

# Make family member the payer

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Add another person to a patient's record as a payer. This can be a family member or a next of kin, which is a relation of the patient who is not a registered patient (i.e. not part of a Family group).

**Note:** If the patient is a child, the family member added to their record must be a parent or a caregiver.

## Make a family member a payer

Locate the patient and open their record, then

1. Under **Payers**, select **Add**.

The **Account Payer Selector** will open.

2. Select **Family / Next of Kin**, then click **Select**.

The **Find Account Payer Details** screen will open.

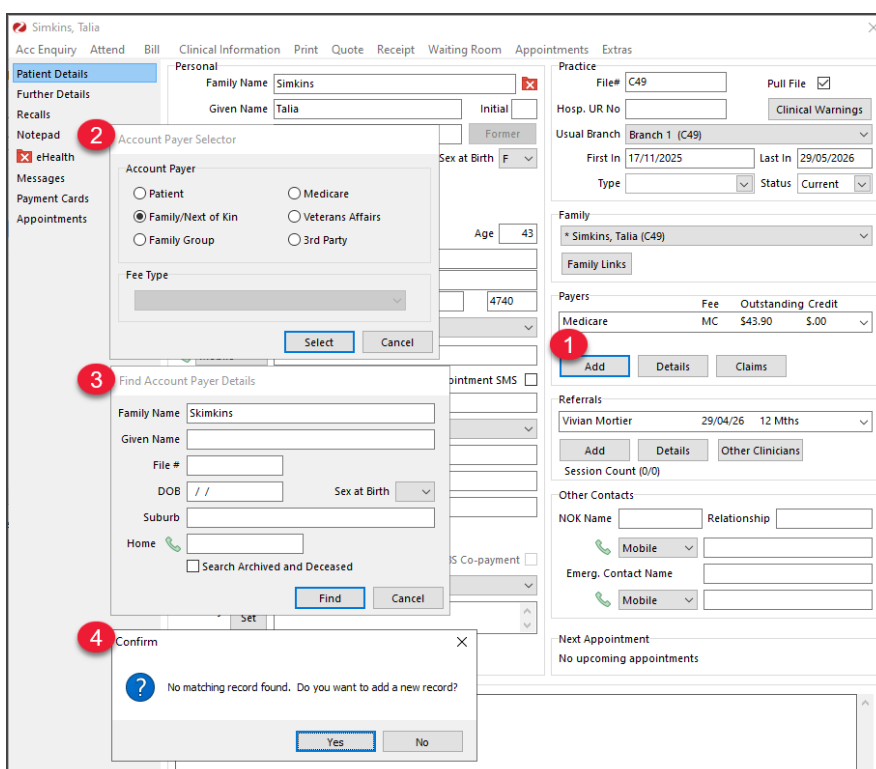
3. Enter the **family name** into the field provided and select **Find**.

The **Next of Kin Account Payer Selector** will open.

4. **Add** the NOK or select an existing NOK in Zedmed.

- o If there is no matching family name, select **Yes** when prompted to add a new record (as shown in screenshot).
- o If a list of people with the surname is shown and none are the required NOK, select **New**.
- o If a list of people with the surname is shown and one is the required NOK, select **that person**.

5. The screenshot below shows steps 1-4, and is followed by the steps to create a new NOK for the patient.



6. If prompted, select **Yes** or **No** to add the patient's address and phone details to the new NOK record.  
The **Family/Next of Kin Account Payer (New Link)** screen will open.
7. Fill in additional details required.
  - o A Medicare card should be included if the patient is under 15 (cannot present their own card).
  - o If you add a Medicare card, perform an **Online Verification** once the NOK record is created.
8. Check the **Patient Fee Type** as it defaults to Private Fee 1 and will need the **correct fee type** selected.

The screenshot shows a form titled "New Family/Next of Kin Account Payer". It is divided into several sections:

- Current Patient:** Simkins, Talia. Current balance: 0.00, Deferred balance: 0.00.
- Fund Name:** (Dropdown menu)
- Membership N°:** (Text field)
- UPI:** (Text field)
- Expiry Date:** (Date field)
- Patient Fee Type:** (Dropdown menu, highlighted with a red box, showing "Phillip Davis" selected)
- Fund alias family name:** (Text field)
- Fund alias given name:** (Text field)
- Account Payer:**
  - Family Name:** Skimkins
  - Given Name:** John
  - Title:** (Text field)
  - Date of Birth:** 08/08/1972
  - Medicare:** 1234 56789 1 1
  - Exp:** 02/02/2029
  - Home:** 77 Shall Cir
  - Suburb/Town:** ALEXANDRA 4740
  - Home Phone:** (Text field)
  - Hold Account Reminder:** (Checkbox)
  - Bank:** (Text field)
  - Branch:** (Text field)
  - Active:** (Checked checkbox)
- Notes:** (Text area)

Buttons at the bottom: Label, Close, Cancel.

9. Select **Close** to save and exit.

The NOK will appear as a payer.

The screenshot shows the patient record for "Simkins, Talia". The "Patient Details" tab is active. The "Payers" table is visible at the bottom right, with "Skimkins, John" highlighted by a red box.

Payers	Fee	Outstanding Credit
Skimkins, John	P6	\$0.00 \$0.00

Buttons below the table: Add, Details, Claims.

A patient record will be created for the NOK in Office.

Note: the Payment Cards tab can be used to request cards for **Payment Gateway** subscribers.

## Add a family member

This section explains how to add a family member.

To add a family member:

1. Go to **Patient Details** in the patient's record.
2. Select **Family Links** from the **Family** section.

The **Family Details** screen (shown below) will open.

3. Select **Add Member**.

The **Patient Search** screen will open.

4. **Find the family member** and select **OK**.

A dialog will ask if you want to copy the family member's address and Medicare details.

5. Select **Close** to save and exit.

The family member will now appear in the **Family** field.

	Name	File #	DOB	Home Address Line 1	Home Address Line 2	Suburb
1	* Holloway, Andrea	A56	26/12/1943	5 Kingsley Gr		BENOWA
2	Holloway, Aoul	A31	15/12/1971	5 Kingsley Gr		BENOWA

## Remove a NOK Payer

You can remove a payer from the Patient Payers list, for example, if it was added incorrectly.

To remove a payer:

1. Open the patient's record.
2. Under **Payers**, select the payer to disable.
3. Select **Details**.
4. Remove the tick next to **Active**.
5. Select **Close** to save.

The screenshot shows a patient record form for 'Holloway, Andrea'. The 'Payers' section is expanded, showing 'Holloway, Knut' as the selected payer. The 'Details' button for this payer is highlighted with a red box. In the 'Active' checkbox area, the 'Active' checkbox is also highlighted with a red box, indicating it should be unchecked.