



# J A D E

## Bp Premier Whitecoat Setup and Pay Guide

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Last updated: 11 April 2019

Intended for usage with Bp Premier version Jade SP2 and later. Some features in this User Manual may be available only in versions later than Jade.

## Configure Whitecoat

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### When can I use Whitecoat in Bp Premier?

CommBank Health Claim is the Bank's latest health claiming solution and is delivered in partnership with Whitecoat. The solution is currently in pilot. If you are interested in participating in the pilot or would like to learn more, please email [SmartTerminalsApps@cba.com.au](mailto:SmartTerminalsApps@cba.com.au).

Best Practice Software will communicate through the regular communication channels and the product release notes when CommBank Health Claim is available to all practices.

### How does Whitecoat work with Bp Premier?

Bp Premier Jade release introduced Whitecoat integration which offers the following functionality:

1. Integrated Medicare Easyclaim using either the **Card Present** or **Card Not Present** option.
2. Overseas Health Cover payments using either the **Card Present** or **Card Not Present** option.
3. Integrated EFTPOS.

#### Integrated Medicare Easyclaim

Whitecoat offers two methods of utilising Medicare Easyclaim via Bp Premier: **Card Present** and **Card Not Present**.

Use **Card Not Present** when your patient has installed and set up the MyWhitecoat mobile device application which allows your patient to store credit card details to pay their invoice. Use the **Card Present** option when your patient does not have MyWhitecoat installed and could claim a Medicare rebate for your service.

Only fully paid accounts can be sent via Whitecoat to Medicare for approval. If approved, the patient can use an EFTPOS card to receive the rebate in their bank account. This functionality is provided by CommBank Health Claim using a CommBank Albert Terminal.

For more information on EasyClaim and which services cannot be paid, review the Department of Human Services information on [Medicare EasyClaim](#).

Practices must choose either Tyro or Whitecoat as their Medicare Easyclaim provider. You can not enable both functionalities within Bp Premier.

#### Overseas Health Cover Payments

Students studying in Australia from overseas can pay for their medical services using the Whitecoat Overseas Student Health Cover functionality from within Bp Premier. Use the **Card Present** option when the patient has their health fund card available. To use the **Card Not Present** function, the patient must have installed and entered their overseas Health Fund Details into the MyWhitecoat mobile device application.

Note that integrations between Whitecoat and Private Health Insurance companies are proceeding, which will result in Whitecoat cardless payment functionality being surfaced inside mobile applications developed by Australian Private Health Insurers.

## Integrated EFTPOS

Use Whitecoat to receive payments of custom items via EFTPOS.

## Before you begin

Contact [Whitecoat](#) to obtain your sign in details and EFTPOS terminals. You will receive a PMS User Id, PMS Instance ID and PIN, which are required to start using Whitecoat with Bp Premier.

You must also register your practice with Medicare to use Online claiming, configure Online claiming, and test that it works correctly.

Whitecoat functionality within Bp Premier requires a persistent internet connection on any machines you process payments from.

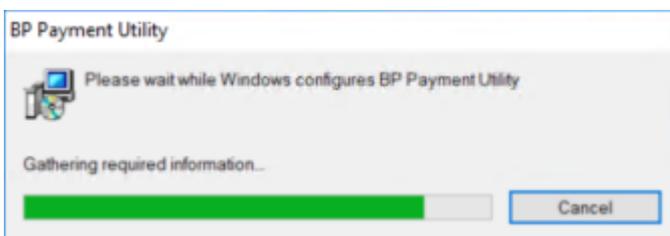
## Install the Bp Payment Utility

Bp Premier integrates with Whitecoat via the **Bp Payment Utility**. This utility is separate from Bp Premier and when installed, can be found in your system tray on your Windows desktop on the right-hand side of your taskbar.



Install the **Bp Payment Utility** on all machines where you will use Whitecoat functionality with Bp Premier.

1. Download the **Bp Payment Utility** [here](#).
2. Double click the downloaded **BpPaymentUtility.Wix** file. The **BP Payment Utility** installs.



3. The **Bp Payment Utility** is visible in your taskbar.

## Configure the Bp Payment Utility

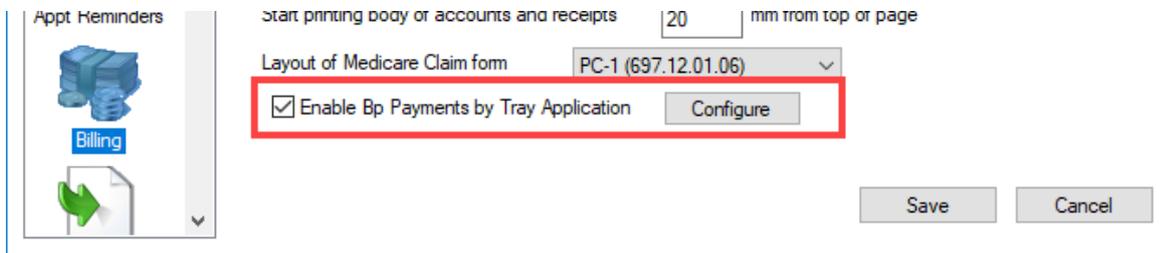
Perform the following steps on any machine where the **Bp Payment Utility** is installed. The user who performs

these steps must have **Allow access** on the **Configuration** permission.

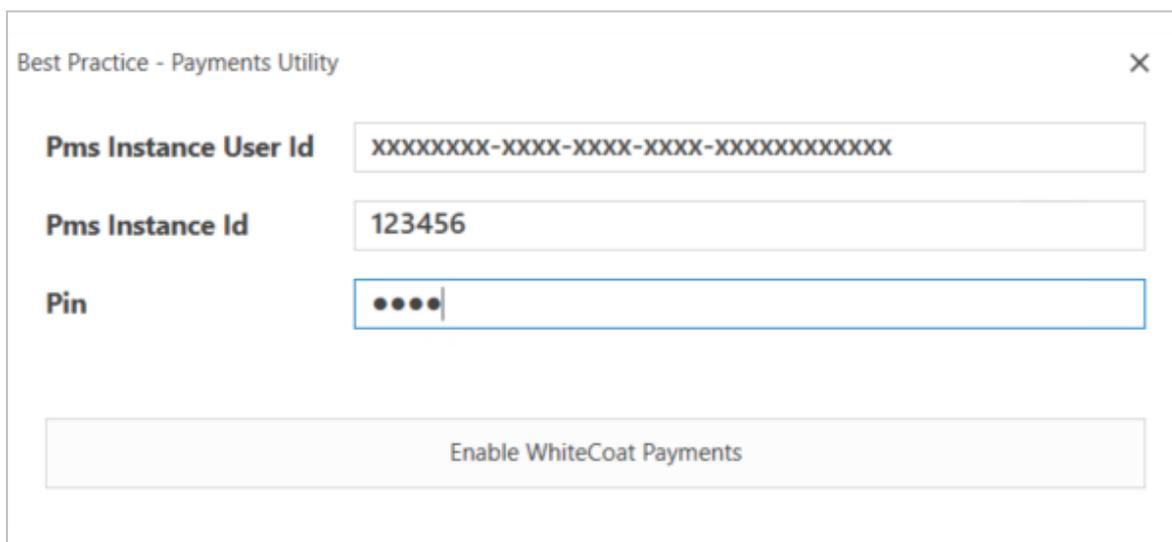
1. Ensure the **Bp Payment Utility** is running in your taskbar. If the utility is not running you can start it by navigating to **C:\Program Files\BP Payment Utility** and double-clicking **BpPaymentsUtility.Wpf.exe**.



2. Log in to Bp Premier and navigate to **Setup > Configuration > Billing**.
3. Check the **Enable Bp Payments by Tray Application** checkbox.



4. Click **Configure**. The **Bp Payments Utility** window appears.
5. Enter your **Pms Instance User Id**, **Pms Instance Id** and **Pin** as provided by Whitecoat.



6. Click **Enable Whitecoat Payments**.
7. The terminals configuration window shows all the CommBank terminals that have been configured for your practice. Click the **Default** check box next to the **Terminal Nickname** to choose the default terminal for this machine.

Best Practice - Payments Utility ×

The Terminals currently enabled for Whitecoat Payments are listed below - you can select a default for card present payments processed on this PC if desired

Terminal Nickname	Default
BestPracticeT1	<input checked="" type="checkbox"/>

8. Click **Save**.
9. Click **Save** on the **Configuration** window.

You have now configured Bp Premier to use Easyclaim **Card Present** payments with Whitecoat. To use **Card Not Present** payments, you must also set up the patient's Whitecoat details via the patient demographics.

## Configure a Patient to Use Whitecoat Card Not Present

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### When can I use Whitecoat in Bp Premier?

CommBank Health Claim is the Bank's latest health claiming solution and is delivered in partnership with Whitecoat. The solution is currently in pilot. If you are interested in participating in the pilot or would like to learn more, please email [SmartTerminalsApps@cba.com.au](mailto:SmartTerminalsApps@cba.com.au).

Best Practice Software will communicate through the regular communication channels and the product release notes when CommBank Health Claim is available to all practices.

### Configure Whitecoat Card Not Present

Whitecoat **Card Not Present** allows your patient to pay their accounts via the credit card or Overseas Student Health Cover details stored in their [MyWhitecoat application](#). Configure the Bp Premier patient **Whitecoat Status** in the **patient demographics** or the **Appointment book**. When a patient's **Whitecoat Status** is configured, you can start using **Card Not Present** functionality for that patient in Bp Premier.

1. Open **Best Practice - Payments Utility** via the patient demographics > **Whitecoat Status Configure** button or right-click an appointment in the **Appointment Book** and select **Whitecoat Options**.

8:00 am	
8:15 am	
8:30 am	
8:45 am	
9:00 am	
9:15 am	
9:30 am	
9:45 am	
10:00 am	
10:15 am	
10:30 am	
10:45 am	
11:00 am	
11:15 am	
11:30 am	
11:45 am	
12:00 pm	
12:15 pm	
12:30 pm	
12:45 pm	
1:00 pm	
1:15 pm	
1:30 pm	
1:45 pm	
2:00 pm	Tom Anderson
2:15 pm	

- Arrived
- New appointment
- Edit appointment
- Cancel appointment
- Move appointment
- Change status
- Create account
- Patient details
- Unavailable
- View record
- Record note
- Start visit
- Start video
- Online patient verification
- Whitecoat Options (Inactive)
- Cut
- Copy
- Paste
- View text

Health Care Home:	<input type="text" value="Nil"/>	<input type="text" value="10/04/2019"/>	HCH	<input type="checkbox"/> 10/04/2019	Cause
Whitecoat Status:	Inactive	Configure		Referral details	Bank account
Last Updated By:	<input type="text" value="Kristen Ida"/>			Medicare/DVA eligibility check	
Last Updated On:	<input type="text" value="19/12/2014 08:12:25 AM"/>			Save	Cancel

2. With the **Best Practice - Payments Utility** window open, ensure that the correct patient **Whitecoat Phone** number is entered.
  - a. If the patient already has a Whitecoat account, the window disables the **Send Invite** button and enables the **Save** button. Status text is displayed at the bottom of the screen to indicate the patient already has a Whitecoat account. Click **Save** and then **Cancel**.

Best Practice - Payments Utility

**Patient:** Kathleen Aalbrecht (Active)

**Whitecoat Phone:** 0403337804

**Whitecoat Reference:**

**Has OSHC Cover:** No

Send Invite Save Cancel

This mobile number is active in Whitecoat and a patient has been selected - Click Save to save this information in Bp.

- b. If the patient does not have a Whitecoat account, the window disables the Save button and enables the Send Invite button. Status text is displayed at the bottom of the screen to indicate the patient does not have a Whitecoat account. Click **Send Invite**. Click **Cancel**.

Best Practice - Payments Utility

**Patient:** Kathleen Aalbrecht (Active)

**Whitecoat Phone:** [Redacted]

**Whitecoat Reference:** [Dropdown]

**Has OSHC Cover:** N/A

Send Invite Save Cancel

There is currently no Whitecoat account set up for this mobile number. Click Send Invite to invite the selected patient to join Whitecoat at this phone number

3. What happens now depends on whether the patient already has a MyWhitecoat account:
- If the patient does not have a MyWhitecoat account, then the patient receives an SMS invitation on their mobile device to download the MyWhitecoat application. The patient must install and set up a Whitecoat account before you can use the **Card Not Present** function.
  - If the patient has already installed and set up MyWhitecoat, then Bp Premier retrieves the **Whitecoat Status**, and you can start using **Card Not Present** functionality for this patient immediately.
4. Click **Save** if the button enables.
5. Close the window.

When the patient downloads MyWhitecoat on their mobile device and creates an account, the **Card Not Present** option is available from the payment window.

Best Practice - Payments Utility ×

**Patient:** Scott Andrews

**Whitecoat Status:** Active (0435319056)

**Total Amount:** \$37.60

Service Date	Item Code	Service Description	Amount
▶ ▲ MBS Item			
10/04/2019	23	Surgery consultation, Level B	\$37.60

**Transaction Method:**  Card Present  Card Not Present

**Claim Type:**

**Terminal:**

Pay

## Pay and claim with Whitecoat

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### When can I use Whitecoat in Bp Premier?

CommBank Health Claim is the Bank's latest health claiming solution and is delivered in partnership with Whitecoat. The solution is currently in pilot. If you are interested in participating in the pilot or would like to learn more, please email [SmartTerminalsApps@cba.com.au](mailto:SmartTerminalsApps@cba.com.au).

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### Pay and claim with Whitecoat

Whitecoat payments are processed from the Payment details screen just like other payment types. A patient can pay for Medicare items via bank card (**Card Present**) or the MyWhitecoat app (**Card Not Present**). Custom items can be paid via EFTPOS.

Note the following are applicable when processing a payment through Whitecoat:

- Only fully paid accounts can be handled via Whitecoat from Bp Premier (the **Pay Full Amount** checkbox must be ticked). If your patient wishes to split payments between card and cash, you must produce two separate invoices, one with the services being paid via Whitecoat and the other with the services being paid by cash.
- Medicare and DVA items cannot be paid through Whitecoat with EFTPOS. You can only pay an invoice with custom practice items through EFTPOS using the CBA terminal. If an invoice has Medicare or DVA items, you are required to provide the patient's Medicare number, and the CBA terminal will direct you to process the payment through Medicare systems.
- Only one Whitecoat transaction can be active on a machine at a time. Complete the transaction by ensuring the **Best Practice - Payments Utility** is closed on your machine before starting another transaction.

### Completing a Whitecoat transaction

All Whitecoat transactions start with the same steps and then differ depending upon how the patient pays their account.

1. Create a simple account to be paid in full via Whitecoat. The Whitecoat process starts on the **Payment details** screen.
2. On the **Payment details** screen, select the **Whitecoat** field and click the **Pay full amount** checkbox to allocate the full amount.

Payment details - Mrs Kathleen Aalbrecht

Total of services:   Pay full amount  Pay gap Location:  Payment date:

Cash:  Whitecoat:  Direct credit:

Manual Transaction

Cheque details:

Cheque No.	Drawer	Bank	Branch	Amount

Cheques total:

Payment reference:

Outstanding items: Gap:  Payment total:

Invoice	Date	Doctor	MBS Item	Description	Fee	GST	Total	Paid	Owing	Pay now
<input checked="" type="checkbox"/> 37	09/04/2019	Dr C. Aram	23	Surgery consultation, Level B, ND...	37.60	0.00	37.60	0.00	37.60	37.60

Amount tendered:  Change:  Balance owing:

3. Click **Process**. The **Best Practice - Payments Utility** window appears.

Best Practice - Payments Utility ✕

**Patient:** Kathleen Aalbrecht

**Whitecoat Status:** Inactive

**Total Amount:** \$37.60

Service Date	Item Code	Service Description	Amount
▶ ▾ MBS Item			
09/04/2019	23	Surgery consultation, Le...	\$37.60

**Transaction Method:**  Card Present  Card Not Present

**Claim Type:** Fully Paid ▾

**Terminal:** BestPracticeT1 ▾

Pay

4. Confirm the correct **Patient**, **Total Amount** and services are displayed.
5. Use the following information to guide the rest of your selections on the **Best Practice - Payments Utility** screen.
  - a. The patient *does not use* the MyWhitecoat app: **Transaction Method: Card Present**
  - b. The patient *uses* the MyWhitecoat app: **Transaction Method: Card Not Present**
  - c. The patient is claiming a Medicare rebate: **Claim Type: Fully Paid**
  - d. The patient is paying with an overseas student health cover fund: **Claim Type: OSHC**
  - e. The patient is paying a custom item via EFTPOS: **Transaction Method: Card Present; Claim Type: Fully Paid.**

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**NOTE** The patient requires a bank card linked to a savings or cheque account to receive the Medicare rebate back into their bank account; Medicare does not support paying rebates onto credit cards.

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6. Ensure that the correct **Terminal** is chosen.

7. Click **Pay**. The **Payment Request Sent** progress bar shows.

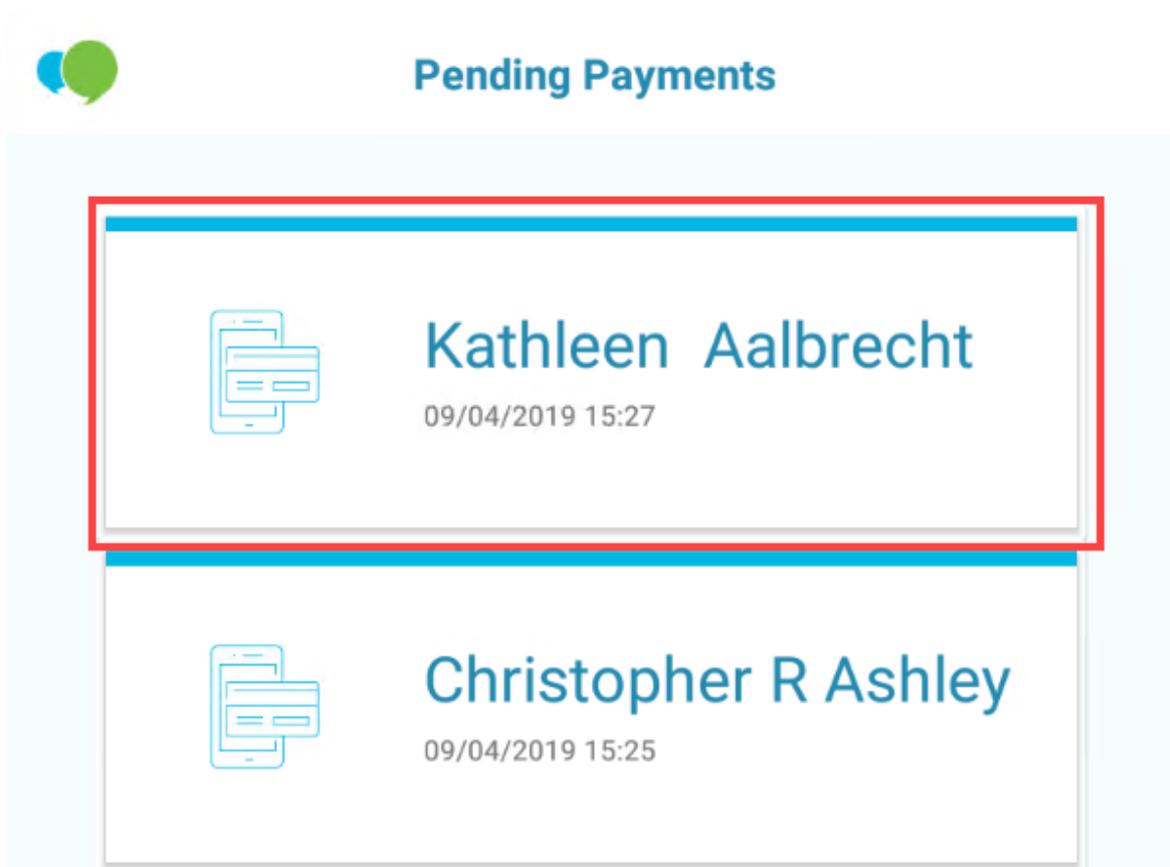
**Payment Request Sent**



8. How your patient is paying will change what steps you perform now. Scroll to the section that describes how the patient is paying.

## Patient is claiming a Medicare rebate and does not use MyWhite-coat

1. The CommBank terminal displays your transaction in the **Pending Payments** list. Select your transaction.



2. If the patient does not have a Medicare number entered in Bp Premier, the terminal allows you to swipe the patient's Medicare card or enter the Medicare Card Number and then the patient number. The **Patient Invoice** is then displayed.

**Patient Invoice**

Receipt <b>0302</b>	Date & Time <b>09/04/2019 15:27</b>
	Status <b>Entered</b>

Practitioner Name <b>Dr Gen Practice</b>	Provider Number <b>674713EL</b>
Patient <b>Kathleen Aalbrecht</b>	Medicare Member Number <b>2952633801</b>

Item Description	Cost
23 <b>Surgery consultation, Level B</b> Date of Service: 09/04/2019	<b>\$37.60</b>

3. Confirm the **Patient Invoice** is correct and select **Accept**. The **Select Payment Method** screen appears.
4. Select either **Card (Full Amount)** or **Cash/Other (Full Amount)**.
5. Follow the prompts on the terminal to complete the transaction with either card or cash. The **Medicare Rebate** screen appears.



## Medicare Rebate

Payment Successful

Receipt

**0302**

Date & Time

**09/04/2019 15:27**

Status

**Rebate Pending**

Practitioner Name

**Dr Gen Practice**

Provider Number

**674713EL**

Patient

**Kathleen Aalbrecht**

Medicare Member Number

**2952633801**

Item Description

**23 Surgery consultation, Level B**

Date of Service: 09/04/2019

Cost

**\$37.60**

6. Select **Request Medicare Rebate**. Swipe, tap or insert the bank card that will receive the Medicare rebate. This card must be linked to a cheque or savings account.
7. The rebate request is sent to Medicare. When complete, the terminal displays the invoice total, total out of pocket and total rebate.

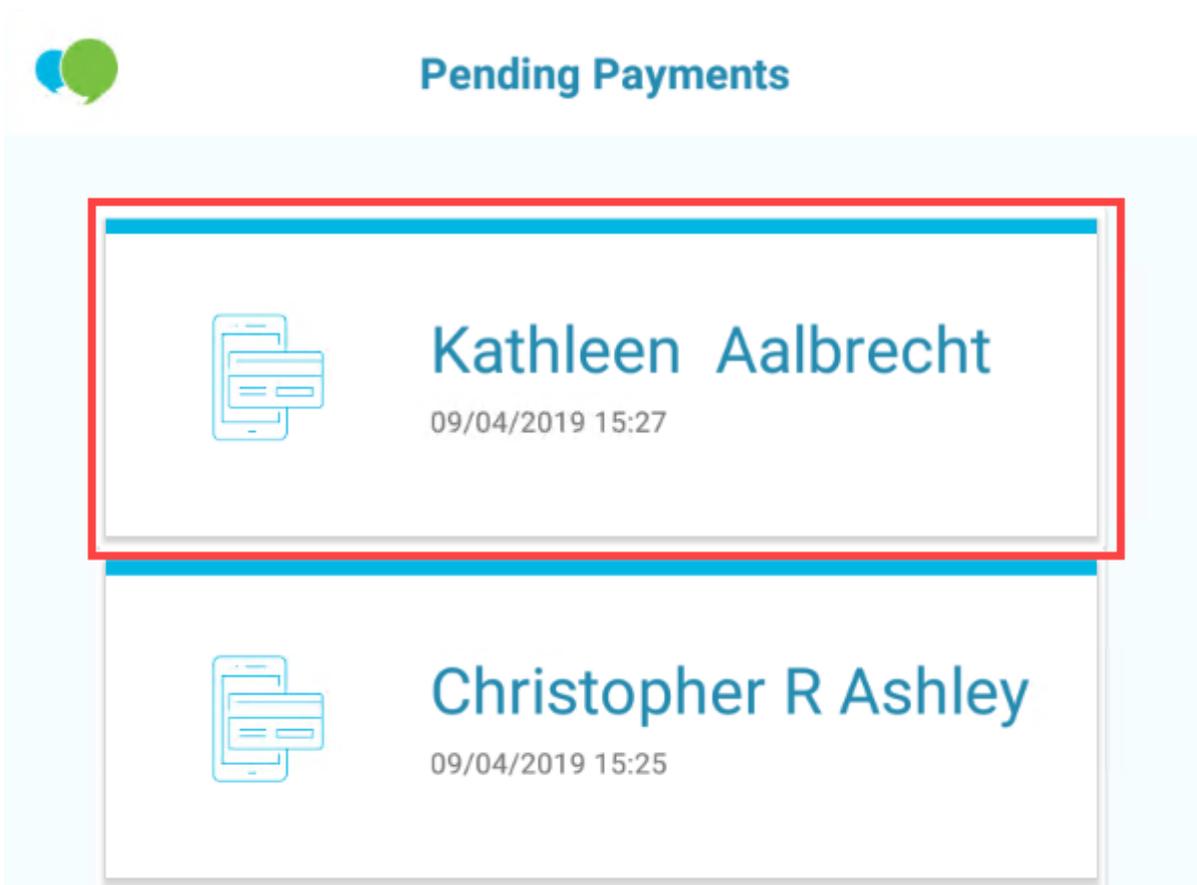
## Patient is claiming a Medicare rebate and uses MyWhitecoat

1. The patient receives a new transaction in the MyWhitecoat app.
2. The patient selects **Approve** in MyWhitecoat.
3. The CommBank terminal displays your transaction in the **Pending Payments** list. Select your transaction.
4. Follow the prompts on the terminal until the **Medicare Rebate** screen appears.
5. Select **Request Medicare Rebate**. Swipe, tap or insert the bank card that will receive the Medicare rebate. This card must be linked to a cheque or savings account.

6. The rebate request is sent to Medicare. When complete, the terminal displays the invoice total, total out of pocket and total rebate.

## Patient is paying with an overseas student health cover card and does not use MyWhitecoat

1. The CommBank terminal displays your transaction in the **Pending Payments** list. Select your transaction.



2. The terminal prompts to swipe the private health insurance card.



3. The terminal contacts the private health fund for payment.
4. The **Patient Invoice** is displayed.

**Patient Invoice**

Receipt: **0302**

Date & Time: **09/04/2019 15:27**

Status: **Entered**

Practitioner Name: **Dr Gen Practice**

Provider Number: **674713EL**

Patient: **Kathleen Aalbrecht**

Medicare Member Number: **2952633801**

Item Description	Cost
23 <b>Surgery consultation, Level B</b> Date of Service: 09/04/2019	<b>\$37.60</b>

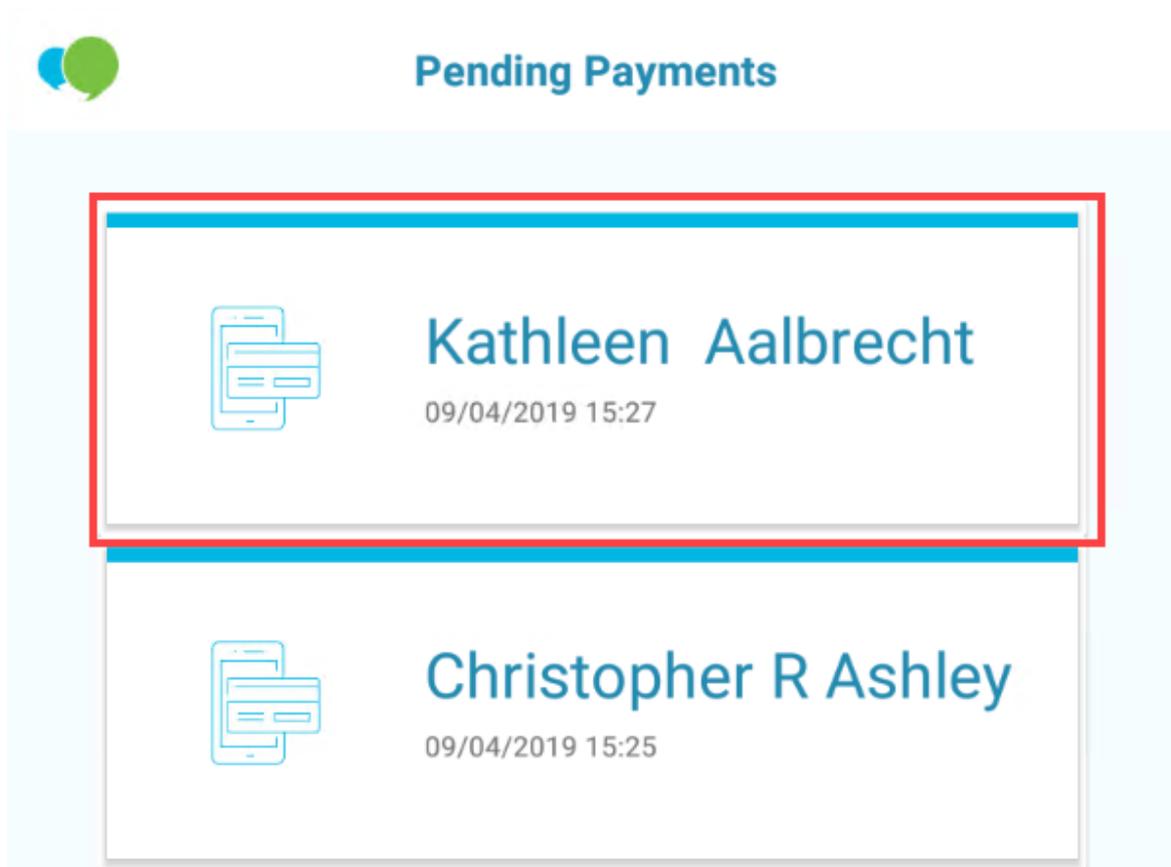
5. If there is a gap that has not been covered by the private health fund, follow the prompts on the terminal to complete the transaction with either card or cash.

## Patient is paying with an overseas student health cover card and uses MyWhitecoat

1. The patient receives a new transaction in the MyWhitecoat app.
2. The patient selects **Approve** in MyWhitecoat.
3. If there is a gap amount between what the overseas health cover company covers and the full amount, complete the transaction on the terminal.

## Patient is paying for a custom item via EFTPOS

1. The CommBank terminal displays your transaction in the **Pending Payments** list. Select your transaction.



2. Confirm the **Patient Invoice** is correct and select **Accept**. The Select **Payment Method** screen appears.
3. Select either **Card (Full Amount)** or **Cash/Other (Full Amount)**.
4. Follow the prompts on the terminal to complete the transaction with either card or cash.

## Finish the Whitecoat transaction

1. Back in Bp Premier, the **Best Practice - Payments Utility** changes status to **Payment Successful**. Close the **Best Practice - Payments Utility** screen.

Best Practice - Payments Utility ✕

**Patient:** Kathleen Aalbrecht

**Whitecoat Status:** Inactive

**Total Amount:** \$37.60

Service Date	Item Code	Service Description	Amount
▶ ▲ MBS Item			
09/04/2019	23	Surgery consultation, Level B	\$37.60

**Transaction Method:**  Card Present  Card Not Present

**Claim Type:** Fully Paid ▼

**Terminal:** BestPracticeT1 ▼

**Payment Successful**

2. Click either **Print receipt** or **Close** on the **Payment details** screen.

You can now process another Whitecoat transaction.