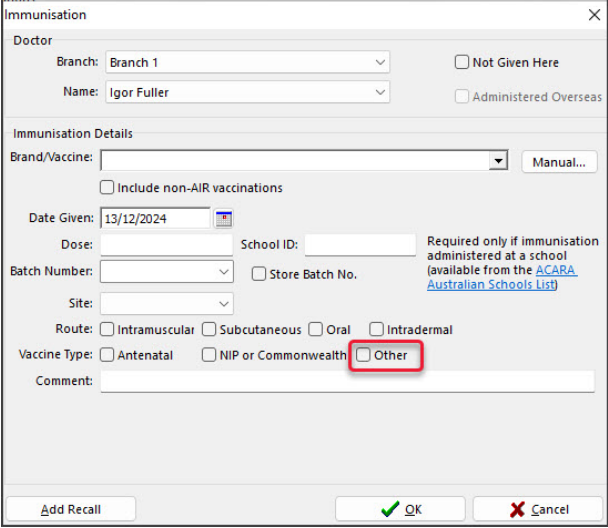


Zedmed's Current Release

Last Modified on 16/12/2024 2:33 pm AEDT

Zedmed v37.7.4

Clinical	ZED-9887	<p>Updated the AIR screen to add Other and remove State and Private Replaced State and Private options for Vaccine Type with Other, to comply with changes to AIR reporting requirements.</p>  <p>The screenshot shows the 'Immunisation' dialog box. Under 'Vaccine Type', the 'Other' option is selected and highlighted with a red box. Other options include 'Antenatal', 'NIP or Commonwealth', 'Intramuscular', 'Subcutaneous', 'Oral', and 'Intradermal'. The 'Date Given' is set to 13/12/2024.</p>
Office	ZED-9980	<p>Fix an issue with not all bank lists being displayed All Banklists are now displayed in the Practice Details > Bank Accounts dialogue.</p>

Zedmed v37.7.2

Payment Gateway

Request a credit card when an appointment is booked and use that card for deposits and to bill future appointments

Payment Gateway is a Zedmed integration with Tyro eCommerce that allows practices to request credit card information from patients when they make an appointment. Tyro manages the payment transfers, and provides Zedmed with a secure token that allows Zedmed to use the card for future attendances, appointment deposits and did not attendeds.

Each bank account receiving payments has an eCommerce account that Tryo transfers patient payments to. If a patient does not have a credit card on file they can be sent an SMS card request when booking an appointment or by requiring a credit card for bookings via Online Appointments. Patients with credit cards on file will display a card icon in the Appointment Grid. The ePayment option is used when billing and ePayment activity is included in the banking reports.

Resources

- [Payment Gateway guide.](#)
- [Payment Gateway FAQ](#)
- [Expression of Interest form](#)

OLA functionality

Bookings made through Zedmed Online appointments can request a credit card when the booking is made.

SMS functionality

Request a credit card when booking an appointment by sending an SMS request from the Appointment Details screen or from an appointment in the Appointment Grid. Patients who receive the SMS will open a link to a credit card information request page.

Appointment Details

Date: **Tuesday, 19 November 2024** ✓

Created by: **Office Admin** on 19/11/24 at 11:32

Doctor: **Phillip Davis** **Black, Emma**

Resource

Start Time: 11:15 Clinic: Branch 1 File No: 62 Pull File: Yes DOB: 13/12/1982

Duration: 00:10 Status: Current First in: Last in: Type:

End Time: 11:25 Type: **Std Consultation**

Notes

Contact Details

Phone (H): Work (W)

Mobile

Address: 30 3rd Street, ELLEN GROVE 4078

Other Details

Expiry MC HCC

Clinical Warnings

Reason for chosen date

Cancellation Waiting Priority

Hide Notes Allow SMS Send Confirmation SMS

Account Payers

Black, Emma	P1	\$0.00
-------------	----	--------

Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip

Close Cancel Help

Select down arrow > Request Payment Card when making a booking

Close & Request Payment Card

Patient Records now include a **Payment Cards** tab.

Black, Emma

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

Patient Details

Further Details

Recalls

Notepad

eHealth

Messages

Payment Cards

Card Type	Card Number	Expiry	Valid
MASTERCARD	XXXX XXXX XXXX 0008	01/39	✓

Remove

Delete Print Patient Verification Find Close Cancel

Prepayments

Take prepayments using Payment Gateway:

- 1) Select **Receipt** on the Patient's Record.
- 2) Enter the **Banklist** and **Amount**, then select **ePayment**.

This generates a receipt that is applied as a credit when billing. For partial payments, Zedmed will determine the amount due.

Receipt Payment

22 Mr Happy Jones

Payer: Jones, Happy Due: 0.00 Patient 0.00 Family 0.00 Deferred 0.00 Patient 0.00 Family 0.00 Credits 20.00

Format	Name	Bank	Branch	Detail	Banklist	Amount
1. Cash	2. Cheque	3. MC Cheque	Tyro Eftpos	ePayment	PD	20.00
4. Card	5. Eftpos	6. Direct Deposit	7. Credits	Tyro EasyClaim		

Payment Total: 0.00
Amount Due: 0.00
Balance: 0.00

Branch Selector for billing

You can now change the branch when billing directly from a patient's record. The invoice will use the treating doctor's provider number and letterhead for that branch. This means you do not need to log into another branch to use the correct provider number. You cannot change the branch if you bill from the Appointment Grid or Waiting Room or a patient record opened from there - the branch will be locked to the branch the appointment was created in.

When you are not billing from the Appointment Book, Zedmed checks for an appointment that matches the branch and doctor. If it finds one, it uses that attendance for the invoice, and if it does not, it creates a new attendance (without a booking).

New Invoice

Invoice Patient: Mr Happy Jones DVA HCC# Safety Pens. Status None
File 22 DOB 4/12/1964 (59)

Payer: Jones, Happy Add/Edit Payer
Applicable Fee Type P1

Branch: Apostrophe sand

Doctor: Davis, Phillip

Request/Referral Dr: <None>

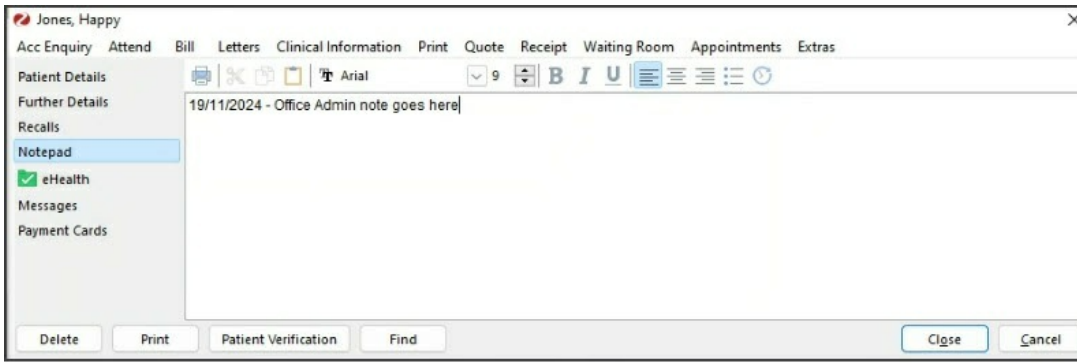
Date	Item#	Description	Fee	Tax	Unit Value	Qty	Amount	Notes	Estim. Refund Gap
19/11/2024			P1		0.00		0.00		0.00

Total: 0.00 Disc: 0.00 Gap: 0.00

- By default, the branch selected is the branch associated with the appointment being billed.
- If you change the branch, the available doctors will update to those set up for that branch, even if they don't have appointments that day.
- To change the branch of an existing invoice, you need to void the invoice and create a new one.

Date stamp for Patient Details notes

The Notes tab in the Patient Record (Office) now has an icon that adds the date and username. This allows staff to date stamp each entry made in notes.



Document Preview

When you click on a supported document in Summary Views, a preview opens beside it. This feature supports all items in the Documents tab and documents in other tabs. It does not support images, provider file formats and MyHealth Record. For example, you cannot preview a pathology referral, but you can preview a referral letter. Selecting an unsupported format will do nothing.

Use the Preview menu to zoom in and out, move to the next page and print. The zoom level will be retained for that session.

Document Preview is enabled by default. It can be disabled under **My Options > Enable Document Preview**.

Tyro ePayment Reconciliation report

This new report will help practices reconcile Tyro ePayments when doing banking. The banking reports include ePayments and still need to be run, but if there is a discrepancy, this report will help with the reconciliation process.

The report is run for each bank list and will only show back lists **configured for Payment Gateway**. To open the report, select Banking > **Tyro ePayment Reconciliation**.

Tyro ePayment Reconciliation

Use this screen to reconcile ePayments between Zedmed and Tyro on previous and current batches and sessions.

Reconcile by

Batch

Batch Number: <Current Batch>

Session

Session Number: 10 Started On 16/10/2024 11:12:53 AM

Date Range

From: 17/10/2024 To: 17/10/2024

Banklist: Show Inactive Bank Account

Phillip Davis

The field above will only contain banklists that have been correctly configured to use the Tyro Payment Gateway. This includes having a Reporting Password and Surcharge specified.

Please be aware that recent transactions will not be displayed until the Tyro data is available. Data will be available approximately 15 minutes after having been processed.

Print Screen Export Close

The report pulls information from Zedmed and Tyro, which should reconcile to a \$0.00 discrepancy. In the example below, you can see an ePayment refund was processed in Zedmed and also in Tyro. The Tyro transaction fee is not included, as it is not received by Zedmed and would prevent reconciliation.

Branch 1 Page 1

Tyro ePayment Reconciliation Report

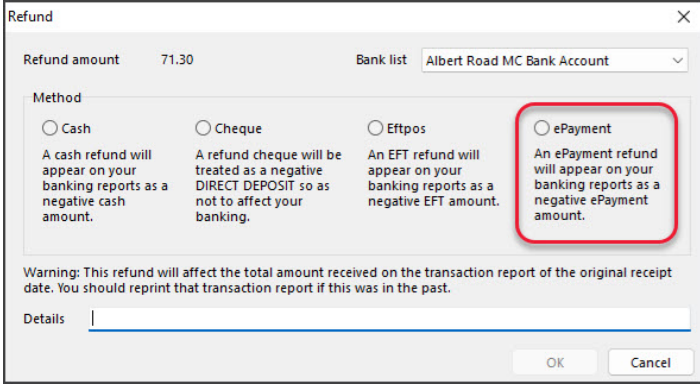
Criteria	
Bank Account	Phillip Davis
Reconcile by: Date Range	16/10/2024 - 17/10/2024

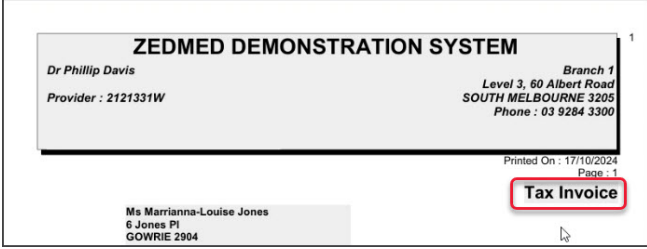
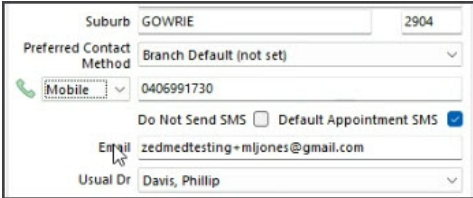
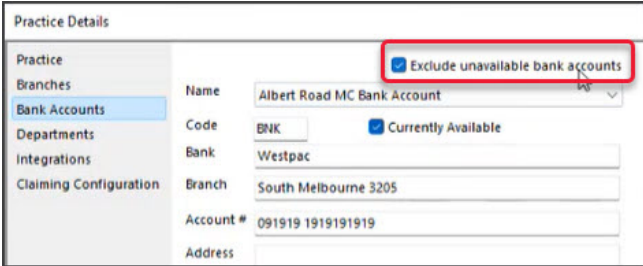
Date	Patient Name	Receipt ID	Transaction ID	Zedmed (\$)	Tyro (\$) Type	Acquirer	Merchant
16/10/2024 10:38:02 AM	Jones, Happy	3	35fe8468-2d22-48bd-bb1c103bbdb9	\$71.30	\$71.30 PAYMENT	APPROVED	TESTZEDMED
16/10/2024 10:38:02 AM	Jones, Happy	3		-\$71.30	\$0.00		
16/10/2024 10:39:06 AM	Abbott, Gabriel	4	c4229c0f-cc87-44e5-ae2f-a84f309d6d75	\$105.30	\$105.30 PAYMENT	APPROVED	TESTZEDMED
16/10/2024 11:03:48 AM	Happy Jones			\$0.00	-\$71.30 REFUND	APPROVED	TESTZEDMED
16/10/2024 11:15:23 AM	Jones, Happy	9	00529126-8477-4197-b137-6eb9bde2a3e0	\$105.30	\$105.30 PAYMENT	APPROVED	TESTZEDMED
Number of Transactions 5				\$210.60	\$210.60		Discrepancy \$0.00

Fixes and enhancements

Office	ZED-9905	Add filter for category Payment Details Link to the Message Manager Messages in the Message Manager can now be filtered on the Payment Details Link category.
Office	ZED-9914	Reduce the Appointment Grid Blue line refresh to every 60 seconds The refresh rate of the current time indicator on the appointment grid has been reduced from half a second to once per minute to reduce unnecessary resource use.
Office	ZED-9801	Tyro Eftpos Reinitialisation not working for Quick Pay Improved the performance of forms that interact with Tyro (invoice and payment forms) when the Terminal Adapter is not yet installed (cloud only). This does not change the time required for the terminal adapter to install.
Office	ZED-9635	Improve the message displayed when attempting to delete a bank list that has transactions When trying to delete a bank list (account) with transactions recorded against it, a more meaningful message is now displayed.
Office	ZED-9724	Improved the Expiring Referral report performance. Substantially improved performance of Expiring Referrals Report when there are lots of appointments in the database.

Office	ZED-9870	Enable the launching of Waiting Room from patient details when the Appointment Grid is open Users can now navigate to the Waiting Room directly from Patient Details when it is being shown on top of the Appointment Grid.
Office	ZED-9782	Fixed Error "Command text must not be empty" Fixed the issue that caused the error "Command text must not be empty" when clicking on Re-Merge in the Patient Merge History dialog.
Clinical	ZED-9874	Removed full stop from the Bulk billing consent SMS Full stop following URL in Bulk Billing consent SMS message sent to patients has been removed.
Clinical	ZED-9641	Improve the message displayed when previewing a Shared Health Summary A more meaningful message is now displayed when attempting to upload a Shared Health Summary that contains a procedure without an onset date defined.
Clinical	ZED-9744	Fixed issue with preprinted paper types printing multiple copies Address Book: Fixed issue with preprinted pathology/radiology referrals printing number of copies equal to number of tests requested.
Clinical	ZED-9784	Improved the message displayed when previewing a Shared Health Summary A more meaningful message is now displayed when attempting to upload a Shared Health Summary that contains an immunisation without a date given defined.
Clinical	ZED-9829	Resolved complications encountered when MHR finds duplicate of a patient's IHI When opening a patient record with a duplicate IHI, the MHR Status now displays My Health Record available. If the MHR button is clicked, the warning message regarding the duplicate patient demographics or duplicate IHI is still displayed, however after clicking OK the MHR dialog now opens. This change may also fix an AV error that is displayed when attempting to upload medication information to My Health Record.
Clinical	ZED-9835	Fixed rrorr "Software error. Incorrect update count." Fixed an error that occurs when a user tries to "print referrals and close" while they have an unsaved referral letter open in the letter writer. The error caused Clinical to freeze. The system will now prompt the user to close the letter writer.

Office	ZED-9698	<p>Add ePayment as a Method on the Refund dialog ePayment has been added as a refund payment method in Zedmed.</p> 
Office	ZED-9650	<p>Option to disable Easyclaim in billing if Medicare is the Payer A new option has been added to Practice details to allow disabling of the EasyClaim button when billing a patient where Medicare is the payer.</p>
Office	ZED-9844	<p>Editing a bank name when there are unavailable bank accounts renames the wrong bank list. Fixed an issue when changing a banklist name resulting in the wrong banklist being changed.</p>
Office	ZED-9840	<p>Tyro ePayment report only shows ePayments Tyro ePayment reports have been updated to remove other payment types. It now only includes ePayments.</p>
Clinical	ZED-9834	<p>Document preview updates when an arrow key is used to select the next document When using the arrow keys to change the selected document or referral, the preview pane is now refreshed with the currently selected document.</p>
Clinical	ZED-9837	<p>Fixed the history list in Clinical Details Fixed an issue where the merge field Clinical Details History was not working for templates.</p>
Clinical	ZED-9838	<p>Office staff can now turn on and off SMS in a patient's clinical History The option to hide SMS messages in the Clinical patient history will now work if the user does not have a doctor code.</p>
Clinical	ZED-9839	<p>The batch writer is now prompting for letter status selection Fixed missing prompt to set document status when editing a letter associated with a batch in Batch Letter Writer.</p>
Clinical	ZED-9841	<p>Template custom merge fields no longer have a black background Fixed the issue where custom merge fields have a black background on clinical templates.</p>
Office	ZED-9517	<p>Error occurs for deleting a Doctor Group from appointments Fixed database error displayed when deleting an unused appointment doctor group.</p>

Office	ZED-9535	<p>Updated Zedmed's invoice wording to "Tax Invoice" When an invoice is printed, Zedmed will now use the words "Tax Invoice" in the heading instead of "Account" or "Duplicate Account".</p> 
Office	ZED-9540	<p>Patients' email addresses now have standalone fields in the Office. The patient details form in Office now shows the phone number and email address in separate fields, instead of combining them in a shared dropdown field.</p> 
Office	ZED-9567	<p>The Appointment Op List will no longer duplicate patients Fixed issue where patient appointments are incorrectly duplicated on the Appointment Op List when their appointment is for a different branch to the one logged in as.</p>
Office	ZED-9581	<p>Remove unavailable bank accounts from bank account list A new checkbox, Exclude unavailable bank accounts, in the Practice Details > Bank Accounts tab hides unavailable accounts from view.</p> 
Office	ZED-9646	<p>Referrals Expiring Report no longer shows Cancelled Appointments Cancelled appointments will not be included in the Expiring Referrals report.</p>
Office & Clinical	ZED-9628	<p>Referral doctor email address field is now bigger The size of the email address field for referral doctors has been increased from 40 to 255 characters.</p>

Clinical	ZED-9519	<p>The HealthLink referrals Print icon is no longer greyed out</p> <p>An issue preventing users from reprinting manually created HealthLink referrals has been fixed.</p>
Clinical	ZED-9536	<p>The referring doctor is now used for reprints, not the doctor that's logged in.</p> <p>When reprinting or resending a pathology or a radiology referral (right-click in Summary Views), Zedmed Clinical will always use the original referring doctor's details (name and signature) instead of the currently logged-in user.</p>
Clinical	ZED-9562	<p>Upgrade Zedmed to latest version of MSXML</p> <p>Upgraded an internal component used in Zedmed Clinical to fix errors occurring at some clinics when opening patient files.</p>
Clinical	ZED-9565	<p>Fixed an Invalid archive file error that occurred when resending a referral via secure send</p> <p>The Referrals UI in Zedmed Clinical will no longer show an error when attempting to resend a referral letter in Today's Referrals using Secure Send.</p>
Clinical	ZED-9570	<p>A patient's History View now includes SMS messages</p> <p>A patient clinical History View now includes SMS communications, including replies, reminders, secure send and direct messages. This is on by default.</p> <p>The information can be hidden in Tools > My Options > Show SMS Messages in the History View checkbox.</p>  <p>The screenshot shows the 'History View' interface with a list of messages. A red box highlights the following messages:</p> <ul style="list-style-type: none"> 14/10/2024 (Mon) 3:05pm SMS Message to 61406991730 (Sent) <ul style="list-style-type: none"> Message Category: Confirmation SMS message sent from Update Results 14/10/2024 (Mon) 3:04pm SMS Message to 61406991730 (Sent) <ul style="list-style-type: none"> Message Category: Result Patient Service Report SMS Message Category: Bulk 14/10/2024 (Mon) 3:01pm SMS Message to 61406991730 (Sent) <ul style="list-style-type: none"> Message Category: Reminder You have an appointment on 15/10/2024 at 9:30 AM with Dr Phillip Davis at Branch 1. Please ring 03 9284 3300 if you cannot attend.

Clinical

ZED-9596

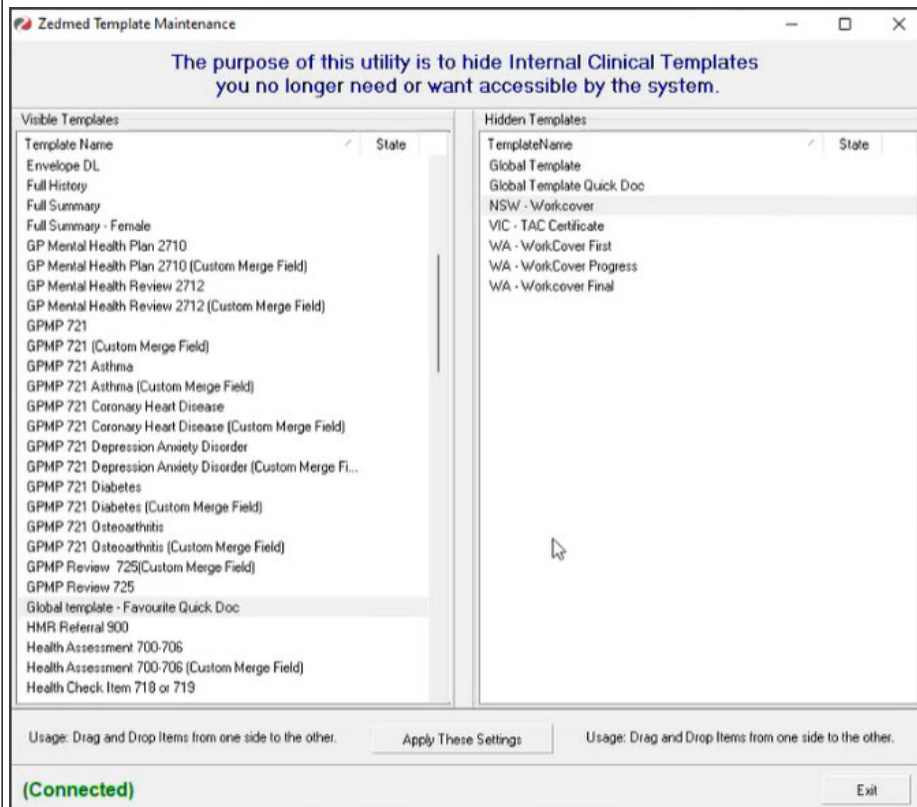
You can now hide and unhide all public (global) templates

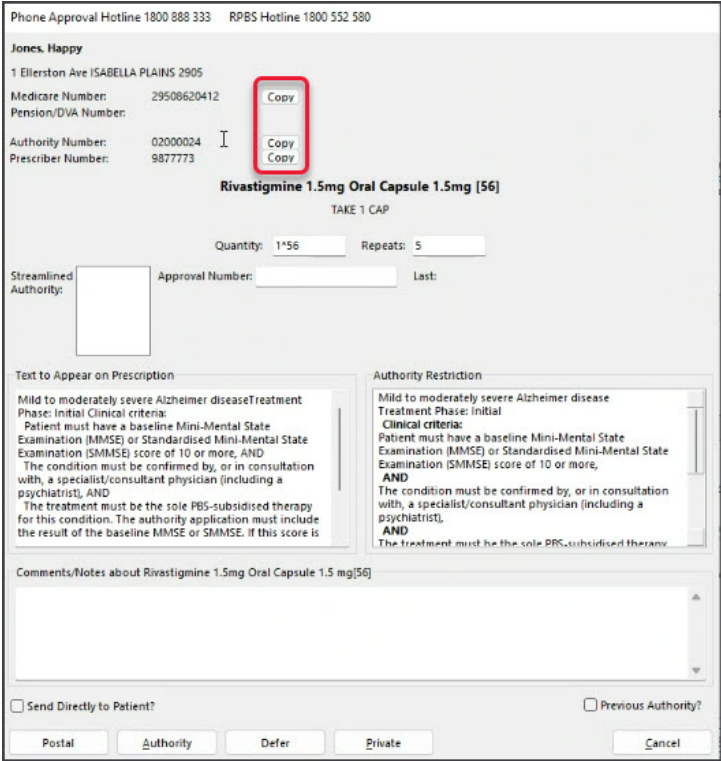
Public Templates can now be hidden from the UI in Clinical using the Hide Clinical Templates utility. This utility does not currently work in the Cloud.

This only applies to global templates, so the template will be hidden for all users. This will help with templates whose owner is no longer with the practice. Individual user's templates can be removed by that user if they don't want to see them.

To open the utility:

1. From Clinical, select **Utilities > Hide Clinical Templates**.
2. Drag the template to the **Hidden Templates** pane.
3. Select **Apply These Settings**.



Clinical	ZED-9600	<p>Approval AuthoMake phone approval hotline details text that can be copied The Medicare Number, Pension/DVA Number, Authority Number and Prescriber Number on the Script Authority Form now have a copy button and are also selectable text. This makes it easier to transfer the information into HPOS when requesting authority scripts.</p> 
Clinical	ZED-9627	<p>CTRL + Z no longer Closes a Patient file Pressing Ctrl-Z in Clinical will no longer close the active patient tab. This happened by accident when users selected Ctrl-Z to undo (Windows function).</p>

Appointment grid enhancements

Clinical	ZED-9537	<p>Optimised the Appointment grid to open faster. Excessive Appointment Grid refreshes have been reduced for a faster start-up.</p>
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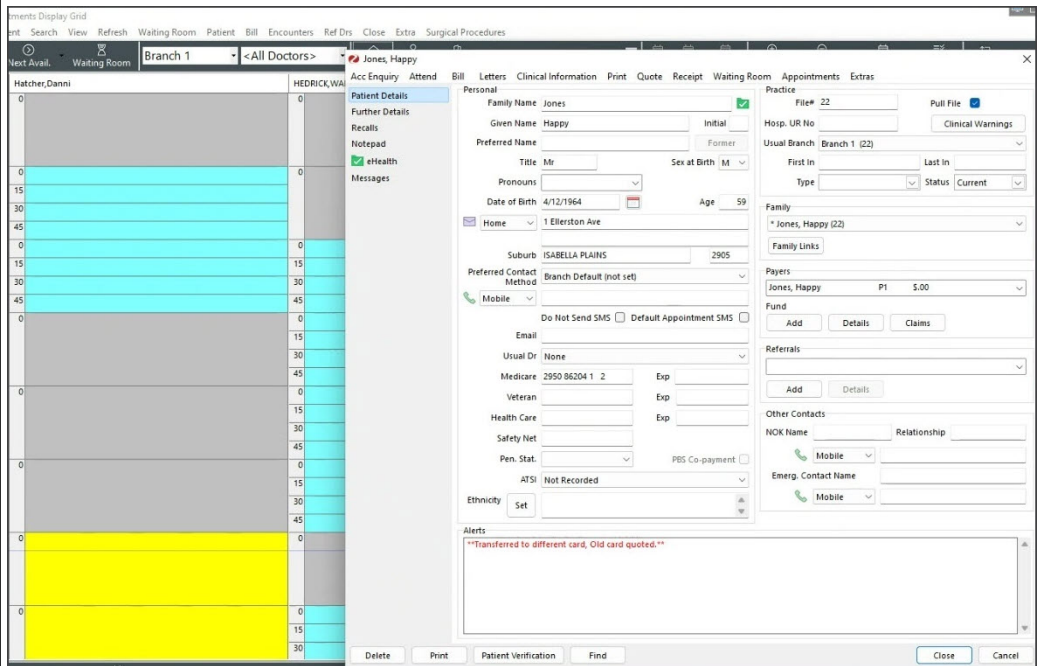
Clinical ZED-9569

The Appointment grid's date now shows the name of the day and month.
 The date picker on the appointment grid now displays the name of the day and month.
 You can use text to change the date: "yesterday", "today", "today+4", "eom", "bom" and the day's name.



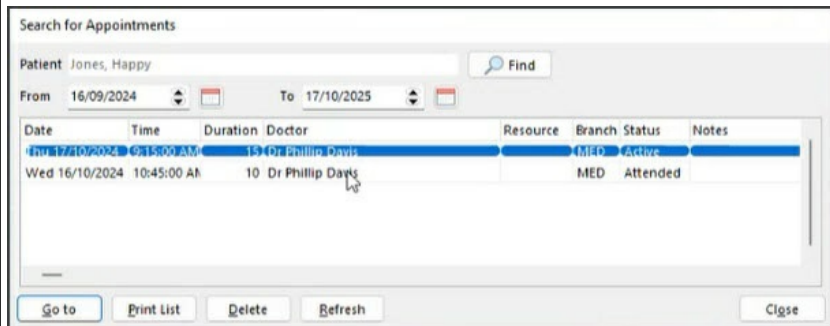
Clinical ZED-9577

The Appointment grid now stays open a Patient's Details is opened.
 Selecting Patient Details will now display the patient details without closing the Appointments grid. You can also open the patient Acct Enquiry.



Clinical ZED-9578

Change Search for Appointments to show Doctor's Full Name
 The appointment search now displays the name of the doctor or resource. It previously only showed their codes.



Clinical	ZED-9654	Revise how dark mode is applied to the appointment screen toolbar The appointments grid now opens faster when using modern (dark) theme.
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Zedmed v37.4.2

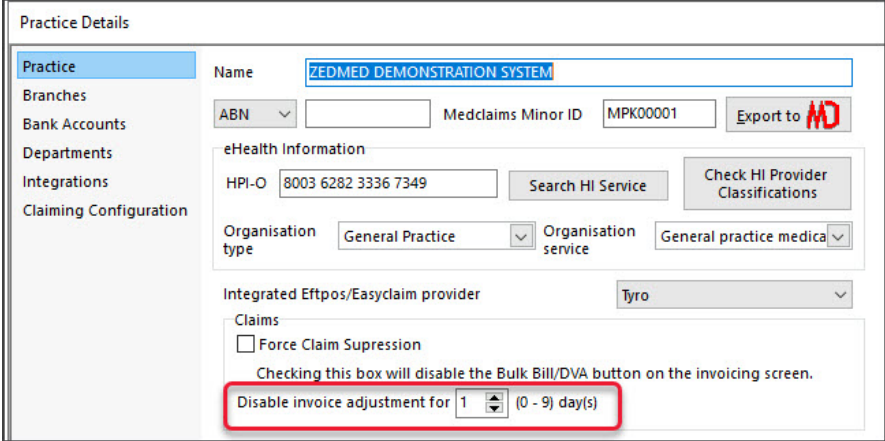
Fix

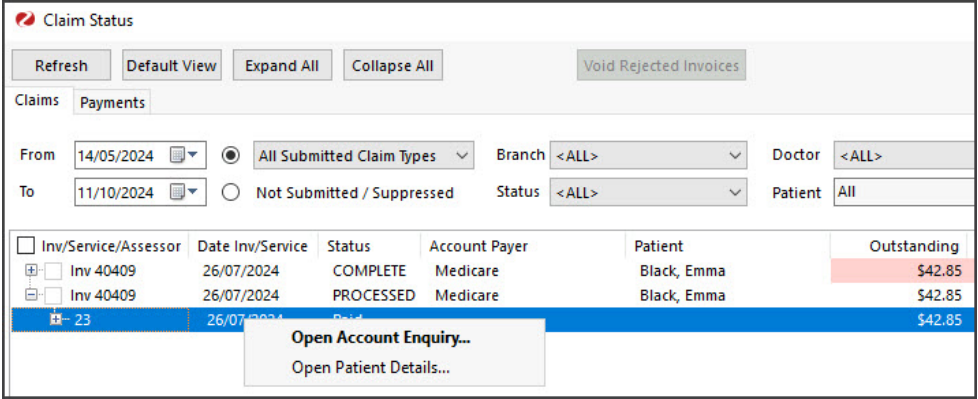
Clinical	ZED-9785	Fixed the slow Waiting Room opening time Doctors were experiencing a slow loading time when opening the Waiting Room in Clinical.
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Zedmed v37.4.0

Fixes and enhancements

Office	ZED-9754	Fixed performance issues in Claim Payments. Some customers were experiencing delays in opening the Claim Payments Screen and when opening claims by individual ID (e.g. by double-clicking a payment).
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Office	ZED-9756	<p>Disabling Adjustments to invoices with claims can be managed by the practice Users can now specify the number of days during which invoice adjustments cannot be made after submitting a claim. The setting can be accessed from Practice Details [tab] > Disable invoice adjustment for days.</p> <ul style="list-style-type: none"> The default setting is 1 day. Customers who had the default 7 days will have the day changed to 1 Changing the days to 0 will mean the Adjustment is always available.  <p>The screenshot shows the 'Practice Details' configuration page. The 'Practice' tab is selected. The 'Name' field contains 'ZEDMED DEMONSTRATION SYSTEM'. The 'ABN' field is empty. The 'Medclaims Minor ID' field contains 'MPK00001'. The 'Export to MD' button is visible. The 'eHealth Information' section includes an 'HPI-O' field with the value '8003 6282 3336 7349' and a 'Search HI Service' button. The 'Check HI Provider Classifications' button is also present. The 'Organisation type' is set to 'General Practice' and the 'Organisation service' is set to 'General practice medica'. The 'Integrated Eftpos/Easyclaim provider' is set to 'Tyro'. In the 'Claims' section, there is a checkbox for 'Force Claim Suppression' and a note: 'Checking this box will disable the Bulk Bill/DVA button on the invoicing screen.' Below this, the 'Disable invoice adjustment for' dropdown menu is set to '1' day, with a range of '(0 - 9) day(s)' shown. This dropdown menu is highlighted with a red box in the original image.</p>
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Office	ZED-9751	<p>Added the ability to open a patient's demographics from the claims screen You can now right-click a claim in Claim Status view to open the patient demographics for that claim.</p> 
Clinical	ZED-9709	<p>RTF Letters no longer save local duplicate copies or prompt to save if no changes were made Removed Clinical letter writer "autosave" function that saved RTF documents to the Zedmed\Letters Folder on Client Machines. The system will also no longer prompt a user to save a letter in Clinical if it has no changes since the last save.</p>

Zedmed v37.3.0

Fixes and enhancements

Office	ZED-9747	<p>Fixed performance issues in Zedmed Some practices experienced slow response times when their Office Waiting Room had a large number of patients.</p>
Clinical	ZED-9739	<p>Fixed the margins of Letters in Summary Views>Documents There was a formatting issue with the margins of letters viewed from the Summary Views Documents Tab - in the Patient Record. The margins are now displayed correctly</p>
Clinical	ZED-9740	<p>Fixed an issue with printing PDFs from the results inbox. There was a problem that prevented the printing of PDF documents from the Results Inbox.</p>

Zedmed v37.2.3

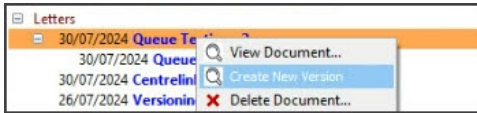
Shortcuts to specific sections:

- [Payment Gateway](#)
- [Branch Selector for billing](#)
- [Date stamp for Patient Details notes](#)
- [Document Preview](#)
- [Tyro ePayment Reconciliation report](#)
- [Document versioning](#)
- [Suppressed invoices workflow](#)
- [Improved claim management](#)
- [Secure Send enhancements](#)
- [Improved WP Tools](#)
- [General enhancements](#)
- [Resolved issues](#)

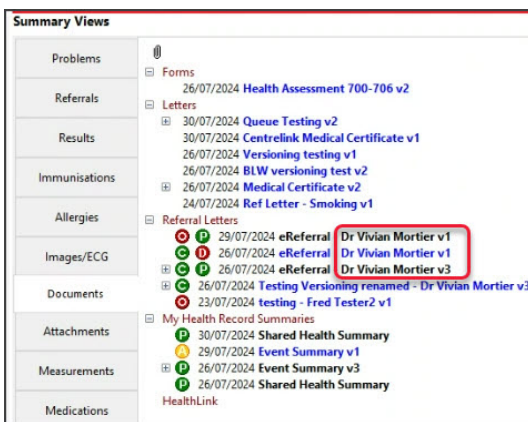
Document versioning

Instead of editing Documents and Referral Letters, you now Create new versions. This ensures that a document's history of changes is retained. This applies to the following document types: Letters, Referrals, CDA Referrals and Batch Letter Writer letters distributed using print or send.

To update a document, right-click it and select **Create New Version**. A new version will be created and opened for editing.



Newly created Documents and Referral letters will have a v1 suffix, and subsequent versions will increase to v2, v3 etc. Versioned documents are displayed using a tree structure. A new document version can be created from any version of a document, it does not have to be the latest.



Versioning is turned off by default and is enabled in Global Options. You can also restrict the ability to delete or edit a document over a certain age. By default, it is set to 0 in Clinical >Global Options for no time limits.

To learn more, see [document versioning](#).

Suppressed invoices workflow

Bulk Bill and DVA can be disabled for Medicare/DVA invoices so that the claims can be reviewed in the Claims tab and then submitted. This provides more oversight and prevents claims from being submitted for invoices that must be voided.

See ZED-9289 for how to enable this option.

New Invoice

Invoice Patient Mr Knut Holloway DVA VSS123343 HCC# Safety Pens. Status Full DVA
 File 41 DOB 19/05/1952 (72)

Payer Medicare Add/Edit Payer
 Applicable Fee Type MC

Doctor D, Phillip A

Request/Referral Dr Adelaide Path Partners PD To Starts Mths Notes 08/11/2023 12

Claim

Payer Debts Patient Family Credit
 Due 365.60 3330.95
 Deferred 0.00

Fund Details Fund # Fund Fee Type

Refund/Gap Calculation Invoice Style
 Fund Medicare Print Gap Corporate

Date	Item#	Description	GST selectable item	Fee	Tax	Unit Value	Qty	Amount	Notes	Estim. Refund	Gap
30/08/2024			MC		FRE	0.00	1	0.00		0.00	0.00
30/08/2024	23	professional attendance by a genera MC			FRE	41.20	1	41.20		0	0

Assist Fee Properties Add Change Delete Total 41.20 Disc. 0.00 Gap 0.00

Doctor Assigned Billing Codes Message Add All This is the invoice message

Billing Instructions Send Medicare Bulk Billing Consent

Defer Family ECLIPSE MA Online Bulk Bill Combo Inv. Print Email Suppress Quick Pay Cancel Help

Medicare is the payer but cannot be selected.

The Claims tab has enhancements to help manage claims for suppressed invoices.

Claim Status

Refresh Default View Collapsed All

View all Claims for Suppressed invoices

Check Claim Status

Manually refresh the status of a Claim or Claim Payment

Inv/Service/Assessor	Date Inv/Service	Status	Account Payer	Patient	Outstanding	Paid	Doctor	Claim ID	Medicare Ref.
Inv 35418	25/07/2024	COMPLETE	Medicare	Simkins, Talia	\$38.85	\$42.85	Igor Fuller	214404	D6616@
23	25/07/2024	Overpaid			\$38.85	\$42.85			
Inv 35419	25/07/2024	COMPLETE	Department of Veterans ...	Chapman, William	\$123.45	\$140.50	Igor Fuller	214405	B9855@
44	25/07/2024	Overpaid			\$123.45	\$140.50			
Inv 35420	25/07/2024	REJECTED...	Post, Jamee	Post, Jamee	\$120.55	\$0.00	Augustus Eason	214402	
104	25/07/2024	Unpaid			\$120.55	\$0.00			
Medicare Fund									
Inv 35422	25/07/2024	WITH ME...	Medicare	Simkins, Talia	\$103.50	\$0.00	Igor Fuller	214406	D6617@
44	25/07/2024	Unpaid			\$103.50	\$0.00			
Inv 35423	25/07/2024	WITH ME...	Department of Veterans ...	Chapman, William	\$40.95	\$0.00	Igor Fuller	214407	B9856@
23	25/07/2024	Unpaid			\$40.95	\$0.00			
Inv 35425	29/07/2024	COMPLETE	Medicare	Aldridge, Joseph	\$18.95	\$19.60	Igor Fuller	214410	D6647@
91890	29/07/2024	Overpaid			\$18.95	\$19.60			
Inv 35426	30/07/2024	COMPLETE	Medicare	Alston, Mia	\$71.30	\$42.85	Igor Fuller	214412	SAP0000030072408230712
23	30/07/2024	Underpaid			\$71.30	\$42.85			

New Account Payer column

To learn more, see the [Suppressed claims workflow](#).

Improved claim management

Easy Account Enquiry Access

When you double-click on an invoice in the Claims tab, it will open the patient's Account Enquiry screen with that invoice highlighted. Closing the invoice will take you back to the Claims tab. This makes it easier to review claims.

More robust claims.

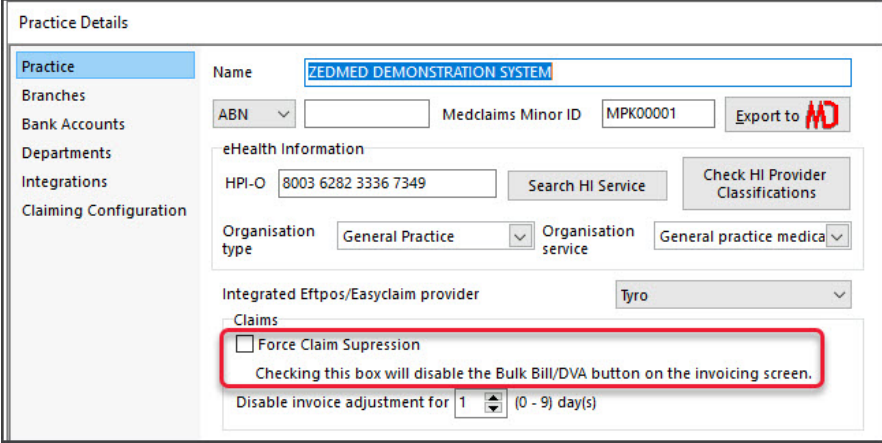
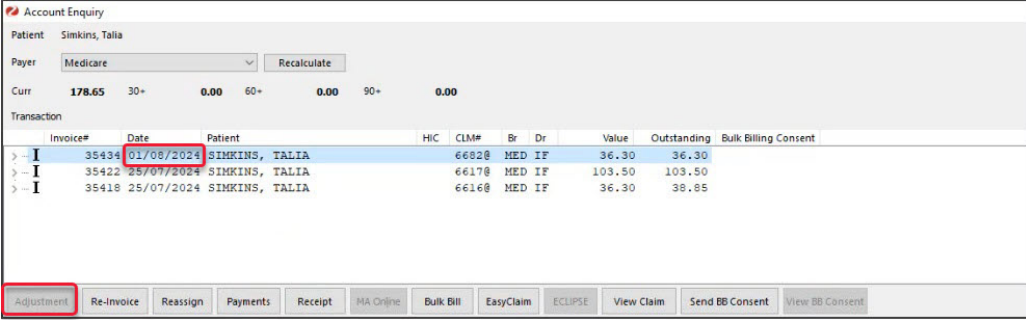
- To avoid changes to an invoice after transmitting a claim, adjustments cannot be made to that invoice from the Account Enquiry screen for 7 days. If the invoice is incorrect and you receive a rejection from Medicare, select the payment in the Payments tab - then click Reconcile Payments > Void Rejected Services to void that invoice. This applies to Bulk Bill, DVA and Eclipse claims. MA Online and Tyro Easy Claim will still have the Adjustment button available. **NOTE:** Zedmed v37.4.0 allows the practice to

enable or disable this and set the number of days.

- When receipting, a warning will suggest waiting 24 hours if full payment information has not been received from Medicare.
- The Claims tab has a **Check Claim Status** button so staff can manually refresh the status of a claim or claim payment.

To learn more, see the [Review Claims guide](#) > **Claim Management enhancements**

Specific updates for invoices and claims

Office	ZED-9289	<p>Add "Force Claim Suppression" to suppress submitting Medicare/DVA claims A new option under Practice Details called Force Claim Suppression. Ticking this box will disable the ability to submit a DVA or bulk bill claims directly from the invoice screen. Note that <u>this setting is off by default</u>.</p> 
Office	ZED-9290	<p>Changes to Claims Status Screen Added Account Payer to the claim status view. Changed the option Not Submitted to Not Submitted / Suppressed. You can choose this option, then select Refresh to display only the Suppressed invoices queued in the Claims tab.</p>
Office	ZED-9291	<p>Restrict changes to invoices for submitted claims Disabled the Account Enquiry screen's Adjustment button for all claims less than 7 days old. This applies to Bulk Bill, DVA and Eclipse claims. MA Online and Tyro Easy Claim will still have the button available.</p> 
Office	ZED-9360	<p>Added a 'Check Claim Status' button Added a Check Claim Status button to the Claims Tab so staff can manually refresh the status of a Claim or Claim Payment.</p>

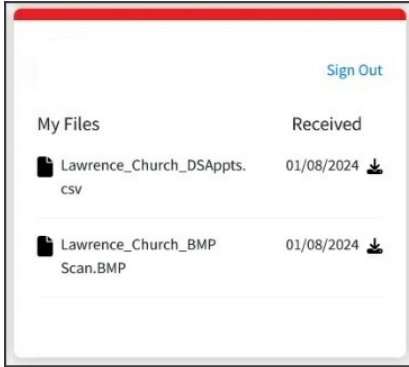
Office	ZED-9361	<p>Change the auto-void criteria for receipting off payments</p> <p>Added additional checks to prevent the automated receipting of claims that have been paid but where the processing report is incomplete.</p>
Office	ZED-9367	<p>Fast access to a claim's invoice from the Claims tab</p> <p>Changed the double-click function in the Claim tab. Double-clicking a claim will now take you to the associated invoice in the patient's Account Enquiry screen.</p>

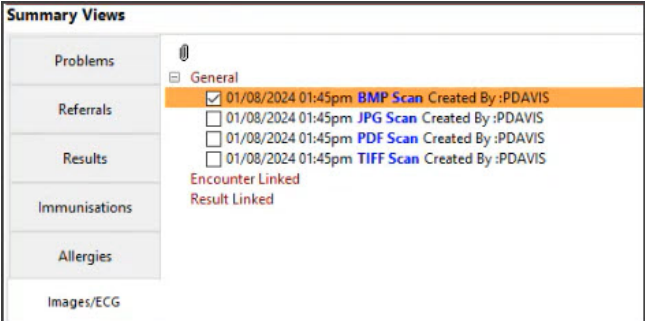
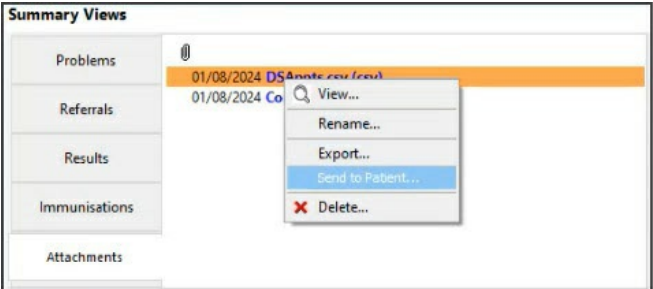
Secure Send enhancements

Features summary:

- Can now be used for patients without an account payer.
- Sender can override the security code requirements
- More meaningful file names
- Can now Secure Send from Summary Views > Images | Attachments | Results
- Can now Secure Send from the Results Inbox.

To learn more, see the [Secure Send guide](#).

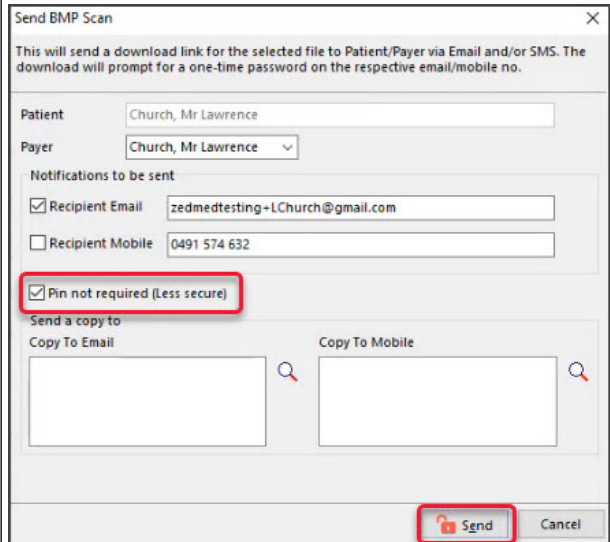
Office	ZED-9323	<p>Secure Send now provides more descriptive file names.</p> <p>The filename is now formatted as <Patient Given Name><Patient Family Name><File Name>.</p> 
Office	ZED-9325	<p>Secure Send can now be used for patients without an account payer.</p> <ul style="list-style-type: none"> • The patient will be the Payer in the Secure Send dialogue • The patient's email and mobile will prepopulate the Secure Send dialogue fields.

Office	ZED-9326 ZED-9327 ZED-9369	<p>Secure send can be used from more Summary Views tabs</p> <ul style="list-style-type: none"> • Summary Views > Images (can send image files) • Summary Views > Attachments (with file type restrictions) • Summary Views > Results (right-click View Results > Send to Patient) <p>For security, some files (exe, dll etc) cannot be sent as shown in the restricted list below Right-click and select Send to Patient.</p>  
Office	ZED-9333	<p>Removed some restrictions on the file types supported by Secure Send</p> <p>Restrictions have been updated to allow more file types to be sent using Secure Send. The following file types are still restricted due to the security risks they pose (malware etc):</p> <pre>bat exe cmd sh php([0-9]) p1 cgi 386 dll com torrent js app jar pif vb vbscript wsf asp cer csr jsp drv sys ade adp bas chm cp1 crt csh fxp hlp hta inf ins isp jse htaccess htpasswd ksh lnk mdb mde mdt mdw msc msi msp mst ops pcd prg reg scr sct shb shs url vbe vbs wsc wsf wsh</pre>

Office ZED-9366

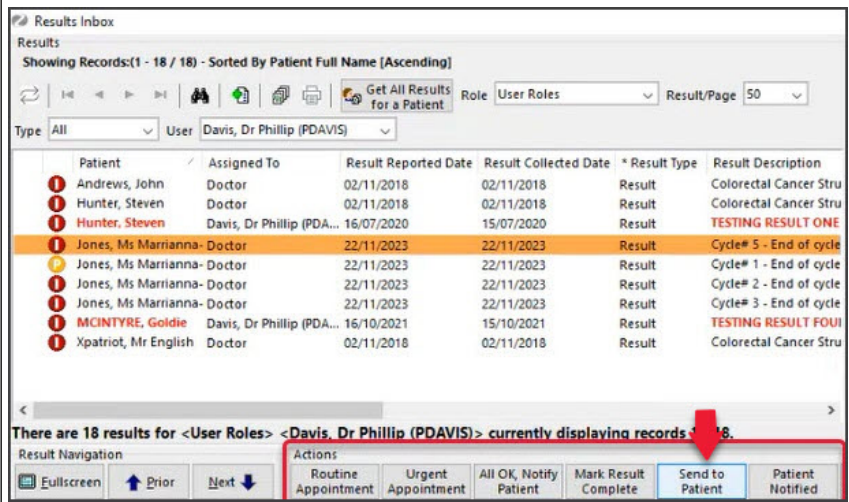
Secure Send can be used without the security code requirement
 The sender can use a checkbox to override the one-time security code requirement. This is the code sent to the patient to open the portal and access files sent to the patient.

Files that required a security code when they were sent, are not displayed if the portal is opened without a security code requirement.



Office ZED-9369

Use Secure Send from the Results Inbox
 Secure Send now allows you to send patient results from the Results Inbox.
 1) Select the result
 2) Select **Send to Patient**.
Summary Views > Results are also supported by Secure Send.



To learn more, see the [Results Inbox guide](#).

Office	ZED-9468	Updated where Secure Send lab reports display the phone number The default Pathology and Radiology reports used for Secure Send now display the phone number in the branch name and address section.
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Improved WP Tools

Zedmed v37 includes new features for creating and editing Clinical templates.

Table resizing

- Add a table within another table.
- Resize a table by dragging on a border; left, right, top or bottom.
- Resize columns and rows.
- Resize a table inside another table.

Hyperlinks

Hyperlinks can now be added using the Toolbar button and Edit menu by typing a URL in the document. E.g

<HTTPS://HyperlinkURLhere.com.au>

Word wrapping around images

- Handle pictures as a character; the picture is inserted in the middle of a sentence
- Relation to paragraph – auto wrap left or right; paragraph text is wrapped to the left or the right of the picture
- Relation to paragraph – wrap left and right; paragraph text is wrapped on the left and the right of the picture
- Relation to page – no wrapping; the picture is displayed over the text
- Relation to page – wrap left and right; text on the page is wrapped on the left and the right of the picture

Colour picker

Provides a greater range of colours, the ability to create and save custom shades and a paragraph background colour button.

General enhancements

New Appointment Counts Report

A new report option, "Appointment Counts", has been added to the Appointments Report.

Office

ZED-9079

Appointment Report

Style

Appointments Only Order by Name

Appointments and Available Slots

Appointment Counts

Cancelled/Missed

Cancelled Only

Missed Only

Send Appointments via SMS

Criteria

Date from: 28/08/2024 To: 28/08/2024

Time from: 06:00 To: 22:00

Branch: Test Branch 1

Doctor: All

Resource: All

Appointment Type: All

Report

Display Options

Addresses Include History

Referral Details

Separator Lines

Preferred Name

It shows the number of appointments per practitioner with the total number of appointments for the selected time range. You can apply filters such as appointment type and select specific practitioners. This report does not capture cancelled, unavailable and non-patient appointments.

Test Branch 1 Page 1

Appointment Counts

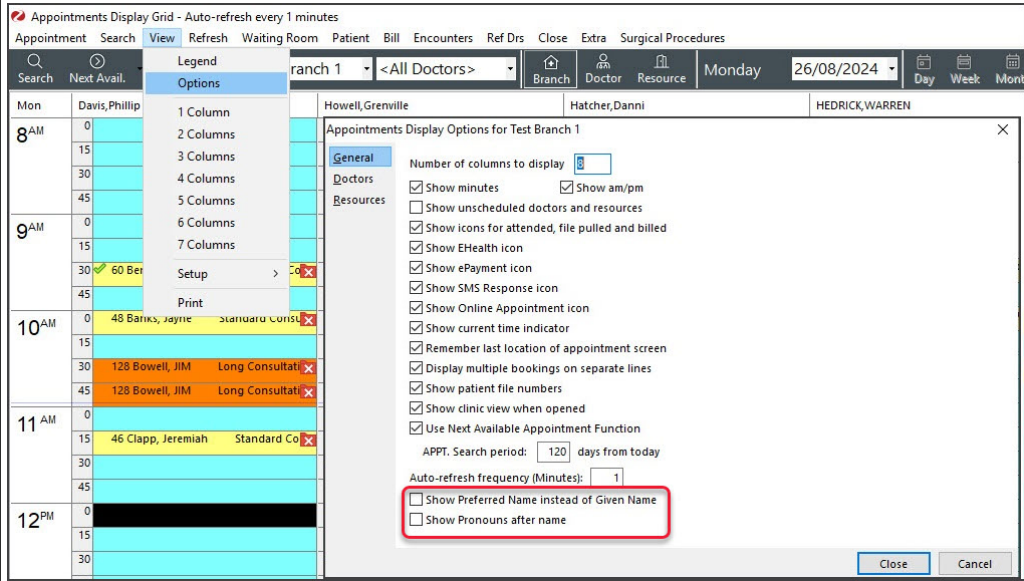
Monday 26 Aug 2024 From 06:00 To 22:00 10 Appointment(s)

Treating Doctor/Resource	Number of Appointments
Dr Grenville Howell	3
Mr Phillip Davis	5
Dr WARREN HEDRICK	2
Total Appointments	10

To learn more, see the [Appointment Report guide](#).

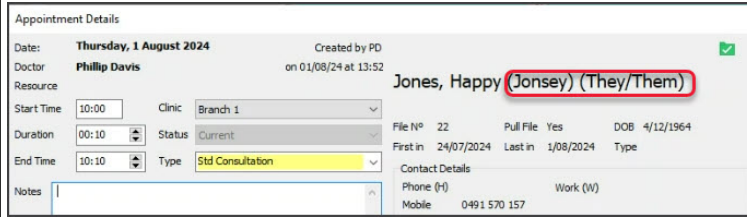
Preferred Name and pronouns displayed in Appointment Details
 Added an option to display preferred name and/or pronouns in the appointment grid.

Select **View > Options** to open the **Appointment Display** options to enable the pronoun options.



Office ZED-9233

Added display of preferred name and pronouns to appointment details and the office and clinical waiting room



To learn more, see the [Appointment display options guide](#).

Office ZED-9321

Preferred Name and pronouns displayed in Attendance Details
 The Attendance Details screen now shows the patient's preferred name and pronouns as shown in the screenshot above.

A batch search for a patient's IHI number can exclude Archived and Deceased patients
Practice setup > Practice tab > HI Service Settings > Branch Settings tab.

The IHI Batch Update and Verification services can now be configured in Office to exclude specific Patients according to their status (Archived, Deceased etc).

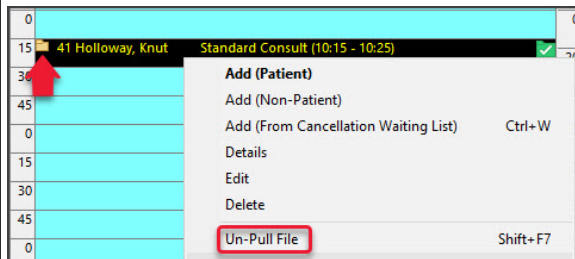
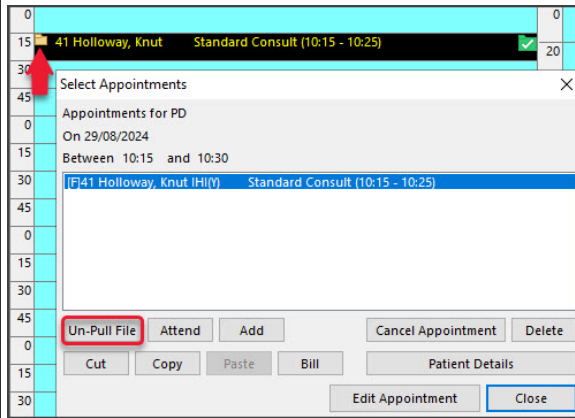
Office ZED-9237

The screenshot shows the 'HI Service Settings' dialog box. The 'Batch Search for IHI' section is active, with the following settings:
- Perform a regular Batch Search for a matching IHI for all patient records with no IHI recorded
- Frequency: Monthly
- Starting: 1/01/2011 at 00:00
- Number of Records: 100
- Email exception report(s) to: [empty field]
- Send intramail to: [checkbox] AUGUSTUS, [checkbox] CHAMINDA, [checkbox] CONNIE, [checkbox] CPV, [checkbox] DANNI, [checkbox] DANIELA
- Exclude Statuses: Archived, Casual, Deceased
The 'Batch Verification of IHIs' section is also visible:
- Perform regular batch verification of IHIs in patient records
- Frequency: Monthly
- Starting: 1/01/2011 at 00:00
- Number of Records: 100
- Verify records last updated more than: 1 Months ago
- Email exception report(s) to: [empty field]
- Send intramail to: [checkbox] AUGUSTUS, [checkbox] CHAMINDA, [checkbox] CONNIE, [checkbox] CPV, [checkbox] DANNI, [checkbox] DANIELA
Buttons: Close, Cancel

Office ZED-9265

You can now Un-pull a file

The Un-Pull File option has been added back to the Appointment Screen. You can no right-click Pull File or Un-Pull File, and the status will be reflected in the Appointment Detaild and the folder icon. Un-Pull File will remove the Pull File icon.



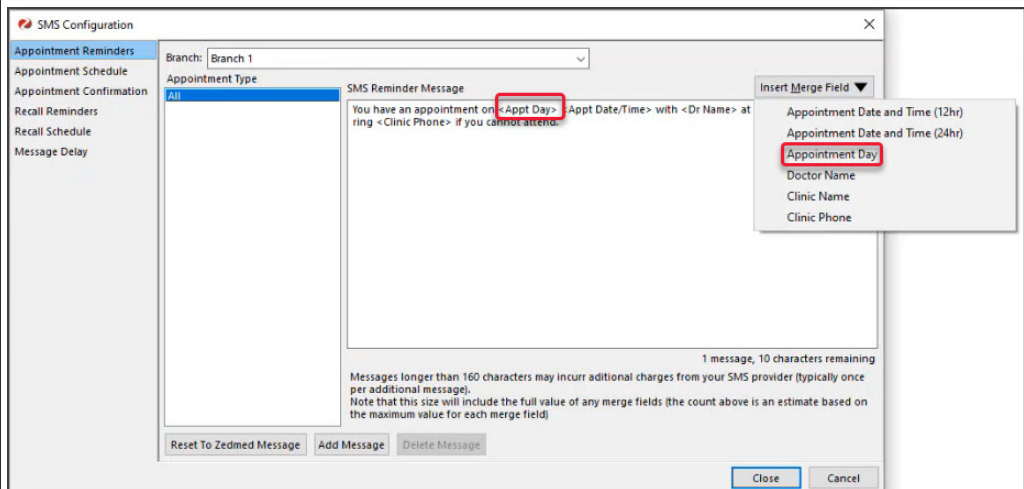
To learn more, see the [Book an Appointment guide](#).

Office ZED-9304

SMS appointment reminders can now include the day of the week.

A new merge field for the Day of the Week has been added to all Appointment, Recall reminder and Expired Referral templates.

This has been added to the Zedmed default reminder message and Appointment reminders sent from the Appointment Report. The Day will need to be added to custom messages.



To learn more, see the [Customise SMS text guide](#).

Office ZED-9412

You can now SMS a doctor when an appointment is booked
 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.

Requirements:

- The doctor's mobile number must be added to the Doctor Details.
- The patient must receive a confirmation for the practitioner to receive a notification.

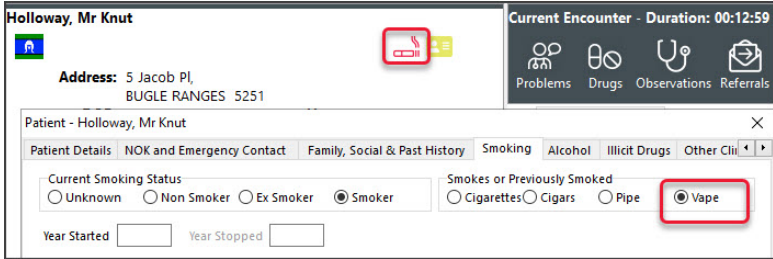
This means the **Send Confirmation SMS** must be manually ticked in the Appointment Details screen when the appointment is booked- unless it is an OLA booking (as it is ticked by default).

To learn more, see the [SMS Send options guide](#).

Office ZED-9472

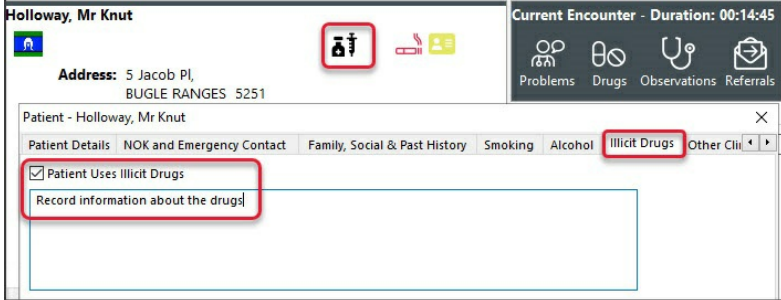
You can now Bill from the Appointment Grid
 Right-click a patient's appointment and select **Bill** to open a New Invoice. This will pick up a practitioner's billing information - just like billing from the Waiting Room.

Vape has been added to the Smoking status options
Practitioners can now select **Vape** as a smoking method in the Patient's Clinical Record > **Smoking** tab.
If Vape is selected, it will show as a cigarette icon.



To learn more, see [Navigating Clinical Records](#)

An 'Illicit drugs' tab has been added to the patient's Clinical record.
Clinical now gives practitioners the ability to indicate if a patient is an illicit drug user and record related details in the patient details maintenance screen. Tick the box to add the injection icon.

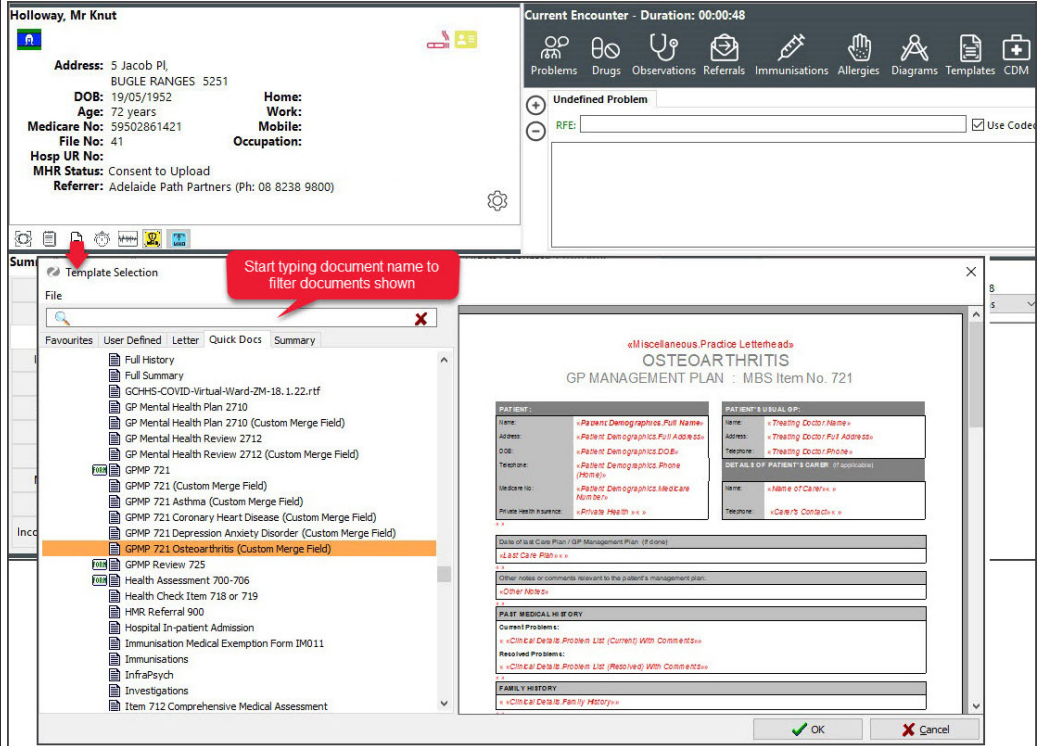


To learn more, see [Navigating Clinical Records](#)

Quick Documents Search - Template Selection screen

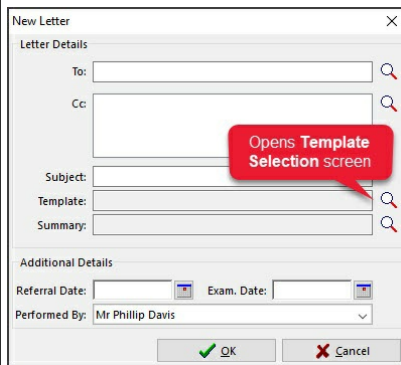
We have created a new Quick Document Search page called Template Selections. This displays all templates in a scrollable screen that will filter as you type a template's name.

Open **Quick Documents Search** using the new icon next to Quick Documents. Select the required tab and start typing the template name to filter the list.



Clinical ZED-9263

The Template Selection screen will also open if you start a New Letter and search for a template.



To learn more, see the [Quick Documents guide](#).

Clinical ZED-9322

Changes to Clinical Waiting Room column widths are now saved

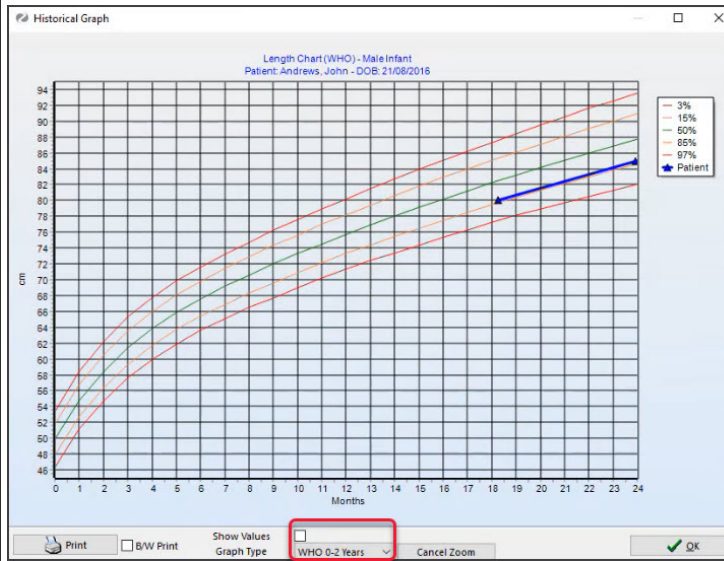
The column width and order of the clinical waiting room is now be remembered for Zedmed user.

Clinical ZED-9508

Clinical Observations now has a paediatric WHO chart

In Clinical Observations > Physical > Measurements.

When you select a graph, the Graph type drop-down has a new option: **WHO 0-2 Years**, which displays the Length, Weight and Head circumference chart for children 0-2 years old.



To learn more, see the [Record physical measurements guide](#).

Clinical ZED-9532

Results Inbox now has a side-by-side viewing option.

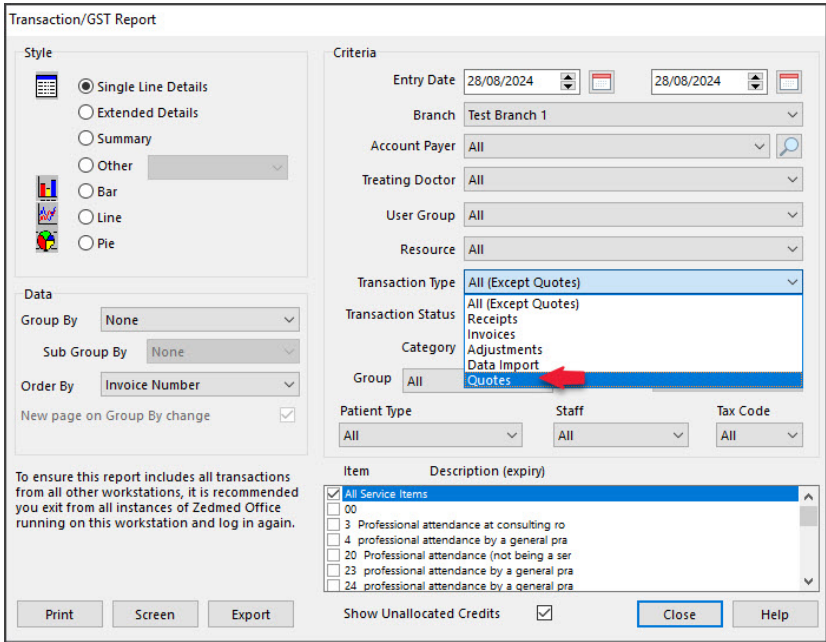
A new setting in the Clinical > My Options screen allows users to select the layout of the Results Inbox.

To change from the default to side-by-side, select **Left to right**.

To learn more, see the [Results Inbox guide](#).

Office ZED-8995

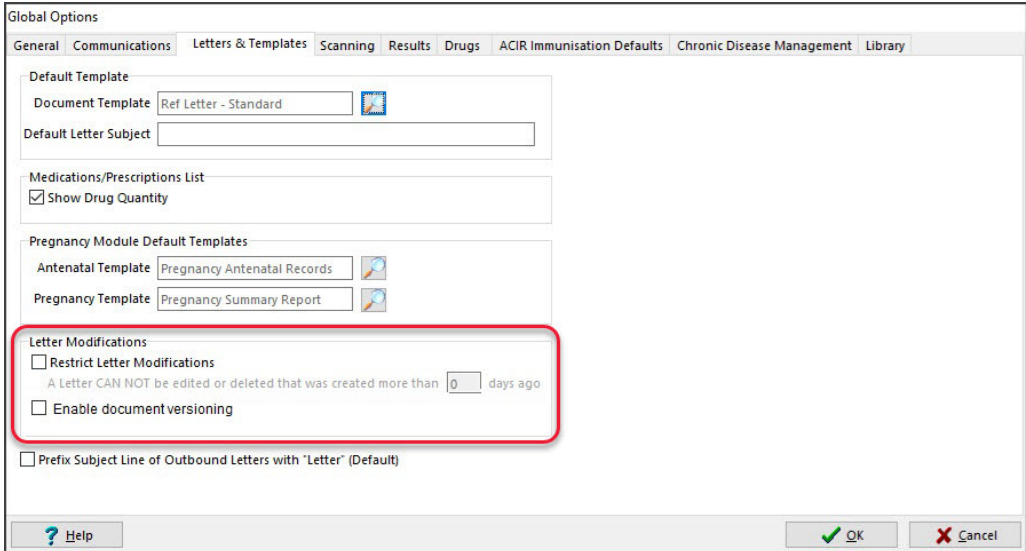
Added Quotes to the Transaction Type of the Transaction/GST Report
Add the option to run the **Transaction/GST report** showing only Quotes, this does not affect the existing All function which will still exclude quotes. Note, the Report Summary will be impacted if you include quotes as there will not be receipts.



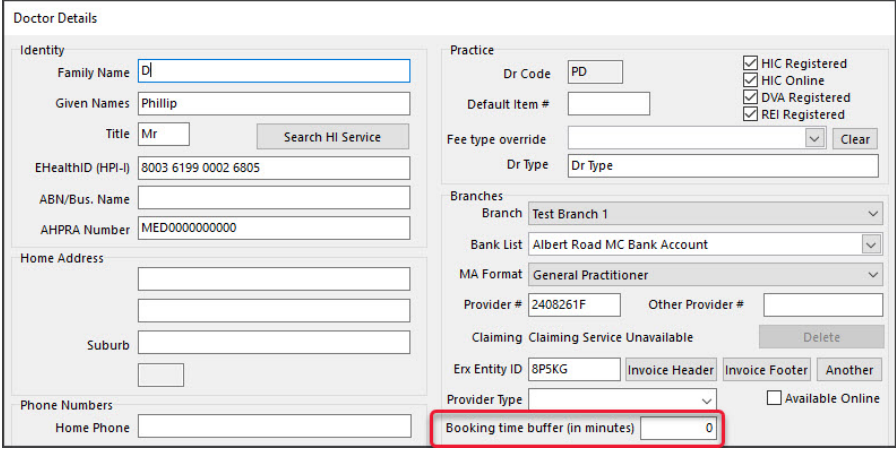
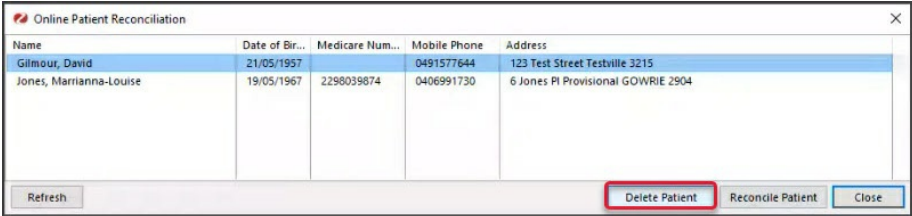
To learn more, see the [Transaction GST Report guide](#).

Clinical ZED-9651

Updated Document versioning so it can be turned on or off
Document Versioning is not enabled by default and is enabled in Clinical > Global Option > Letters & Template tab > -Enable document versioning



To learn more, see the [Document versioning guide](#).

OLA	ZED-9457	<p>You can now add a booking time buffer to a practitioner's appointments</p> <p>A new setting, "Booking time buffer", has been added to the Doctor Details screen and is configurable by branch. The value entered is used to refine the available appointments sent to the Online Appointments (OLA) by only allowing appointment slots that begin after (Booking Time + Buffer).</p> <p>This prevents people booking online appointments close to the current time</p>  <p>To learn more, see the Online Appointment setup guide.</p>
OLA	ZED-9238	<p>Reject a patient in the OLA patient reconciliation screen.</p> <p>When linking first-time OLA bookings to existing Zedmed patients, we have added the ability to remove provisional patients from the reconciliation process. If the patient already has an Appointment, you need to Delete their appointment first.</p>  <p>To learn more, see the Reconcile new OLA patient guide.</p>
Clinical	ZED-9607	<p>Enable printing of multiple TIFF documents as one document</p> <p>In Zedmed Cloud, printing a multi-page image document will no longer result in one print job per page</p>

Resolved issues

Office	ZED-9642	<p>Claim and payment reconciliation mismatch</p> <p>Fixed an issue that caused claim and payment mismatches when reconciling Medicare claims.</p>
Office	ZED-9003	<p>Appointment Report AV error when the Referral Details option is selected</p> <p>Fixed an issue that caused the Appointment report to display an error when running it with the Referral Details option selected.</p>

Office	ZED-9044	Task Manager displays the same patient for all Tasks Created The Task Manager screen in Zedmed Office has been fixed to display the correct linked patients in the task details.
Office	ZED-9062	Unable to save more than 1 new resource at a time Fixed the issue that resulted in only the first resource being saved when adding multiple resources.
Office	ZED-9063	Fee update error 'Is not a valid floating point value' Improved the error message shown in Item Fee Update when no value is entered for a percentage or dollar amount increase. Also fixed the error displayed if Category or Group is selected. Selections will now correctly filter the items in the list.
Office	ZED-9064	Patient and Find menu items no longer work in the Waiting Room The Patient and Find Patient menu options in the waiting room now work as expected.
Office	ZED-9349	Internal Mail Merge Template - Unable to Preview and Edit Mail Merge Before Printing When using internal templates, it is now possible to preview the results of a mail merge and make changes before printing.
Office	ZED-9375	When adding a new patient, you can't add pronouns until you've saved the patient Fixed an issue that prevented a pronoun from being selected when creating a new patient in Office.
Office	ZED-9398	The Referral date merge field prints a random date on the Label Standard patient labels (Internal Template) now print the correct referral date. This corrects a reported error that some labels print a random date.
Office	ZED-9410	Claim Report missing the Claim ID s8th digit and MBS items 5th digit Increased space available to display item numbers and claim IDs in the Claim Report.
Office	ZED-9434	Third-Party Account Enquiry allocation Error Fixed an issue in Third Party Account Enquiry that resulted in an allocation error 400.
Office	ZED-9442	Error 'FireDAC[[Phys][FB]Dynamic SQL Error: Too many Contexts of Relation/Procedure/Views. The maximum allowed is 255' Fixed a Firebird error that occurred when merging patients from a database that had a considerable number of Clinics.
Office	ZED-9458	Duplicating schedules does not copy messages correctly When duplicating or copying sessions on the doctor and resource appointment schedule dialogue, the schedule messages selected for display in OLA will now be copied.
Office	ZED-9467	Appointment incorrectly removed when cancelling the cancel appointment operation Cancelling the cancellation of an appointment (at either the reason or linked appointment warning phase) will no longer remove the appointment from the Select Appointments form listing.

Office / Clinical	ZED-9420	Radiology/Pathology Template download notification pop up. The notifications are now displayed when Report templates are downloaded from Office or Clinical,
Clinical	ZED-9018	Unable to Print Results in Alphabetical Order Results previewed and printed from the Results Inbox are now in the order, regardless of the column (and direction) they are sorted on.
Clinical	ZED-9081	Resolved problems with re-prescribing a 'one-off' drug Fixed an issue preventing re-prescribing of a one-off drug. Effected new scripts with no drug name/description.
Clinical	ZED-9218	Spelling mistake in Clinical Observation Pap Smear Result input "Inflamitory" has been corrected to "Inflammatory" in the pap smear observation screen - result options.
Clinical	ZED-9384	Results provides no warning when clearing the patient notified date Clinical will now ask for confirmation before clearing the "Patient Notified" date when viewing results.
Clinical	ZED-9437	Access Violation when accessing the Outbox Viewer Fixed an issue that caused an error and did not allow the Outbox viewer to open.
Clinical	ZED-9438	Error 'Must be a numeric value' when modifying observation and measurement value. Fixed an issue where an error was incorrectly displayed when an observation value was deleted (for correction).
Clinical	ZED-9439	Access Violation when clicking the Distribute button in the letter writer, Fix an error that occurred when Secure Send was enabled but the distribute dialog for letters in clinical was disabled.
Clinical	ZED-9532	Results Inbox Access Violation error Resolved an Access Violation error that could occur when rapidly scrolling through PDF results in the results inbox.
Clinical	ZED-9637	Refresh issue when resizing the encounter notes Fixed a visual corruption that occured when resizing the encounter panel during an encounter.
Clinical	ZED-9662	Upgrade script failure – Index RDB\$PRIMARY95 already exists Fixed an issue with upgrade scripts that could cause an error when upgrading some databases.
Clinical	ZED-9649	Document names and versions not displayed in encounter notes Fixed issues with the document version, renamed document and duplicated document names not displaying in Encounter notes. Note: an encounter needs to be running for the note to be written.

Clinical	ZED-9675	In WP Tools, electronic results do not merge correctly in templates Fixed an issue where the results merge field was not working correctly when it was part of a table and overlapped part of the text. If multiple results are selected they will no longer overlap into the next table in the template.
Clinical	ZED-9678	Update for Clinical encounter notes issue Made an update to address the issues encountered when drawing the text edit field for the current encounter.
Clinical	ZED-9693	Results showing overlapping text Fixed issue where Historical HL7 results show overlapping text.
Clinical	ZED-9697	Upgraded the wPDF Viewer to the latest version This upgrade fixes issues with viewing PDFs containing multiple documents or charts in the Results Inbox.
Clinical	ZED-9703	Summary Views > Results shows overlapping text Fixed an issue with some results showing overlapping text in Summary Views Results and Incoming Documents.
Clinical	ZED-9725	An AV in CRS_Client error occurs when right-clicking on a referral in the History View Zedmed Clinical no longer shows an error in patient history when user right-clicks on a referral.
Cloud	ZED-9241	Don't check for Tyro install on Zedmed startup Updated the way Tyro starts in Zedmed Cloud so if the Tyro Eftpos option in the receipts form is not available, you only need to close and reopen the Quickpay> Receipt screen after a short pause. You no longer have to restart Office.

See all [Zedmed v36 release notes](#)