address can be obtained directly from your EFTPOS device, by selecting **Menu > Settings > Terminal Info**. The IP Address will appear on the print-out provided. Note also the Merchant ID (MID) that appears on the printout - you will need this for Step 10, following.
7. Click the **OK** button to confirm. You will be prompted that in order to use Integrated EFTPOS a *Merchant Id* needs to be associated with each bank account recorded in PracSoft.



- Click the **Yes** button to setup the Bank Account details. The **Bank Account Setup** window appears.

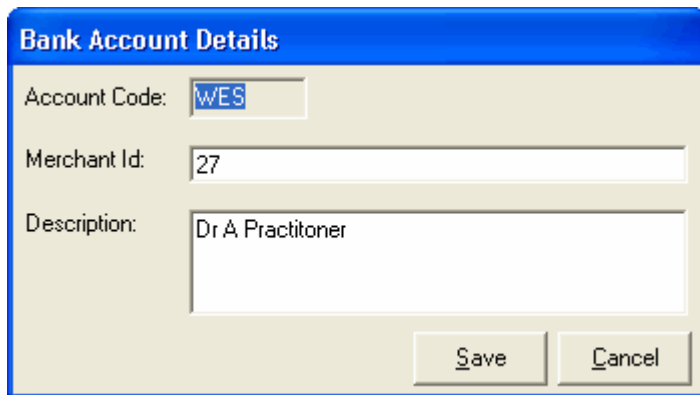


The **Bank Account Setup** window displays a table with the following data:

| Account Code | Merchant Id | Account Description |
|--------------|-------------|---------------------|
| WES | 27 | Dr A Practitioner |
| SWE | | Dr Feelgood |

At the bottom of the window are four buttons: **Add**, **Edit**, **Delete**, and **Close**.

- Select the account for which you wish to use Integrated EFTPOS, and then click the **Edit** button. The Bank Account Details window appears.



The **Bank Account Details** window shows the following fields:

- Account Code:
- Merchant Id:
- Description:

At the bottom of the window are two buttons: **Save** and **Cancel**.

- Enter the Merchant ID for this bank account that you noted in Step 6. This information will be provided to you via e-mail once your application has been Credit Checked and approved by Tyro, and is also available via **Menu > Settings > Terminal Info**. Click the **Save** button to confirm.
- Repeat Steps 9 - 10 for each bank account you wish to use Integrated EFTPOS with. *Failing to setup each bank account's Merchant ID will result in this information being required when you perform a receipt for that Practitioner.*
- When you have completed modifying bank accounts, click the **Close** button on the Bank Account Details window. You are now ready to use Integrated EFTPOS.
- For each workstation that will be used to record Integrated EFTPOS payments, select **Setup > EFTPOS/Medicare Easyclaim > Device Configuration**, and record a Friendly Name and the IP Address for the EFTPOS Terminal it will use. This must be performed, even if there is only one EFTPOS Terminal.

Changes to Workflows

Record Visit Window

Previously, EFTPOS transactions (using EFTPOS Machines) were performed *prior* to recording the visit and receipt information in PracSoft.

Now when recording a visit:

- Select the **Pay Now** option
- Select **EFTPOS Auto** from Payment Type (for Integrated EFTPOS Transactions)
- Specify which Bank account to bank the receipt to.
- Click the **Receipt** button to start the process.

Processing of the Integrated EFTPOS Auto transaction starts when the **Receipt** button is pressed. This sends the Merchant ID of the selected bank account, along with the payment amount, to the EFTPOS Auto Device.

A screen is displayed within PracSoft, which prompts you with each step through the EFTPOS transaction, so that you can ask the patient to: insert their card; enter their PIN; and so forth.

Once the payment transaction has completed successfully, you are able to save or save and print the receipt as normal.

Record Visit

File View

Patient Name: JENNIFER S. ANDREWS Seen by Dr: AP Location: Surgery

Consult Time: 2:44:00 PM

Consult Date: 27/08/2007

Invoice I.o: Patient Payer: MR JOHN ANDREWS
2 KENNEDY RD
DEMO TOWN 4523

Service Details

| Item No | Description | Fee | Gap | Fee Rate | GST Rate | GST Amount | Text |
|---------|-----------------|---------|--------|--------------|----------|------------|------|
| 23 | Level B Surgery | \$32.10 | \$0.00 | Schedule Fee | 0 | \$0.00 | |

Gap Override Fee Automation \$32.10 \$0.00 \$0.00

In Hospital Add Delete

Payment Options (F12) Visit Options Print Options

Pay Now Remove Waitroom Non Visit
 Pay Later Non Patient A/c After Care Print Voucher Print Preview
 Print PC1 Copies: 1

Payment Details

| | Amount | Payment Type | Bank To |
|---|---------|--------------|---------|
| <input checked="" type="radio"/> Full Payment | \$32.10 | EFTPOS Auto | WES |
| <input type="radio"/> Gap Payment | | | |

Hold Receipt Account Cancel

Receipt Window

- The option *EFTPOS Auto* has been added to the **Payment Type** drop-down menu in the Payment Details section of the **Receipt** window.
- A new **Status** column has been added to the Payment Details grid to indicate if an Integrated EFTPOS Auto payment has been processed or failed.
- Processing of the Integrated EFTPOS Auto transaction starts when the **Receipt** button is pressed. This sends a request to the EFTPOS Auto Device for each EFTPOS Auto item in the Payment Details list that has not already been processed.
- A screen is displayed within PracSoft, which prompts you with each step through the EFTPOS transaction, so that you can ask the patient to: insert their card; enter their PIN; and so forth.
- Once all of the Integrated EFTPOS Auto transactions have been processed successfully, the standard workflow resumes.
- If any of the Integrated EFTPOS Auto transactions fail, you will be returned to the **Receipt** window.

Receipt

Receipt Date: 26/10/2007 Receipt For: Mr John ANDREWS Site ID 0
 40 Oxley Street
 Crows Nest NSW 2065

Bank To: IS

Payment Details

| No | Amount | Payment Type | Drawer / Name on Card | Card No /Cheque No | Bank | Branch / Expiry Date | Status |
|----|---------|--------------|-----------------------|--------------------|------|----------------------|--------|
| 1 | \$32.80 | Cash | | | | | |

\$32.80

Comment:

Payment Allocation

| No | Patient | Date | Item No | Description | Fee | GST | Already Paid | Amount Due | Payment Allocation | Account No |
|----|---------------|------------|---------|-----------------|---------|--------|--------------|------------|--------------------|------------|
| 1 | ANDREWS, John | 26/10/2007 | IS | Level B Surgery | \$32.80 | \$0.00 | \$0.00 | \$32.80 | \$0.00 | 1 |

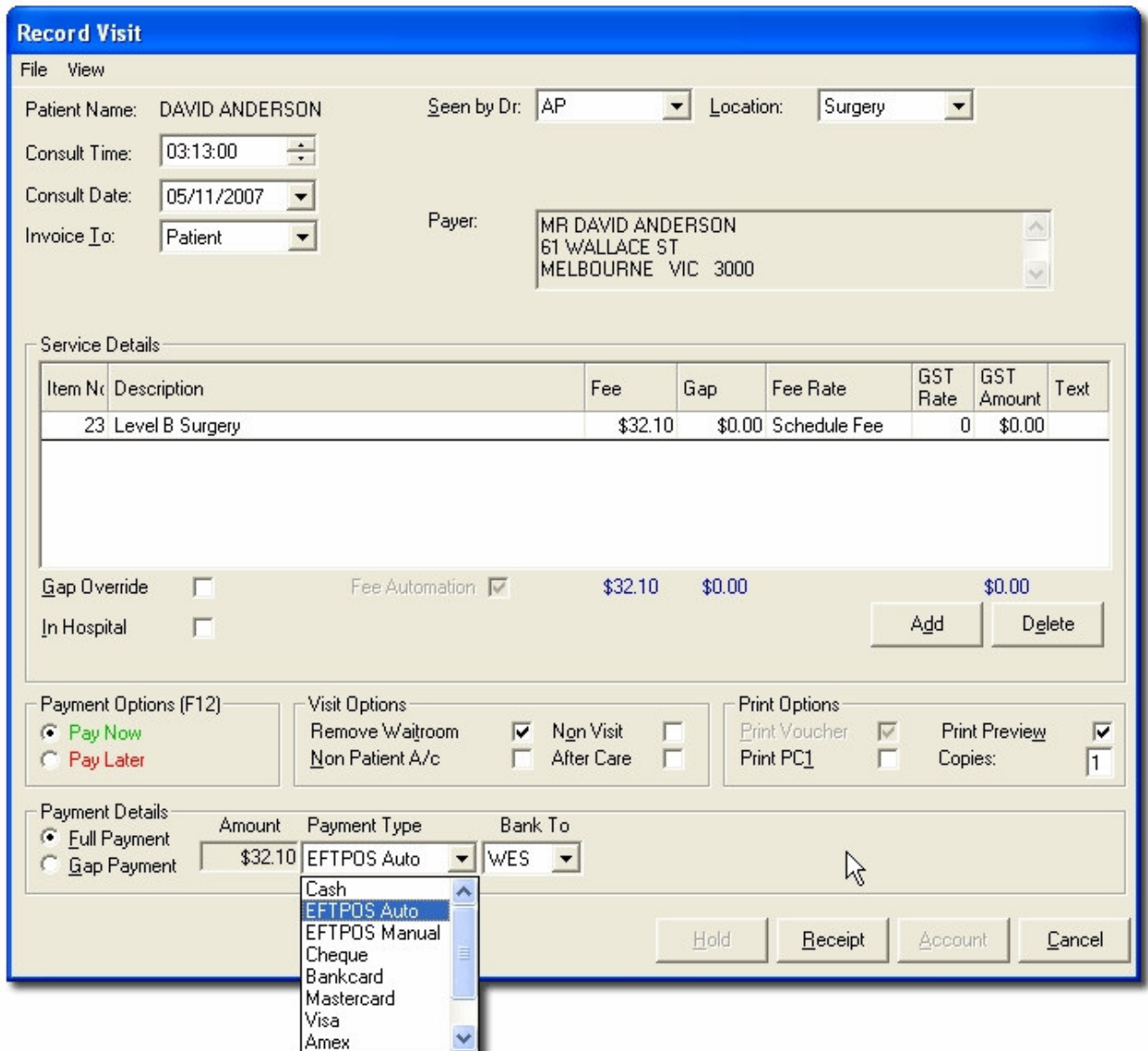
\$0.00 \$32.80 \$0.00

Print Preview

Copies:

Processing Receipts with Integrated EFTPOS

1. When processing a receipt, in either the **Record Visit** or the **Receipt** window, select **EFTPOS Auto** from the **Payment Type** drop-down menu.



Record Visit

File View

Patient Name: DAVID ANDERSON Seen by Dr: AP Location: Surgery

Consult Time: 03:13:00

Consult Date: 05/11/2007

Invoice I.o: Patient Payer: MR DAVID ANDERSON
61 WALLACE ST
MELBOURNE VIC 3000

Service Details

| Item Nr | Description | Fee | Gap | Fee Rate | GST Rate | GST Amount | Text |
|---------|-----------------|---------|--------|--------------|----------|------------|------|
| 23 | Level B Surgery | \$32.10 | \$0.00 | Schedule Fee | 0 | \$0.00 | |

Gap Override Fee Automation \$32.10 \$0.00 \$0.00

In Hospital Add Delete

Payment Options (F12): Pay Now Pay Later

Visit Options: Remove Waitroom Ngn Visit
Non Patient A/c After Care

Print Options: Print Voucher Print Preview
Print PC1 Copies: 1

Payment Details: Full Payment Amount: \$32.10 Payment Type: EFTPOS Auto Bank To: WES

Cash
EFTPOS Auto
EFTPOS Manual
Cheque
Bankcard
Mastercard
Visa
Amex

Hold Receipt Account Cancel

2. Click the **Receipt** button to start the process.
3. The first of a series of EFTPOS Payment Processing screens appears. You will be prompted to have the patient swipe their card.



4. You will be prompted to have the patient select their account.



5. If the patient chooses to pay by EFTPOS, you will be prompted to have them enter their PIN, after which the transaction will be processed.
6. If the patient chooses to pay by credit, the transaction will be processed and you will be prompted to have the patient sign the EFTPOS transaction receipt. Check the patient's signature against that on their card. PracSoft will prompt you with the question 'Signature OK?', at which point you will need to select **OK** on the EFTPOS terminal.

Processing Eftpos Payment ✕



Details:

Payer: MR JOHN ANDREWS

Payee: Dr Feelgood (2)

Device Name: Please enter terminal name

Amount: **\$32.10**



Instructions/Status:

Swipe card. Purchase: \$32.10
Select account
Processing transaction - please wait

This concludes the EFTPOS Payment Process.

7. A receipt can be printed, which indicates that the transaction used EFTPOS Auto

The Surgery

TAX INVOICE

Account Date: 12/09/2007
Account No.: 0AP

Account To: MR JOHN ANDREWS
2 KENNEDY RD
DEMO TOWN 4523

| Patient Name | Visit Date | Item | Description | Fee | GST |
|--|------------|------|-----------------|---------|--------|
| Service Provider: DR. I. FEELGOOD Provider No: 0111111L | | | | | |
| ANNA ANDREWS | 12/09/2007 | 23 | Level B Surgery | \$32.10 | \$0.00 |

| | | |
|-----------------------------|----------------|--------|
| Account Total : | \$32.10 | \$0.00 |
| Total incl GST : | \$32.10 | |
| Previous Owning : | \$0.00 | |
| Amount Outstanding : | \$32.10 | |

Payment Details

EFTPOS Auto

| | Amount |
|------------------------------|---------------|
| Amount Received : | \$32.10 |
| Balance Outstanding : | \$0.00 |

Per : _____