

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. For patient questions, see the [Secure Send FAQ](#).

Considerations

- Secure Send is a free feature. However, the SMS option requires ZedSMS and uses ZedSMS credits.
- The email and SMS sent to the patient will show the practice name but not the practice email or phone number.
- Documents will be available in the Secure Send portal for seven days.
- If multiple documents are sent within 15 minutes, one notification will be received to give access to all documents.
- The pathology and radiology templates do not include laboratory contact details and require an [Electronic signature](#).
- Printing a document sent to a mobile phone may pose problems for some patients.

Security information

Documents are securely transmitted via HTTPS and stored in encrypted, Australia-based Amazon (AWS S3) cloud storage. They are automatically deleted seven days after being sent. To access the document, the patient receives an access pin using the same email or mobile number that sent the document link.

Popular scenarios for Secure Send

- Telehealth and video consultations.
- In-patient consultations where electronic pathology and radiology referrals are preferred.
- In-patient consultations where invoices and documents need to be sent electronically to the patient.

Secure Send video guide

Requirements

Practice

Secure Send is **requested by submitting a [Secure Send request form](#)**. Zedmed will set up a branded download portal for your patients and will need access to your server to complete the setup. Upgrade to Zedmed v36.5 before submitting the request.

Practitioner

An **electronic signature must be set up** in the practitioner's profile to use Secure Send for pathology and radiology referrals. If it is not, the referral will be sent without a signature. To learn more, see the [Electronic signature guide](#).

Patient/payer

The patient should have their email address and mobile number in their patient record to populate the Secure Send delivery fields. The patient or next of kin (NOK) Account Payer being sent the message **should be set up as a payer** in the patient's record. The default payer can be different, but the patient/NOK Account Payer must also be

selectable. The patient name and email/SMS will be used if there is no Payer in the patient's record.

SMS

SMS delivery requires ZedSMS and uses SMS credits. Without **ZedSMS**, Secure Send can only be delivered to email addresses.

For Pathology and radiology referrals

To use Secure Send for laboratory referrals, Zedmed's 'PathologyZedmedRequestForm' or 'RadiologyZedmedRequestForm' templates are used because lab-specific templates rely on laboratory paper.

To use these templates, the practice will need to create a pathology addressee with the pathology template and a radiology addressee with the radiology template in the Clinical **Address Book**. Practitioners using these templates must set up their **electronic signature** so it can be added to the letters.

The screenshot shows the 'Address Book Search' window with the 'Details' tab selected. The 'Family/Business Name' is 'Zedmed - Pathology' and the 'Type of Contact' is 'Pathology Laboratory'. The 'Paper Type' is set to 'PathologyZedmedRequestForm'. The 'Referral Format' is set to 'PDF'. The 'Transport Type' is 'Legacy Messaging'. The 'Available' checkbox is checked. The 'Lab Communications' section is also visible.

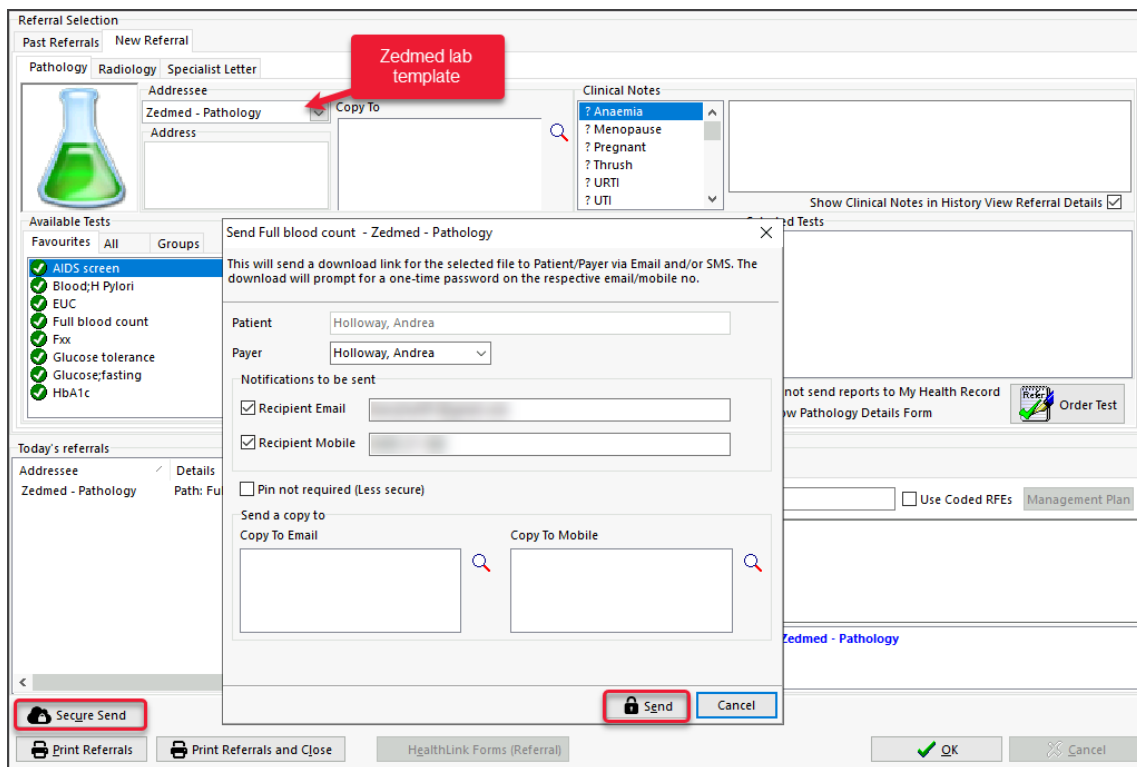
Sending referrals

Important: Zedmed created a Radiology and a Pathology template to support **electronic signatures**. To use these templates, the practitioner must have a signature file in their profile. The practice must also create a pathology addressee for the pathology template and a radiology addressee for the radiology template, and the practitioner should use these addresses when using Secure Send for a Pathology or Radiology referral.

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.
 - 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.
- 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.
- 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 7 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.



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'.

Print/Send

Interim Print (does not change the queue)

Add to distribution queue if not already queued

Add to distribution queue, even if sent previously

Distribute Now

Send electronically to all electronic recipients

Print Document

Print Envelopes

Document printing preferences

Print one copy if there is a paper recipient

Print one copy

Print a copy for each paper recipient

Print a copy for each recipient

Envelope printing preferences

Print an envelope for each paper recipient

Print an envelope for primary recipient only

Print an envelope for CC recipients only

Print an envelope for every recipient

Print a copy for file

Resend

Send to Patient

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: Holloway, Andrea

Payer: Holloway, Andrea

Notifications to be sent

Recipient Email

Recipient Mobile

Pin not required (Less secure)

Send a copy to

Copy To Email

Copy To Mobile

Print envelopes without tracking

OK Cancel Help

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.

The screenshot shows the 'New Invoice' form in a software application. A 'Send Invoice' dialog box is open in the center, with the following 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.' The dialog box contains fields for 'Patient' (Jones, Marrianna-Louise) and 'Payer' (Jones, Marrianna-Louise). Under 'Notifications to be sent', there are checkboxes for 'Recipient Email' (checked), 'Recipient Mobile' (checked), and 'Pin not required (Less secure)' (unchecked). There are input fields for email and mobile numbers. At the bottom of the dialog are 'Send' and 'Cancel' buttons. The background form shows patient information for Ms. Marrianna-Louise Jones, a table of Payer Debts, and a table of Services. At the bottom of the form, a button labeled 'Send to Patient' is highlighted with a red box.

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.

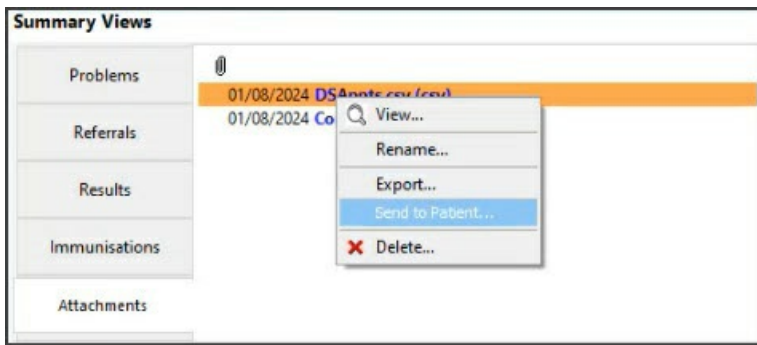
Sending from Summary Views

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.

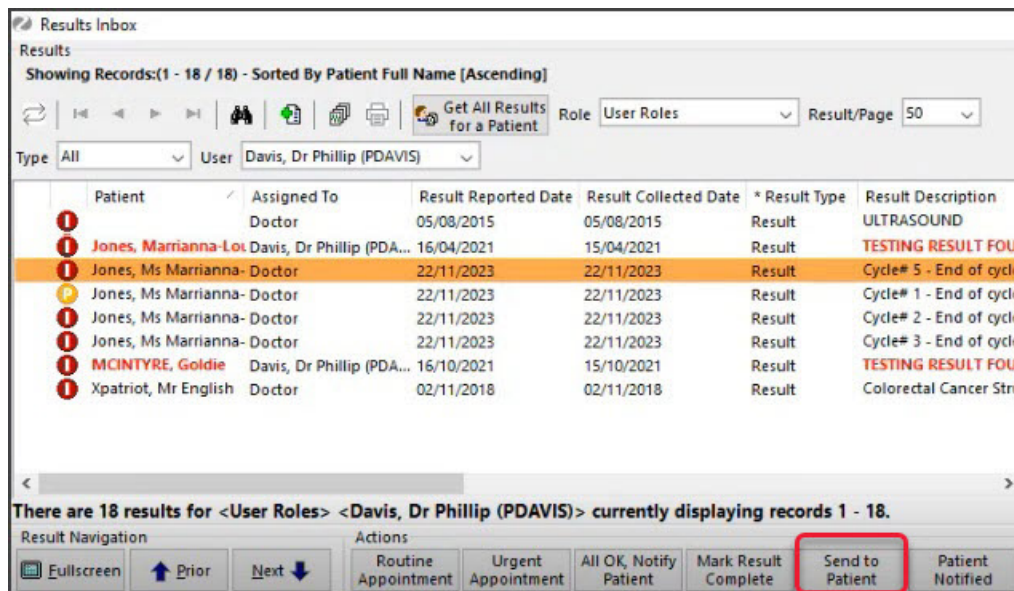
The Secure Send dialog will open.

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.



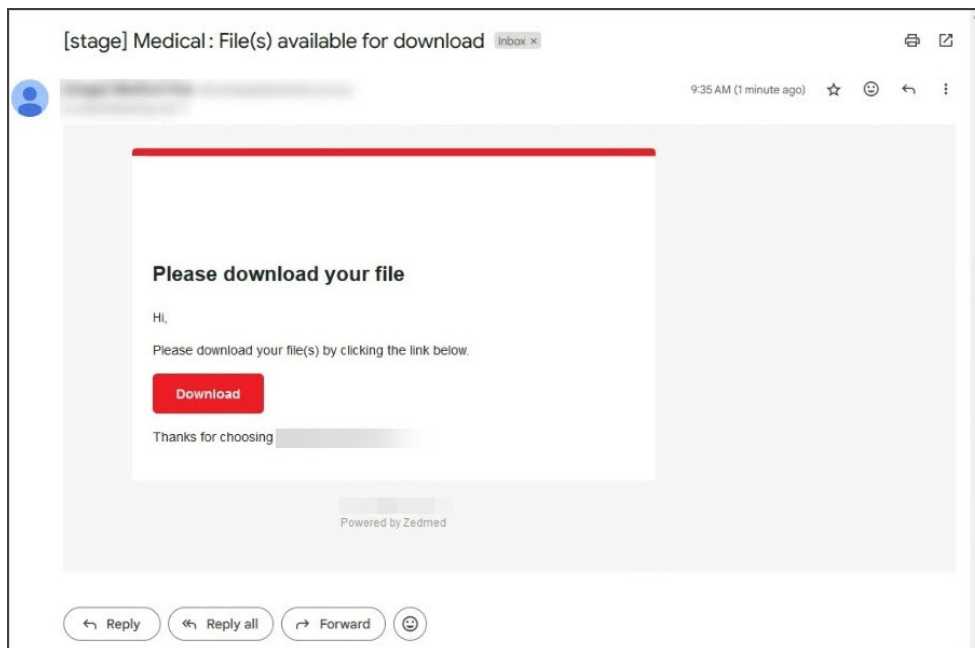
How a patient uses Secure Send

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:

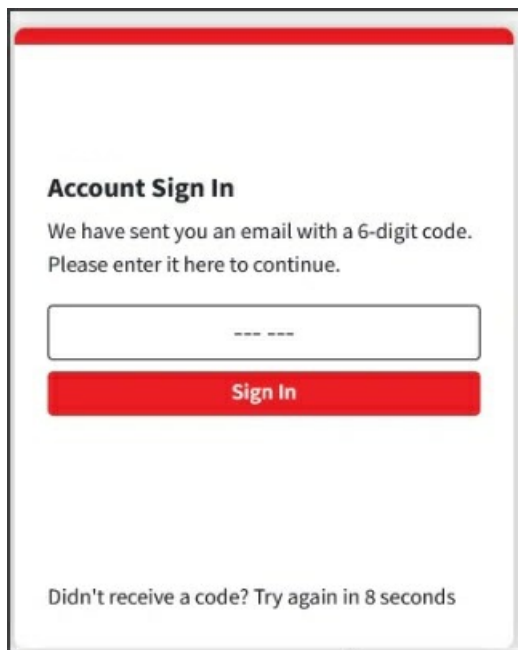
1. Open the first email or SMS message from the practice.

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.



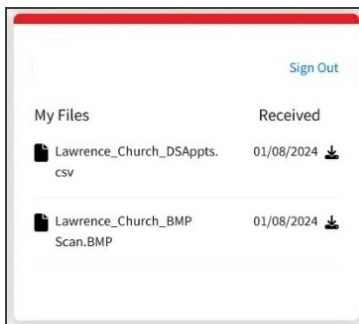
4. Copy or type the code into the prompt.
5. Select **Sign In**.

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>.

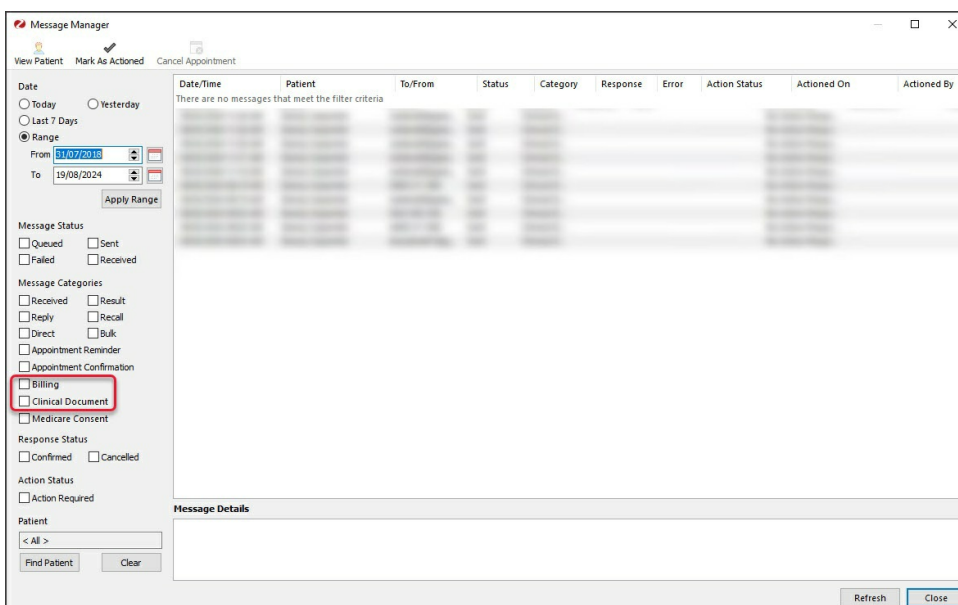
6. Click on the file to open or use the down arrow to download it.

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



Monitoring Secure Send

Use **Message Manager** to view Secure Send messages for all patients with the Billing and Clinical Document filters.



Use the **Messages** tab on the patient's record to view Secure Send messages for a specific patient. Secure Send messages will have the description "File Delivery messages". You can see the address or mobile number the document was sent to and what the document was.

Jones, Marrianna-Louise

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details
Further Details
Recalls
Notepad
 eHealth
Messages

Date/Time	Sent By	To/From	Status	Category	Response
16/05/2022 11:43 AM	Dr P Davis	zedmedtesting+JonesM@gmail.com	Sent	Billing	
Message text is not available for File Delivery messages					
Invoice: Invoice No. 99279					
12/05/2022 04:45 PM	Dr P Davis	zedmedtesting+JonesM@gmail.com	Sent	Clinical Document	
Message text is not available for File Delivery messages					
Letter: ststststst					
12/05/2022 04:28 PM	Dr P Davis	email@email.com	Sent	Billing	
Message text is not available for File Delivery messages					
Invoice: Invoice No. 99274					
12/05/2022 02:39 PM	Dr P Davis		Sent	Clinical Document	
Message text is not available for File Delivery messages					
Letter: GP Mental Health Plan 2710 - Dr Brenda Reed					
12/05/2022 02:39 PM	Dr P Davis	zedmedtesting+JonesM@gmail.com	Sent	Clinical Document	
Message text is not available for File Delivery messages					
Letter: GP Mental Health Plan 2710 - Dr Brenda Reed					
12/05/2022 02:09 PM	Dr P Davis		Sent	Clinical Document	
Message text is not available for File Delivery messages					
Referral: Referral - PFD Testing					
12/05/2022 02:09 PM	Dr P Davis	zedmedtesting+Jonesoverride@gma...	Sent	Clinical Document	

Send SMS

Send

Delete Print Patient Verification Find Close Cancel