

Zedmed v35 preparations

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Before upgrading, there are important steps that must be taken, and some of the steps need to be planned in advance.

Other Zedmed v35 updates

Although the main feature in this release is Medicare Web Services support, it's important to be aware of other changes and features so you can take advantage of them, and know what changes are part of Medicare Web Services. Other changes include [Zedmed Stock Management system](#), [Electronic Work Capacity Certificates integration](#) and [My Health Record](#) for specialists.

How will claims be impacted?

Historical batching information and any batches waiting to be transmitted or waiting for replies will be removed by the upgrade process. This is because the batching screens and features will be replaced to support the new Medicare Web Services workflow.

This means these invoices will need to be held before the upgrade. To make sure this happens, do not use any batching or transmission screens, and do not select Easyclaim (Tyro) or ECLIPSE when creating an invoice. You can still create invoices up to the time of the upgrade, and you will be able to transmit them after the upgrade.

It may help to provide ongoing reminders for office staff to hold invoices, for example, by putting notes on monitors.

Note: If a batch is transmitted and the upgrade is performed before remittance advice is sent back, you will not be able to see the payments in Zedmed. You will need to contact Medicare, the DVA or the Health Fund directly to get the remittance advice.

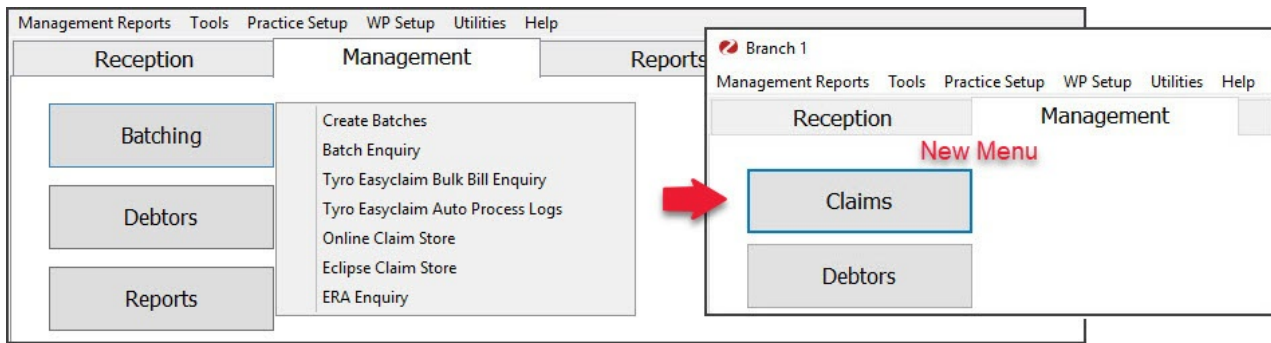
Summary of affected processes:

- Past (historical) Medicare, DVA, other 3rd parties, Tyro and ECLIPSE batching records will be removed.
- Any sent batches will not receive replies from Medicare if the upgrade occurs before a reply is received.
If this happens, you will need to contact the payer directly to get the remittance advice.
- Any unsent batches will be removed.
- Any unsent AIR records will be removed.

Note: This upgrade and the move to Medicare Web Services will have minimal impact on invoice creation, and all invoices, including those that were batched, will still be stored in the patients' records.

The 7 screens listed under **Batching**, will have their data removed as part of the Zedmed v35 upgrade. After the upgrade, the Batching button will be replaced by a new **Claims** button, which opens the new **Claims Status** screen for all invoices and payments.

Please read the [Migration FAQ](#) for answers to common questions about these changes .



Preparing for the upgrade

This section explains the tasks that need to be completed in the days leading up to the upgrade. These tasks should be reviewed at least a week before the upgrade.

Important: If you have more than one Zedmed server/database (for example, you practice from more than 1 site) you will need to upgrade each database with its own credentials.

Summary of tasks:

- Check the version of Windows running on the computer that the Zedmed server is installed on.
- Ensure that any AIR records have been submitted
- Ensure that no batches for Medicare, Tyro, ECLIPSE or DVA are waiting to be transmitted or awaiting a response.
- Back up any previous batch reports from Medicare if you want to retain a historical record.

1. Windows operating system requirement

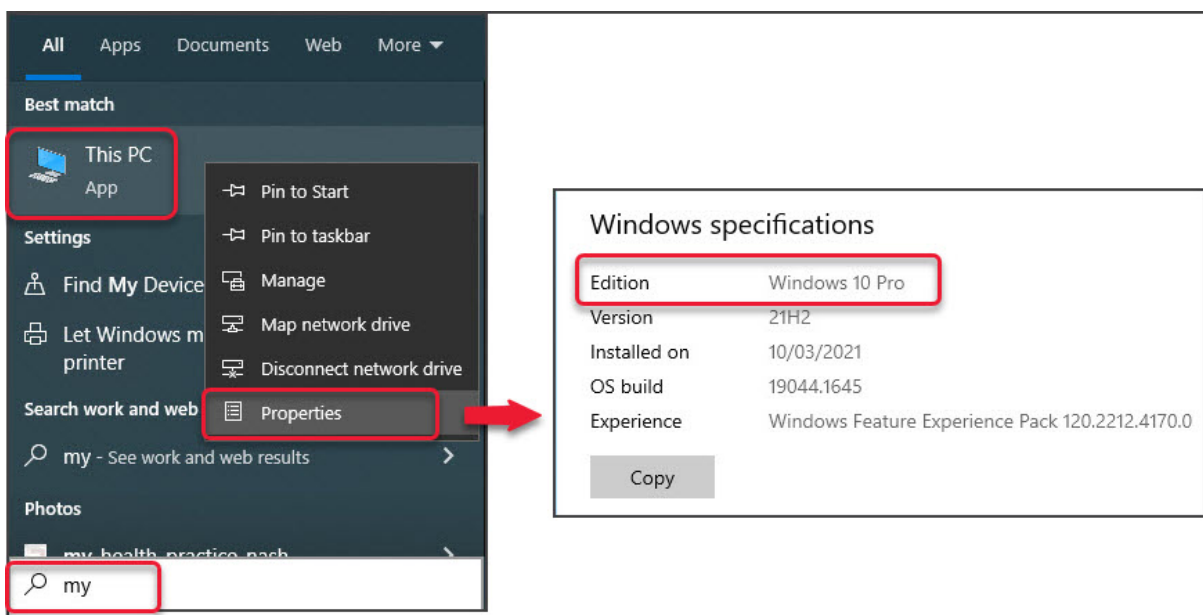
The server you are upgrading Zedmed on MUST be running Windows 10 Pro or Windows Server 2008 R2 or later with TLS 1.2 installed and enabled. If you do not have the required Windows Server version, your 3rd party IT support provider will need to update or upgrade your server operating system.

- If you are running Windows Server 2003 R2 or older, your IT support will need to upgrade the operating system.
- If you are running Windows Server 2008, your IT support will need to install the R2 service pack.
- If you are running Windows Server 2008 R2, 2012 or 2012 R2, your IT support will need to add and enable TLS 1.2. This will require installing a Windows update, editing the registry and restarting the server.
- If you are running Windows Server 2016 or later, you are ready to go. No Windows updates to your server are required.
- If you are running a Windows desktop operating system, it must be running Windows 10 Pro. Your IT support will need to upgrade if you are using Windows 10, Windows 7 or an older operating system to run the Zedmed server (database).

To check the version of Windows you are running:

1. Type '**this**' or '**my**' into the search field, and **This PC** will appear.
2. Right-click **This PC** and select **Properties**.
3. On the screen that opens, look for the Windows Version, for example, Windows 10 Pro or Windows Server 2016.

4. Compare the version of Windows to the bullet points above to see if any updates are required.



2. Medicare/DVA batching

Hold the invoices long enough to ensure there are no batches waiting to be transmitted or waiting for a reply from Medicare when you perform the Zedmed v35 upgrade. To determine how long to hold the invoices for, note the time it takes Medicare to respond to a batch, add an additional day as a buffer, and do not batch invoices for that many days prior to the upgrade.

For example, if Medicare always responds the next day, stop batching 2 working days prior to the upgrade. This will give time for Medicare to respond to the existing batches and ensure no batches are waiting for a response when the upgrade is performed. If you are performing the upgrade on a Saturday, the last batch sent would be on Wednesday. There would be no batching on Thursday or Friday. On Thursday, Medicare will report their payments back to Zedmed and those batches can be receipted.

After the upgrade, transmit the held invoices from the new Claim Status screen as explained in the [Held invoice processing](#) guide.

3. Tyro Easyclaim batching

Follow the same process as Medicare manual batching (suppress invoice to transmit later). We do recommend that you hold invoices and stop batching for the same number of days to streamline the upgrade preparations.

After the upgrade, transmit the held invoices from the new Claim Status screen as explained in the [Held invoice processing](#) guide.

4. ECLIPSE Claims

Follow the same process as Medicare batching. It does take longer to get a report from the ECLIPSE Claim Store, and different health funds have different response times, so you will need to hold the invoices for a longer period, which will depend on the practice's own turnaround time with ECLIPSE claims. Whatever timeframe is used, it is important that there are no outstanding ECLIPSE claims in the ECLIPSE Claims store when the Zedmed v35 upgrade is performed.

After the upgrade, you will need to transmit the held invoices by going into each one and selecting ECLIPSE. The invoices will be in the respective patient's record in the Account Inquiry screen. This process means you will need to know what invoices were held. For more information on processing held invoices, see the [Held invoice processing](#) guide.

5. MA Online and Tyro private patient transactions

Invoices paid in full by private patients using MA Online and Tyro can be processed up to the Zedmed v35 upgrade. These invoices are processed and approved as part of the transaction and do not need to be held. If Easy Claim is required to process a Medicare rebate, the invoice will need to be held.

6. Australian Immunisation Register (AIR)

You can transmit AIR entries up until the day of the upgrade because any errors are fixed by AIR and not reported back to Zedmed. However, you must not have any claims sitting in the **Australian Immunisation Register - Management** screen when you perform the upgrade.

7. Backing up historical reports

Once the Zedmed v35 upgrade had been completed, previous batch reports from Medicare will no longer be available. If you want to keep a copy of these reports, you can view and save them as PDF using the Print icon. In the steps below, we have used the Batch Enquiry screen to explain the steps. The process will be the same for ECLIPSE and Tryo - view the Medicare reports, use the print icon and select PDF for the printer then save the file.

To backup your Medicare reports:

1. Go to Zedmed's **Management** tab.
2. Press **F5** and change the **Report** to print to **PDF**.
3. Select **Batching > Batch Enquiry**.

The **Batch Enquiry** screen will open.

You could also select, **Tyro Easyclaim Bulk Bill Enquiry** or **Eclipse Claim Store**.

4. Select **All** in the **Doctor** field.
5. Select the type from the **Batches** field.
6. Select a date range.
7. Select all reports by clicking the box beside the **Status** column.
8. Select **MA Bulk Billing >** Then select **Preview Medicare Payment Report** or **Preview Medicare Process Report**.

The **Report Preview** screen will open.

9. Select **Print**.
10. Save the PDF to the local computer.

8. Notify Medicare if any held invoices are voided.

We recommend not voiding any of the invoices that are held before the upgrade. If you do have to void an invoice, ensure that you contact Medicare and advise them not to pay the invoice. When you try to reconcile your first payments after the upgrade, Zedmed will not be able to reconcile a payment if Medicare has paid for an invoice that is voided in Zedmed. This means all invoices covered by that payment will need to be manually receipted.

The pre-upgrade checklist

This is a copy of the checklist / online survey that customers were provided with in our Zedmed v35 upgrade communications.

Preparations

Hold (suppress) Medicare / DVA batching invoices long enough to ensure no batches are waiting to be transmitted or waiting for a reply from Medicare when you perform the v35 upgrade. Held invoices will appear in, and can be transmitted from, the Claims Status screen after the upgrade.

Hold (suppress) Tyro Easyclaim batching invoices long enough to ensure no batches are waiting to be transmitted or waiting for a reply from Medicare when you perform the v35 upgrade. Held invoices will appear in, and can be transmitted from, the Claims Status screen after the upgrade.

Hold (suppress) ECLIPSE batching invoices long enough to ensure no batches waiting to be transmitted or waiting for a reply when you perform the Zedmed v35 upgrade.

It does take longer to get a report from the ECLIPSE Claim Store, and different health funds have different response times, so you will need to hold the invoices for a longer period, which will depend on the practice's own turnaround time with ECLIPSE claims.

Note: Record what patients have suppressed invoices so you can locate and submit them after the upgrade.

Notify Medicare if any held invoices were voided: If you do have to void an invoice, ensure that you contact Medicare and advise them not to pay that invoice.

Back up historical reports: After the upgrade, previous batch reports from Medicare will no longer be available. If you want to keep a copy of these reports, you can save them as PDF by following the "Preparing for the upgrade - Step 7" instructions in the migration guide.

Considerations

For MA Online and Tyro private patient transactions: Invoices paid in full by private patients using MA Online and Tyro can be processed up to the Zedmed v35 upgrade. These invoices are processed and approved as part of the transaction and do not need to be held. If Easy Claim is required to process a Medicare rebate, the invoice will need to be held.

For AIR: You can transmit AIR claims up until the day of the upgrade because any errors are fixed by AIR and not reported back to Zedmed. However, you must not have any claims sitting in the Australian Immunisation Register - Management screen when you perform the upgrade.

These requirements have been reviewed and confirmed by the practice manager.
