How do I use Tyro Integrated EFTPOS and Easyclaim with Best Practice?

Overview

The functionality outlined in this document assumes that you are using Best Practice version 1.8.4.639 or higher.

Prior to using Tyro Integrated EFTPOS and Easyclaim with Best Practice you need to perform configuration steps. Please refer to the document '*BP_FAQ-Configuring Tyro for use with Best Practice'* which outlines how these are performed.

Once your workstation has been configured for Tyro and you have activated Integrated Medicare Easyclaim claiming, you will find that some new buttons and tick boxes appear on various Account details and Payment screens. These changes will be outlined below.

If these buttons don't appear then Best Practice is not able to communicate with the Tyro terminal – please refer to the configuration instructions above to make sure the terminal is paired with your computer.

There are two parts to the Tyro system:-
- o Integrated EFTPOS (payment by EFTPOS and Credit Card)
- o Integrated Medicare Easyclaim (Patient claiming rebates)

What items cannot be sent via Integrated Medicare Easyclaim

The following items cannot be processed through Easyclaim. Best Practice will continue to process these items where applicable via Online Patient Private Claiming:-

- o Multiple attendance or In-Hospital items (i.e. Item 4, 24, 35, etc.)
- o Items requiring notes or services text in explanation (i.e. site specific biopsies, etc.)
- o Patient claims more than 2 years from date of service
- o Pathology items (except for those in Group P9 - Simple Basic Pathology Tests)
- o Patient claims with non-standard referrals
- o Items requiring separate site information (except for items 30061, 30071, 30192 or 30195 where you select 'Separate sites' from the restrictions when adding the item)
- o Items where the charge exceeds $9,999.99
- o Department of Veterans' Affairs (DVA) claims

NOTE: Accounts which contain a mixture of MBS and non-MBS items cannot currently be transmitted via Easyclaim. This functionality will be added in a future version.

In these above circumstances the 'Send via Easyclaim' tick box will be greyed out or invisible however in some cases these items may still be sent via Online Private Patient claiming.

Private Patient invoices

We have not provided complete steps for creating an account in this FAQ. Please refer to the document 'BPM_FAQ-Creating a Patient account.pdf' for further information.

> ⚠️ **Important**: Tyro Integrated Medicare Easyclaim rebates to the patient are immediate which means that Adjustments to the Account or Payment cannot not usually be made once the claim is approved.

There are two steps for processing payments using the Integrated Tyro solution:-
- o Process the payment (i.e. Cash, EFTPOS, Credit card, Cheque, etc.)
- o Transmit the Patient claim via Easyclaim to Medicare to rebate into the bank account associated with a patient's EFTPOS card immediately.

Process the payment

1) Entry of Payment information

When you create a private account that is billed to **'Patient', 'Head of Family', 'Workcover'** or **'Other'** and press the **'Pay now'** button, the **'Payment details'** screen will appear.

If you have Tyro configured in Best Practice and your workstation has Tyro installed, you will see a grey border surrounding the **'EFT** and **Credit card'** fields. If you click in either of these fields a **'Use Tyro'** tick box will activate.

> **Tip**: To save staff having to think whether they have been given a Debit or Credit card we recommend that you use the EFT box for all card types processed via the Tyro terminal.

> **Tip**: Use the EFT field for Tyro and keep the Credit Card field available for other uses such as other EFTPOS systems or HICAPS, etc. (makes your reporting easier to reconcile)

Paying full amount
- Click in the field adjacent to the payment method (i.e. Cash, EFT, Credit Card, Direct Credit, Cheque total)
- If the Payment is being made via EFT or Credit Card the **'Use Tyro'** checkbox will appear and will be ticked automatically. (This can be un-ticked if required)
- Tick the **'Pay full amount'** tick box at the top of the screen.
- This will automatically enter the amount owing into the field you have selected and auto allocate the payment to each of the services below.
- The invoice lines below will be ticked and the **'Pay now'** column will be automatically filled in with the amount being paid.

Paying gap
- Click in the field adjacent to the payment method (i.e. Cash, EFT, Credit Card, Direct Credit, Cheque total).
- If the Payment is being made via EFT or Credit Card the **'Use Tyro'** button will appear and will be ticked automatically. (This can be un-ticked if required)
- Tick the **'Pay gap'** tick box at the top of the screen.
- This will automatically enter the gap amount into the field you have selected and auto allocate the payment to each of the services below.
- The invoice lines below will be ticked and the **'Pay now'** column will be automatically filled in with the amount being paid.

Part payments

- If the patient is paying a different amount, then click in the field adjacent to the payment method (i.e. Cash, EFT, Credit Card, Direct Credit, Cheque total).
- Enter the amount being paid into the highlighted field
- If the Payment is being made via EFT or Credit Card the **'Use Tyro'** tick box will appear and will be ticked automatically.   (This can be un-ticked if required)
- Tick the invoice lines below to indicate which invoices are being paid or press the '**Auto Allocate**' button to spread the payment amount between the services on the invoice – this will happen from the top down.
- The '**Pay now**' field will be updated with the amount of the payment.
- If you do not wish to allocate these amount, click the **'Allocate'** button to display the **'Allocate payment'** screen which will allow you to allocate the amounts manually.

Zero Gap payments

The system will allow you to process an Easyclaim transaction where the patient is not paying any money.

- Leave ALL the payment fields empty and do not tick **'Use Tyro'.**
- Tick the invoice lines below to indicate which invoices are to the processed

Split payment types

It is possible for the payment to be made using multiple payment types (i.e. part EFT, part cash).
- Click in the field adjacent to the payment method for the first part of the payment and enter the amount to be paid
- Click on the field adjacent to the second payment method for the second part of the payment and enter the amount to be paid
- More payment types are possible by entering the amount in the relevant field
- Tick the invoice lines below to indicate which invoices are being paid or press the '**Auto Allocate**' button to spread the payment amount between the services on the invoice – this will happen from the top down.
- The '**Pay now**' field will be updated with the amount of the payment.
- If you do not wish to allocate these amount, click the **'Allocate'** button which will allow you to allocate the amounts manually.
- If the Payment is being made via EFT or Credit Card the **'Use Tyro'** button will appear and will be ticked automatically.   This can be un-ticked if required.

Payment via two cards

When taking payment using two cards (i.e. EFT and Credit Card or two different EFT cards) you will have to process the payment in 2 steps.

- Enter the payment amount to be paid via the first card.
- Process via Tyro but do not send via Easyclaim
- Close the Payment screen
- Open the Patient Billing History, highlight the Account and press Pay Single invoice
- Enter the payment amount to be paid via the second card
- Process via Tyro and tick 'Send via Easyclaim' or 'Online Patient Claiming' as relevant.

Paying multiple invoices

Multiple invoices can be paid using the Patient Billing History screen and pressing '**Pay All**' then following the relevant steps above for the functionality.

Paying account at a later time

Use the Patient Billing History screen, highlight the account in question and select **'Pay single invoice'** then follow the relevant steps above for the functionality.

2) Indicate Medicare rebate method

Once you have filled in the payment information the next step is to send a claim to Medicare to rebate the patient. This can be done via '**Online Patient Claiming**', '**Integrated Easyclaim**' or by printing the receipt to give to the patient.

By default you can have both 'Send via Patient Claiming' and 'Send via Easyclaim' visible the bottom of the screen so you can choose the best method for the patient on the fly. It is possible to change the default as required via the Setup > Configuration screen. Refer to the 'Configuration options related to Private accounts' section at the bottom of this document for details.

Where a patient rebate is not required then untick both '**Send via Patient Claiming**' and '**Send via Easyclaim**' check boxes and press '**Print Receipt'**.

The difference between Online Patient Claiming and Integrated Easyclaim are:-

- Integrated Easyclaim
  - o Patient swipes their EFTPOS card, enter their pin number and the Medicare rebate is made into the bank account associated with the patient's EFTPOS card.

- Online Patient Claiming
  - o Patients need to have lodged their bank details with Medicare Online or you need to type in their bank account details for the Medicare rebate to be processed

> **Tip**: If the 'Send via Easyclaim' check box is invisible or greyed out it means that the invoice that is being processed contains items that cannot be claimed via Easyclaim. Refer to the section about on 'What items cannot be sent via Easyclaim'. These items may be able to be transmitted via 'Online Private Patient Claiming'.

3) Processing a payment via Tyro

When you press the **'Process'** button, if you have also ticked **'Use Tyro'**, the Tyro machine will activate and various screens will appear on the tyro terminal. These messages will also appear on your screen at the same time to help you direct the patient to perform the relevant tasks.

The messages that display include:-
- o Swipe / Insert Card
- o Select Account type to use
- o Enter PIN or Approved signature?

If the payment is '**Approved**', a docket will be printed on the Tyro machine. This is the '**Merchant**' copy for you to keep in the practice for reconciliation purposes. A prompt will appear on the screen if you wish to print a copy for the Patient.

If the payment is '**Declined',** a docket will be printed on the Tyro machine to indicate the problem. You will be returned to the '**Create Account'** screen so that the payment can be processed again.

Transmit claim for rebate

4) Transmit claim to Medicare via Easyclaim

Once the payment has been processed, if the '**Send via Patient Claiming**' has been ticked the claim will be transmitted via the Online Patient Claiming method. Refer to the document *'BPM_FAQ-Using Online Patient Claiming.pdf'* for further details.

If the '**Send via Easyclaim'** has been ticked, the Tyro terminal will start transmitting the claim to Medicare.

The claim is immediately assessed by Medicare and if approved, the message 'Claim approved. Swipe / Insert EFTPOS card' will appear. Ask the patient to insert or swipe their EFTPOS card for the rebate to be paid to. The user will then be asked to indicate their account type (only Savings or Cheque accounts are valid - Medicare will not rebate to a Credit card) and depending upon the type of account they may have to enter a PIN number.

If the rebate is **'Approved'**, a **'Medicare Claim Receipt'** will be printed on the Tyro machine for the Patient indicating the benefit that is being rebated to their bank account. You will be returned to the **'Payment details'** screen so you can print a receipt if required.

If the transaction is cancelled via the screen or on the Tyro terminal the transmission is cancelled and a docket will be printed on the Tyro machine to indicate **'Claim Cancelled'** and you will be returned to the **'Payment details'** screen so that the transmission can be processed again.

Depending upon the reason for rejection, you may send the claim again via Easyclaim or Patient claiming. Tick the relevant check box and press the **'Process' button** to start the transmission again.

> **Note**: Integrated Medicare Easyclaim has a 5 minute delay before you can resend the claim to Medicare. You have the option to wait 5 minutes or send the claim via Private Patient Claiming.

Once the claim has been processed, the **'Print Receipt'** button will be activated so that you can print a receipt for the patient if required. This will be required if they pay by Cash, Cheque or Direct Credit as they will not have a docket to indicate how much they have paid.

5) Sending a claim via Easyclaim / Patient claiming after the payment has been made

If for some reason you have had to cancel the Payment screen after processing the payment but before sending the claim via Easyclaim or Patient Claiming, you can still send the claim to Medicare if the patient is still present. NOTE: this can only be done on the original payment date.

Open the **Management > Patient Billing History** screen and enter the patient's name. Tick 'Show payments' at the top of the screen. Highlight the payment concerned and right click and select either **'Send online patient claim'.** This will display the payment screen allowing you to select the **'Send via Patient Claiming'** or **'Send via Easyclaim'** check box and transmit the claim as outlined above.

6) Refund of payments taken via Tyro terminal

Best Practice has not implemented 'Integrated Tyro Payment reversals' however it is possible to perform the reversal manually.

Please refer to your Tyro terminal documentation for more information. Your terminal will need to be enabled to process refunds and as a security measure you will require the 'Refund password' set by your practice when first activating the Tyro terminal. Please contact the Tyro support desk for further information.

Reversing a payment in Best Practice
Remember that if you reverse a payment via the Tyro terminal you will have to reverse the Payment within Best Practice. Before doing so, please read the important note below regarding the Easyclaim rebate.

o   Select Management > Patient Billing History and select the patient in question
o   Tick the 'Show Payments' tick box at the top of the screen
o   Highlight the payment and press 'Reverse'. Enter the reason for the reversal
o   The related Invoice/s will have their status changed to 'Unpaid' so that they can be adjusted as required and payment can be entered again.

Troubleshooting

Cancellation of Rebates that have already been transmitted

Patient claiming rebates

If the patient has had their claim processed via Patient Claiming:-
o   Claims can only be deleted on the same day they are sent
o   Select Management > Patient Claiming.
o   Highlight the Invoice and right click
o   Select Delete claim
o   A deletion request will be sent to Medicare to cancel the claim.

Integrated Medicare Easyclaim Rebates

⚠️ **Important**: Integrated MedicareEasyclaim rebates to the patient are immediate which means that Adjustments to the Account or Payment cannot be made automatically once the claim is approved.   If you reverse a payment you MUST take into account how any related claim has been transmitted and contact Medicare to arrange cancellation as required.
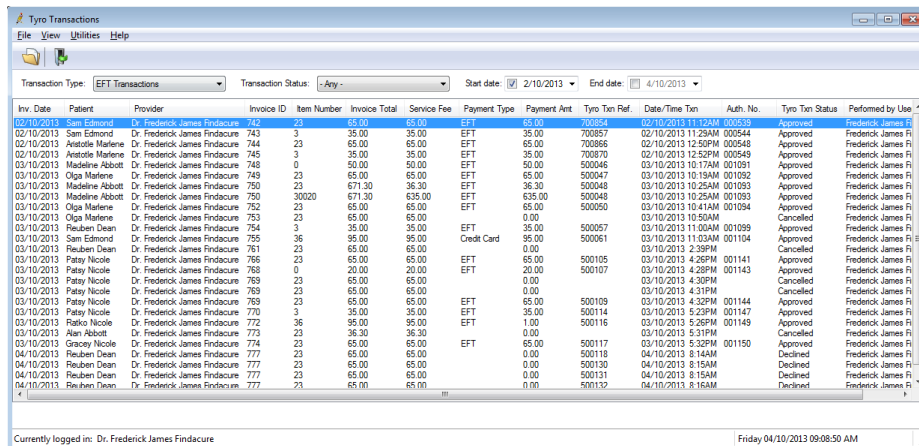
If the patient has had their claim processed via Easyclaim:-
o   As these claims are immediately rebated to the Patient's bank account it is not possible to cancel the Medicare rebate directly from Best Practice.
o   If you are required to cancel the claim for some reason, you will need to contact Medicare to have them cancel the rebate to the patient's account
o   The Easyclaim Transaction ID can be found by selecting Management > Tyro Transactions.
o   Select the Transaction Type of 'Private Claim' from the drop down box
o   Find the claim that has been transmitted and identify the Transaction ID

Tyro Transaction Logging
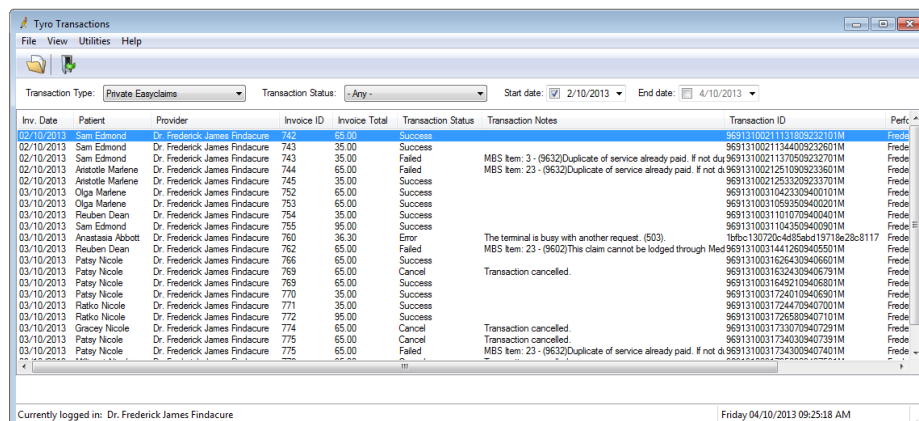
Each time a Tyro Payment or Easyclaim transaction is transmitted, a log is made in the system to record the details of the transaction including the patient, invoice number, amount, reference numbers, date and time, status and the user who performed the transaction.

You can access the transactions by selecting Management > Tyro Transactions from the main Best Practice screen. By default the screen will show all the Tyro EFTPOS transactions for the current date. You can use the filters at the top of the screen such as **'Transaction Status'** and/or the **'Start'** and **'End'** dates to change the listing.

Use the **'Transaction Type'** filter and change to **'Private Easyclaims'** to change the list to show the Easyclaim transactions.   Again you can use the other filters to change the listing.
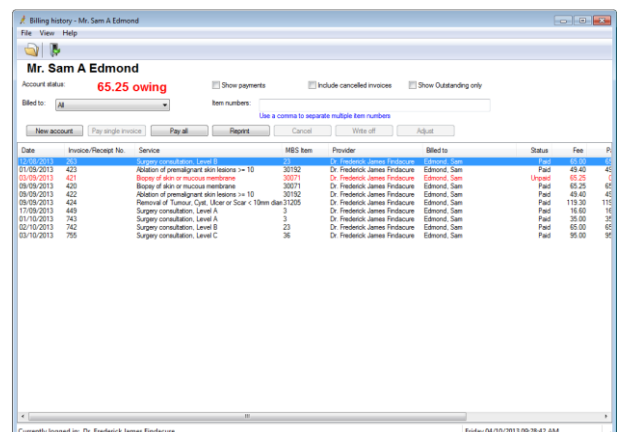

Patient Billing History

To view further details of the Invoice or Payment, right click on the item on the screen and select **'Patient Billing History'**. You can use the normal features of this screen to find the payment information.

List of Transactions

To print a list of transactions, highlight the item and select **'File' > 'Print List'**. This will print the list as displayed currently on the screen.

Patient details

To view the demographics of the patient, highlight the item and select **'Patient details'**. This will display the usual **'Edit patient'** screen.

Configuration options related to Private accounts

Activate Online Private Patient Claiming	Activate Tyro Integrated EFTPOS	Activate EasyClaim Private Patient Claiming	Always send private patient claims by best available method	Effect on 'Send via' method Payment screen
Unticked	Not present	Not present	Not active	**Neither option present**
Ticked	Not present	Not present	Unticked	**'Send via Patient claiming' unticked**
Ticked	Not present	Not present	Ticked	**'Send via Patient claiming' ticked**
Unticked	Ticked	Unticked	Not active	**'Use Tyro' active;** **'Send via Easyclaim' inactive**
Ticked	Ticked	Unticked	Unticked	**'Use Tyro' active;** **'Send via Patient claiming' unticked**
Ticked	Ticked	Unticked	Ticked	**'Use Tyro' active;** **'Send via Patient claiming' ticked**
Ticked	Ticked	Ticked	Unticked	**'Use Tyro' active;** **'Send via Patient claiming' unticked** **'Send via Easyclaim' unticked**
Ticked	Ticked	Ticked	Ticked	**'Use Tyro' active;** **'Send via Easyclaim' ticked**

Support available

Contact details for Tyro

Tyro can assist with questions regarding processing payments and Integrated Medicare Easyclaim transactions. Tyro has a dedicated Easyclaim support option that can be accessed after calling the general support line listed below.

Tyro Customer Support Team: 1300 966 639

Account Manager: (02) 8907 1717 and am@tyro.com

Best Practice Contact details

For more information consult the Best Practice Help Library or contact us via :-

07 4155 8800   http://forum.bpsoftware.com.au

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