

Void Claim services role

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In Zedmed v35.7.0, the ability to void an invoice with an outstanding claim was restricted to roles with the new **Void Claim Services** function. This function must be added to the appropriate roles so the correct staff can void invoices with claims. The Administrators role has this access by default.

Does not apply to Zedmed v37 and later due to this update: To avoid claims failing due to invoice changes, adjustments cannot be made to invoices with claims submitted in the previous 7 days.

This change was implemented because practices have had users void invoices with claims and not informed Medicare. This results in the claim being paid with no invoice to reconcile against, and all invoices covered by the payment then need to be manually receipted. In some cases, the payment for the voided invoice needs to be refunded to Medicare.

Below are the 2 recommended ways of giving access to the **Void Claim Services** function - based on who should have this access.

Add the **Void Claim Services** function to users with the practice manager role

If only staff with a practice manager role should be able to void an invoice with a claim, add the **Void Claim Services** function to the practice manager role. In a small practice, this process could be used to add the function to an office staff role.

To add the role:

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

The Zedmed Security Roles and Users screen will open.

3. Select the role used by the practice manager.

The name of this role will be different in different practices. In the example below, it is called High access (Office). You can open the practice manager in the **Staff** tab to see what role they have if you're not sure.

Caution: If the practice manager uses the role 'Administration' they will already have void access, but this role gives full access to Zedmed and should be tightly controlled. Office staff should never have access to this role.

4. Select Edit.

The Role Properties screen will open.

- 5. Select the Void Claim Services role (under Claiming) on the left pane.
- 6. Select the arrow icon to move the function to the right pane.
- 7. Add the **Claim Processing** function if it's not already in the right pane.
- 8. Select **OK** to save the changes.

All users with the practice manager role will now be able to void invoices with claims.

	Role Name: High access (Office) Des	cription: High level	High level access in Office		
	Used in Clinical Work Flow (Results Inbox) Role	e Type: Staff	~		
	Available Functions	-	Included Functions		
	API Access	~	Accounting Transactions		
	Administration		Appointments		
	Appointments		Banking		
	Australia Immunisation Register		Batching		
Zedmed Securi	Batching		Daily Reports		
C Deles	Claiming		Debtors		
arr Livies Use	Daily Reports		Patient Records		
	🗄 Data Exchange		Practice Setup		
	Debtors		Reports		
ole Name	Encounter		± SMS		
Administrator	Patient Records		Stock Control		
Receptionist (Typis	Practice Setup		Utilities		
Doctor	Reference View				
Nurse	Reports		Waiting Room		
High access (Office	Reports Tab		Claiming		
Medium access (Of	Results Processing		Claim Processing		
Basic access (Offic	± SMS		Void Claim Services		
Administrator (Clini	Stock Control				
ow Doctor access	Summary View				
Medium Doctor acc	Tools				
High Doctor access	🗄 Utilities				
Voiding claim invoid	WP Setup	~			
	View and reconcile Claims and Claim Payments				
	Expand All		Expand All		
			OK Carr		

Create a role for Void Claim Services and give select staff the new role

If you have office staff who understand the impact of voiding invoices with claims and the importance of advising Medicare, you can create a role for the **Void Claim Services** function and give select staff this role.

To create the new role:

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

The Role Properties screen will open.

- 3. Give the new role a logical name like 'Voiding claim invoices' and a description.
- 4. Select the Void Claim Services role (under Claiming) on the left pane.
- 5. Select the arrow icon to move the function to the right pane.
- 6. Add the **Claim Processing** function if it's not already in the right pane.
- 7. Select **OK** to save the changes.

	Role Properties					×
	Role Name: Voiding claim invoices	Description:	Senior role	for voiding invo	pices with transmitted Medicare claims	
	Used in Clinical Work Flow (Results Inbox)	Role Type:	Staff		~	
	Available Functions				Included Functions	
Zedmed Securi Staff Roles Use	 API Access Accounting Transactions Administration Appointments Australia Immunisation Register Banking Batching 		Î))}	Claim Processing Void Claim Services	
Role Name Administrator Receptionist (Typis Doctor	Claiming Daily Reports Data Exchange E Debtors Encounter					
Nurse High access (Office Medium access (Of	Practice Setup Reference View Reports			•		
Basic access (Offic Administrator (Clin Low Doctor access	 Reports Tab Results Processing SMS 					
Medium Doctor acc High Doctor access	Stock Control Summary View Tools		~			
	Expand All				Expand All	
					OK Cance	:
Conv	Delete	Γ	Print	Add	Edit Close	

Give the new role to the appropriate staff:

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

The Edit Staff Member screen will open.

- 4. Select the role, for example, Voiding claim invoices.
- 5. Select the arrow button to add it to the user's **Included Roles**.
- 6. Select **OK** to save the changes.

Repeat this process for each staff member who needs this role.

All users with the new role will now be able to void invoices with claims.

		Edit Staff Member			×
		User Name: JANE	Staff ID:	R12 Dr C	Code:
		Given Name: Anderson		Mobile Ph	one:
		Family Name:	7510	Title:	
		User's password never expires	Don't disable us	ser due to inactivity	
2 Zedmed Sec	urity Roles and Lise	EHealthID (HPI-I):			Search HI Service
Staff Roles I	User Groups Databa	Clinical History User Group:			
User Name	Full Name	Available Roles		Included Roles	
EXTERNAL ZEDMED		Administrator Basic access (Office)		Administrator (Clinic Voiding claim invoice	al) 🔨
JANE OFFICE CHAMINDA PDAVIS DANUTA LYDIA DANNI WARREN GRACE GRENVILLE CONNIE CPV	Anderson Admin, Office BANKS, CHAMINDA Davis, Dr Phillip FERNANDEZ, DANUT HERNANDEZ, LYDIA Hatcher, Dr Danni Hedrick, Dr Warren Herman, Grace Howell, Dr Grenville JONES, Connie Vendor, Dr Ccc Pds	Doctor High Doctor access (Office) High access (Office) Low Doctor access (Office) Medium Doctor access (Office) Medium access (Office) Nurse Receptionist (Typist)			
				ОК	Cancel
Set Password	Make Inactive		Print	Add C	Edit <u>C</u> lose