

# Secure Send

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Secure Send uses email or ZedSMS to send invoices, referrals and documents to a patient or next-of-kin Account Payer using a link to a secure download page.

## Resources

- [Secure Send FAQ for patients.](#)
- [Secure Send integrations request form.](#)
- [Practice Manager implementation guide](#) \*
- [Address Book and template requirements.](#) \*

\* These guides explain how to set up [laboratory templates](#) for Secure Send referrals.

## Considerations

- Documents will be available in the Secure Send portal for 14 days.
- If multiple documents are sent within 15 minutes, one notification will be received to give access to all documents.
- Printing a document sent to a mobile phone may pose problems for some patients.
- There is no cost to use Secure Send via email. If you use ZedSMS, you will pay the cost of the SMS message.

## Secure Send video guide

## Sending referrals

To send a referral:

1. Follow the standard [pathology, radiology](#) or [referral letter](#) process.
2. For radiology and pathology:
  - a. Select an addressee that uses the "Zedmed Default" template.
  - b. The **Order Test** button will add the referral to the **Today's referral** section.
3. For referral letters:
  - a. After selecting **File > Distribute**, review the **Send to Patient** section.
  - b. Choose a **Recipient email** or **recipient mobile**.
  - c. You can also use **Distribute** to send it electronically to the referral recipient with secure messaging.
  - d. Select **OK** to add the referral letter to the **Today's referral** section.
4. Select **Secure Send**.
  - The **Secure Send** button will open the **Send** screen for the referral in the **Today's Referrals** section.
  - Multiple referrals will open in the tab's order (Pathology, Radiology, Letter), not the order in which they are listed.
5. Review the **Send** dialog.
  - The title will show the name of the referral being sent.

- o Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.

Additional recipients can be added using a comma between email addresses and mobile numbers.

Caution - if an incorrect email or mobile number is used, the unintended recipient will be able to view any documents in the download portal.

- o Optional: **Copy TO Mobile** or **Copy To Email** fields.

You can add recipients to the Copy fields if they have a valid email address or mobile in the **Clinical Address Book**.

To remove a CC: use right-click > Remove.

**Note:** This is different to the referrals **Copy To** field used when you want to notify a practitioner of the requested test.

You can use the Address Book's **HealthShare** directory for email delivery, not for SMS.

- o Optional: **Pin not required** (v37 and later)

Overrides the one-time security code requirement - the code sent to the patient to open the portal and access the sent files.

## 6. Select **Send**.

A message will display that includes the text 'Delivery successful'.

The patient will receive a link to download the referral, which will be useable for 14 days, as explained in [the section below](#).

If a laboratory referral addressee does not have the pathology or radiology template, 'Template not found' will appear.

The screenshot displays the 'Referral Selection' window in the Zedmed system. It features a 'Send Full blood count - Zedmed - Pathology' dialog box. A red box highlights the 'Zedmed lab template' dropdown menu, which is currently set to 'Zedmed - Pathology'. Another red box highlights the 'Send' button at the bottom of the dialog box. The dialog box includes fields for 'Patient' (Holloway, Andrea) and 'Payer' (Holloway, Andrea). It also has checkboxes for 'Recipient Email' and 'Recipient Mobile', and a 'Pin not required (Less secure)' option. Below these are fields for 'Copy to Email' and 'Copy to Mobile'. The background window shows a list of 'Available Tests' including 'AIDS screen', 'Blood;H Pylori', 'EUC', 'Full blood count', 'Fix', 'Glucose tolerance', 'Glucose;fasting', and 'HbA1c'. There are also buttons for 'Secure Send', 'Print Referrals', and 'Print Referrals and Close' at the bottom of the main window.

## Sending letters

Practitioners can send referral letters and documents, such as management plans and medical certificates, using

## Secure Send.

To send a letter or document:

1. Follow the normal process for a **referral letter** or a **quick document**.
2. Select **File > Distribute**.

The **Print/Send** screen will open with a section called **Send to Patient**.

The patient's name will be shown, and the payer will be the patient or 'NOK Account Payer'. The notification will be sent to the payer.

3. Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.
4. Optional: **Copy TO Mobile** or **Copy To Email** fields.

To add additional recipients using these fields, they must be in the **Clinical Address Book** and have a valid email address or mobile number. To remove a CC, right-click > Remove.

You can use the Address Book's **HealthShare** directory for email delivery but not for SMS.

5. Optional: **Pin not required** (v37 and later)

Overrides the one-time security code requirement - the code sent to the patient to open the portal and access the sent files.

6. Select **OK**.

A message will display that includes the text 'Delivery successful'.

The screenshot shows the 'Print/Send' dialog box. The 'Send to Patient' section is highlighted with a red border. It contains the following fields and options:

- Send to Patient** (Section Header)
- Text: "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."
- Patient**: Text input field containing "Holloway, Andrea"
- Payer**: Dropdown menu containing "Holloway, Andrea"
- Notifications to be sent**:
  - Recipient Email
  - Recipient Mobile
- Pin not required (Less secure)
- Send a copy to**:
  - Copy To Email**: Text input field with a search icon
  - Copy To Mobile**: Text input field with a search icon

At the bottom of the dialog, there are three buttons: **OK** (with a green checkmark), **Cancel** (with a red X), and **Help** (with a question mark). There is also a radio button for "Print envelopes without tracking" at the bottom left.

## Sending invoices

A patient's invoices can be sent electronically to the patient if they are the payer. This is done in the **New Invoice** screen or later from the patient's **Account Enquiry** screen.

**Third-party payers** can have their email or mobile number typed into the fields provided, and **additional recipients** can be added using a comma between email addresses and mobile numbers. This should be done with **caution** because if an incorrect email or mobile number is used, the unintended recipient can view any patient's documents in the download portal, including letters and referrals.

To send an invoice:

1. Follow the standard **invoice creation** process to create and fill in the new invoice.
2. Select **Send to Patient**.

The **Send Invoice** dialog will open.

The patient's name will be shown, and the payer will be the patient or 'NOK Account Payer'. The notification will be sent to the payer.

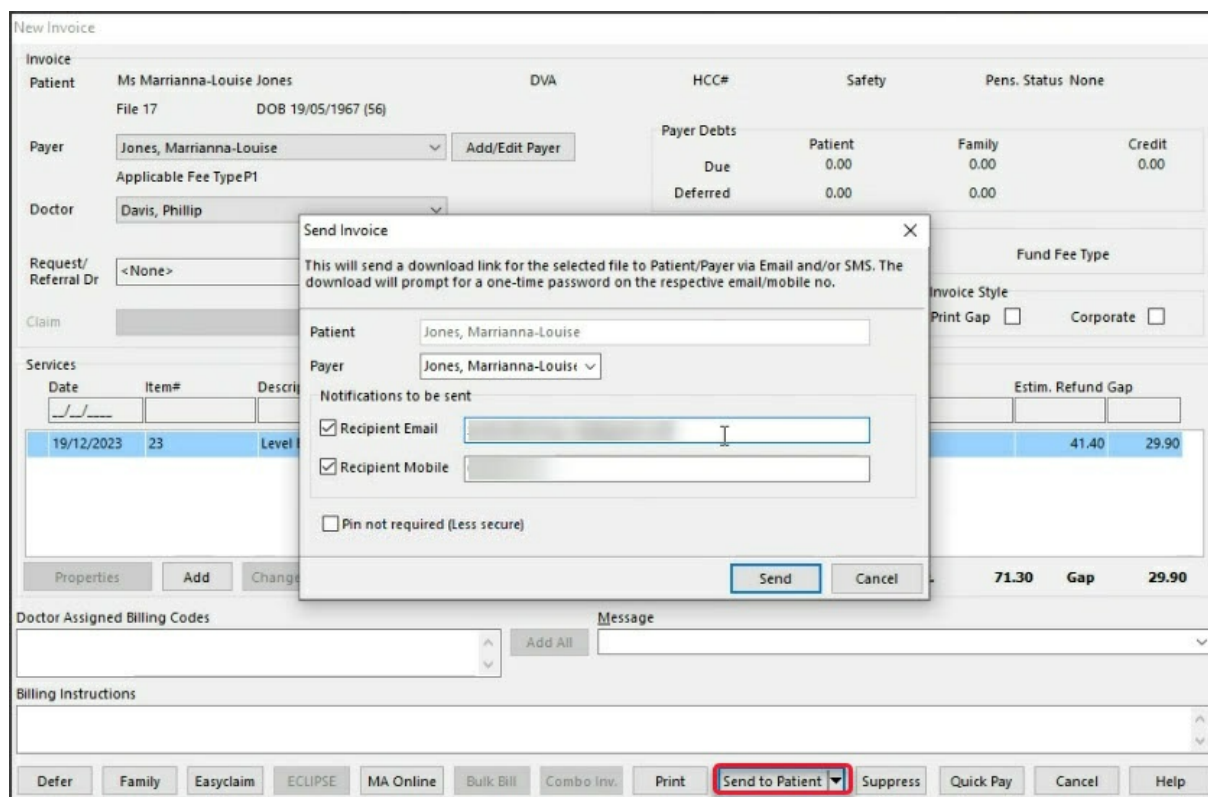
**Note:** If you select the down arrow by Send to Patient, you can access the original **Email as Attachment** option.

3. Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.
4. Optional: **Pin not required** (v37 and later)

Overrides the one-time security code requirement - the code sent to the patient to open the portal and access the sent files.

5. Select **Send**.

A delivery success or failure notification will display.



To send an invoice at a later time at the patient's request:

1. Open the patient's record.

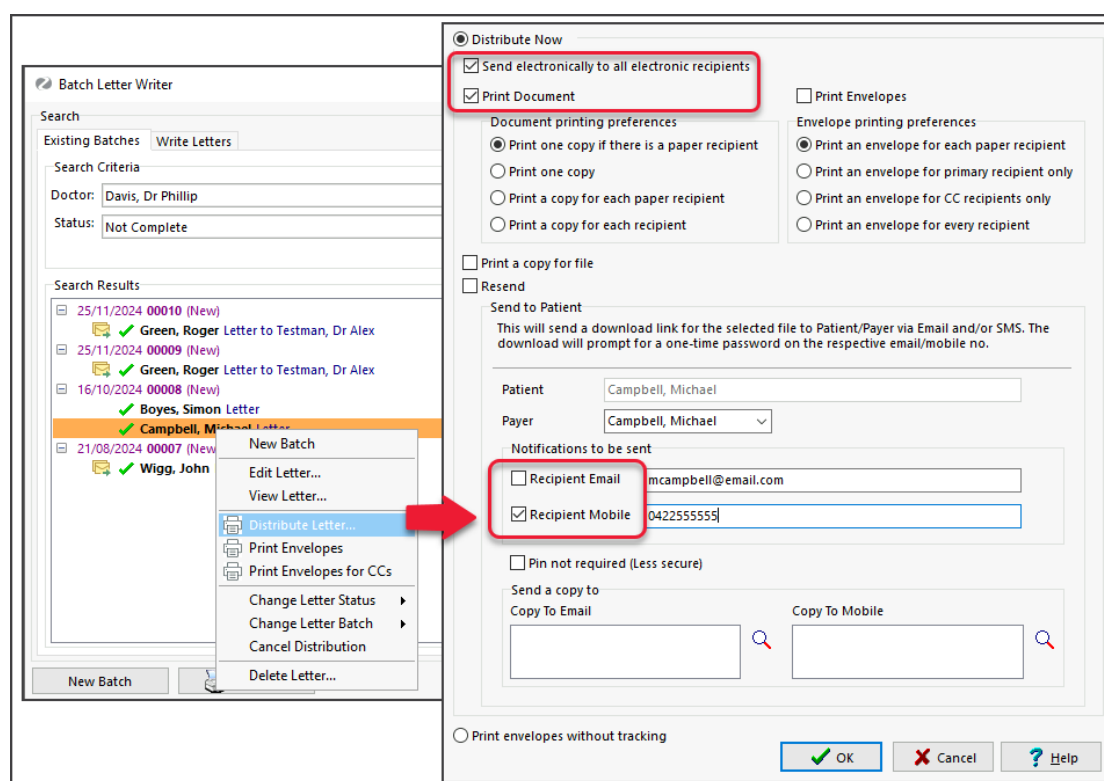
2. Go into **Account Enquiry**.
3. Select **Send to Patient** and follow the process outlined above.

## Sending from Batch Writer

Secure Send is provided as a right-click option for each letter in Clinical's **Batch Letter Writer**. This allows the letter to be sent to a specific patient's email address.

To use Secure Send:

1. Right-click the patient's name under the letter and select **Distribute**.
2. Review the **Distribute Now** options and untick any not required.
3. Select the recipient's **Email** or **Mobile**.
4. Use **Copy** to add other recipients.
5. Select **OK**.



## Sending from Summary Views

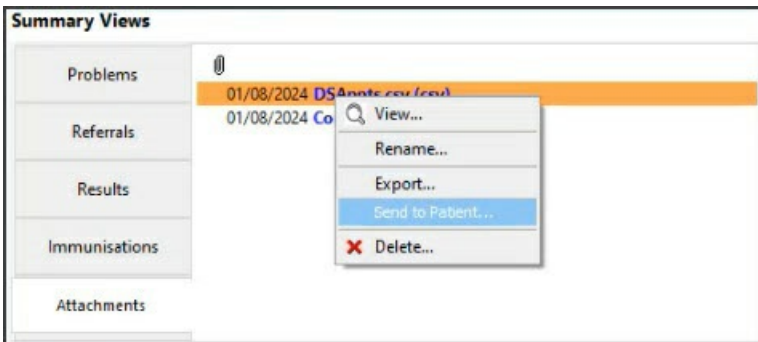
Secure Send can send documents from a patient's Summary Views tabs. Zedmed v36 and lower only support Referrals.

- Summary Views > **Referrals**.
- Summary Views > **Images** (can send supported image files).
- Summary Views > **Attachments**.
- Summary Views > **Results** (right-click **View Results** > **Send to Patient**).

To send from Summary views.

1. Right-click the letter, document or file.

- For Results, right-click **View Results**.
- 2. Select **Send to Patient**.
- 3. Select **Send** on the Send dialog.



For security reasons, some files (exe, dll, etc.) cannot be sent, as shown in the restricted list below.

## Sending from Results Inbox

With Zedmed v37 and later, you can send patient results from the Results Inbox.

- 1. Select the result.
- 2. Select the **Send to Patient** button.

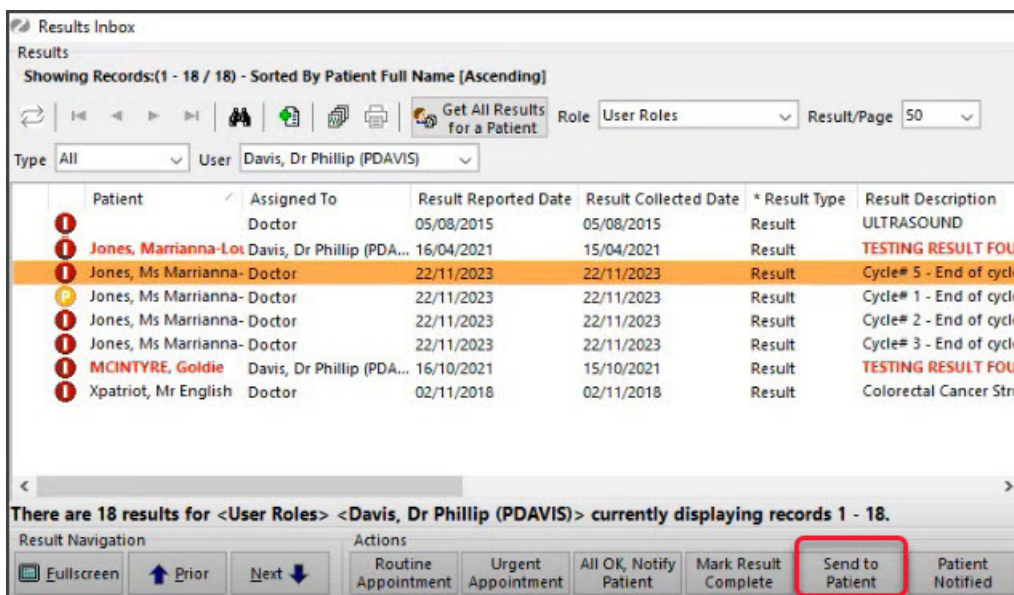
The Secure Send dialog will open.

- 3. Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.
- 4. Optional: **Pin not required** (v37 and later)

Overrides the one-time security code requirement - the code sent to the patient to open the portal and access the sent files.

- 5. Select **Send**.

A delivery success or failure notification will display.



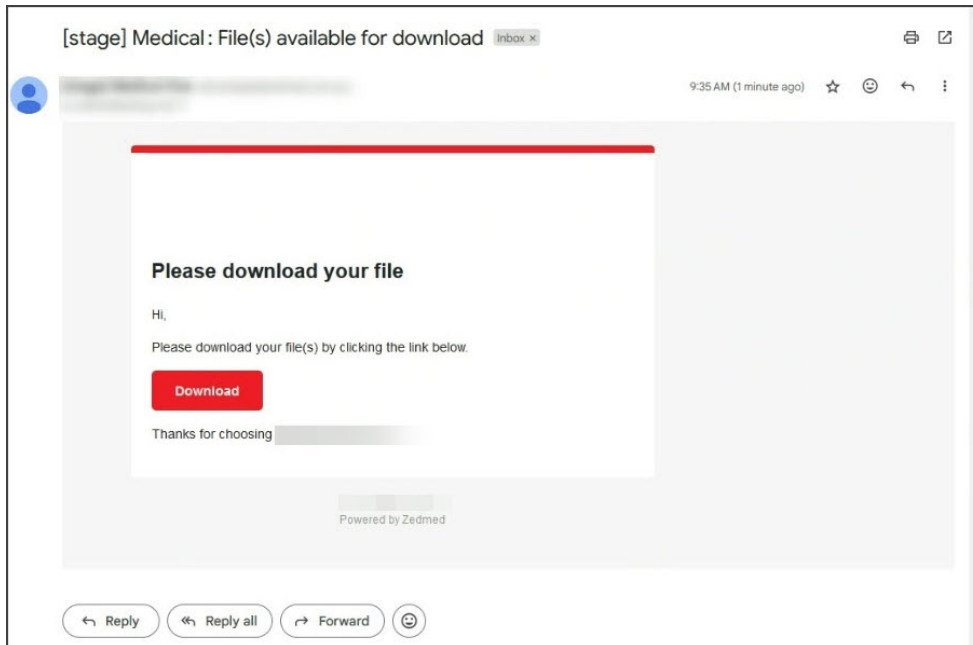
## How a patient uses Secure Send

The patient will receive an email or SMS with a link to the document followed by another message with a security code to enter into a security prompt. The link will be valid for 7 days.

The steps are as follows:

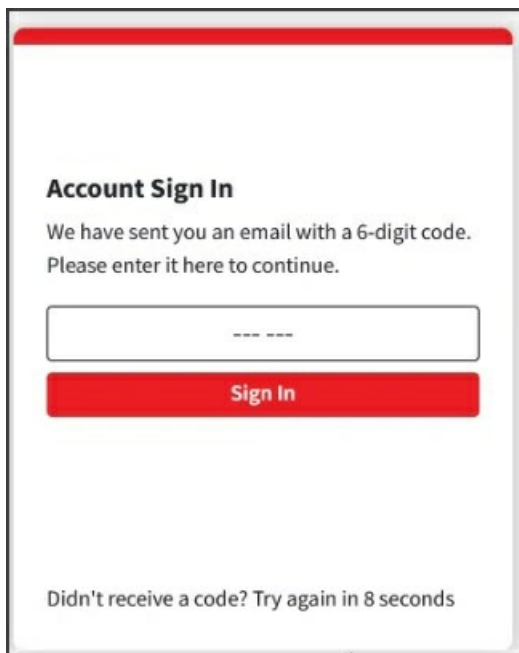
1. Open the first email or SMS message from the practice.

There will be a Download link in the message.



2. Select the **Download** button.

You will be presented with a 6-digit security code prompt.



3. Open the second email or SMS with the security code.

This will be delivered just after the message with the download link.



4. Copy or type the code into the prompt.

5. Select **Sign In**.

Your Secure Send portal will open and show all the files sent to you in the last 7 days.

The filename format is <Patient Given Name><Patient Family Name><File Name>.

6. Click on the file to open or use the down arrow to download it.

A download lock will apply for 30 minutes if you download multiple files quickly.

