

# Secure Send

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Secure Send uses email or ZedSMS to send invoices, referrals (including radiology and pathology) and documents to a patient or NOK Account Payer using a link to a secure download page.

Secure Send is ideal for telehealth where the doctor is unable to print out a referral on laboratory paper and hand it to the patient. Instead, the patient is securely sent the referral on generic referral paper that they can print it out to present at the laboratory

## Considerations

- Secure Send is a free feature for Zedmed customers.
- Using ZedSMS with Secure Send will cost SMS credits.
- The email and SMS will show the practice name but not the practice email or phone number.
- If a practitioner sends multiple documents using Secure Send, all documents will be uploaded to the portal, but the patient will only receive an email or SMS notification for the first document - if the documents were sent within a 15-minute window. This avoids unnecessary notifications as the first email or SMS will give access to the portal where all new documents will be located.

For common patient questions, see the [Secure Send FAQ](#) for patients.

## Secure Send video guide

## Requirements

The practice should also consider when to use Secure Send. The function is ideal for telehealth and video consultations. It can also be used for in-person consultations, but note that the Secure Send pathology and radiology templates do not include contact details for specific laboratories.

### Practice

Secure Send is **requested by submitting a [Secure Send request form](#)**. Zedmed will set up a branded download portal for your patients and will need access to your Server to complete the setup. Upgrade to Zedmed v36.5 before submitting the request.

### Practitioner

An **electronic signature must be set up** in the practitioner's profile to use Secure Send for pathology and radiology referrals. If it is not, the referral will be sent without a signature. To learn more, see the [Electronic signature guide](#).

### Patient/payer

The patient or NOK Account Payer being sent the document **must be set up as a payer** in the patient's record. The default payer can be different but the patient/NOK Account Payer must also be selectable. The patient should also have their email address and mobile number added to their patient record to populate the Secure Send delivery fields.

## SMS

For Secure Send to support SMS deliveries to a mobile number, the practice must be using ZedSMS. Without ZedSMS, Secure Send can only deliver to email addresses.

### For Pathology and radiology referrals

To use Secure Send for laboratory referrals, Zedmed's 'PathologyZedmedRequestForm' or 'RadiologyZedmedRequestForm' templates are used because lab-specific templates rely on laboratory paper. To support these templates, the practice will need to create a pathology addressee with the pathology template and a radiology addressee with the radiology template in the Clinical Address Book. See the screenshot below.

The screenshot displays the 'Address Book' interface. On the left, a search panel shows 'Zedmed Default - Pathology' selected. The main window is titled 'Addressbook' and has tabs for 'Properties' and 'Locations'. The 'Details' section includes: 'Type of Contact' set to 'Pathology Laboratory'; 'Family/Business Name' set to 'Zedmed Default - Pathology'; 'Given Name' and 'HPI-I' fields; 'Speciality' dropdown; 'Normal Email Address' field; and 'Preferred Delivery Method' set to 'Hardcopy Letter Only'. The 'Messaging' section shows 'ESend Transport' as 'PIT', 'ESend Address' field, 'ESend Method' as '<Default>', and 'Referral Format' with 'PDF' selected. There are radio buttons for 'Prefix Subject Line with 'Letter'' (Yes, No, Sit Default) and 'Salutation' field. 'Default Document Template' and 'Default Summary Template' fields are present. The 'Available' checkbox is checked. The 'Laboratory Details' section has 'Use As Preferred Laboratory' unchecked and 'Paper Type' set to 'PathologyZedmedRequestForm'. The 'Lab Communications' section includes 'DL Command Line', 'DL Directory', and 'UL Directory' fields. The 'Private Contact Details' section has fields for 'Mobile Phone', 'Home Phone', 'AH Phone', and 'Pager'. The 'Notes' section is empty. The 'Practice Locations' section has 'Main Location' checked and fields for 'Organisation', 'Address Line 1-3', 'Suburb/Town', 'Postcode', 'HPI-O', '(W) Phone', and 'Fax'. The 'Transport Type' is set to 'Legacy Messaging' and 'End Point Service URI' is empty. At the bottom, there are 'Update Details from HI Service', 'Help', 'OK', and 'Cancel' buttons.

## Sending invoices

A patient's invoices can be sent electronically to the patient if they are the payer. This is done in the **New Invoice** screen or later from the patient's **Account Enquiry** screen.

**Third-party payers** can have their email or mobile number typed into the fields provided, and **additional recipients** can be added using a comma between email addresses and mobile numbers. This should be done with **caution** because if an incorrect email or mobile number is used, the unintended recipient can view any patient's documents in the download portal, including letters and referrals.

To send an invoice:

1. Follow the standard **invoice creation** process to create and fill in the new invoice.
2. Select **Send to Patient**.

The **Send Invoice** dialog will open.

The patient's name will be shown and the payer will be the patient or 'NOK Account Payer'. The notification will be sent to the payer.

**Note:** If you select the down arrow by Send to Patient, you can access the original **Email as Attachment** option.

3. Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.
4. Select **Send**.

A delivery success or failure notification will display.

The screenshot shows the 'New Invoice' form with a 'Send Invoice' dialog box open. The dialog box contains the following information:

- Patient:** Jones, Marrianna-Louise
- Payer:** Jones, Marrianna-Louise
- Notifications to be sent:**
  - Recipient Email
  - Recipient Mobile

The 'Send Invoice' dialog box also includes a message: "This will send a download link for the selected file to Patient/Payer via Email and/or SMS. The download will prompt for a one-time password on the respective email/mobile no." and buttons for 'Send' and 'Cancel'.

In the background, the 'New Invoice' form is visible, showing patient details (Ms Marrianna-Louise Jones, DOB 19/05/1967), payer information, and a table of services. The 'Send to Patient' button in the bottom toolbar is highlighted with a red box.

To send an invoice at a later time at the patient's request:

1. Open the patient's record.
2. Go into **Account Enquiry**.
3. Select **Send to Patient** and follow the process outlined above.

## Sending referrals

The function is ideal for telehealth and video consultations. It can also be used for in-person consultations.

**Important:** Zedmed has created a Radiology and Pathology template to support **electronic signatures**, and the practitioner must have a signature file in their profile to use these templates. **As noted in the requirements section above**, the practice should create a pathology addressee for the pathology template and a radiology addressee for the radiology template, and the practitioner should use these addresses when using Secure Send for a Pathology or Radiology referral.

To send a referral:

1. Follow the standard **pathology, radiology** or **referral letter** process.
2. For radiology and pathology:
  - a. Select an addressee that uses the "Zedmed Default" template.
  - b. The **Order Test** button will add the referral to the **Today's referral** section.
3. For referral letters:
  - a. After selecting **File > Distribute**, review the **Send to Patient** section.
  - b. Choose a **Recipient email** or **recipient mobile**.
  - c. You can also use **Distribute** to send it electronically to the referral recipient using secure messaging.
  - d. Select **OK** to add the referral letter to the **Today's referral** section.
4. Select **Secure Send**.
  - The **Secure Send** button will open the **Send** screen for the referral in the **Today's Referrals** section.
  - Multiple referrals will open in the tab's order (Pathology, Radiology, Letter) not the order they are listed.
5. Review the **Send** dialog.

- The title will show the name of referral being sent.
- Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.

Additional recipients can be added using a comma between email addresses and mobile numbers.

Caution - if an incorrect email or mobile number is used, the unintended recipient will be able to view any documents in the download portal.

- Optional: **Copy TO Mobile** or **Copy To Email** fields.

You can add recipients to the Copy fields if they have a valid email address or mobile in the **Clinical Address Book**.

To remove a CC: use right-click > Remove.

**Note:** This is different to the referrals **Copy To** field that is used if you want to notify a practitioner of the requested test.

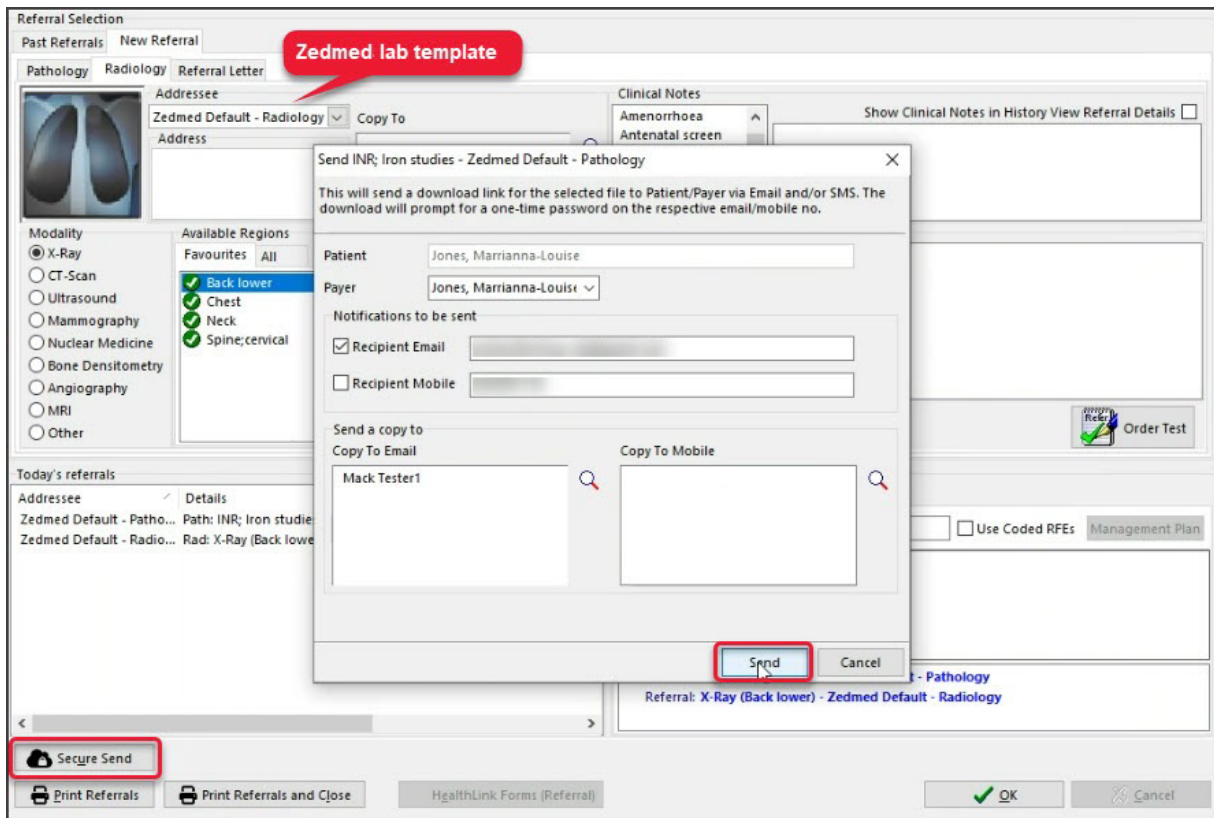
You can use the Address Book's **HealthShare** directory for email delivery, not for SMS.

6. Select **Send**.

A message will display that includes the text 'Delivery successful'.

The patient will receive a link to download the referral, which will be useable for 7 days as explained in **the section below**.

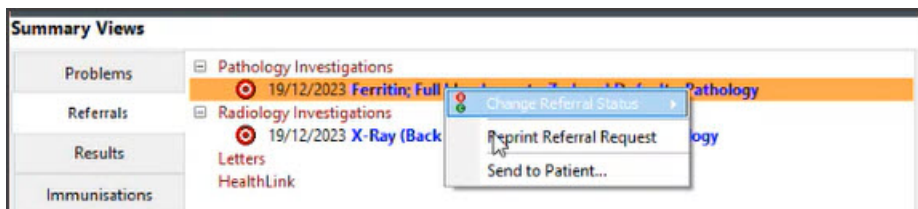
'Template not found' will appear if a laboratory referral addressee does not have the **pathology or radiology** template.



## Summary Views

Sent referrals are saved in **Summary Views > Referrals**.

You can right-click a saved referral and select **Send to Patient** to reopen the **Send** screen.



To send the referral at a later date:

- a. Go to **Summary Views**.
- b. Select the **Referrals** tab on
- c. Right-click the document and select **Send to Patient**.
- d. Follow the steps in the section above to send the letter.

## Sending letters

Practitioners can send letters and documents such as management plans and medical certificates using Secure Send.

To send a letter or document:

1. Follow the normal process for a **referral letter** or a **quick document**.
2. Select **File > Distribute**.

The **Print/Send** screen will open, with a section called **Send to Patient**.

The patient's name will be shown and the payer will be the patient or 'NOK Account Payer'. The notification will be sent to the payer.

3. Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.
4. Optional: **Copy TO Mobile** or **Copy To Email** fields.

To add additional recipients using these fields, they must be in the **Clinical Address Book** and must have a valid email address or mobile number. To remove a CC: use right-click > Remove.

You can use the Address Book's **HealthShare** directory for email delivery, but not for SMS.

5. Select **OK**.

A message will display that includes the text 'Delivery successful'.

**Print/Send**

Interim Print (does not change the queue)

Add to distribution queue if not already queued

Add to distribution queue, even if sent previously

**Distribute Now**

Send electronically to all electronic recipients

Print Document

Print Envelopes

Document printing preferences

Print one copy if there is a paper recipient

Print one copy

Print a copy for each paper recipient

Print a copy for each recipient

Envelope printing preferences

Print an envelope for each paper recipient

Print an envelope for primary recipient only

Print an envelope for CC recipients only

Print an envelope for every recipient

Print a copy for file

Resend

**Send to Patient**

This will send a download link for the selected file to Patient/Payer via Email and/or SMS. The download will prompt for a one-time password on the respective email/mobile no.

Patient: Jones, Marrianna-Louise

Payer: Jones, Marrianna-Louise

Notifications to be sent

Recipient Email

Recipient Mobile

Send a copy to

Copy To Email: Mack Tester1

Copy To Mobile

**Secure Send section**

Print envelopes without tracking

OK  Cancel  Help

To send a letter at a later date:

1. Go to **Summary Views**.
2. Select the **Referrals** or **Documents** tab on
3. Right-click the document and select **Send to Patient**.
4. Follow the steps in the section above to send the letter.

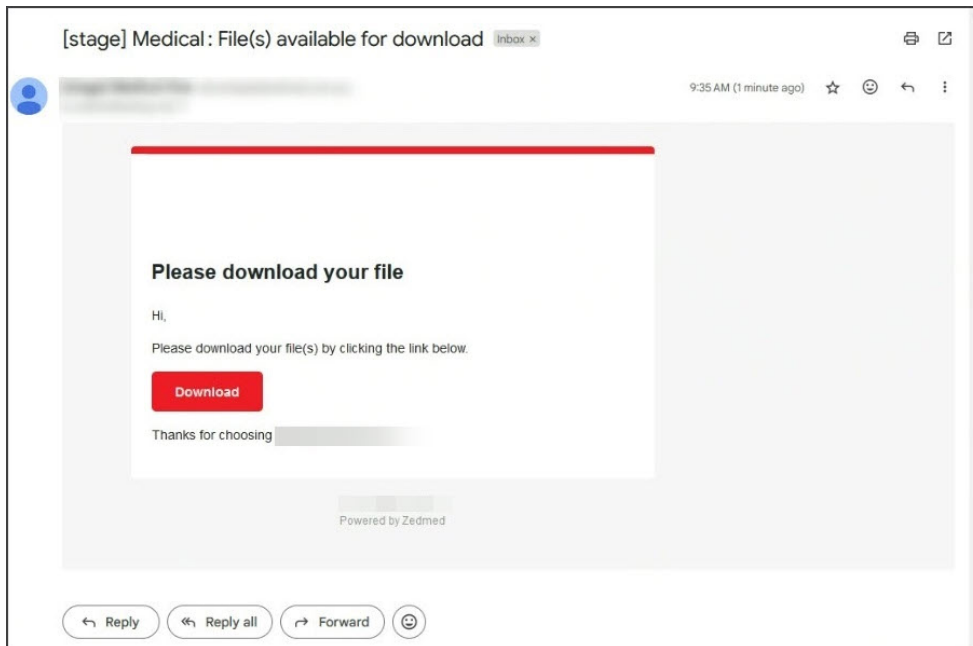
# How a patient uses Secure Send

The patient will receive an email or SMS with a link to the document, followed by another message with a security code to enter into a security prompt. The link will be valid for 7 days.

The steps are as follows:

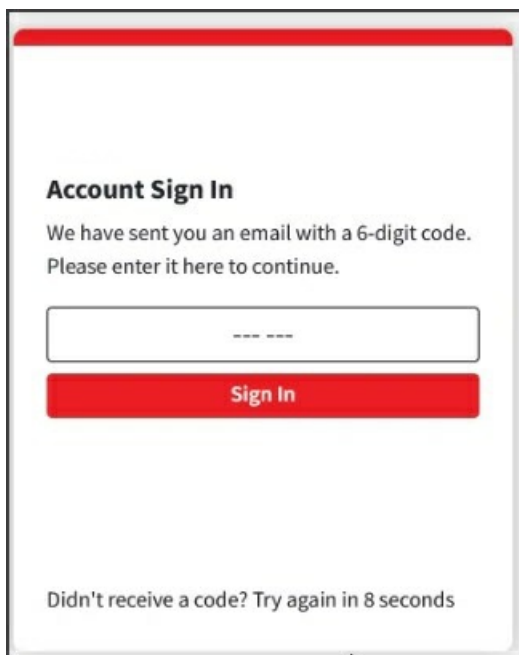
1. Open the first email or SMS message from the practice.

There will be a Download link in the message.



2. Select the **Download** button.

You will be presented with a 6-digit security code prompt.



3. Open the second email or SMS with the security code.



This will be delivered just after the message with the download link.

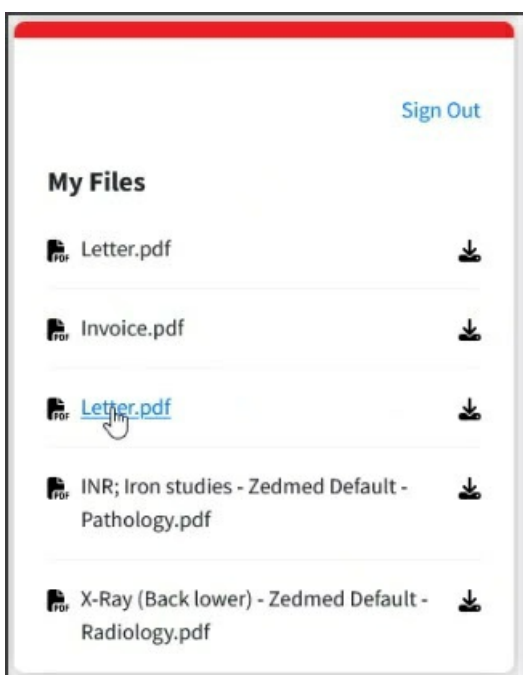


4. Copy or type the code into the prompt.
5. Select **Sign In**.

Your Secure Send portal will open and show all the files sent to you in the last 7 days.

6. Click on the file to open or use the down arrow to download it.

If you download multiple files quickly a download lock will apply for 30 minutes.



## Monitoring Secure Send

You can view Secure Send messages for all patients in Zedmed's **Message Manager**. You can view Secure Send messages for a specific patient using the **Messages** tab on the patient's record.

Secure Send messages will have the description "File Delivery messages". You can see the address or mobile number the document was sent to and what the document was.



Jones, Marrianna-Louise

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details  
Further Details  
Recalls  
Notepad  
 eHealth  
**Messages**

Date/Time	Sent By	To/From	Status	Category	Response
16/05/2022 11:43 AM	Dr P Davis	zedmedtesting+JonesM@gmail.com	Sent	Billing	
Message text is not available for File Delivery messages					
Invoice: Invoice No. 99279					
12/05/2022 04:45 PM	Dr P Davis	zedmedtesting+JonesM@gmail.com	Sent	Clinical Document	
Message text is not available for File Delivery messages					
Letter: ststststst					
12/05/2022 04:28 PM	Dr P Davis	email@email.com	Sent	Billing	
Message text is not available for File Delivery messages					
Invoice: Invoice No. 99274					
12/05/2022 02:39 PM	Dr P Davis		Sent	Clinical Document	
Message text is not available for File Delivery messages					
Letter: GP Mental Health Plan 2710 - Dr Brenda Reed					
12/05/2022 02:39 PM	Dr P Davis	zedmedtesting+JonesM@gmail.com	Sent	Clinical Document	
Message text is not available for File Delivery messages					
Letter: GP Mental Health Plan 2710 - Dr Brenda Reed					
12/05/2022 02:09 PM	Dr P Davis		Sent	Clinical Document	
Message text is not available for File Delivery messages					
Referral: Referral - PFD Testing					
12/05/2022 02:09 PM	Dr P Davis	zedmedtesting+Jonesoverride@gma...	Sent	Clinical Document	

Send SMS

Send

Delete Print Patient Verification Find Close Cancel