

# Zedmed v37.2.4

Last Modified on 11/09/2024 11:47 am AEST

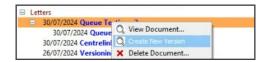
### Shortcuts to specific sections:

- 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.



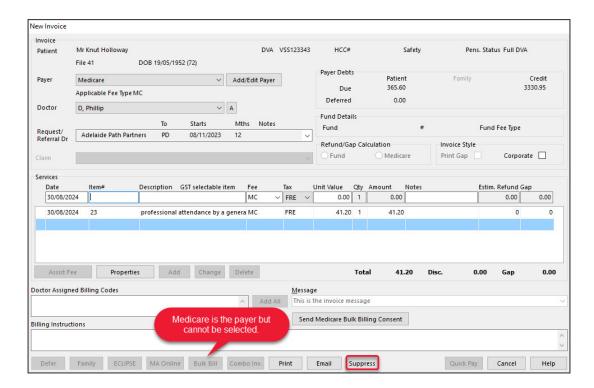
Versioning is turned off by default and is enabled in Global Options. You can also restrict the ability to delete or edit a document over a certain age. By default, it is set to 0 in Clinical > Global Options for no time limits.

To learn more, see document versioning.

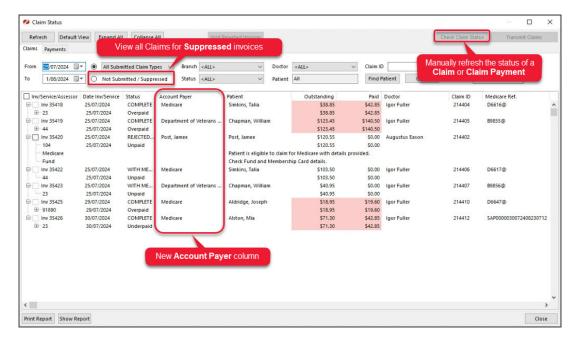
## Suppressed invoices workflow

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.



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



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 claims failing due to invoice changes, adjustments cannot be made to invoices with claims submitted in the previous 7 days. If the invoice is incorrect, select it in the **Claims** tab and click **Voice Rejected Invoices** to remove it.
- 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.

## Specific updates for invoices and claims

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Office	ZED-9289	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 this setting is off by default.  Practice Details  ABN
Office	ZED-9290	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.
Office	ZED-9291	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.    Account Enquiry
Office	ZED-9360	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.
Office	ZED-9361	Change the auto-void criteria for receipting off payments  Added additional checks to prevent the automated receipting of claims that have been paid but where the processing report is incomplete.

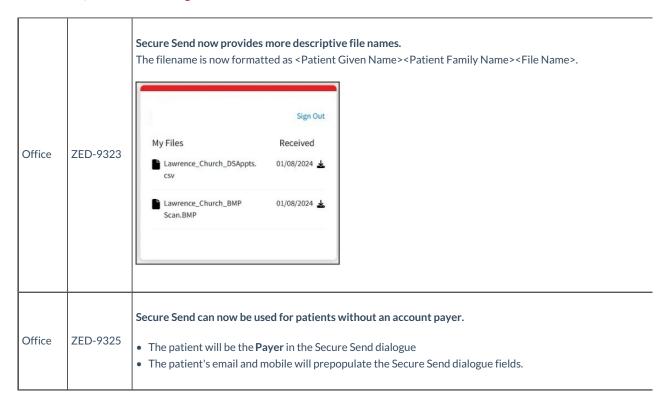
Office	ZED-9367	Fast access to a claim's invoice from the Claims tab  Changed the double-click function in the Claim tab. Double-clicking a claim will now take you to the associated invoice in the patient's Account Enquiry screen.
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### **Secure Send enhancements**

### Features summary:

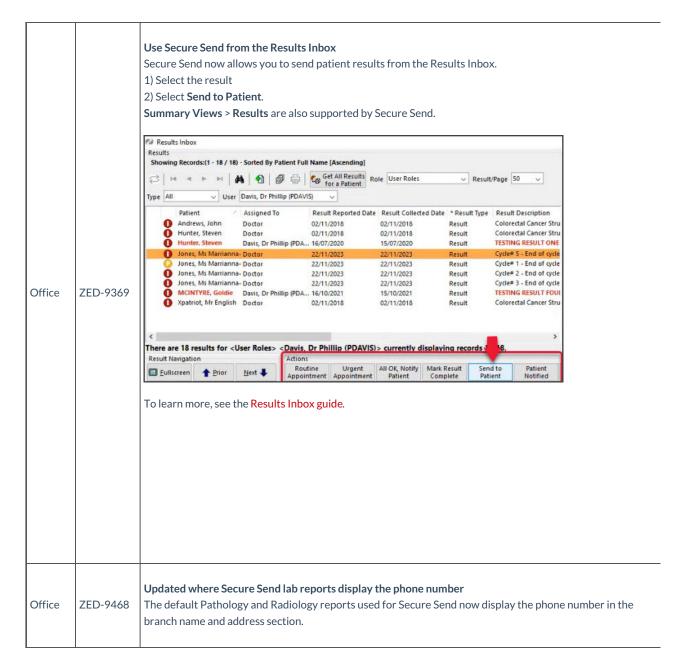
- Can now be used for patients without an account payer.
- Sender can override the security code requirements
- More meaningful file names
- Can now Secure Send from Summary Views > Images | Attachments | Results
- Can now Secure Send from the Results Inbox.

To learn more, see the Secure Send guide.



Secure send can be used from more Summary Views tabs • Summary Views > Images (can send image files) • Summary Views > Attachments (with file type restrictions) • Summary Views > Results (right-click View Results > Send to Patient) For security, some files (exe, dll etc) cannot be sent as shown in the restricted list below Right-click and select Send to Patient. **Summary Views** Problems ☐ General ✓ 01/08/2024 01:45pm BMP Scan Created By :PDAVIS □ 01/08/2024 01:45pm JPG Scan Created By :PDAVIS Referrals 01/08/2024 01:45pm PDF Scan Created By :PDAVIS 01/08/2024 01:45pm TIFF Scan Created By :PDAVIS Results **Encounter Linked** ZED-9326 Result Linked **Immunisations** Office ZED-9327 ZED-9369 Allergies Images/ECG **Summary Views** Problems 01/08/2024 DSAppate could 01/08/2024 Co Q View... Referrals Export. Results X Delete... **Immunisations** Removed some restrictions on the file types supported by Secure Send 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): Office ZED-9333 bat|exe|cmd|sh|php([0-9])|p1|cgi|386|d11|com|torrent|js|app|jar|pif|vb| vbscript|wsf|asp|cer|csr|jsp|drv|sys| ade|adp|bas|chm|cpl|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

## 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. Send BMP Scan 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. Church, Mr Lawrence Church, Mr Lawrence Office ZED-9366 Payer Notifications to be sent ☑ Recipient Email zedmedtesting+LChurch@gmail.com Recipient Mobile 0491 574 632 Pin not required (Less secure) Send a copy to Copy To Mobile Copy To Email Q Q Send



## Improved WP Tools

The new version of WP Tools now includes these new features for creating and editing Clinical templates.

Additional Table functions:

- Ability to add a table within another table
- Can be resized by dragging on a border; left, right, top or bottom
- Both the column and row can be resized
- Table inside another table can also be resized

Hyperlinks can be added using:

- Toolbar button
- Edit menu
- Typing a URL in the document e.g.

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

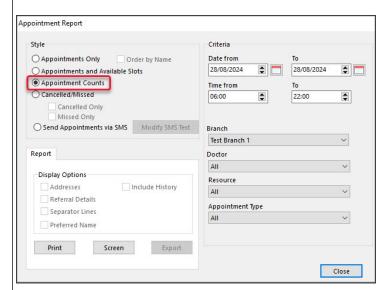
### Colour picker:

- Offers a greater range of standard colours and the ability to create and save custom shades.
- A paragraph background colour button has also been added.

### General enhancements

## **New Appointment Counts Report**

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

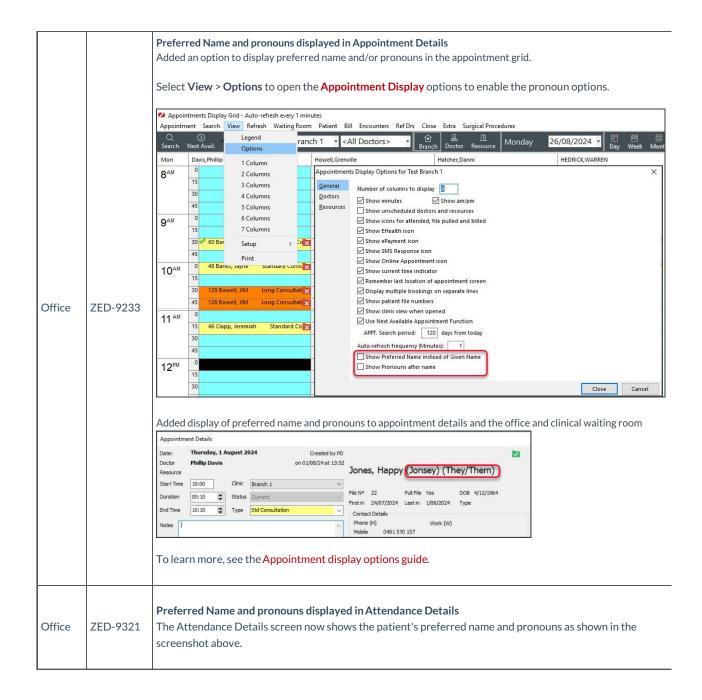


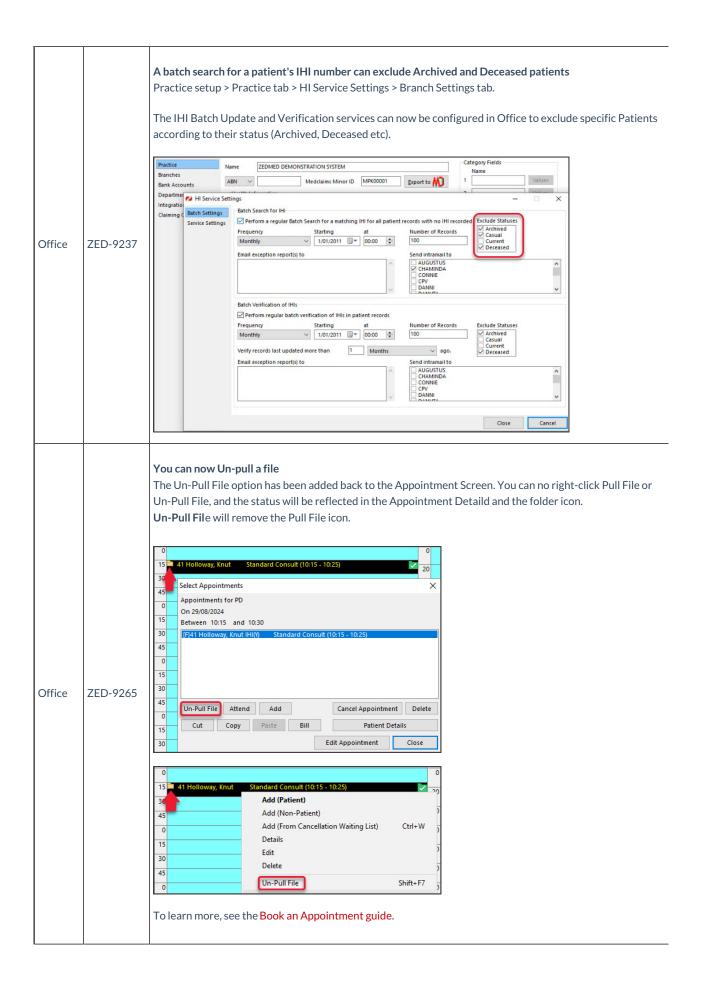
Office ZED-9079

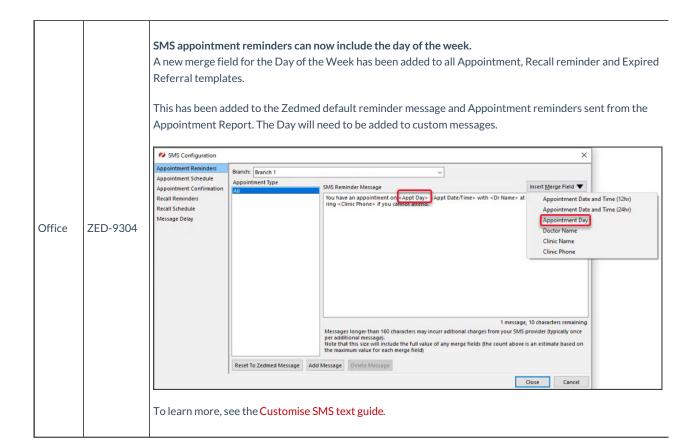
It shows the number of appointments per practitioner with the total number of appointments for the selected time range. You can apply filters such as appointment type and select specific practitioners. This report does not capture cancelled, unavailable and non-patient appointments.



To learn more, see the Appointment Report guide.







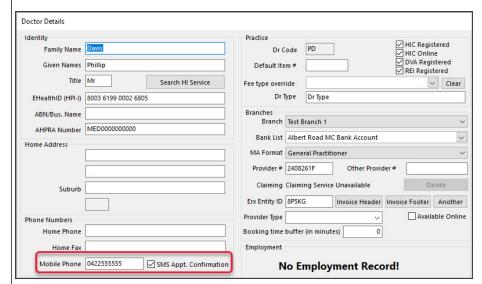
### You can now SMS a doctor when an appointment is booked

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:

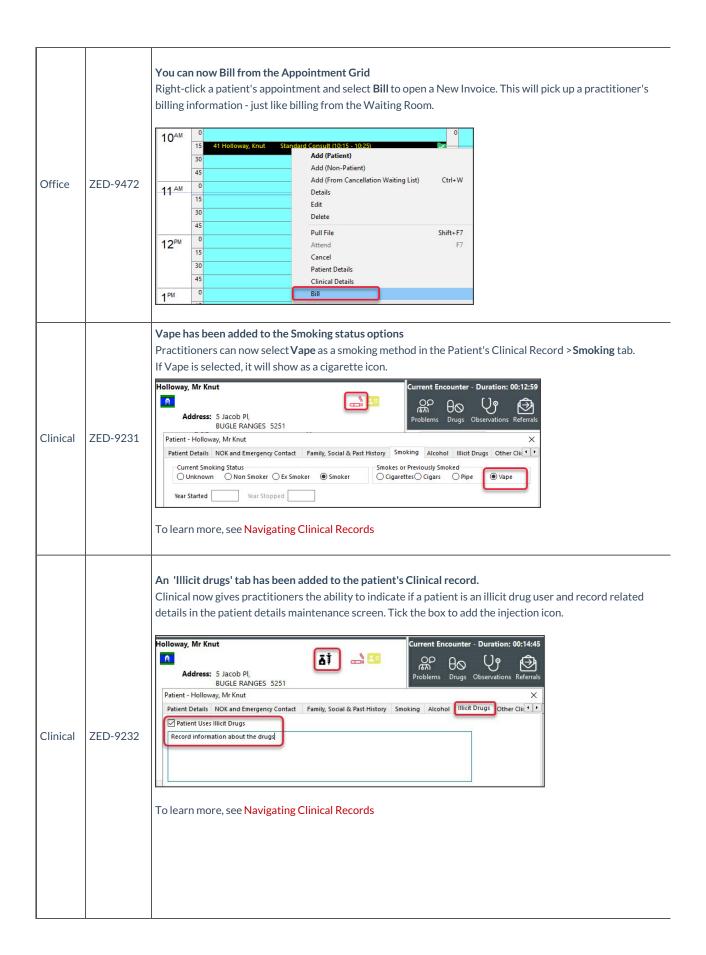
- The doctor's mobile number must be added to the Doctor Details.
- The patient must receive a confirmation for the practitioner to receive a notification.

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).



Office ZED-9412

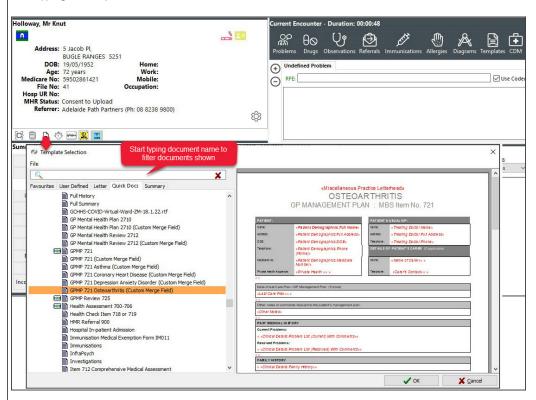
To learn more, see the SMS Send options guide.



## Quick Documents Search - Template Selection screen

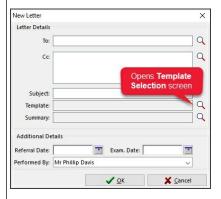
We have created a new Quick Document Search page called Template Selections. This displays all templates in a scrollable screen that will filter as you type a template's name.

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.

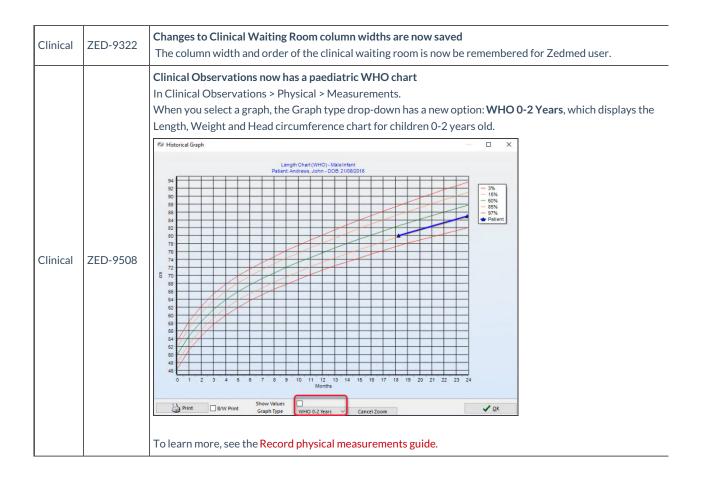


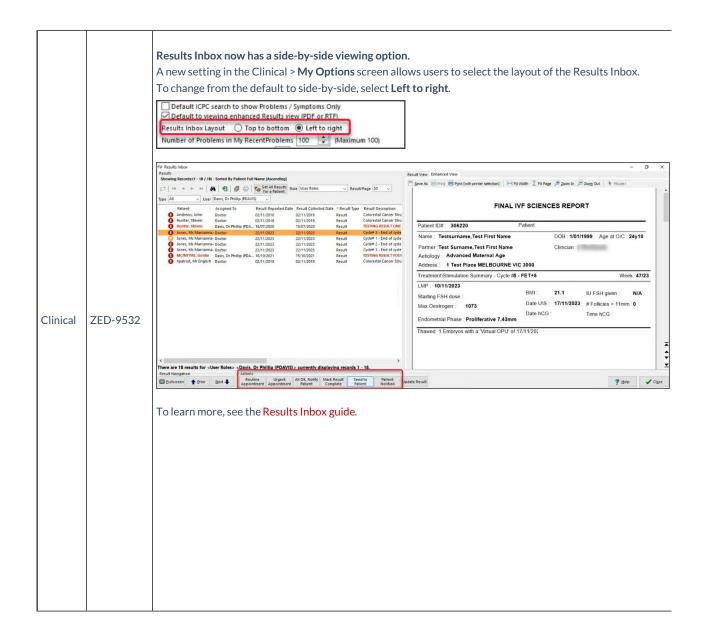
Clinical ZED-9263

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

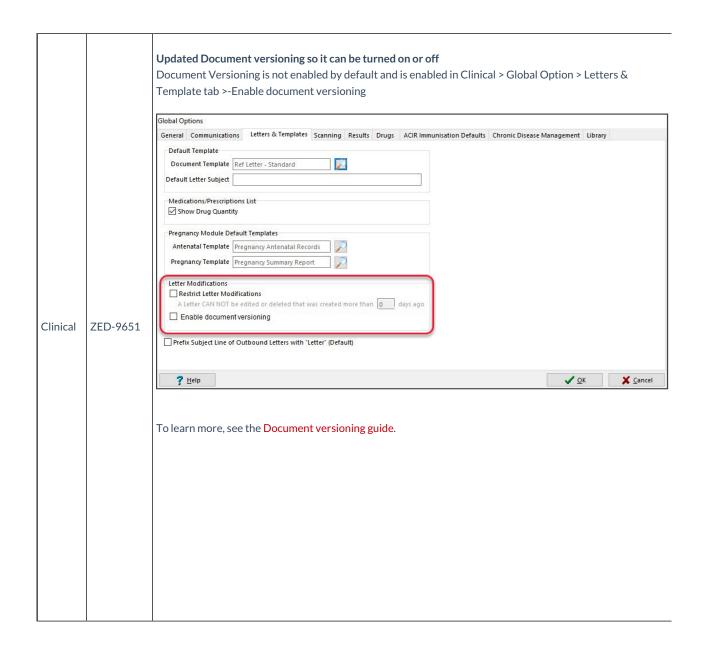


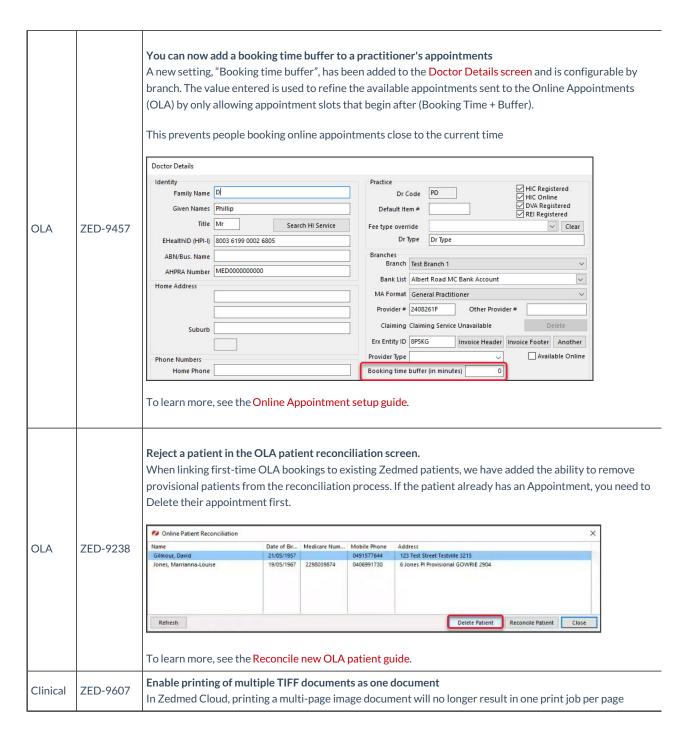
To learn more, see the Quick Documents guide.





#### Added Quotes to the Transaction Type of the Transaction/GST Report $Add the option to run the {\color{red} \textbf{Transaction/GST report}} showing only Quotes, this does not affect the existing All {\color{red} \textbf{All report}} showing only Quotes, this does not affect the existing All {\color{red} \textbf{All report}} showing only {\color{red$ function which will still exclude quotes. Note, the Report Summary will be impacted if you include quotes as there will not be receipts. Transaction/GST Report Style Criteria Entry Date 28/08/2024 • 28/08/2024 Single Line Details O Extended Details O Summary V Account Payer All Other Treating Doctor All ○ Bar User Group All OLine ○ Pie Office ZED-8995 Transaction Type All (Except Quotes) Transaction Status All (Except Quotes) Receipts Group By None Category Invoices Adjustments Sub Group By None Data Import Group All Order By Invoice Number Patient Type Staff Tax Code New page on Group By change All All All Item Description (expiry) To ensure this report includes all transactions from all other workstations, it is recommended you exit from all instances of Zedmed Office running on this workstation and log in again. All Se 00 3 Professional attendance at consulting ro 4 professional attendance by a general pra 20 Professional attendance (not being a ser 23 professional attendance by a general pra 24 professional attendance by a general pra Close Screen Export Show Unallocated Credits Help To learn more, see the Transaction GST Report guide.





## Resolved issues

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

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 Clain 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