

SUNIX Vision Medicare (Web Services) Setup Guide

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Outline	3
FAQ	4
Medicare Changes Claim Number Sequencing Patient Claim Claimant PKI (old) vs PRODA (new) SUNIX Vision Version Requirements	5 5 5 5 5 5
Downloading reports	5
Prerequisites	6
PRODA (for owners)	7
PRODA for Optometrists	14
SUNIX Vision Settings Direct Deposit Payment Type Printer Setup	15 15 16
Setup Completed	17
Troubleshooting Retrieve PKI RA Number RA Linking Troubleshooting PKI RA has expired Unable to link Outstanding request for assistance Any other issue Web Service Troubleshooting Token does not exist or is invalid	18 18 20 20 20 20 20 20 20 21 21
Useful Links and Contacts	21



Outline

This document contains instructions to set up SUNIX Vision with Medicare Web Services.

It is recommended that this document is used in electronic **PDF** form so that you can use hyperlinks.

The next sections of this document take you through each of the following processes in detail:

- FAQs and Medicare Changes
- Prerequisites Ensure you meet the prerequisite requirements before you begin
- PRODA for owners These steps are to be completed by the business owner. Upon completing these steps, you should have the following:
 - PRODA account
 - PRODA Organisation
 - Medicare Online Service
 - B2B device
- PRODA for Optometrists These steps are to be completed by optometrists (who are not the owner)
- Vision Settings These steps will set Vision specific settings



FAQ

- You can still use the old version (v4/v6) until these interfaces are disabled (advised by Medicare to be 13th March 2022)
- Claims submissions commenced on the old versions can have their processing completed in the new version.



Medicare Changes

Claim Number Sequencing

In the old system your ClaimId's were increasing sequentially. e.g. Your ClaimId's would be A1234@ => A1235@ => A1236@ etc.

In the new system the ClaimId's are now assigned by Medicare. The ClaimId reset **each day**, for **each optometrist**. This results in the majority of your ClaimId's being A0001. e.g.

Monday - Greg - A0001@ Monday - Greg - A0002@ Monday - Greg - A0003@ Monday - Dave- A0001@ Monday - Dave- A0002@ Tuesday - Greg - A0001@ Tuesday - Dave- A0001@ Tuesday - Dave- A0002@

Because of this change, the system no longer allows a single batch to submit the same optometrists on multiple days. To resubmit an optometrist the items must be moved to a new batch.

Patient Claim Claimant

The claimant for a patient claim must now be populated, Vision will automatically populated the claimant with the patient's details by default. This should be changed if claiming for a minor.

PKI (old) vs PRODA (new)

The security system used by Medicare has changed. Previously you would have received new PKI certificates via CD every 2 years. Now SUNIX Vision will warn you when your B2B Device is about to expire (Currently warns at the 5th month, expires at the 6th month). Once you receive this warning, you will need to login into PRODA to re-activate your B2B Device. If you do not re-activate your B2B device before the expiry date, Medicare will stop accepting your claims until the B2B Device is re-activated.

SUNIX Vision Version Requirements

An active ongoing Support and Maintenance Agreement is required to be able to update and use the Medicare Web Services claiming system. **SUNIX Vision Elite Version 22.1.24** or later is required (as at time of writing) to use Medicare Web Services. Please refer to the SUNIX Retail website to download and update to the latest version.

Downloading reports

Reports can only be downloaded for 6 months from the date they were sent. Previously reports could be downloaded up to 2 years.



Prerequisites

Please ensure that you have the following information before you start.

• Before you begin please ensure that you have the **latest version** of SUNIX Vision installed, with an active ongoing **Support and Maintenance Agreement**. Contact the SUNIX Retail support team to renew your Support and Maintenance Agreement if required.

You should be running SUNIX Vision Elite version 22.1.24 or later before proceeding.

- LocationId
 - a. If this is the first time you are using Medicare Online, please ensure that you have the LocationId provided to you by SUNIX (e.g. SUN12345). SUNIX would have given this to you in a separate email or document.
 - b. If you have used Medicare online before, the LocationId is located in SUNIX Vision. (instructions on following pages)
- Either the owner, associate or an authorised contact of the business will need to:
 - Create a PRODA account (instructions on following pages) <u>Documentation to prove identity</u> is required.
 - Create an Organisation in PRODA (instructions on following pages) <u>Proof of ownership</u> is required. Example proof of ownership questions: <u>PRODA Step by Step Guide Page 22</u> Example ANZSIC: 85320 <u>Optometry and Optical Dispensing</u>
- New optometrists will need to:
 - Create their own PRODA account (instructions on following pages).
 <u>Documentation to prove identity</u> is required.
- Existing Optometrist (who are not owners) will not need to do anything



PRODA (for owners)

These instructions are for the owner/associate/authorised contact of the business.

1. Create an individual **PRODA** account.

See the following link for assistance in creating an account: <u>How to register for an Individual account</u>

Note that this PRODA account should be owned by you as an individual. This is not an account for the practice/staff/business, this is your account.

Delegating to staff members (ADVANCED USERS ONLY) If you wish to delegate PRODA tasks to other team members (e.g. practice manager), at a minimum you must complete the steps for creating and verifying your PRODA organisation (Step 2) yourself. After this step it is possible to delegate PRODA tasks to your team members. Please see the following link for more information: Managing members and delegations in an organisation

2. Register a PRODA Organisation for your business. PRODA (Provider Digital Access) - How to register an organisation

Example ANZSIC: 85320 - Optometry and Optical Dispensing



3a. New Practices

If you are a new practice or have not used the Medicare Online, please ensure you have your LocationId provided to you from SUNIX then complete the following forms:

- i. <u>Online claiming provider agreement form (HW027)</u> Q3: enter in the RA number of the **Organisation** created in step 2 Q25: No
- ii. <u>Banking details online claiming form (HW052)</u> If the owner is not an optometrist, you can skip the HW052 form

Please be note that it typically takes 2 weeks for Medicare to process these forms.

If you encounter difficulty with PRODA, please contact the Service Australia e-Business Service Centre on 1800 700 199.

3b. Existing practices

If you are already using Medicare Online then you will need to retrieve your **PKI RA Number**. *This is not the same as your Personal RA Number, nor the Organisation RA Number.*

Click on the following link and search for your RA number: <u>Verizon Business / Cybertrust - Healthcare Public Directory Search</u> We recommend searching by **Email address** Alternatively you can search by typing the **practice name** in the **First name**

Once you have located your practice, copy the number that appears just after the name.

← → C	ificates-australia.com.au/general/cert_search_health.shtml	← → C	
	PRODUCTS ABOUT US	verizon	PRODUCTS ABOUT US
Certificate Search Healthcare Public Directory		Quick Links	Matching Certificates
MASH Directory NASH Directory NASH Test Directory Medicare Australia PKI Super Chain of Trust Sha1 Root CA Certificate Root CA CRL OCA Certificate OCA CRL OCA CRL Sta2	Copulation runner	Certificate Search Healthcare Public Directory NASH Test Directory NASH Test Directory VASH Test Directory Vedicare Australia PKI Super Chain of Trust Sha1	Note: A maximum of 50 entries will be displayed. To download a certificate in the standard MIME fordet, press the green control of the standard MIME fordet press the green to the standard MIME format: press the <u>Netherape</u> button for the format: press the <u>Netherape</u> <u>Netherape</u> <u>I</u> = 10 put
Root CA Certificate Root CA CRL OCA Certificate OCA CRL Documentation	What this page provides Here you can search Hailloce Public Directory for registered persons and download their public digital certificates. To exact for MSL certificates in the secure directory circle have	Root CA Certificate Root CA CRL OCA Certificate OCA CRL	Email: 0 Junicase 10 Jun 2020 to 13 Mar 2022 (Site policy: Signing Centificate) Convention Metacase 30 Jun 2020 to 13 Mar 2022 (Site policy: Encryption Centificate)
Certificates Australia PKI CA Certificates & CRLs General Home Service Desk	How to use this page Type in other the name of the person you are looking for, their email address, their RA Number, the name of their organisation, or any combination thereof. All or wry of these fields are searchable. You may retref partial names and use the wild card character "" to match one or more characters in a name with Type of our throw.	 Sha2 Root CA Certificate Root CA CRL OCA Certificate OCA CRL Documentation 	
	After you click the "Search?" button you will see a list of persons matching the search orderia, and all they valg public digital certificates. From there you can download a certificate to use in your "certificate-aware" application.	Certificates Australia PKI CA Certificates & CRLs	
	Note: If you are after the public certificate or the Certificate Revocation List (CRL) for the Medicare Australia CA, choose the appropriate link in the column on the left.	→ General Home Service Desk	

If you are unable to locate your RA number, please see the section <u>Troubleshooting- Retrieve PKI</u> <u>RA number</u> for an alternative method to retrieve your RA number.



- 4. Retrieve LocationId
 - a) If you are a new practice, ensure you have your LocationId given to you by SUNIX
 - b) If you are an existing practice, you can retrieve the LocationId by:
 - i. Opening SUNIX Vision
 - ii. Maintenance menu
 - iii. Medicare Online Setup menu
 - iv. Copy the Minor / LocationId
- 5. Complete the steps for Adding and linking to Medicare Online in PRODA

When answering: "Has your organisation been issued with a PKI site certificate by us?"

- a. If you have not used Medicare Online before, answer **No** and fill in your **LocationId**. *Please note that it typically takes medicare 2 weeks to have processed your paper*
- b. If you have used Medicare Online before, answer **Yes**. Enter the **PKI RA Number** and **LocationId** obtained earlier.

Please note that you have a **limited number of attempts** before you will get locked out of the system.

- Organisation Linking - Create Rel X +		~	-		×
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Organisation Linking - Create Relationships					?
Identifying your organization					8
identifying your organisation					•
'Has your organisation been issued with a PKI site certificate by us?					
Please select one					
Yes O No					
What is your PKI RA Number?					
Identifier type Identifier					
Minor Cystomer Id					
Link to Medicare Online /ECLIPSE/DVA/AIR - The identifier issued by your Software Vendor for your location, this number is unique to each location.					
terreet for your reason, and names to anyou to addit Mediati.					

If the link to Medicare online fails, or you get locked out, you will have to stop here. Please see <u>Troubleshooting - RA linking</u> for some suggestions.



- 6. Go to the SUNIX Vision system
- 7. Click on Maintenance, then choose Medicare Online Setup
- 8. Set Medicare Version to "W1", confirm "Yes"
- **9.** If you are a new practice, please ensure that the **Minor / Location ID** and **Enable Medicare Online** fields have been entered. *These would have been provided to you by SUNIX separately.*

If you are an existing practice please continue to the next step (as the fields should have already been populated).

- 10. Click Generate Setting
- 11. Keep this screen open as we will come back to this in a moment.
- 12. Log into PRODA
- 13. Click on to Organisations using the top menu
- **14.** Click on the Organisation corresponding to your practice as shown below

My organisations ← → C ■	PRODA × +	9. FÅ	×	-	Paused	× :
	Australian Government Services Australia PRODA Provider Digital Access Profile Services Organisations	Logou	ıt			
	My organisations					
	You're a member of the organisations listed below Select the organisation name to: • view the organisation's details • manage the organisation's devices • add or remove the organisation's members • add subsidiary organisations (for parent organisations only)					
	Name ABN Organisation Status Role/Status Ptv Ltd Active Director / Active H 1 H 10	Dund				
	Join an Organisation	>				
	Register New Organisation	>				



15. Click B2B Devices and then Register New B2B Device

Manage my organisation PROD × +						`	× –	· 🗆	×
← → C	gov.au/piaweb/app/or	gdel/orgs			Q	¢	☆	D Paused)
Australian Services Aus	Government F Stralia P	PRODA rovider Digital Access	<u>Pro</u>	file <u>Services</u> <u>Org</u>	anisations Lo	<u>ogout</u>			
< Back									
Manage	e my orga	nisation							
Organisatio	on Details								
Organisation	Name	Pty	Ltd						
PRODA RA (O	Organisation)	101001-0							
Status		Active							
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Cortact Phon	e Number	1000		L	Jpdate Phone				
Remove	e Organisation								
Members					~				
Subsidiary Organ	nisations				~				
Service Provider					~				
	Device Name 🌲		10 54	Device Status 🌲	no record found				
Register	r New B2B Device		10 *						
	Back								



16. Copy the **Device Name** (usually SunixVision*Suburb*) from your SUNIX Vision application into the **Device Name** on the PRODA page (maximum 30 characters).

You can enter anything into the Description on the PRODA page.

Vedicare Online / MedClair	n Configuration
medicare ON	LINE Copy PSI Path More Setting
Minor / Location Id	CUBL Medicare Version W1
Enable Medicare Online	
Medicare Online Set	P Generate Setting
Activate Code	Activate Device
Device Name	SunixVision
Drganisation RA	
Facility ID	
Client ID	SUN00003
Product ID	SUNIX Vision 21.0
Proda Token Aud	https://proda.humanservices.gov.au
Medicare Token Aud	https://medicareaustralia.gov.au/MCOL
Proxy Domain	Proxy Port
Tony 2 Silicin	
ce details PRODA x + C = proda.humanservices.gov. Australian Governmed Services Australia	au/plaweb/app/orgdet/orgs/8039990149/devices/register Max PRODA Provider Digital Access Profile Services Organisations Logo
ice details PRODA x + C proda.humanservices.gov. Australian Governmed Services Australia C Back Register Nev Generate a Device Activat	Au/plaweb/app/orgdet/orgs/8039990149/devices/register Au/plaweb/app/orgdet/orgs/8039990149/devices/register PRODA Provider Digital Access Profile Services Organisations Logo N B2B Device on Code for a new device.
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ice details PRODA x + C # proda.humanservices.gov. Australian Governmee Services Australia	at/piaweb/app/orgdel/orgs/R0039990149/devices/register at/piaweb/app/orgdel/orgs/R003990149/devices/register
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- 17. Click Register Device
- 18. Copy the fields from the PRODA page back into SUNIX Vision:
 - Your Device Activation Code
 - Device Name
 - PRODA RA (Organisation)



19. Click Activate Device. The system will report if it was successful as shown below:





PRODA for Optometrists

These instructions are for Optometrists (who are not owners).

If you are already claiming through Medicare Online, you do not need to do anything and can skip this entire section.

If you are not already claiming through Medicare Online, then:

1. Create an individual **PRODA** account:

How to register for an Individual account

At Step 3 - match existing services, link the optometrist PRODA Individual Account to the: Medicare Online service

- 2. Complete the following forms:
 - i. <u>Online claiming provider agreement form (HW027)</u> Q3: enter in the RA number of the **Organisation** created in step 2 Q25: No
 - ii. <u>Banking details online claiming form (HW052)</u> If the owner is not an optometrist, you can skip the HW052 form

Please be note that it typically takes 2 weeks for Medicare to process these forms.

If you encounter difficulty with PRODA, please contact: Service Australia e-Business Service Centre on 1800 700 199



SUNIX Vision Settings

Please ensure that these settings are correctly set in SUNIX Vision.

Direct Deposit Payment Type

- 1. Go to Financial, Bulk Billing Accounts
- 2. Click the List button
- 3. Select Medicare (M)
- 4. Set the **Payment Type** to "**DDep**" Some older systems may have this set to other payment types (e.g. Cheque), newer systems will already have this set to DDep (Direct deposit)
- 5. Save
- Repeat the above steps for the Veterans Consultation (V) and Veterans Jobs (VJ) bulk billing accounts

📑 Bulk Billing Account	
Account Code	М
Vision Description	Medicare
Name (Mailing)	Medicare
Address	
Phone No.	
Payment Type	DDep



Printer Setup

The following print outs will need to be set to an A5-Portrait printer:

Bulk Billing report names:

• Statement of Claim and Benefit Payment

Patient Claim report names:

- Lodgement Advice
- Same Day Delete

The following print outs will need to be set to an A5-Landscape printer:

Bulk Billing report names

• Medicare Online Direct Bill Assignment

To change a printer:

- 1. Go to Maintenance, Report Setup
- 2. Click List or press the L key
- 3. Scroll down and highlight select the report Please note that a report will not show up in the list until you print the report the first time
- 4. Click Printer & Paper Setup
- 5. Select your preferred Printer and then click Ok
- 6. Set the paper size and preferred paper tray; then click Ok



Setup Completed

If you have reached this part of the document then you are now ready to test the system.

Please open a patient with a Medicare Card number and click the **V** (Verify) button next to their Medicare Card, ignore the service date and press ok.

📑 Patient detai	ls [TES] - Robin Dorsey (# 9986) Bal \$ 244.15
Title1	Ref No: 9986
Given Name	Robin
Surname	Dorsey
Known As	Sex M
Date of Birth	02/02/1971 Age 51 Former Na
Property	
Street	5 Hugh Gr
Suburb	Boronia Park
Home Phone	•
E-Mail	Er
Medicare No	2952-81997-1 1 / 🗸
(

If the patient has successfully been verified then the setup has completed successfully and you can now proceed to submit and process Medicare claims using the new Medicare Web Services system.

If the test did not work, please check Web Service Troubleshooting.



Troubleshooting

Retrieve PKI RA Number

If you were unable to find your PKI RA number via the online search, you can retrieve the PKI RA number from your existing PSI store.

1. In SUNIX Vision Elite, go to Maintenance and then Medicare Online Setup.



- 2. Set Medicare Version to "W1", confirm with "Yes"
- 3. Click Copy PSI Path

(This will copy the absolute path to the clipboard)



4. Open your Windows Control Panel





5. Run the PKI Certificate Manager

All Control Panel Items				- 0
$\leftarrow \rightarrow$ \checkmark \uparrow $\mbox{\ \ online\ $	All Control Panel Items >	~	ۍ ،	
Adjust your computer's setting:				View by: Small icons 🔻
繼 Administrative Tools	autoPlay	🐌 Backup and Restore (Windows 7)	🏘 BitLocker Drive Encryption	n
💶 Color Management	Credential Manager	🚔 Date and Time	befault Programs	
🗄 Device Manager	DeviceLock	The Devices and Printers	Ease of Access Center	
🔄 File Explorer Options	le History	A Fonts	🔒 Indexing Options	
🔁 Internet Options	🔊 Java (32-bit)	🔤 Keyboard	(32-bit)	
Mail (Microsoft Outlook) (bit)	Mouse	😳 Network and Sharing Center	Phone and Modem	
PKI Certificate Manager (32-bit)	Power Options	Programs and Features	Recovery	
🔗 Region	4 RemoteApp and Desktop Connections	陀 Security and Maintenance	🐐 Sound	
🖶 Speech Recognition	Storage Spaces	🔕 Sync Center	🔛 System	
Taskbar and Navigation	Troubleshooting	luser Accounts	🔗 Windows Defender Firewa	911

- 6. (Click Setup), Use an existing PSI store.
- 7. Right click on the File Name Box and click Paste, then click Finish
- 8. The RA number is located as shown below (under blue highlight):

1	View: Certificates		-	🗳 Setup
	Personal Other People Token Resident Root Certification	Authorities		🗐 Install
	Issued To	Issued By	Email	
	Test Location Certificate 21 :76	CN=Test Medicare Au	test.location211@	0 Store
	Test Location Certificate 211 :76	CN=Test Medicare Au	test.location211@	



RA Linking Troubleshooting

PKI RA has expired

If the system reports "RA has expired", the most likely cause is that PRODA has not set up the system properly on their side. We recommend that you tick the box and ask for assistance and send them the message:

System reports RA has expired RA has not expired Suspect certificate is not loaded into Idap

It typically takes a few days for PRODA to respond. If issues persist, please call the Service Australia e-Business Service Centre on 1800 700 199.

Unable to link

If the system has failed to establish a link, it is usually because the **PKI RA number** and the **LocationId** do not match up.

The most common issue is that the incorrect RA number has been used. Please ensure that you are using the **PKI-certificate/Location RA number** and not your personal/organisation's RA number.

Outstanding request for assistance

If you get an error message about being unable to process a request because you have an *outstanding request for assistance*, you will need to go to **Requests for Assistance**, then **withdraw** your request before you can proceed.



Your organisation has a relationship with the following chan

Medicare Online / ECLIPSE / DVA / AIR

Any other issue

For any other issue we recommend that you call the Service Australia e-Business Service Centre on 1800 700 199.



Web Service Troubleshooting

Token does not exist or is invalid

If you see the below error message then the system has not managed to authenticate with PRODA:

Error message : vWebHeader: Token does not exist or is invalid, Medicare Authentication Failed. Please check that your connection to the Medicare service is available and enabled

 If you are running version 22.1.23 or earlier, please UPDATE your SUNIX Vision application to the latest version (22.1.24 at time of writing) and try again. Ensure that you <u>clicked</u> <u>Generate Setting</u> and saved the settings.

• Ensure that you completed the steps for <u>Adding and linking to Medicare Online in PRODA</u> <u>Bookmark</u>

Otherwise please contact the SUNIX team for support

Useful Links and Contacts

SUNIX Retail Website - Medicare: <u>https://www.sunixvision.com.au/system-updates/medicare/</u> Website - Support: <u>https://www.sunixvision.com.au/support/</u> Support Email: <u>support@sunixvision.com.au</u> Support Phone: 02 8719 8988

PRODA

Login: <u>PRODA Login Page</u> Info: <u>Medicare Online for health professionals</u> Info: <u>PRODA (Provider Digital Access)</u> Info <u>PRODA Step by Step guide</u> e-Business Service Centre: 1800 700 199 Provider helpline: 132 150