

Add a new doctor

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Set up a new doctor or locum in Zedmed. This includes a Doctors Details screen with billing and contact information, a Zedmed login for system access and a schedule for the Appointment Book.

Prerequisites

Doctors need the IDs and accounts issued by the relevant national and state regulatory authorities to perform different medical functions. Many of these credentials are entered into Zedmed to support that functionality.

Credentials used by Zedmed include:

- **Provider number**: need one for each location doctor practices at to claim, bill, refer or request Medicare services.
- Prescriber number: required to prescribe medicines.
- EHealthID (HPI-I): the Health Practice Identifier is required for ePrescribing and loading My Health Records.
- eRx: prescription exchange service for ePrescribing. To learn more, see the ePrescribing with eRx guide.
- Online claiming approval: for Medicare Web Services via the HW052 or HW027 form. Required for bulk billing/DVA.
- AHPRA Number: required for Safescript (Victorian RTPM) functionality.

Create a doctor

Review the following fields and check that you have the information necessary to set up the doctor. Some fields are critical for functions like Medicare billing and e-prescribing, and incorrect or incomplete information can result in failed transactions.

To set up a doctor:

- 1. Go to Zedmed's Management tab.
- 2. Select Practice Setup then Doctors > Find Treating Doctors.

The Find Doctor Detail screen will open.

- 3. In the Family Name field, enter the doctor's surname.
- 4. Press enter and a pop-up will advise "No doctors found! Do you want to add a New Doctor Record?"
- 5. Select Yes.

A new Doctor Details screen will open.

1.1		Dec. March
Eamily Name	Davis	Practice PD HIC Registered
		HIC Online
Given Names	Phillip	Default Item #
Title	Mr Search HI Service	Fee type override Clear
EHealthID (HPI-I)	8003 6199 0002 6805	Dr Type Dr Type
ABN/Bus. Name		Branches
AHPRA Number	MED000000000	Branch Test Branch 1
Home Address		Bank List Albert Road MC Bank Account
		MA Format General Practitioner 🗸 🗸
		Provider # 2408261F Other Provider #
Suburb		Claiming Claiming Service Unavailable Delete
545475		Erx Entity ID 8P5KG Invoice Header Invoice Footer Another
		Provider Type Available Online
Phone Numbers		
Home Phone		
Home Fax		Employment
Mobile Phone	0422555555 SMS Appt. Confirmation	No Employment Record!
Clinical Settings		
Qualification	FRACGP, MBBS, Clin Dip P	
Prescriber No	987777	Details New
Email Address		Available Assist Only External Primary Surgeon Only
Online Appointmen	t System	ECLIPSE Fund Schemes Show Code on Appt. Screen
Practitioner ID	Biographic Information	Text for specialty treatment
	Generate	~
		Signature Image
Find		Close Cancel

- 6. Fill in the applicable Identity fields.
 - a. Family and Given names are mandatory fields.
 - b. Title is used for the doctor's medical title.
 - c. **ABN/Bus. Name** and **AHPRA Number** are optional fields but an AHPRA number is required for Safescript functionality.
 - d. EHealthID (HPI-I) is the Health Practice Identifier.

Required for e-prescribing and loading My Health records. Make sure the ID is searchable in the HI Service. To check, select **Search HI Service** to open the **Search for Healthcare Provider Identifier** screen, then select the **Search** button. If it does not find the ID, contact PRODA Health Professional Online Services - phone 1300 361 457.

For a no HPI-I doctor

- 7. Fill in the Home Address fields.
- 8. Fill in the Phone numbers fields.

SMS Appt. Confirmation

An SMS confirmation can be sent to a practitioner every time a patient makes an appointment with them. The message will contain the patient's name and the appointment's date and time, and incur a cost for the SMS. **Requires Zedmed v37 or later.** Learn more.

9. Fill in the Clinical Settings fields.

- a. Qualification is for the doctor's medical qualification. It is required for e-prescribing.
- b. Prescriber No is required to prescribe medicines.
- c. Email Address used by the doctor.
- 10. Provide Biographic Information

This is used for **Online Appointments.** To learn more, see the **Setup Online Appointments** guide - doctors section.

11. Signature Image.

Zedmed letters and referrals can have the practitioner's signature applied using an image file.

To learn more, see the Electronic signature guide.

- 12. Fill in the applicable Practice fields.
 - a. **Dr Code** is a code you make up using your own internal format. Zedmed uses the code to link the doctor's appointments to billing. The drop-down next to the field is used to locate doctors' details using their Dr Code.
 - b. Default Item # is used to add a default Item to invoices raised for this doctor's consultations.
 - c. Fee type override is for doctors who use their own custom fee. This fee will be selected by default when an invoice is created.
 - d. HIC Registered, HIC Online, DVI Registered and REI Registered are required to transmit invoices to Medicare. All 4 boxes should be selected.
- 13. Fill in the applicable Branches fields.

The **Branch** drop-down box shows the doctor's current branches.

To add a branch: check you completed the Dr Code and Doctor Type fields, select the Another button to open the Branch Selector and choose the branch. Select Close and that branch will appear in the drop-down list of branches.

Branches fields:

- a. **Bank list** is used to select the bank account to be used for the doctor's billing. Payments, including payments for claims, will be paid into this account. This could be the practice bank account or the doctor's own bank account. Bank accounts are set up in the **Practice Details** screen's **Bank Accounts** tab.
- b. **MA Format** is used to select the specialty the doctor is registered for at Medicare Australia. This is required for Medicare Billing and it must match the information Medicare has. When a doctor is registered with Medicare, they provide this information to get their Provider Number.
- c. **Provider#** is the Doctor's Medicare number and is linked by Medicare to the Practice MinorID. Medicare uses this to link its payments to the doctors so it knows who the money should go to.
- d. Other Provider # can be left blank.
- e. Claiming Active and Registration. Follow the steps in the Register doctors for Medicare claims guide.
- f. **eRx Entity ID** is entered by Zedmed. It links the doctor to eRx. You should never change or enter anything into this field.

The Doctor will need to register on the erx.com.au website. When eRx provides Zedmed with the relevant registration information, Zedmed will contact the practice's technical contact to add the information to the Zedmed Server.

The practice will also need a NASH certificate for ePrescribing. NASH certificates are provided to registered organisations using the HPOS online portal. You can log into this portal using a **PRODA** account then request and download a NASH Certificate.

g. Invoice Header/Footer allows the doctor to have their own details. The default header uses the clinic's details.

- h. Another is used to select another branch the doctor practices at using the Branch Selector screen.
- Booking time buffer is used to enter a value that will refine the available appointments sent to the Online Appointments (OLA) by only allowing appointment slots that begin after (Booking Time + Buffer). This prevents people booking online appointments close to the current time

14. For a Locum fill in the Employment fields.

If the doctor is a locum, select **New** in the **Employment** section. This will open the **New Employment Record** screen. Select the Locum's employer from the drop-down list, then select **Close** to save and exit.

dentity		Practice					
Family Name	FERNANDEZ	Dr Code DF VIIC Registered					
Given Names	DANUTA	Default Item #					
Title	Dr Search HI Service						
Elization (UDLI)	9002 6140 0002 2720	Dr Type					
Effeature (FFF-I)	000 0149 0005 2739						
ABN/Bus. Name		Branch Riley Street Clinic					
AHPRA Number	MED1234567890	Bank List Branch 3 Bank Account					
lome Address		MA Format Council Doubling on					
	123 Testing Street						
	Address Line 2	Provider # 1734511H Other Provider #					
Suburb	SOUTH MELBOURNE	Claiming Locked Active Contact Support					
	3205	Erx Entity ID Invoice Header Invoice Footer Another					
Phone Numbers		New Employment Record X ailable Online					
Home Phone	03 1234 5678						
Home Fax	03 9876 5432	Begin Date 02/10/2024 End Date 02/12/2024					
Mobile Phone	0408509482 SMS Appt. Confir	Locum					
Clinical Settings							
Qualification	MBBS, Dip. Derm, FRACGP	Close Cancel Nave					
Prescriber No	9877773	Status					
Email Address	dfernandez@testing.email.auu	Available Assist Only External Primary Surgeon Only					
Online Appointmen	t System	ECLIPSE Fund Schemes Show Code on Appt. Screen					
Practitioner ID	Biographic Information	Text for specialty treatment					
	Genera	te					
		Signature Image					

- 15. Fill in the Status fields:
 - a. **Available** is ticked by default and means the doctor is active and can be selected for appointments. A doctor cannot be deleted so this selection is used if the doctor is on holiday or has left the practice.
 - b. Assist only means the doctor can be added to an invoice as an assist. To learn more, ass the Assisted Billing Guide.
 - c. Available Online is used to make the doctor available for Online Appointments.
- 16. ECLIPSE Fund Schemes is used to set up the doctor for ECLIPSE.

To learn more, see Set up ECLIPSE for treating specialists.

17. Select $\ensuremath{\text{Close}}$ to save and exit.

Banking, Fees and Funds

If the practitioner has their own bank account, the account will need to be set up at the practice level and then added to their profile. Adding a bank account to the practice is explained in the Bank Account section of the **Practice Setup** guide. This will create a banklist, that you then select in step 12-a of the doctor setup section above.

If the practitioner has their own fees for services, they will need to be added to the **Item Detail** screen. This is documented in the **Doctors** section of the **Managing Item Fees** guide.

If the practitioner uses ECLIPSE billing, they will need an agreement or a scheme with each Fund they intend to submit claims to. To learn more about ECLIPSE, visit Services Australia. The Funds are added using the ECLIPSE Fund Schemes button documented in step 15 in the section above.

Create a doctor's login

For Zedmed Cloud

Zedmed Support creates usernames and passwords for Zedmed Cloud as part of our managed solution. To have a user login created, please submit a request form.

For Zedmed on-prem

This section sets up the doctor's login credentials and gives them access to the parts of Zedmed required by a doctor.

To create a doctor's account:

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

The Zedmed Security Roles and User screen will open at the Staff tab.

3. Select Add.

This will open the Edit Staff Member screen.

- 4. In the **User Name** field, enter the name the doctor will use to log into Zedmed with. The practice will have its own format.
- 5. For Staff ID, enter the Dr Code you created in the section above.
- 6. Enter the doctor's Given Name and Family Name into the fields provided.
- 7. For **Dr Code**, select the doctor's code from the drop-down list.
- 8. Enter the doctor's Mobile Phone number into the field provided.
- 9. The EHealthID (HPI) and Healthcare Role do not need to be selected if you have a Dr Code selected.

The EHealthID (HPI-I) is only added for users who need to **Participate in My Health Record**. A doctor still needs the HPI-I to be entered when they are set up as a treating doctor.

- 10. From the **User Roles** tab, select the applicable doctor role then select the single arrow to move the role into the **Included Roles** pane.
- 11. Review the Use Clinical History User Group drop-down options.

This optional field is only used to restrict the sharing of patient information between doctors by only allowing members of the selected group to see each other notes. To learn more, see the Accounts and Security article.

12. The $\ensuremath{\mathsf{App}}\xspace$ Access is for access to the Doctor's App.

To learn more, see the Doctor's App article.

13. Select **OK** to close.

The Set Password screen will open.

- 14. Enter and confirm the password.
- 15. Select **OK** to save and close.
- 16. You can now provide the doctor with their login information.

Advise the doctor that they should use the **Utilities** tab > **Change Password** button to change their password.

	0					Zed	med Securi	ty F	oles and Users			_	
	Staff	Roles	User Group	s Data	base Users]							
							Sele	Selection Filter:					
4				Edit	Staff Me	mber				Staff ID	Dr	Code	Status
Jser Name	e: D	DANUTA			Staff ID:	DFD	Dr Co	de:	DF (DANUTA F	EXT			Active
							 7			_X_			Active
Siven Nam	ne: Fe	ernandez					Mobile Pho	ne:	0422803434	PL			Active
amily Nar	me: Da	anuta					Title:			OA			Active
			and the							LA	LA	A	Active
User's password never expires							CB			Active			
Particip	pate in M	ly Health	Record							PD	PE	D	Active
EHealt	hID (HPI	[-I):						Sea	arch HI Service	RD	RI	D	Active
Health	care Rol	e								DF	DI	F	Active
The Grow	con e reor									LH	LH	1	Active
Clinical History User Group:							DH	DI	н	Active			
Jser Role	S Ann	Access								WH	W	Ή	Active
	hpp	ACCESS								GH1	G	H1	Active
Available	e Roles					Include	ed Roles			GH	G	Н	Active
Administ	trator			^		Doctor	with EP			CJ			Active
Administ	trator (C	linical)								MS	M	S	Active
High Doo High acc	ctor acc cess (Of ctor acce	ess (Offic fice) ess (Office	e)		*								Acuve
Medium Medium Nurse	Doctor a access	access (O (Office)	ffice)	=						Add	Ed	lit	Close
Reception Doctor -	onist (Ty - No EP	vpist)			•								
				~									

Create a schedule

Each doctor needs a schedule created so they appear in the Appointment Book. The schedule helps manage what a doctor's time is used for, and Activity Types are used to determine the types of appointments that can be booked in that schedule's time slots.

To create the doctor's schedule, follow the Create a Schedule guide.

Create a non-HPI-I doctor

In Zedmed v36.5 and later, you can create a practitioner without an HPI-I. This is ideal for treating doctors without an HPI-I that need to be set up for Online Appointments. This is achieved by generating an ID that Online Appointments can use.

Follow the same setup process for a standard practitioner, but add a Practitioner ID in the **Doctor Details** screen as outlined below.

To add a Practitioner ID for a non-HPI-I doctor:

- 1. Open the practitioner's **Doctor Details** screen.
- 2. Clear the HPI-I field and ensure it is blank.

Family Name	FERNANDEZ		
Given Names	DANUTA		
Title	Dr	Search HI Service	

- 3. Select the Generate button next to the Practitioner ID field.
- 4. Select Available Online if the practitioner is to be available for Online Appointments.

Qualification	MBBS				Detail	s New	
Prescriber No			Status	Assist Only	External Primary Surgeon Only	Available Online	
nline Appointment System			ECLIPSE F	und Schemes	Show Code on Appt. Screen		
			Text for specialty treatment				
Practitioner ID	Biographic	Information					
(69201FA0		Generate	Signati	ure Image			

Important: If this practitioner working in multiple clinics, they must use the <u>same autogenerated Practitioner ID</u> in each branch or it will duplicate their schedule.

Configure Online Appointments

If the practice is using Zedmed's Online Appointments, you need to enable the doctor for OLA and provide their Biographic Details and a photo. This is documented in the Set up Online Appointments guide.

The full Set up Online Appointments guides should be reviewed as new doctors must also be configured for OLA Appointment Types and Schedules.

Define Payment Gateway availability

This step is only for doctors taking credit card payments for Online Appointments (OLA) using Zedmed's Payment Gateway. It requires the Appointment Types to have been made available online as part of the Online Appointment setup.