Accounts & security

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Manage access to Zedmed for staff and doctors. This is done by assigning specific roles to users, which gives them access to the parts of Zedmed required to perform their work.

For Zedmed Cloud customers, Zedmed manages user accounts and accepts requests via the cloud user request forms.

Overview

Zedmed uses granular permissions called functions that give access to specific features and processes within Zedmed. These functions are grouped into roles based on employees' duties and each employee's user account is given access to one or more roles.

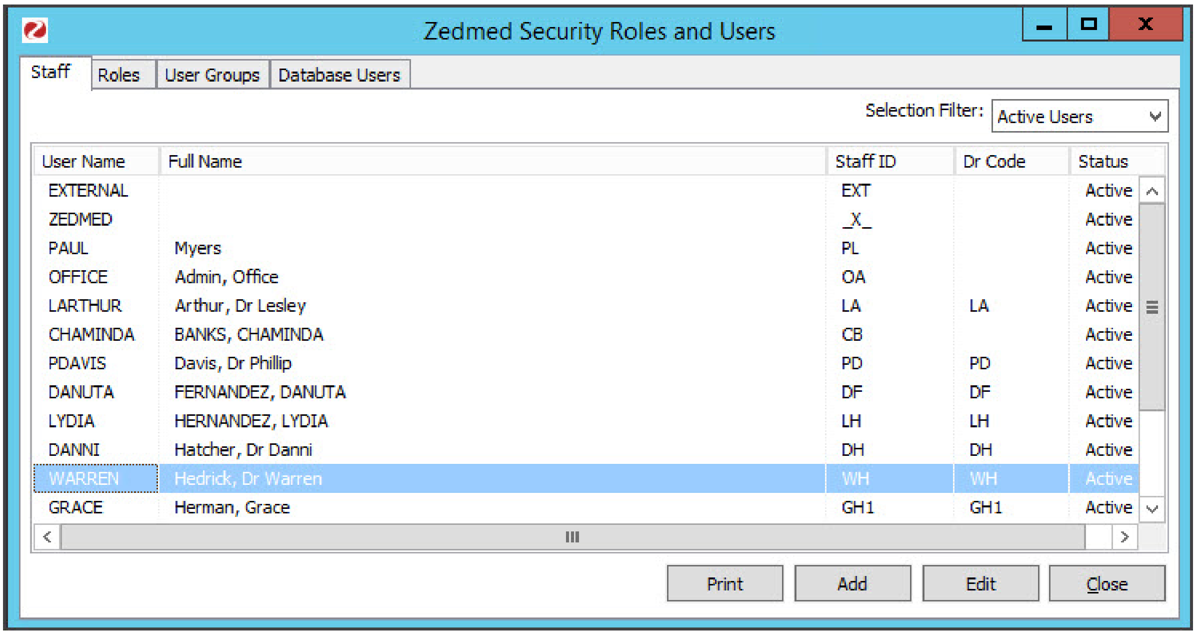
Roles make it easy to assign access. For example, if you have a new nurse, just create an account and allocate the **Nurse** role and the nurse has all the access they need.

You can change the functions that the standard roles have or create new roles. Out of the box, Zedmed has 4 pre-configured roles: **Administrator**, **Doctor**, **Nurse** and **Receptionist**. Each role gives access to the functions commonly used by those roles.

To access the **Security Roles and Users** screen:

1. Go to Zedmed's **Utilities** tab.
2. Select **Security**.

   The **Zedmed Security Roles and User** screen will open.



Selection Filter: Active Users

User Name	Full Name	Staff ID	Dr Code	Status
EXTERNAL		EXT		Active
ZEDMED		_X_		Active
PAUL	Myers	PL		Active
OFFICE	Admin, Office	OA		Active
LARTHUR	Arthur, Dr Lesley	LA	LA	Active
CHAMINDA	BANKS, CHAMINDA	CB		Active
PDAVIS	Davis, Dr Phillip	PD	PD	Active
DANUTA	FERNANDEZ, DANUTA	DF	DF	Active
LYDIA	HERNANDEZ, LYDIA	LH	LH	Active
DANNI	Hatcher, Dr Danni	DH	DH	Active
WARREN	Hedrick, Dr Warren	WH	WH	Active
GRACE	Herman, Grace	GH1	GH1	Active

Managing users and roles

This section explains how to create and modify roles and assign them to users

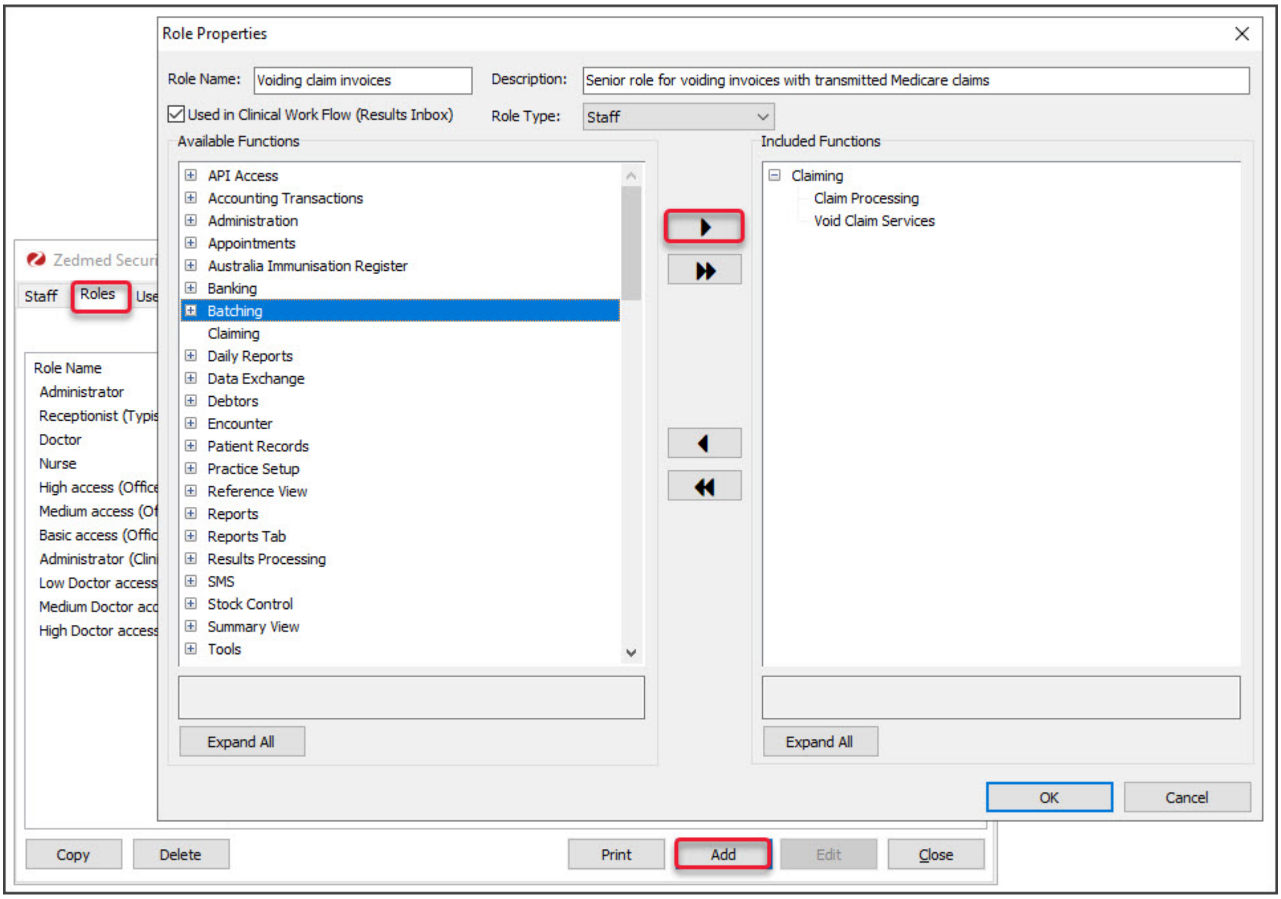
- To add a new staff member, see the Add new staff guide.
- To add a new doctor, see the Add new doctor guide.

Creating a new role

To create a new role:

1. Select the **Roles** tab.
2. Select **Add**.

   The **Role Properties** screen will open.
3. Give the new role a name and description.
4. Add the functions you want the role to have by selecting the function and clicking the arrow button.
5. Select **OK** to save the new role.



Role Properties

Role Name: Voiding claim invoices

Description: Senior role for voiding invoices with transmitted Medicare claims

☑ Used in Clinical Work Flow (Results Inbox)

Role Type: Staff

Available Functions

- API Access
- Accounting Transactions
- Administration
- Appointments
- Australia Immunisation Register
- Banking
- Batching
- Claiming
- Daily Reports
- Data Exchange
- Debtors
- Encounter
- Patient Records
- Practice Setup
- Reference View
- Reports
- Reports Tab
- Results Processing
- SMS
- Stock Control
- Summary View
- Tools

Included Functions

- Claiming
  - Claim Processing
  - Void Claim Services

Zedmed Securi

Role Name

- Administrator
- Receptionist (Typis
- Doctor
- Nurse
- High access (Office
- Medium access (Of
- Basic access (Offic
- Administrator (Clini
- Low Doctor access
- Medium Doctor acc
- High Doctor access

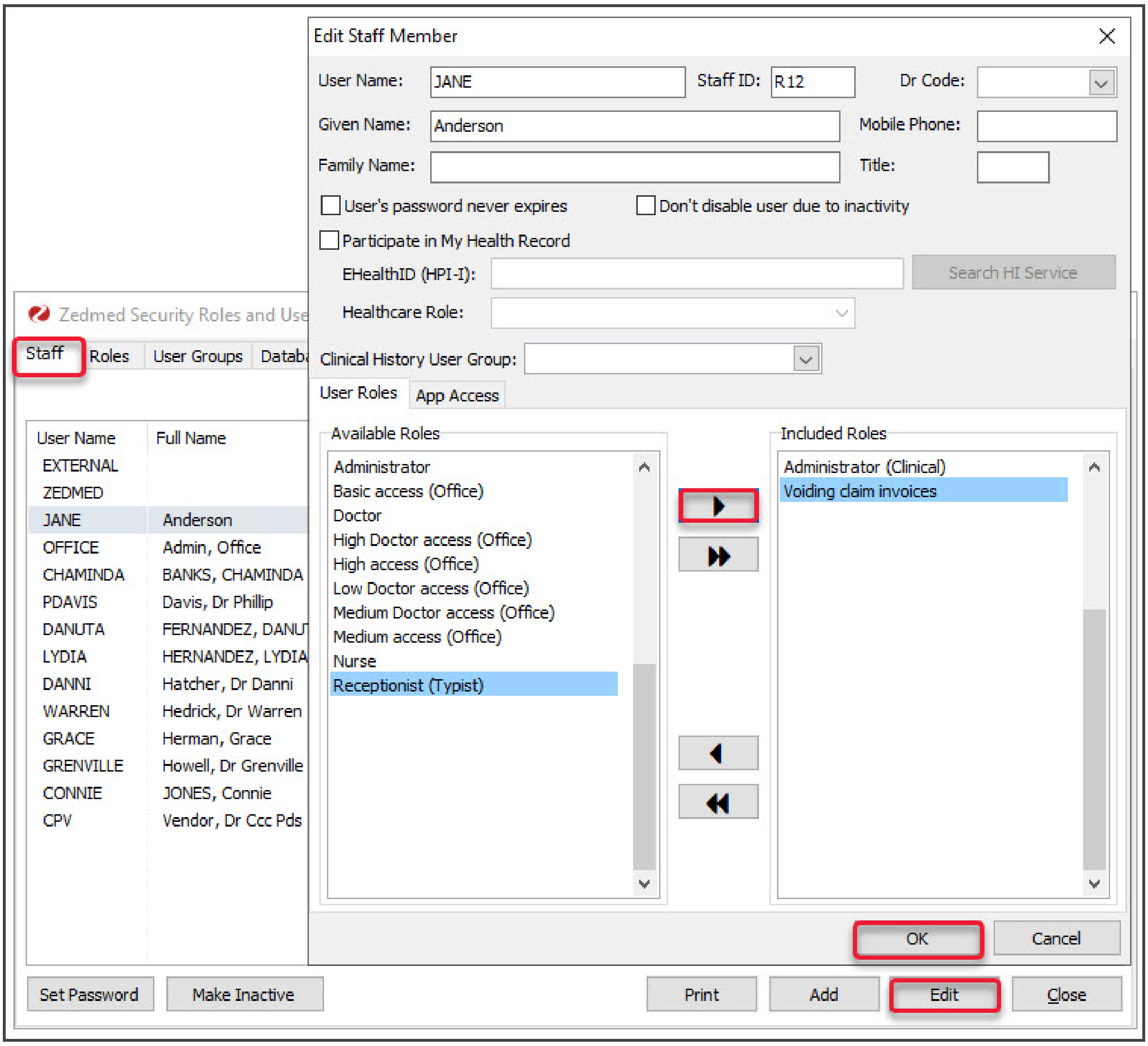
Adding roles to users

To add a role to a user:

1. Select the **Staff** tab.
2. Select the user.
3. Select **Edit**.

The **Edit Staff Member** screen will open.

4. Select the role you want to add.
5. Select the arrow button to add it to the users.
6. Select **OK** to save the changes.


Edit Staff Member

User Name: JANE
Staff ID: R12
Dr Code:
Given Name: Anderson
Mobile Phone:
Family Name:
Title:

☐ User's password never expires
☐ Don't disable user due to inactivity
☐ Participate in My Health Record

EHealthID (HPI-I):
Healthcare Role:
Clinical History User Group:

Available Roles:
- Administrator
- Basic access (Office)
- Doctor
- High Doctor access (Office)
- High access (Office)
- Low Doctor access (Office)
- Medium Doctor access (Office)
- Medium access (Office)
- Nurse
- Receptionist (Typist)

Included Roles:
- Administrator (Clinical)
- Voiding claim invoices

User Name	Full Name
EXTERNAL	
ZEDMED	
JANE	Anderson
OFFICE	Admin, Office
CHAMINDA	BANKS, CHAMINDA
PDAVIS	Davis, Dr Phillip
DANUTA	FERNANDEZ, DANU
LYDIA	HERNANDEZ, LYDIA
DANNI	Hatcher, Dr Danni
WARREN	Hedrick, Dr Warren
GRACE	Herman, Grace
GRENVILLE	Howell, Dr Grenville
CONNIE	JONES, Connie
CPV	Vendor, Dr Ccc Pds

User Groups (restrict clinical note sharing)

By default, doctors can see each other's clinical notes (encounter history), but if you create a **User Group**, only doctors added to that group will be able to see each other's clinical notes. For example, you could create a user group for GPs so that only the GPs in that group can see each other's clinical notes, and another group for specialists, or you could have different groups for different clinics within a practice.

You can also allow members of a group to see the clinical notes of members in another group without sharing their own. For example, if a practice had a group so GPs could restrict the sharing of clinical notes and a psychologist wanted to view those notes without joining the group (because the GPs would see the psychologist's notes), you can create a group for the psychologist and add it to the GP's group. The psychologist will see the GPs' clinical notes but the GPs will not be able to see the psychologist's.

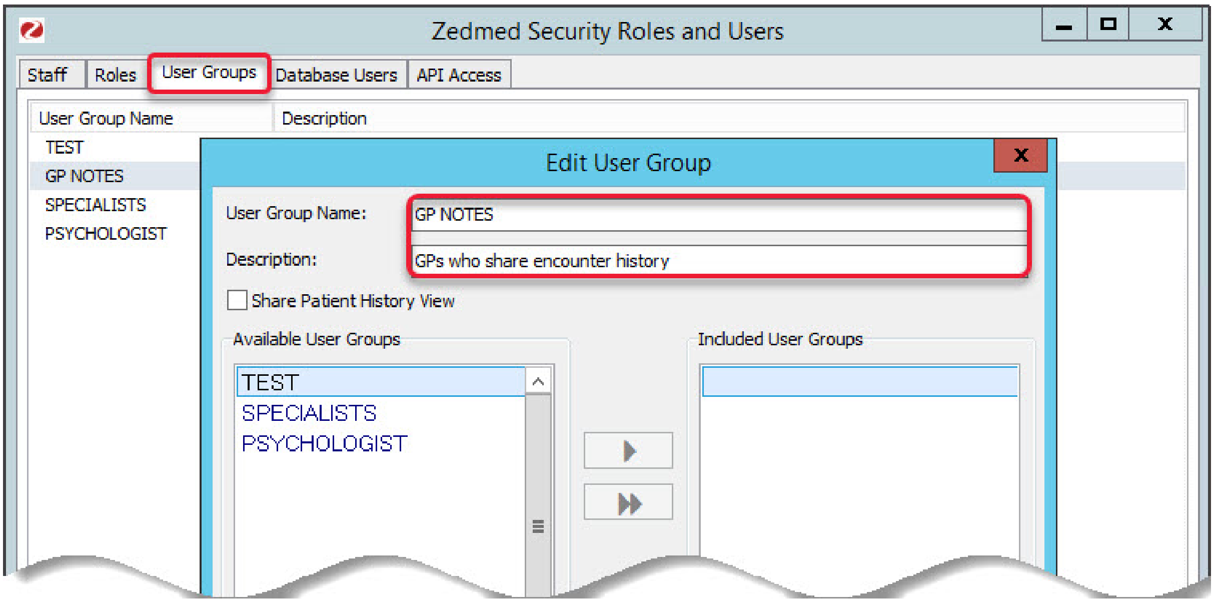
Important: these sharing restrictions will only apply to clinical notes added after the group security is applied.

Create a group and add members

Only members of this group will be able to see each other's clinical notes (encounter history).

1. Go to Zedmed's **Utilities** tab.
2. Select **Security**.

   The **Zedmed Security Roles and User** screen will open.
3. Select the **User Groups** tab.
4. Select **Add**.
5. Enter a **User Group Name** and **Description.**



Zedmed Security Roles and Users

User Group Name	Description
TEST	
GP NOTES	
SPECIALISTS	
PSYCHOLOGIST	

Edit User Group

User Group Name: GP NOTES

Description: GPs who share encounter history

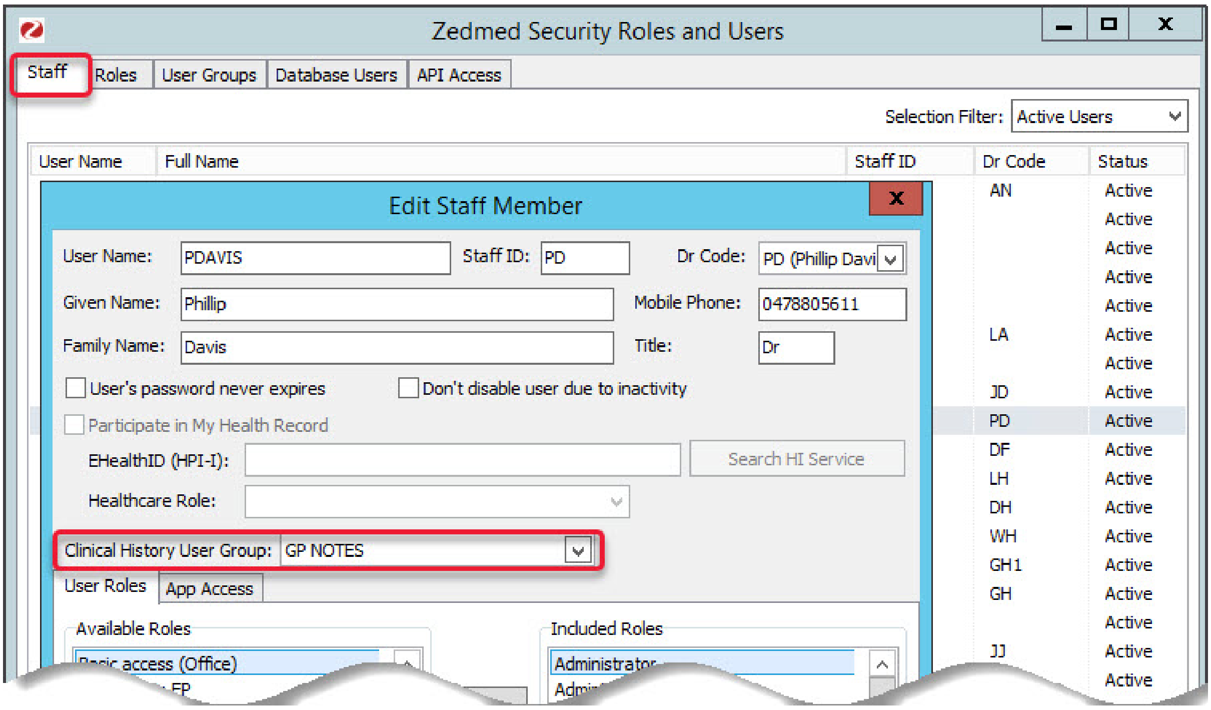
□ Share Patient History View

Available User Groups: TEST, SPECIALISTS, PSYCHOLOGIST

Included User Groups:

6. Select **OK** to save the group.

   Now you need to add the doctors to the group.
7. Select the **Staff** tab.
8. Double-click an applicable doctor to open their **Edit Staff Member** screen.
9. From the **Clinical History User Group** field, select the name of the group you created.
10. Repeat this for each doctor that wants to restrict access to their clinical notes - to group members.



Selection Filter: Active Users

User Name	Full Name	Staff ID	Dr Code	Status
			AN	Active
				Active
				Active
				Active
				Active
			LA	Active
				Active
			JD	Active
			PD	Active
			DF	Active
			LH	Active
			DH	Active
			WH	Active
			GH1	Active
			GH	Active
				Active
			JJ	Active
				Active

User Name: PDAVIS
Staff ID: PD
Dr Code: PD (Phillip Davi
Given Name: Phillip
Mobile Phone: 0478805611
Family Name: Davis
Title: Dr

□ User's password never expires
□ Don't disable user due to inactivity
□ Participate in My Health Record

EHealthID (HPI-I):
Healthcare Role:

Clinical History User Group: GP NOTES

Available Roles: Basic access (Office), FP

Included Roles: Administrator, Admi

Allow a doctor to see the clinical notes of another group (not reciprocated)

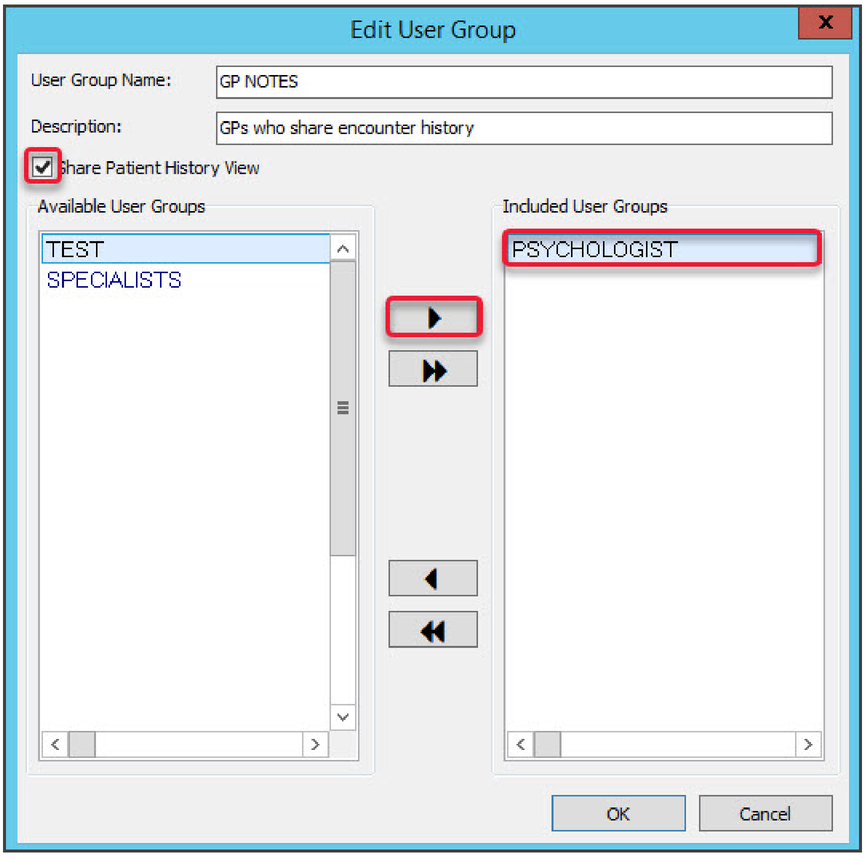
In this example, a psychologist uses a group called PSYCHOLOGIST where they are the only member. The psychologist wants to access the clinical notes of a practice's GPs (who also use a group) but does not want to share their own clinical notes by joining that group.

1. Go to Zedmed's **Utilities** tab.
2. Select **Security**.

   The **Zedmed Security Roles and User** screen will open.
3. Select the **User Groups** tab.
4. Open the group used by the doctors.
5. Tick **Share Patient History View**.
6. Select the PSYCHOLOGIST group.

   The section above explains how to create a group.
7. Select the arrow to add the PSYCHOLOGIST group to the right pane.
8. Select **OK**.

   On the screenshot below, members of the Psychologist group can see the notes of members of the GP NOTES group - but members of the GP NOTES group can not see the notes of members of the PSYCHOLOGIST group.



User Group Name: GP NOTES

Description: GPs who share encounter history

☑ Share Patient History View

Available User Groups: TEST, SPECIALISTS

Included User Groups: PSYCHOLOGIST