

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.

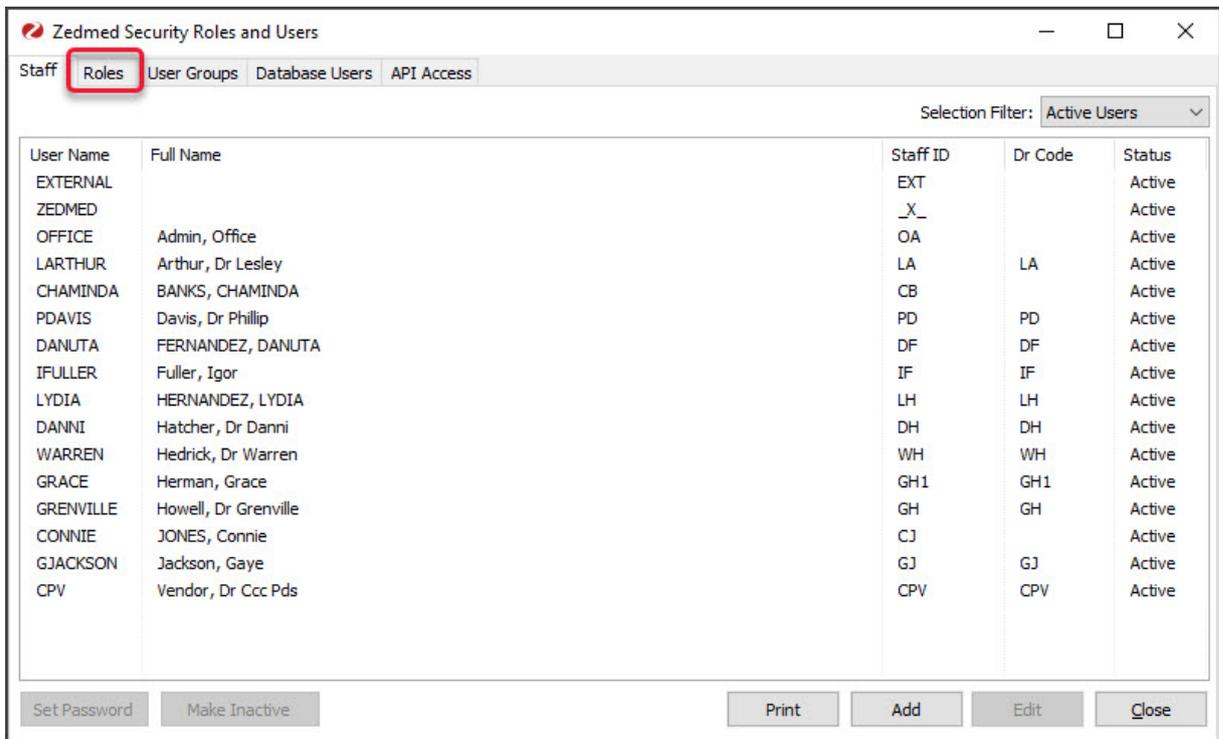
By default, the **Administrator** role has the **Claims** function, so staff with the Administrator role do not need any access changes to be able to use the **Claims Status** screen.

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.



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.

