Add practice details

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Enter a practice's details into Zedmed. This information includes settings that can govern other branches, practice definable fields and doctors' banking reports.

Practice Details

This section explains the practice information used by Zedmed and how to enter it. For a new practice, there are additional screens that need to be reviewed and set up, as explained in the Practice setup and Staff setup categories.

To enter a practice's details:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Practice.**

   The **Practice Details** screen will open with the **Practice** tab selected.
3. Fill in the fields that apply to the practice.

   Information on key fields:

   - The **Name** and **ABN/ACN** number fields are mandatory.
   - The **Medclaims Minor ID** is provided by **Zedmed** and should never be changed.

     This is a software-specific ID that Zedmed gives to Medicare, who link it to the provider numbers of all the doctors in the practice. When Medicare receives billing from this ID, it knows what doctor it is linked to it and who the money should go to. Without this ID, Medicare will not accept claims submitted from Zedmed.
   - **Organisation type** and **Organisation service** - These fields are preset by Zedmed and do not need to be updated.
   - **Integrated Effpos/Easyclaim provider** - Use these fields to set up Tyro or other EFTPOS payments. To learn more, see Set up Tyro.
   - **API Gateway Key** - This key is provided by Zedmed and is required to use the Doctors App.
   - **Family Links** - Select this tick box if you intend to link patients into family groups in the Patient Details screen.
   - **Round to 5 cents** - This is selected by default because the MBS Schedule is based on item values being rounded to the nearest 5 cents. Untick the box if the practice has hospital contracts that require them to work to the nearest cent.
   - **Find Archived/Deceased** - This setting enables the "Include archived and deceased" option in the Patient Seach screen.
   - **Using Zedmed Clinical** - This setting enables the clinical module.
   - **Types** - This field is used to select practice-defined values. To learn more, see the Practice definable fields section.
   - **Export to MD** - This button is only used when advised to by Zedmed staff. It puts an MD-compatible patients.in file into the Patients-Transfer folder for import into Medical Director. This may take some time depending on the size of your database.
4. **HIP-0.**

This important number is used for electronic prescribing and uploading My Health Records. The following steps verify the number by confirming it is searchable.

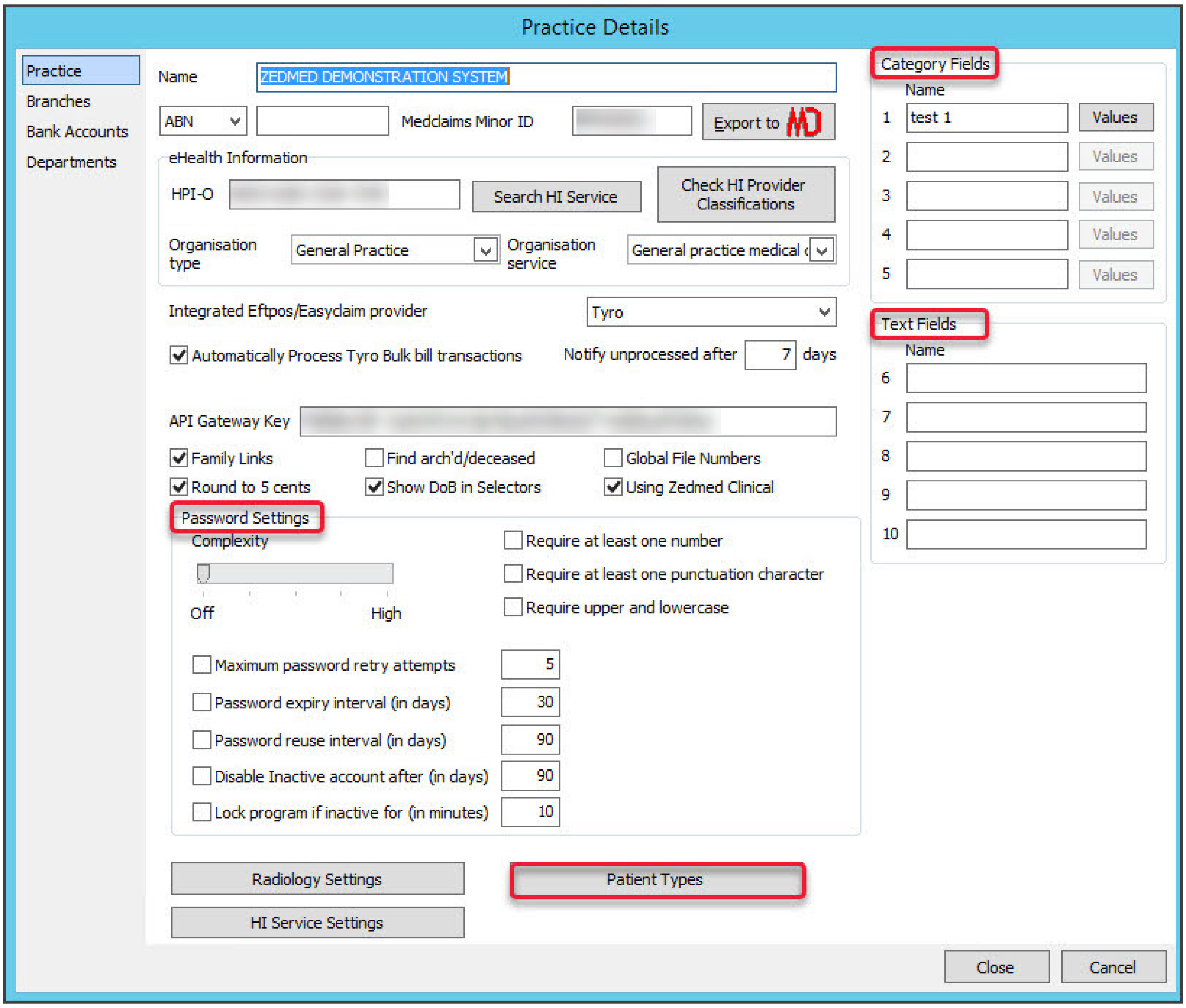
   a. Select the **Search HI Service** button.
   b. Enter the practice HIP-O number into the field provided.
   c. Select **Search.**
   d. Select the search result. The result will include the Organisation name and ABN.
   e. Select **Save selected HPI-O**.

5. **Password Settings.**

   This section is used to set password rules for all users. Selecting a box enables the rule and you can update the fields with default intervals.
6. **Radiology Settings.**

   Selecting this opens the **Radiology Settings** screen, which is used to integrate with a PACS Radiology Server.
7. **Category Fields, Text Fields** and the **Patient Types** button.

   To learn how to use these practice definable fields, see the next section.



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

Practice definable fields

Zedmed can add custom fields to the **Further Details** tab of all patient records. These fields can display preconfigured information with assigned values using the **Category Fields**, or free text fields with Names using the **Text Fields**. You can also set up values for the Types field in each patient record. Personal information can also be recorded by doctors in the Clinical Patient Details tabs.

Patient Types

The **Patient Types** button is used to configure the selectable options for the **Types** field in each patient record. This setting is explained in the dedicated Add patient Types guide.

Category Fields

Category Fields are used to add additional information to a patient record, such as the patient's background or a health issue, along with a value that is selected from a drop-down list of preconfigured options. These drop-downs are useful for recording answers to questions.

To add **Category Fields**:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Practice.**

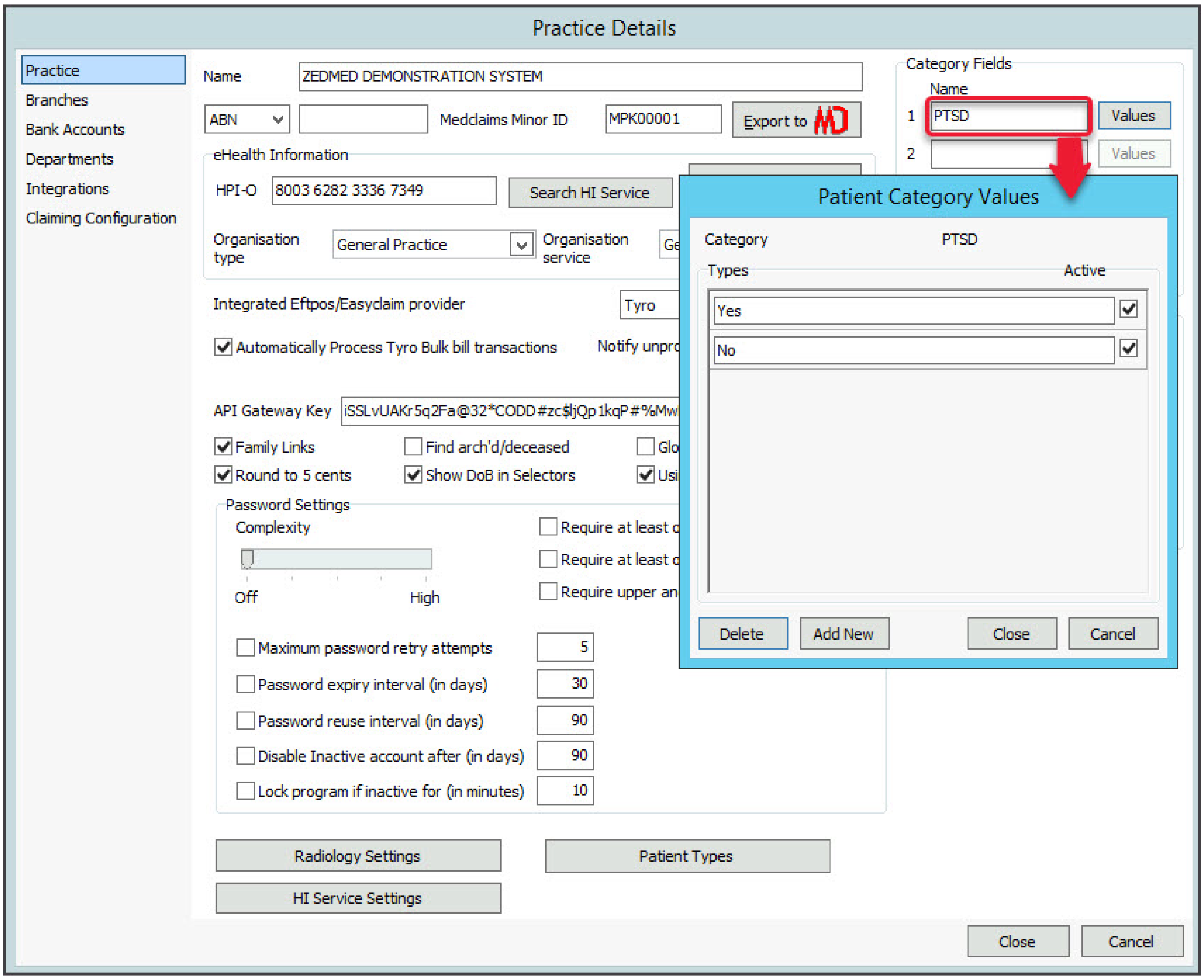
   The **Practice Details** screen will open with the **Practice** tab selected.

   Under **Category Fields** is a column of 5 fields.
3. Enter a name for the information you want to record into a field.

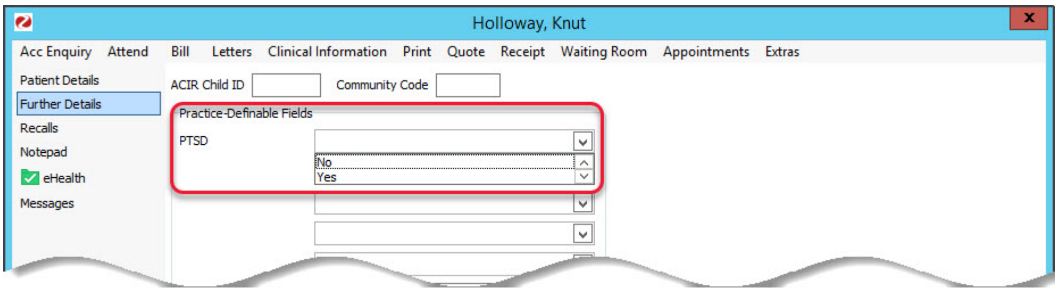
   There is a 15-character limit on these fields.
4. Select the **Values** button next to that field.

   The **Patient Category Values** screen will open.
5. Select **Add New** and enter a value into the field provided.

   Repeat this step to add additional values.
6. When you have finished, select **Close** to save and exit.



The information you added will appear in the **Further Details** tab of each patient record, with the values you provided as selectable options.



Text Fields

Custom Text Fields are used to add additional information to a patient record, such as the patient's background or a health issue.

To add new **Text Fields:**

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Practice.**

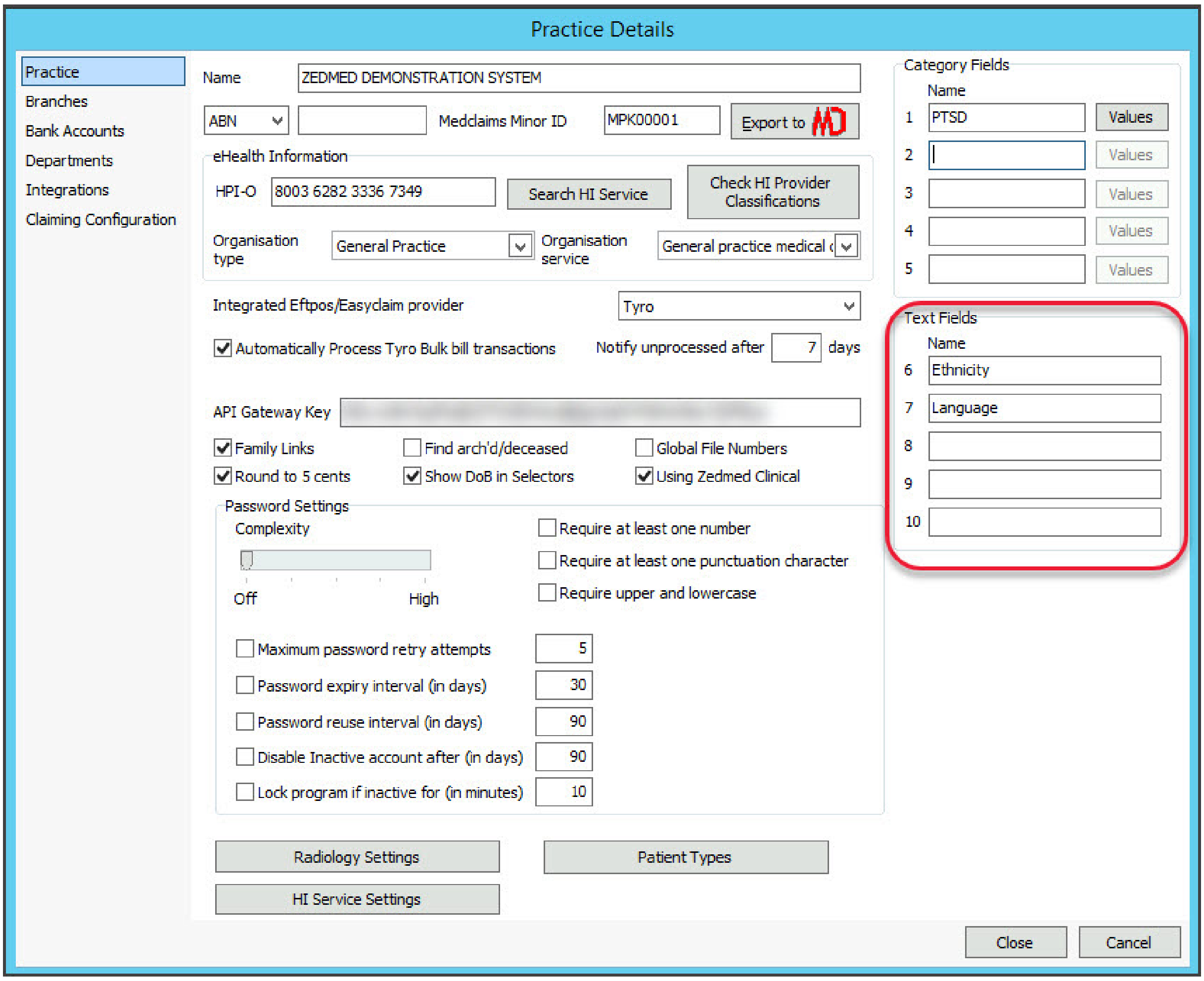
   The **Practice Details** screen will open with the **Practice** tab selected.

   Under **Text Fields** is a column of 5 fields (6-10).

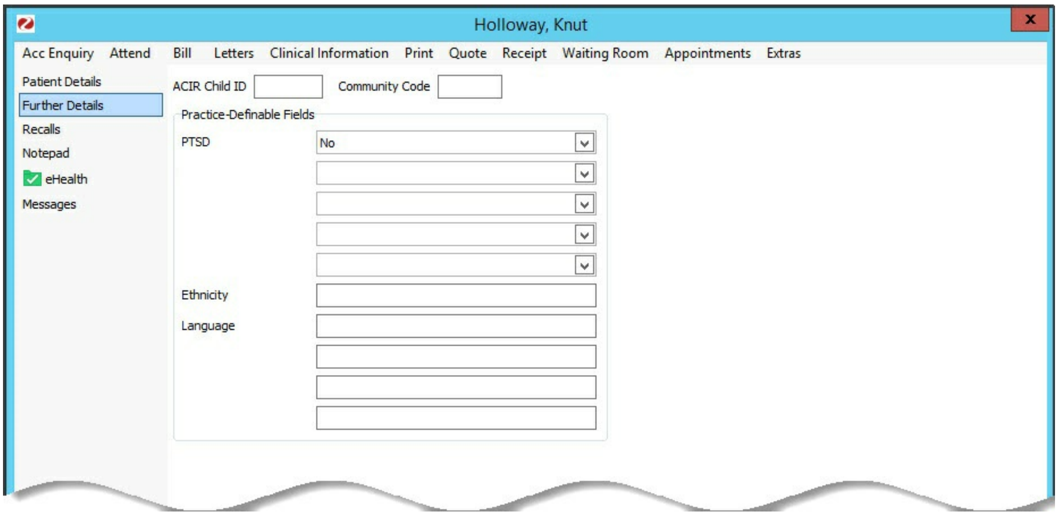
3. Enter the information you want to record into the fields provided.

   The Name used will be the field's description, and it will be available in all patient records.

   There is a 15-character limit.
4. Select **Close** to save and exit.



The **Text Fields** will appear in the **Further Details** tab of all patient records.



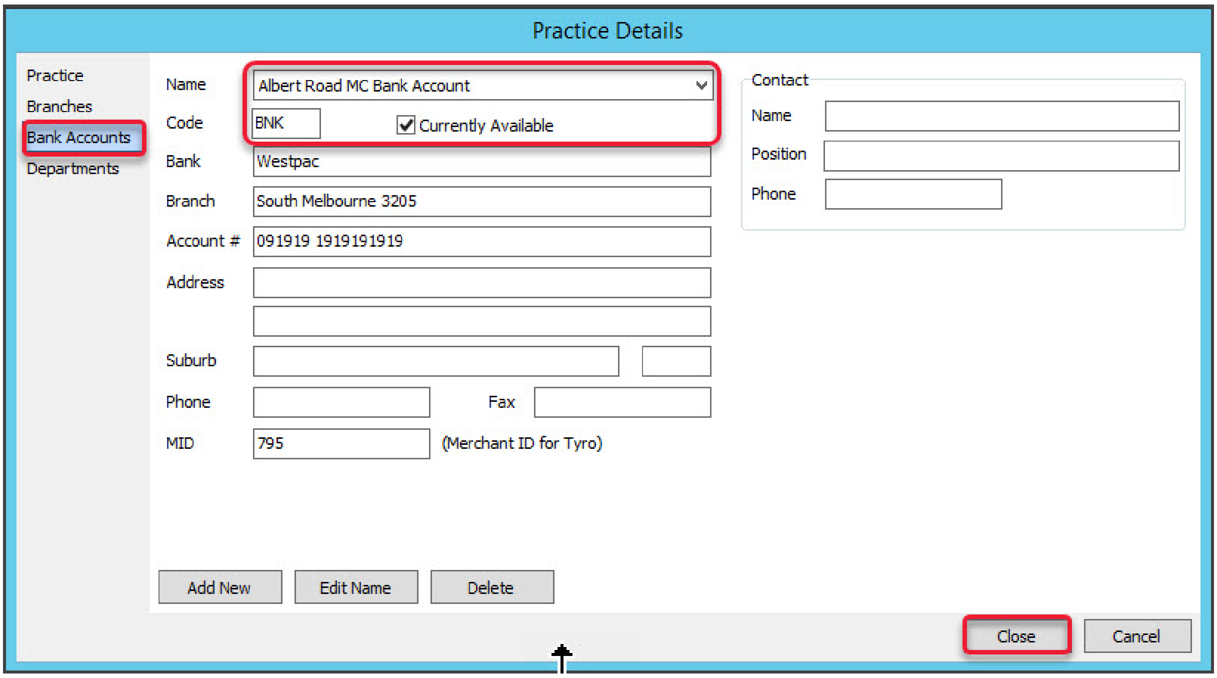
Bank accounts tab

This optional tab is used to create bank accounts for doctors or surgeons who want their banking reports to be separate from the practice reports. When the practice pulls its reports, there will be a separate one for the doctor and their banking information is only contained in that report.

To enter a bank account:

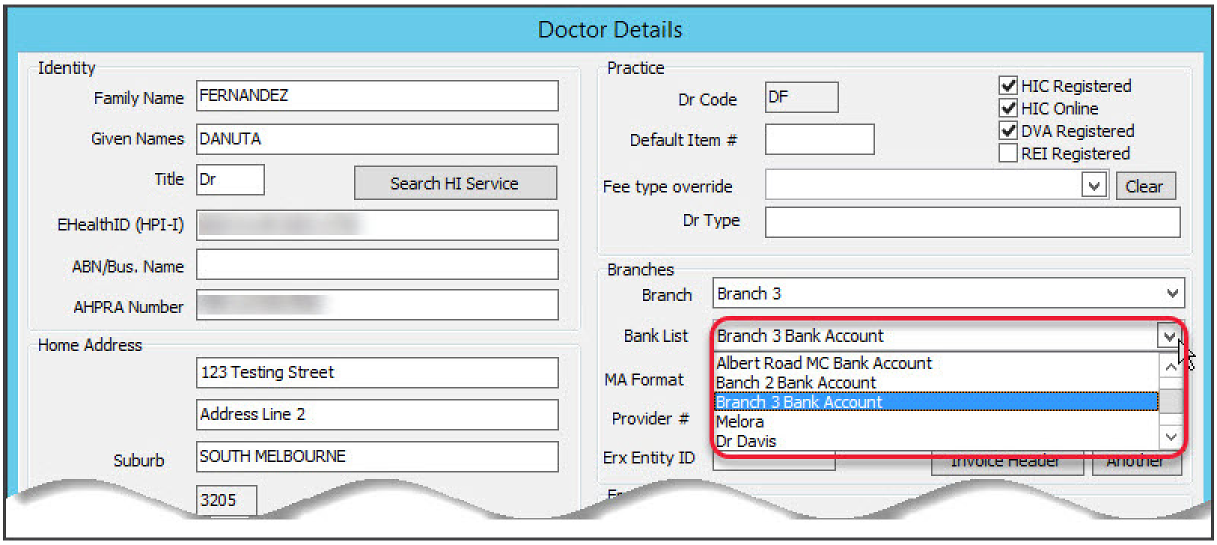
1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Bank accounts > Banklists.**

   The **Practice Details** screen will open with the **Bank Accounts** tab selected.
3. Enter the bank's name into the field provided.
4. In the **Code** field, enter a code for the bank.
5. Select **Close** to save and exit.

   Now we will add the bank to the doctor.
6. Select **Practice Setup > Doctors > Find Treating Doctors.**

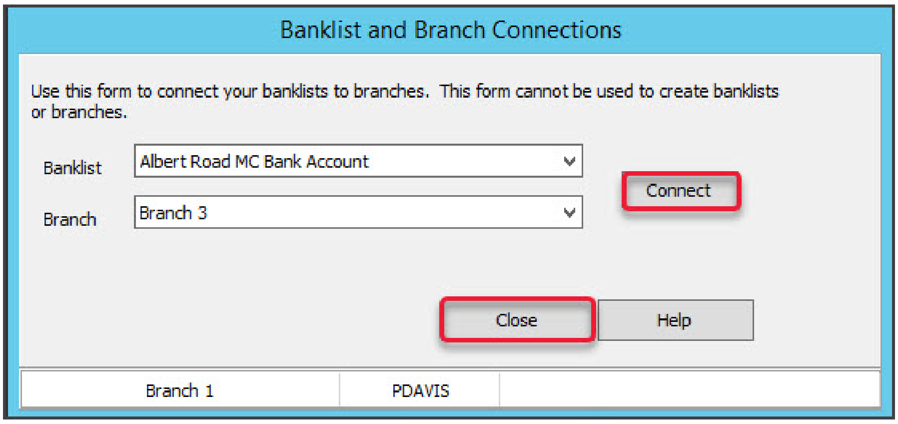
   The **Find Doctor Details** screen will open.
7. Locate the doctor and open the **Doctor Details** screen.
8. Select the bank account from the **Bank List** drop-down in the **Branches** section.
9. Select **Close** the save and exit.



The next steps are for doctors who want to use the bank account in additional branches.

10. Select **Practice Setup > Bank Accounts > Branch Connections.**

    The **Banklist and Branch connection Accounts** screen will open.
11. Select the **Banklist** and a **Branch** that the bank account will be used at.
12. Select **Connect**.
13. Repeat for each branch.
14. Select **Close** to save and exit.



PRODA registration for B2B devices

Some clinical software solutions need the practice to register and activate their Business to Business (B2B) devices in PRODA, before the software can be authorised to interact with Medicare Web Services.

You do NOT need to register B2B devices with PRODA for Zedmed. Authorised access to Medicare Web Services is managed by the Zedmed software. If you need to register your B2B device for other clinical software solutions, the process is documented on the Services Australia website. You can remove your B2B device's PRODA registration without impacting Zedmed.