

Commercial-in-confidence



Whitecoat Pro Reconciliation User Guide and FAQs

WorkSafe Victoria – Pilot v2.0

April 2021



Whitecoat Pro - Reconciliation User Guide - Pilot

v2.0

Whitecoat Pro is an innovative payment and claiming solution for healthcare practitioners, now available on iOS, Android and Desktop. Our claiming solution seamlessly fits into your practice workflow – helping to make your job easier and make your patients happier. By reducing the time spent on manual claim forms and waiting on responses, you'll free up your front desk, knowing you'll be getting paid quickly.

The Whitecoat solutions allows for easy and accurate reconciliation of provider accounts and settled payments. Receive one daily payment instead of multiple, with full reconciliation reporting online and no more remittance emails and complicated reconciliation. Your reconciliation reporting is available in real-time and you can access this anywhere and anytime.

The Whitecoat Reconciliation User Guide explains how to use the Whitecoat Merchant Portal to reconcile your payments and claims.

Login to your Merchant Portal here: <https://merchant.whitecoat.com.au/login>

You can find out more here: <https://www.whitecoat.com.au/pages/providers/worksafe-victoria-pilot/>



Add your Internal ID for Easy Reconciliation

- By navigating to the Transactions page from the side navigation panel, you will see a list of all transactions made by a particular practice registered to your account.
- We've introduced an optional "Invoice Reference" field so you can add your own PMS or internal reference ID to every WorkSafe claim you submit from the Whitecoat Merchant Portal.
- This will then be shown in your reconciliation reporting for quick reference when reconciling your payments.
- When you create a claim, in the right-hand side you will see an "Invoice Reference" field where you can add in your own ID before pressing Process Invoice.



Transaction Reconciliation

- By navigating to the Transactions page from the side navigation panel, you will see a list of all transactions made by a particular practice registered to your account.
- If you have multiple practices, you can view another practice registered to your account by selecting it using the Practice drop-down selector at the top.
- The Transactions History Report table displays a transaction Status, giving you an overview of the status of each invoice including Settled, Incomplete, Cancelled and Pending.
- You can export this report to CSV or XLSX by clicking the Export button on the right.
- For all WorkSafe Victoria claims, you can click on the specific transaction to see the detailed Transaction record.



Invoice Reconciliation

- By navigating to the **Invoice Reconciliation** page from the side navigation panel, you will see all invoices made by a particular practice registered to your account, allowing you to view expected amounts, total paid amounts, and payment status.
- You can change the date or practice from the options at the top and click **Run Report**. Simply select the target practice from the Practice drop-down selector and specify the time period you wish to view with the From Date and To Date selectors.
- You can export this report to CSV or XLSX by clicking the **Export** button on the right.
- For additional details, including what has been paid, you can click on the specific transaction which will bring up the Disbursement details.



Bank Reconciliation

- By navigating to the **Bank Reconciliation** page from the side navigation panel, you will be redirected to the **Bank Reconciliation Report page**. This tool provides you will a detailed listing of bank payments made to a particular practice.
- You can change the date or practice from the options at the top and click **Run Report**. Simply select the target practice from the Practice drop-down selector and specify the time period.
- For additional details, including which invoices have been paid as part of each bank payment, you can click on the specific transaction which will bring up the invoice details including the optional PMS Internal Client Reference ID you can input when processing the transaction.
- You can cross reference your Internal Client Reference number or Invoice Numbers and Item codes with the **Invoice Reconciliation Report** if you need additional details.
- You can export this report to CSV or XLSX by clicking the **Export** button on the right.



Reconciliation Support Queries

- If you have any queries, please contact our support team at supportteam@whitecoat.com.au and provide as much detail as possible so we can assist you further.



FAQs

When do I get paid?

- The Whitecoat solution makes payments quicker and easier for WorkSafe Victoria claims.
- Payments for WorkSafe Victoria transactions are processed by Whitecoat the next business day and paid into your account within 3 business days depending on your Bank. You can double check the details in the Whitecoat Merchant Portal at <https://merchant.whitecoat.com.au/login>

How do I see my statements and remittance advices for payments?

- Receive one daily payment instead of multiple, with full reconciliation reporting online (no more remittance emails and complicated reconciliation).
- You can view your Transaction history in the Whitecoat Merchant Portal by navigating to the Transactions page or the Invoice Reconciliation page. You can also find the details within the Whitecoat Pro mobile application by clicking the History tab. This will include the Amount, Status and Patient details for your reference.

I have questions about a specific claim?

- Every time you submit an invoice, we will display the response from WorkSafe Victoria in real-time. If you require support to resolve issues with invoicing for a specific claim or patient, please contact the claim's designated managing WorkSafe Agent as per your usual business practice and they will be able to provide additional information. Contact details for the Agents can be found at www.worksafe.vic.gov.au/your-worksafe-agent.

The Invoice Number is different to my PMS? Can I add my own PMS invoice number?

- The Whitecoat solution includes a unique invoice number for each transaction. You can add your own PMS reference or internal ID when processing a claim through the Whitecoat Merchant Portal. When you create a claim, in the right-hand side you will see an "Invoice Reference" field where you can add in your own ID before selecting the Process Invoice option.



What happens if my invoice goes into Pending Review?

- If WorkSafe Victoria has put your claim under review, you can wait for a response from the Agent. This may take approximately 2 business days and the invoice will update automatically in the Whitecoat system. If the invoice is approved, we will process the payment directly. If the invoice is rejected, you will need to action this accordingly.
- You can find out more information in the Whitecoat Merchant Portal Pilot User Guide.
- You can contact the WorkSafe Provider Support Team for the specific explanation as to why the service/s require review. Additional WorkSafe Support Information is available here: <https://www.worksafe.vic.gov.au/payments-platform>

Can I process Telehealth items?

- Currently WorkSafe Victoria do not support Telehealth item codes for the pilot for WorkSafe real time claiming so you will need to submit telehealth items using the old process. Visit the User Guide provided on sign up to find the list of item codes supported for GP and Telehealth.

My invoice declined but I've used a valid Participant Claim Number?

- The response you received has come directly from WorkSafe Victoria so you will need to contact the Managing Agent directly for additional information. You can find the Managing Agent contact details here: <https://www.worksafe.vic.gov.au/your-worksafe-agent>
- We recommend double checking the name, date of birth and Claim number for your patient record in the Whitecoat portal to ensure all details are correct.
- When submitting an eligibility check or invoice for an injured worker, you will need their 11-digit claim number and date of birth.
- Claim numbers must include all zeros (0) with no spaces or dashes.

What if I need to update my patient's details?

- You can add this patient again with the updated details directly in the app or portal and resubmit the invoice.

Error message: Valid Provider Number Required

- Your provider name and provider number need to match exactly to the details you have setup with WorkSafe Victoria.
- Please double check the details are correct in your Whitecoat Merchant Portal, including the spelling of the first name and last name.
- Please contact us if any changes need to be made and we can update accordingly.



I would like to clarify the WorkSafe scheduled Fees?

- The Whitecoat platform includes the item codes and fee schedule provided by WorkSafe Victoria. When you input the item, you can update the price if you would like but it will default to the WorkSafe Victoria fee schedule. You can view the current fee schedule here:
<https://www.worksafe.vic.gov.au/resources/medical-service-reimbursement-rates-information-2021>

Which item codes are supported?

- You can find the list of supported item codes for the pilot in the WorkSafe Victoria Support Information Pilot Welcome Pack sent to you via email when you registered for the pilot.
- When you get to the item selection step you will have the option to search the Item Code in the portal or app, type in the item code or first few digits and it should bring up the appropriate items when you click the blue search icon to the right of the search bar.
- If the item code you are looking for is not available for the pilot, you will need to invoice the item using the old process.



For help with the Whitecoat electronic invoicing platform including any technical issues, training or settlement of invoices, please contact the Whitecoat Technical Support Team.

Phone: 0488 894 483

Email: supportteam@whitecoat.com.au

Support Hours: 9am - 5pm Monday to Friday (Melbourne Business Days)