

## **Claims & Payments access**

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Give selected staff access to the Claims Status screen so they can manage outgoing claims and incoming payments. This screen is accessed via the Management tab's Claims button, and access is granted by adding the Claiming function to the role used to restrict access to claims and payments.

## Access control overview

Zedmed uses 'Functions' to give access to specific features and processes, and these functions are grouped into 'Roles'. Staff accounts are given one or more roles based on what they need to have access to in Zedmed. For example, if you get a new nurse, you just create an account and give it the **Nurse** role, which will contain all the functions a nurse needs.

By default, the **Administrator** role has the **Claims** function, so staff with the Administrator role do not need any access changes to be able to use the **Claims Status** screen.

To learn more, see the Review Claims and Reconcile Payments guides and the Accounts & Security guide.

Giving Access to the Claims Status screen

To give access:

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

The Zedmed Security Roles and Users screen will open.

3. Select the Roles tab.

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_		Selection Filter: Active Users			
ser Name	Full Name	Staff ID	Dr Code	Status	
EXTERNAL		EXT		Active	
ZEDMED		_X_		Active	
OFFICE	Admin, Office	OA		Active	
ARTHUR	Arthur, Dr Lesley	LA	LA	Active	
CHAMINDA	BANKS, CHAMINDA	CB		Active	
PDAVIS	Davis, Dr Phillip	PD	PD	Active	
DANUTA	FERNANDEZ, DANUTA	DF	DF	Active	
FULLER	Fuller, Igor	IF	IF	Active	
YDIA	HERNANDEZ, LYDIA	LH	LH	Active	
DANNI	Hatcher, Dr Danni	DH	DH	Active	
NARREN	Hedrick, Dr Warren	WH	WH	Active	
GRACE	Herman, Grace	GH1	GH1	Active	
GRENVILLE	Howell, Dr Grenville	GH	GH	Active	
CONNIE	JONES, Connie	CJ		Active	
SJACKSON	Jackson, Gaye	GJ	GJ	Active	
CPV	Vendor, Dr Ccc Pds	CPV	CPV	Active	
SJACKSON CPV	Jackson, Gaye Vendor, Dr Ccc Pds	GJ CPV	GJ CPV		

The Role Properties screen will open.

4. Select the role that allows staff to manage outgoing claims and incoming payments.

This is the role that would have been given staff access to batching and ECLIPSE claims and payments before the Zedmed v35 upgrade.

Note: If no role is currently used to manage access to claims/payments, select Add on the Security Roles and Users screen to create a new role, add the Claims Processing function to that role, and then use the Staff tab add the new role to all the staff who require claims/payments access. For more information, see the Accounts & Security guide.

- 5. In the left pane, expand the Claiming function and select Claim Processing.
- 6. Select the Right-facing arrow.
- 7. Claiming will be added to the **Included functions** on the right pane.
- 8. Select OK.

All staff with the 'Role' you added the **Claim Processing** 'Function' to will now be able to use the **Claims Status** screen.

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tole Name:	High access (Office)	Description:	High level access in Office		Users with this role will get access to Claims Status.	-
Used in C	linical Work Flow (Results Inbox)	Role Type:	Staff	~		
Available F	unctions			Included Function	ons	
API Admini     Admini	ccess istration			Accounting     Administrat	Transactions tion	
Austra     Batchi	alia Immunisation Register			Banking     Batching		
Claimir	ng im Processing			Daily Report     Debtors	rts	
🖽 Daily F	Reports Exchange			Patient Rec     Practice Se	tup	
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View and	reconcile Claims and Claim Payments	5				
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