

# Zedmed v37.9.0

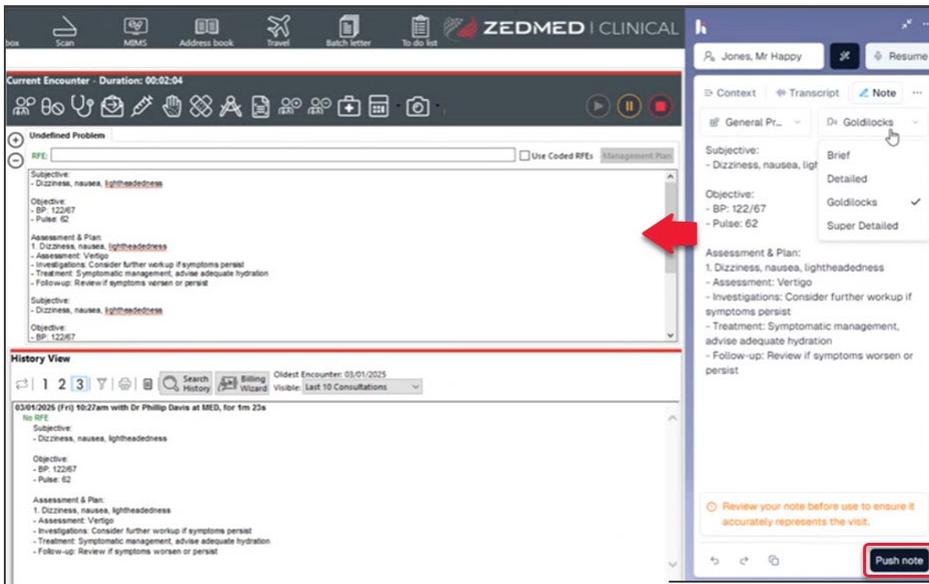
Last Modified on 07/02/2025 3:39 pm AEDT

## NEW Heidi AI

Zedmed's Heidi AI integration uses voice input to generate AI-enhanced clinical notes and consultation transcripts. Before it is added to a patient's file, all generated content can be reviewed and manually edited.

To use Heidi AI, each practitioner needs their own paid subscription. To subscribe, select the **Set up Heidi** link in Clinical's Heidi AI wigit. You can also use Heidi's 30-day free trial via this link.

[Read Zedmed's full Heidi AI guide](#)



## Zedmed v37.8.3

OLA	ZED-10044	<p><b>Resolved performance issues related to the Next Available Appointment query</b></p> <ul style="list-style-type: none"> <li>Added a configuration to allow the Next available appointment slot request to cache the next available appointment information. This speeds up the response time.</li> <li>Added a configuration to modify the number of days OLA will look forward for next available appointments. This configuration is managed by Zedmed support and cannot be done in the Zedmed UI.</li> </ul>
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## Zedmed v37.8.2

		<p><b>Tyro terminal selector</b></p> <p>Currently, in Zedmed Cloud, users are linked to Tyro terminals, and each user can only be linked to one. This causes problems if users move desks or need to use a different terminal. This <b>new</b> feature allows a user to be linked to multiple terminals and to select the required terminal when they log in.</p> <p>For on-premise customers, workstations are linked to Tyro terminals (not users) so no change is needed.</p> <p><b>Requirements</b></p> <ul style="list-style-type: none"> <li>Zedmed Cloud customer.</li> <li>Must be configured by Zedmed support.</li> </ul>
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- Two or more Tyro terminals.

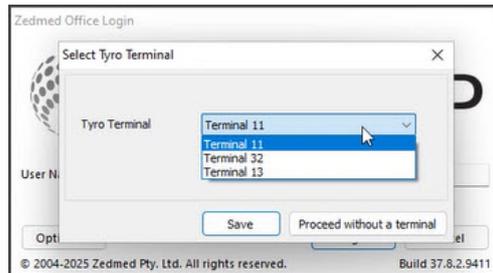
### Terminal selection workflow

After you log into Zedmed, a **Select Tyro Terminal** dialog will display.

1. Select the terminal required.
2. Select **Save**.

The login will complete with the terminal assigned.

Selecting **Proceed without a terminal** will log you in without Tyro terminal access.



### How to change terminals

- Users can log out and back into Zedmed to change the selected terminal.
- The terminal selector will not appear if F3 Switch User is selected.
- If a user is logged into a terminal, and then logs on to a different terminal on another workstation, the new terminal will become the only terminal they are connected to.

### Using two sessions

If you run two sessions of Office, the same terminal should be selected for both. If you choose a different terminal for the second session, the first session will use the terminal selected for the second session.

Office ZED-9963

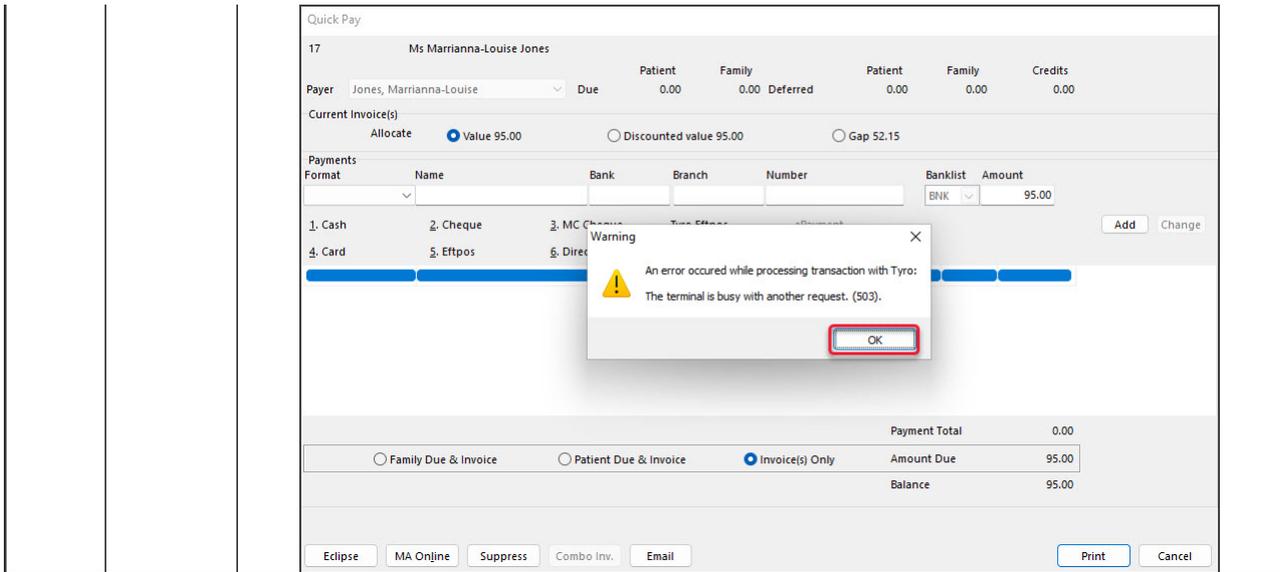
### What to do if a terminal is in use

If multiple users share a terminal, it may be in use when billing. If it is in use, both the Tyro terminal and Zedmed will display 'Terminal is busy with another request (503)'.

To proceed:

1. Select **OK**.

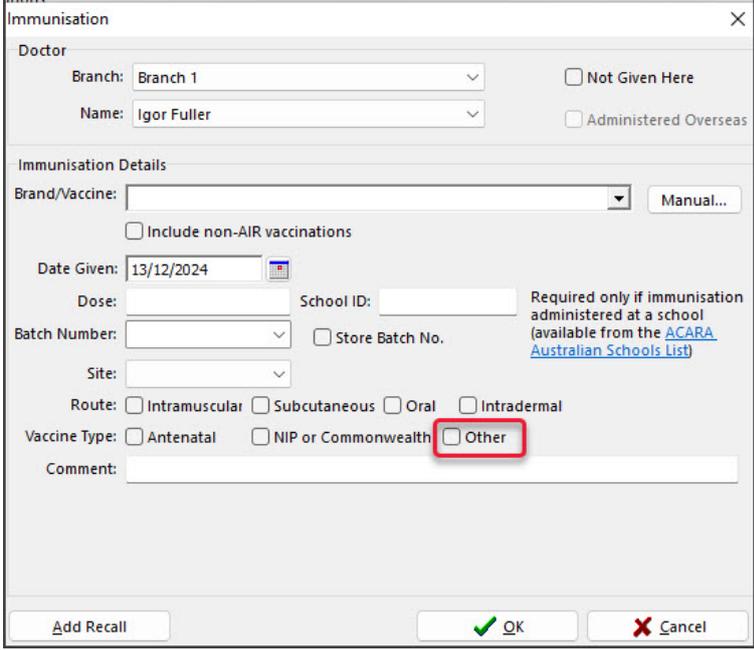
The invoice will remain ready to be submitted.



Zedmed v37.8.1 2. Select **Cancel Transaction**.

Clinical	ZED-10025	<p><b>Purchase</b></p> <p>Import results error</p> <p>Amount \$95.00 Cashout \$0.00 Total \$95.00</p> <p>The terminal is busy with another request. (503).</p> <p><b>tyro</b></p> <p><b>Warning</b></p> <p>An error occurred while processing transaction with Tyro: The terminal is busy with another request. (503).</p> <p><b>Cancel Transaction</b></p>	Fixed an issue that prevents loading some incoming documents into Zedmed
Zedmed v37.8.0			
Office	ZED-9576	<p><b>Online Appointments now supports Time Zones</b></p> <p>If a patient is booking an appointment with a clinic in a different time zone (e.g. for telehealth), the time zone shown on the invoice will be changed to the practice time zone. Appointment confirmations and reminders will show the time zone chosen by the patient. <a href="#">Learn more.</a></p> <p><b>Message Details</b></p> <p>Your appointment with Dr Candy Veitch on 31/12/2024 at 09:30 AM (AEDT) at Test Practice is confirmed. Please call 0355501234 if you cannot attend.</p>	

Zedmed v37.7.4

Clinical	ZED-9887	<p><b>Updated the AIR screen</b></p> <p>In AIR, the 'State' and 'Private' options for 'Vaccine Type' have been replaced with 'Other'. This is to comply with changes to AIR's reporting requirements.</p> 
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### Zedmed v37.7.3

Office	ZED-9980	<p><b>Bank List not completely displayed</b></p> <p>Fixed the issue where not all Banklists were being displayed in the Practice Details &gt; Bank Accounts dialog</p>
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### Zedmed v37.7.2

#### Other fixes and enhancements

Office	ZED-9905	<p><b>Add filter for category Payment Details Link to the Message Manager</b></p> <p>Messages in the Message Manager can now be filtered on the Payment Details Link category.</p>
Office	ZED-9914	<p><b>Reduce the Appointment Grid Blue line refresh to every 60 seconds</b></p> <p>The refresh rate of the current time indicator on the appointment grid has been reduced from half a second to once per minute to reduce unnecessary resource use.</p>

### Zedmed v37.7.0

#### Payment Gateway enhancements

##### SMS functionality

You can now SMS patients a link to collect Credit Card information. The SMS can be sent when you close the Appointment Details screen or from an appointment in the Appointment Grid.

Appointment Details

Date **Tuesday, 19 November 2024** ✓

Created by **Office Admin** on 19/11/24 at 11:32

Doctor **Phillip Davis** **Black, Emma**

Resource

Start Time 11:15 Clinic Branch 1 File N° 62 Pull File Yes DOB 13/12/1982

Duration 00:10 Status Current First in Last in Type

End Time 11:25 Type **Std Consultation**

Notes

Reason for chosen date

Cancellation Waiting Priority

Hide Notes  Allow SMS  Send Confirmation SMS

Account Payers

Black, Emma	P1	\$0.00
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Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip

Close Cancel Help

Close & Request Payment Card

Select down arrow >  
**Request Payment Card**  
when making a booking

62 Black, Emma	Std Consultation (11:15 - 11:25)	0	✓
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**Add (Patient)**

Add (Non-Patient)

Add (From Cancellation Waiting List) Ctrl+W

Details

Edit

Delete

Request Payment Card

Patients will open a link in the SMS to a credit card information collection page.

**Add new card:**

Card Holder Name

Card Number

Expiry Date  MM  YY Security Code (CVV)

To verify your card details, a AU\$1 temporary authorisation charge will be placed on your card. This is temporary and will be removed from your statement.

Add Payment Method

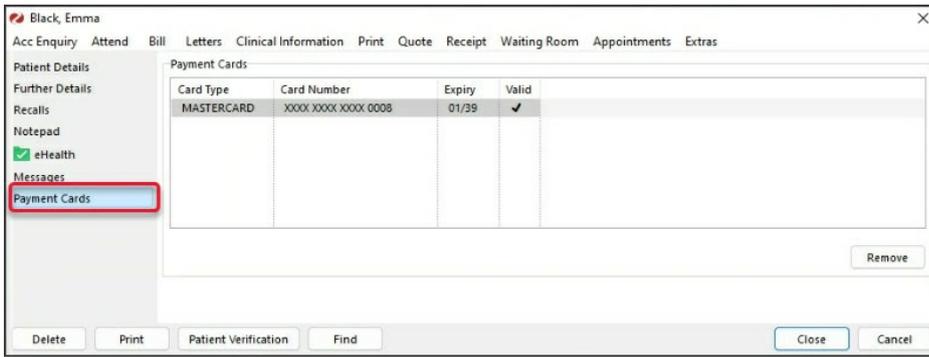
Once credit card information is collected, it will be saved and can be used to bill for this and future consultations.

- A credit card icon on the right means the patient has a valid credit card on record.
- A \$ icon on the left means the patient has made a credit card payment for that appointment.

#### Displaying cards and payments

\$	2 Black, Emma	Std Consultation (11:15 - 11:25)	✓
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Patient Records now include a **Payment Cards** tab. Only a Zedmed Administrator can use the Remove function - or a Zedmed account with the *Patient Details - Payment Card (Edit)* function.

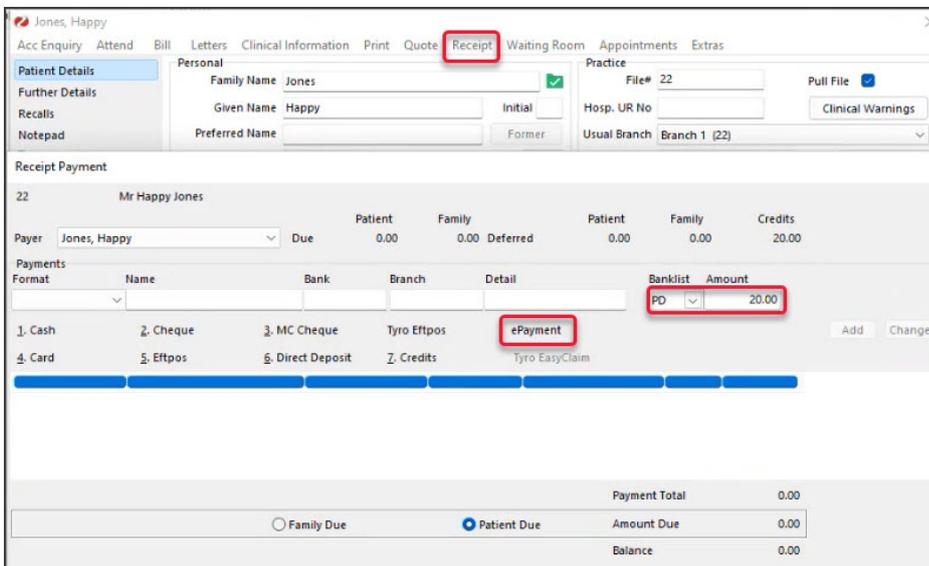


## Prepayments

You can now take prepayments using credit card information collected using Payment Gateway.

- 1) Select **Receipt** on the Patient's Record
- 2) Enter the **Banklist** and **Amount**, then select **Payment**.
- 3) Use the ePayment screen to select **Bill** for the shown/selected credit card.

When you bill, select **Credits** to apply the deposit, then use **ePayment**, which will automatically determine the amount due.



## Other Payment gateway updates

- The credit card (token) is now associated with the patient and not just an appointment.
- If multiple cards are recorded for a patient, you can select a preferred card in **QuickPay** by clicking **ePayment**.
- Family/NOK account payer cards are listed when billing. E.g. A credit card captured for a parent can be used to bill the child.
- You can part-pay through ePayments and use other payment methods on the same receipt.

## Branch Selector for billing

You can now change the branch when billing directly from a patient's record. The invoice will use the treating doctor's provider number and letterhead for that branch. This means you do not need to log into another branch to use the correct provider number. You cannot change the branch if you bill from the Appointment Grid or Waiting Room or a patient record opened from there - the branch will be locked to the branch the appointment was created in.

When you are not billing from the Appointment Book, Zedmed checks for an appointment that matches the branch and doctor. If it finds one, it uses that attendance for the invoice, and if it does not, it creates a new attendance (without a booking).

- By default, the branch selected is the branch associated with the appointment being billed.
- If you change the branch, the available doctors will update to those set up for that branch, even if they don't have appointments that day.
- To change the branch of an existing invoice, you need to void the invoice and create a new one.

### Date stamp for Patient Details notes

The Notes tab in the Patient Record (Office) now has an icon that adds the date and username. This allows staff to date stamp each entry made in notes.

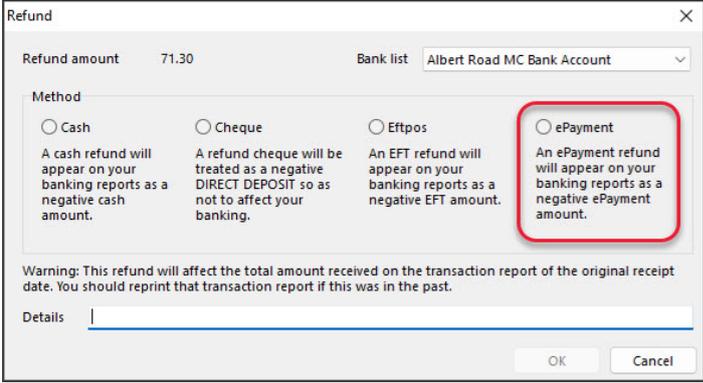
### Other fixes and enhancements

Office	ZED-9801	<p><b>Tyros Eftpos Reinitialisation not working for Quick Pay</b></p> <p>Improved the performance of forms that interact with Tyro (invoice and payment forms) when the Terminal Adapter is not yet installed (cloud only). This does not change the time required for the terminal adapter to install.</p>
Office	ZED-9635	<p><b>Improve the message displayed when attempting to delete a bank list that has transactions</b></p> <p>When trying to delete a bank list (account) with transactions recorded against it, a more meaningful message is now displayed.</p>

Office	ZED-9724	<b>Improved the Expiring Referral report performance.</b> Substantially improved performance of Expiring Referrals Report when there are lots of appointments in the database.
Office	ZED-9870	<b>Enable the launching of Waiting Room from patient details when the Appointment Grid is open</b> Users can now navigate to the Waiting Room directly from Patient Details when it is being shown on top of the Appointment Grid.
Office	ZED-9782	<b>Fixed Error "Command text must not be empty"</b> Fixed the issue that caused the error "Command text must not be empty" when clicking on Re-Merge in the Patient Merge History dialog.
Clinical	ZED-9874	<b>Removed full stop from the Bulk billing consent SMS</b> Full stop following URL in Bulk Billing consent SMS message sent to patients has been removed.
Clinical	ZED-9641	<b>Improve the message displayed when previewing a Shared Health Summary</b> A more meaningful message is now displayed when attempting to upload a Shared Health Summary that contains a procedure without an onset date defined.
Clinical	ZED-9744	<b>Fixed issue with preprinted paper types printing multiple copies</b> Address Book: Fixed issue with preprinted pathology/radiology referrals printing number of copies equal to number of tests requested.
Clinical	ZED-9784	<b>Improved the message displayed when previewing a Shared Health Summary</b> A more meaningful message is now displayed when attempting to upload a Shared Health Summary that contains an immunisation without a date given defined.
Clinical	ZED-9829	<b>Resolved complications encountered when MHR finds duplicate of a patient's IHI</b> When opening a patient record with a duplicate IHI, the MHR Status now displays My Health Record available. If the MHR button is clicked, the warning message regarding the duplicate patient demographics or duplicate IHI is still displayed, however after clicking OK the MHR dialog now opens. This change may also fix an AV error that is displayed when attempting to upload medication information to My Health Record.
Clinical	ZED-9835	<b>Fixed rror "Software error. Incorrect update count."</b> Fixed an error that occurs when a user tries to "print referrals and close" while they have an unsaved referral letter open in the letter writer. The error caused Clinical to freeze. The system will now prompt the user to close the letter writer.

## Zedmed v37.6.0

### Fixes and enhancements

Office	ZED-9698	<p><b>Add ePayment as a Method on the Refund dialog</b> ePayment has been added as a refund payment method in Zedmed.</p> 
Office	ZED-9650	<p><b>Option to disable Easyclaim in billing if Medicare is the Payer</b> A new option has been added to Practice details to allow disabling of the EasyClaim button when billing a patient where Medicare is the payer.</p>
Office	ZED-9844	<p><b>Editing a bank name when there are unavailable bank accounts renames the wrong bank list.</b> Fixed an issue when changing a banklist name resulting in the wrong banklist being changed.</p>
Office	ZED-9840	<p><b>Tyro ePayment report only shows ePayments</b> Tyro ePayment reports have been updated to remove other payment types. It now only includes ePayments.</p>
Clinical	ZED-9834	<p><b>Document preview updates when an arrow key is used to select the next document</b> When using the arrow keys to change the selected document or referral, the preview pane is now refreshed with the currently selected document.</p>
Clinical	ZED-9837	<p><b>Fixed the history list in Clinical Details</b> Fixed an issue where the merge field Clinical Details History was not working for templates.</p>
Clinical	ZED-9838	<p><b>Office staff can now turn on and off SMS in a patient's clinical History</b> The option to hide SMS messages in the Clinical patient history will now work if the user does not have a doctor code.</p>
Clinical	ZED-9839	<p><b>The batch writer is now prompting for letter status selection</b> Fixed missing prompt to set document status when editing a letter associated with a batch in Batch Letter Writer.</p>
Clinical	ZED-9841	<p><b>Template custom merge fields no longer have a black background</b> Fixed the issue where custom merge fields have a black background on clinical templates.</p>

Zedmed v37.5.0

## Summary Views - Document Preview

When you click on a supported document in Summary Views, a preview opens beside it. This feature supports all items in the Documents tab and documents in other tabs. It does not support images, provider file formats and MyHealth Record. For example, you cannot preview a pathology referral, but you can preview a referral letter. Selecting an unsupported format will do nothing.

Use the Preview menu to zoom in and out, move to the next page and print. The zoom level will be retained for that session.

Document Preview is enabled by default. It can be disabled under **My Options > Enable Document Preview**.

The screenshot shows a patient summary for Jones, Ms Marrianna-Louise. The patient's details include: Address: 6 Jones Pl, GOWRIE 2904; DOB: 19/05/1967; Age: 57 years; Medicare No: 22980398741; File No: 17; Home: ; Work: ; Mobile: 0406991730; Occupation: ; Hosp UR No: ; MHR Status: My Health Record available, Consent to Upload. The Summary Views menu is open, showing a list of documents including '17/10/2024 Full Summary', '15/10/2024 Immunisations', '15/10/2024 RTF Referral - Dr Vivian Mortier', '15/10/2024 RTF Referral - Dr Vivian Mortier', '17/10/2024 Shared Health Summary', and '17/10/2024 Event Summary v1'. The '17/10/2024 Full Summary' document is selected, and its preview is shown in a separate window. The preview window displays the 'FULL SUMMARY' document, which includes patient details, family history, and current medications.

## Tyro ePayment Reconciliation report

This new report will help practices reconcile Tyro ePayments when doing banking. These payments use Zedmed's Payment Gateway to collect payment information for Online Appointments (OLA). The banking reports include ePayments and still need to be run, but if there is a discrepancy, this report will help with the reconciliation process.

The report is run for each bank list and will only show back lists **configured for Payment Gateway**.

To open the report, select Banking > Tyro ePayment Reconciliation.

The screenshot shows the 'Tyro ePayment Reconciliation' window. The window title is 'Tyro ePayment Reconciliation'. The main text reads: 'Use this screen to reconcile ePayments between Zedmed and Tyro on previous and current batches and sessions.' There are three radio buttons for 'Reconcile by': 'Batch' (selected), 'Session', and 'Date Range'. Under 'Batch', there is a dropdown menu for 'Batch Number' with '<Current Batch>' selected. Under 'Session', there is a dropdown menu for 'Session Number' with '10 Started On 16/10/2024 11:12:53 AM' selected. Under 'Date Range', there are two date pickers for 'From' and 'To', both set to '17/10/2024'. There are 'Print', 'Screen', and 'Export' buttons at the bottom left, and a 'Close' button at the bottom right. On the right side, there is a 'Banklist' section with a dropdown menu for 'Banklist' showing 'Phillip Davis' and a checkbox for 'Show Inactive Bank Account'. Below the banklist dropdown, there is a note: 'The field above will only contain banklists that have been correctly configured to use the Tyro Payment Gateway. This includes having a Reporting Password and Surcharge specified.' At the bottom right, there is another note: 'Please be aware that recent transactions will not be displayed until the Tyro data is available. Data will be available approximately 15 minutes after having been processed.'

The report pulls information from Zedmed and Tyro, which should reconcile to a \$0.00 discrepancy.

In the example below, you can see an **ePayment refund** was processed in Zedmed and also in Tyro.

The Tyro transaction fee is not included, as it is not received by Zedmed and would prevent reconciliation.

### Tyro ePayment Reconciliation Report

Criteria	
Bank Account	Phillip Davis
Reconcile by: Date Range	16/10/2024 - 17/10/2024

Date	Patient Name	Receipt ID	Transaction ID	Zedmed (\$)	Tyro (\$) Type	Acquirer	Merchant
16/10/2024 10:38:02 AM	Jones, Happy	3	35fe8468-2d22-48bd-bbdd-eb1c103bbd9	\$71.30	\$71.30 PAYMENT	APPROVED	TESTZEDMED
16/10/2024 10:38:02 AM	Jones, Happy	3		-\$71.30	\$0.00		
16/10/2024 10:39:06 AM	Abbott, Gabriel	4	c4229c0f-cc87-44e5-ae2f-a84f309d6d75	\$105.30	\$105.30 PAYMENT	APPROVED	TESTZEDMED
16/10/2024 11:03:48 AM			Happy Jones	\$0.00	-\$71.30 REFUND	APPROVED	TESTZEDMED
16/10/2024 11:15:23 AM	Jones, Happy	9	00529126-8477-4197-b137-6eb9bde2a3e0	\$105.30	\$105.30 PAYMENT	APPROVED	TESTZEDMED
<b>Number of Transactions 5</b>				<b>\$210.60</b>	<b>\$210.60</b>		<b>Discrepancy \$0.00</b>

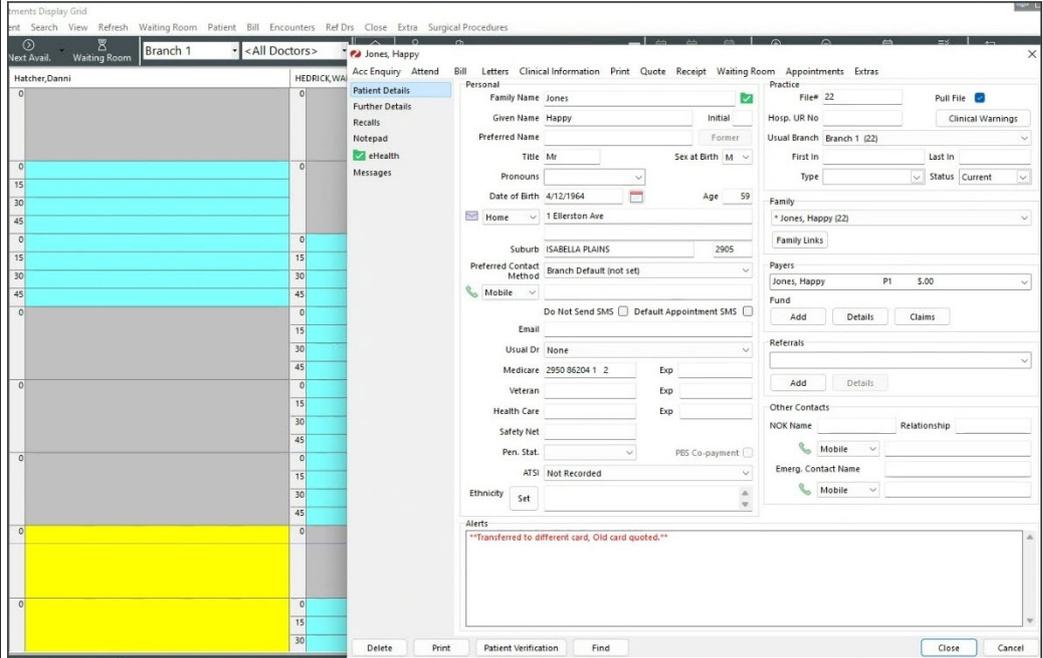
#### Appointment grid enhancements

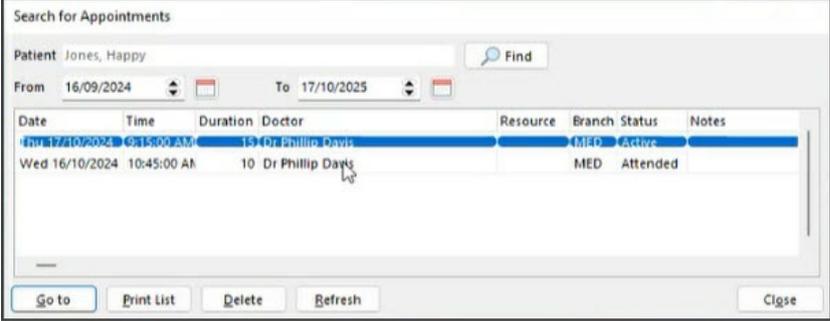
Clinical	ZED-9537	<p><b>Optimised the Appointment grid to open faster.</b> Excessive Appointment Grid refreshes have been reduced for a faster start-up.</p>
Clinical	ZED-9569	<p><b>The Appointment grid's date now shows the name of the day and month.</b> The date picker on the appointment grid now displays the name of the day and month. You can use text to change the date: "yesterday", "today", "today+4", "eom", "bom" and the day's name.</p>  <p>The screenshot shows a software interface with a menu bar containing 'Waiting Room', 'Patient', 'Bill', 'Encounters', 'Ref Drs', 'Close', 'Extra', and 'Surgical Procedures'. Below the menu bar are several dropdown menus: 'Branch 1', '&lt;All Doctors&gt;', and a date picker set to 'Wednesday 16 Oct 2024'. The date picker is highlighted with a red box. Below the date picker, the text 'HEDRICK, WARREN' and 'Appointment Date GRACE' are visible.</p>

**The Appointment grid now stays open a Patient's Details is opened.**

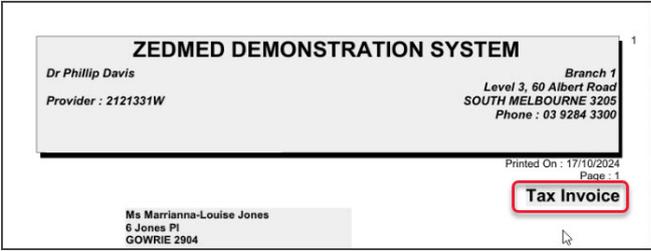
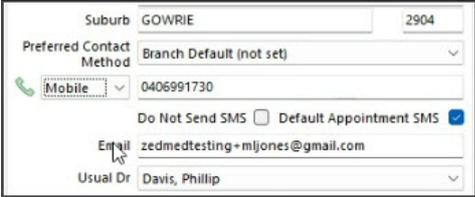
Selecting Patient Details will now display the patient details without closing the Appointments grid. You can also open the patient Acct Enquiry.

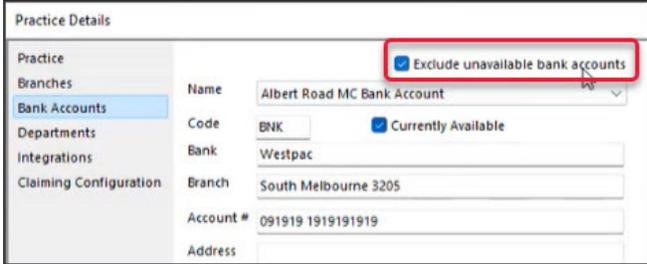
Clinical ZED-9577



Clinical	ZED-9578	<p><b>Change Search for Appointments to show Doctor's Full Name</b> The appointment search now displays the name of the doctor or resource. It previously only showed their codes.</p> 
Clinical	ZED-9654	<p><b>Revise how dark mode is applied to the appointment screen toolbar</b> The appointments grid now opens faster when using modern (dark) theme.</p>

#### Fixes and enhancements

Office	ZED-9517	<p><b>Error occurs for deleting a Doctor Group from appointments</b> Fixed database error displayed when deleting an unused appointment doctor group.</p>
Office	ZED-9535	<p><b>Updated Zedmed's invoice wording to "Tax Invoice"</b> When an invoice is printed, Zedmed will now use the words "Tax Invoice" in the heading instead of "Account" or "Duplicate Account".</p> 
Office	ZED-9540	<p><b>Patients' email addresses now have standalone fields in the Office.</b> The patient details form in Office now shows the phone number and email address in separate fields, instead of combining them in a shared dropdown field.</p> 

Office	ZED-9567	<p><b>The Appointment Op List will no longer duplicate patients</b></p> <p>Fixed issue where patient appointments are incorrectly duplicated on the Appointment Op List when their appointment is for a different branch to the one logged in as.</p>
Office	ZED-9581	<p><b>Remove unavailable bank accounts from bank account list</b></p> <p>A new checkbox, <b>Exclude unavailable bank accounts</b>, in the <b>Practice Details &gt; Bank Accounts</b> tab hides unavailable accounts from view.</p>  <p>The screenshot shows the 'Practice Details' interface with the 'Bank Accounts' tab selected. A red box highlights the 'Exclude unavailable bank accounts' checkbox, which is checked. Other visible fields include 'Name: Albert Road MC Bank Account', 'Code: BNK', 'Bank: Westpac', 'Branch: South Melbourne 3205', and 'Account #: 091919 19191919'.</p>
Office	ZED-9646	<p><b>Referrals Expiring Report no longer shows Cancelled Appointments</b></p> <p>Cancelled appointments will not be included in the Expiring Referrals report.</p>
Office & Clinical	ZED-9628	<p><b>Referral doctor email address field is now bigger</b></p> <p>The size of the email address field for referral doctors has been increased from 40 to 255 characters.</p>
Clinical	ZED-9519	<p><b>The HealthLink referrals Print icon is no longer greyed out</b></p> <p>An issue preventing users from reprinting manually created HealthLink referrals has been fixed.</p>
Clinical	ZED-9536	<p><b>The referring doctor is now used for reprints, not the doctor that's logged in.</b></p> <p>When reprinting or resending a pathology or a radiology referral (right-click in Summary Views), Zedmed Clinical will always use the original referring doctor's details (name and signature) instead of the currently logged-in user.</p>
Clinical	ZED-9562	<p><b>Upgrade Zedmed to latest version of MSXML</b></p> <p>Upgraded an internal component used in Zedmed Clinical to fix errors occurring at some clinics when opening patient files.</p>
Clinical	ZED-9565	<p><b>Fixed an Invalid archive file error that occurred when resending a referral via secure send</b></p> <p>The Referrals UI in Zedmed Clinical will no longer show an error when attempting to resend a referral letter in <b>Today's Referrals</b> using Secure Send.</p>

**A patient's History View now includes SMS messages**

A patient clinical History View now includes SMS communications, including replies, reminders, secure send and direct messages. This is on by default.

The information can be hidden in **Tools > My Options > Show SMS Messages in the History View** checkbox.

Clinical ZED-9570

**History View**

Oldest Encounter: 14/10/2024  
Visible: Last 10 Consultations  Include MHR

15/10/2024 (Tue) 3:23pm with Dr Phillip Davis at MED, for 4m 41s  
Allergy: No Known Allergies (recorded 15 Oct 2024)  
No Known Allergies (recorded 15 Oct 2024)  
No RFE  
Rx: Rosuvastatin 5mg Coated Tablet 5mg [30] - Qty: 1\*30 Rpts. 5 - TAKE 2 TAB BD

15/10/2024 (Tue) 3:11pm with Dr Phillip Davis at MED, for 9m 22s  
No RFE

15/10/2024 (Tue) 2:30pm with Dr Phillip Davis at MED, for 6m 11s  
No RFE

The referral RTF Take 2 has been renamed to RTF Take 2 renamed  
Referral has been duplicated  
Referral has been duplicated

14/10/2024 (Mon) 3:17pm SMS Message to 61406991730 (Sent)  
Your appointment with Dr Phillip Davis on 17/10/2024 at 09:30 AM at Branch 1 is confirmed. Please call 03 9284 3300 if you cannot attend.  
Message Category: Confirmation

14/10/2024 (Mon) 3:05pm SMS Message to 61406991730 (Sent)  
SMS message sent from Update Results  
Message Category: Result

14/10/2024 (Mon) 3:04pm SMS Message to 61406991730 (Sent)  
Patient Service Report SMS  
Message Category: Bulk

14/10/2024 (Mon) 3:01pm SMS Message to 61406991730 (Sent)  
You have an appointment on 15/10/2024 at 9:30 AM with Dr Phillip Davis at Branch 1. Please ring 03 9284 3300 if you cannot attend.  
Message Category: Reminder

14/10/2024 (Mon) 3:01pm SMS Message to 61406991730 (Sent)

**You can now hide and unhide all public (global) templates**

Public Templates can now be hidden from the UI in Clinical using the Hide Clinical Templates utility. This utility does not currently work in the Cloud.

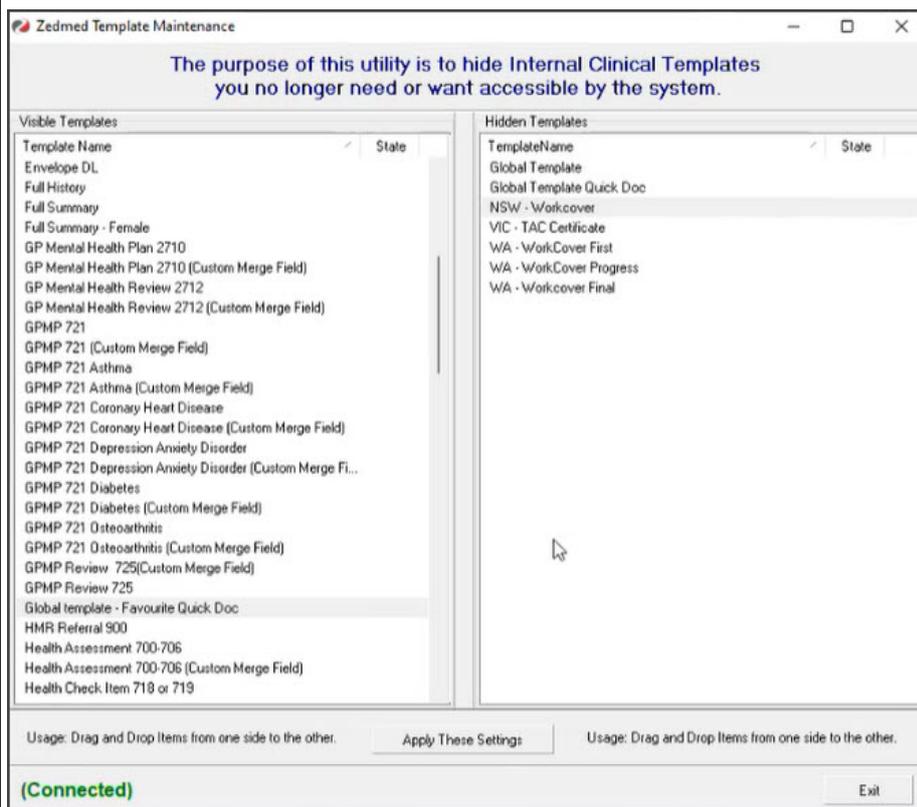
This only applies to global templates, so the template will be hidden for all users.

This will help with templates whose owner is no longer with the practice.

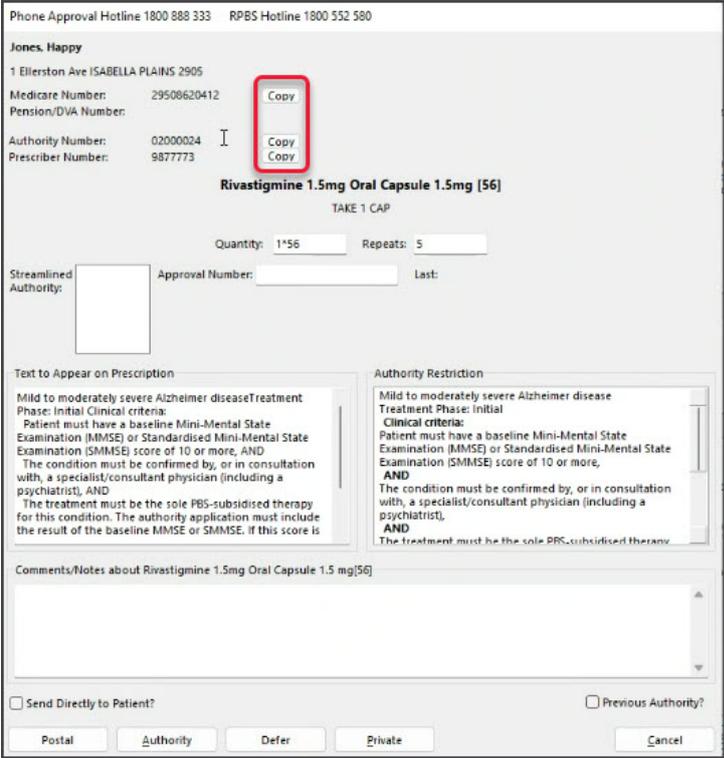
Individual user's templates can be removed by that user if they don't want to see them.

To open the utility:

1. From Clinical, select **Utilities > Hide Clinical Templates**.
2. Drag the template to the **Hidden Templates** pane.
3. Select **Apply These Settings**.



Clinical ZED-9596

Clinical	ZED-9600	<p><b>Approval AuthoMake phone approval hotline details text that can be copied</b>  The Medicare Number, Pension/DVA Number, Authority Number and Prescriber Number on the Script Authority Form now have a copy button and are also selectable text. This makes it easier to transfer the information into HPOS when requesting authority scripts.</p> 
Clinical	ZED-9627	<p><b>CTRL + Z no longer Closes a Patient file</b>  Pressing Ctrl-Z in Clinical will no longer close the active patient tab. This happened by accident when users selected Ctrl-Z to undo (Windows function).</p>

## Zedmed v37.4.2

### Fix

Clinical	ZED-9785	<p><b>Fixed the slow Waiting Room opening time</b>  Doctors were experiencing a slow loading time when opening the Waiting Room in Clinical.</p>
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## Zedmed v37.4.0

### Fixes and enhancements

Office	ZED-9754	<p><b>Delay in Claim Payments Screen and selecting an invoice from the Payments Tab.</b>  Fixed performance issues when opening the claim payment view and when opening claims by individual ID (e.g. by double-clicking a payment).</p>
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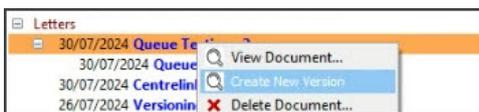
Office	ZED-9756	<b>Changing disable invoice adjustments number of days to a practice setting</b> Users can now specify the number of days during which invoice adjustments cannot be made after submitting a claim. The setting can be accessed from Practice Details [tab] > Disable invoice adjustment for days. The default setting will be 1 day.
Office	ZED-9751	<b>Add link to Patient details from claims screen</b> Added a right-click menu to the Claim Status view to enable opening patient demographics for a claim.
Office	ZED-9747	<b>Office attendance query slow</b> Fixed possible performance issue with the Office waiting room.
Clinical	ZED-9739	<b>Letter Formatting issue when viewing letter</b> Fixed the layout of documents viewed from the Summary Views Documents Tab in the Patient Record, margins are now displayed correctly
Clinical	ZED-9740	<b>Cannot print document on result inbox</b> Fixed an issue with printing pdf results from the results inbox.
Clinical	ZED-9709	<b>RTF Letters under Zedmed\Letters Folder on Client Machines</b> Removed Clinical letter writer "autosave" function that did nothing but save rtf documents into the Zedmed folder. System will no longer prompt a user to save a letter in Clinical if it has no changes to it since the last save.

## Zedmed v37.2.3

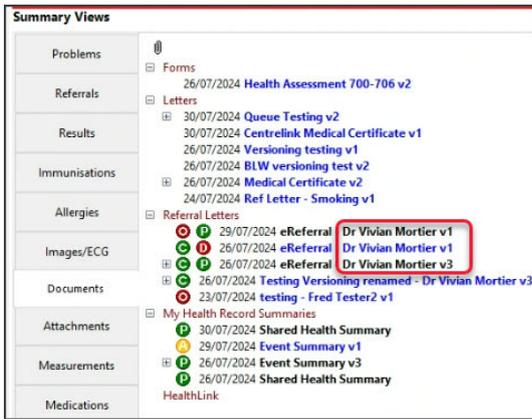
### Document versioning

Instead of editing Documents and Referral Letters, you now Create new versions. This ensures that a document's history of changes is retained. This applies to the following document types: Letters, Referrals, CDA Referrals and Batch Letter Writer letters distributed using print or send.

To update a document, right-click it and select **Create New Version**. A new version will be created and opened for editing.



Newly created Documents and Referral letters will have a v1 suffix, and subsequent versions will increase to v2, v3 etc. Versioned documents are displayed using a tree structure. A new document version can be created from any version of a document, it does not have to be the latest.



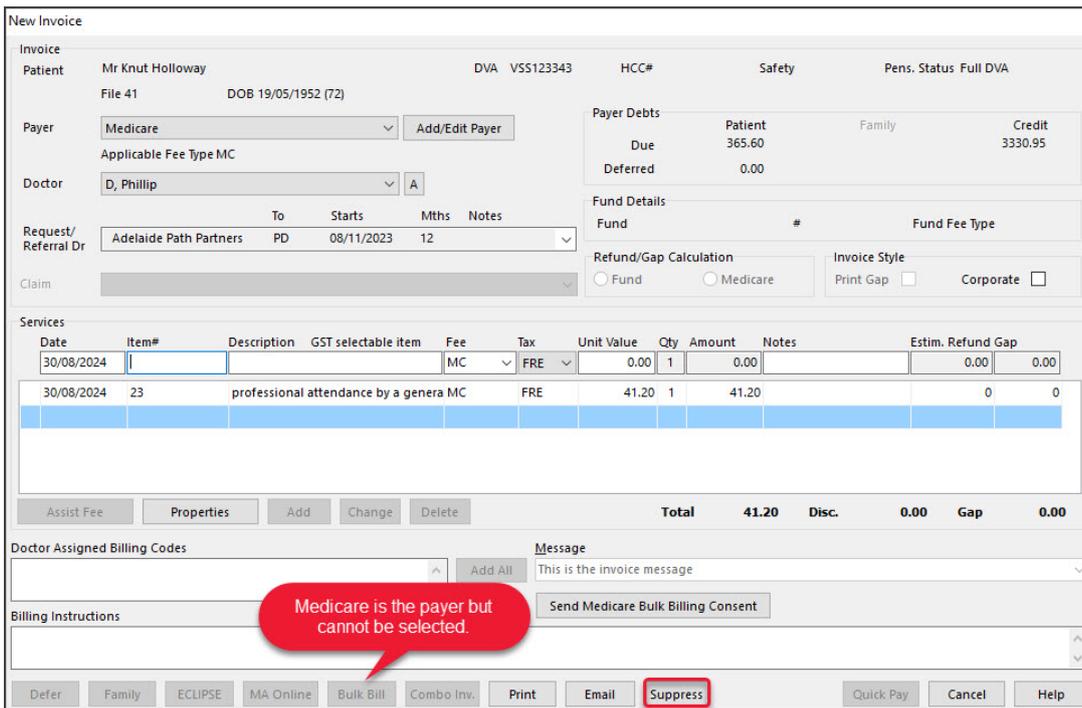
Versioning is turned off by default and is enabled in Global Options. You can also restrict the ability to delete or edit a document over a certain age. By default, it is set to 0 in Clinical >Global Options for no time limits.

To learn more, see [document versioning](#).

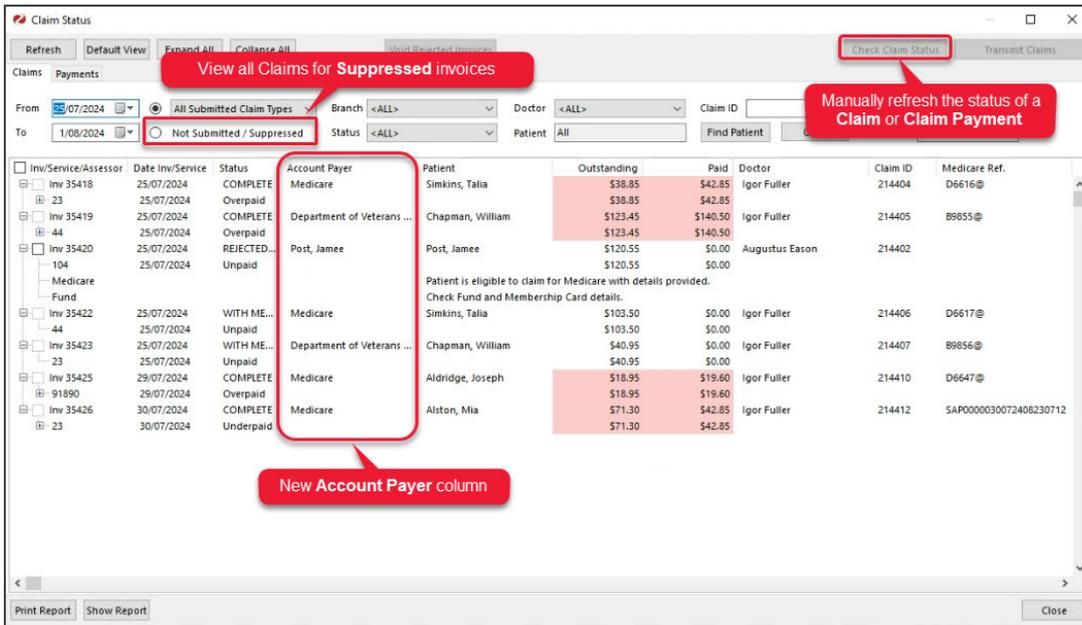
### Suppressed invoices workflow

Bulk Bill and DVA can be disabled for Medicare/DVA invoices so that the claims can be reviewed in the Claims tab and then submitted. This provides more oversight and prevents claims from being submitted for invoices that must be voided.

See ZED-9289 for how to enable this option.



The **Claims** tab has enhancements to help manage claims for suppressed invoices.



To learn more, see the [Suppressed claims workflow](#).

## Improved claim management

### Easy Account Enquiry Access

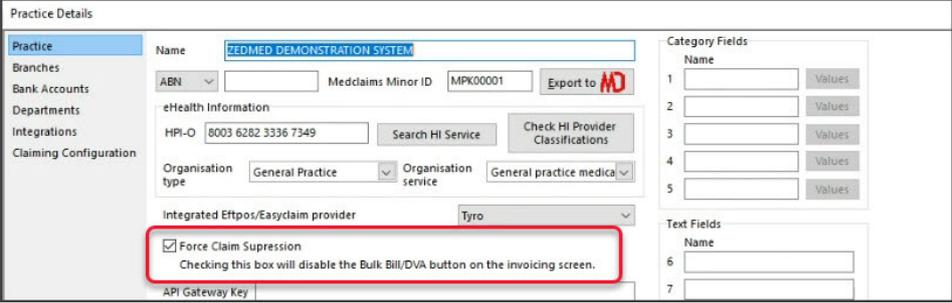
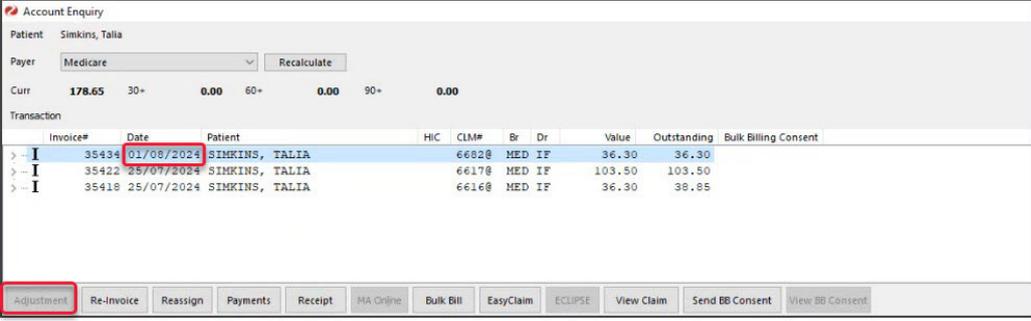
When you double-click on an invoice in the Claims tab, it will open the patient's Account Enquiry screen with that invoice highlighted. Closing the invoice will take you back to the Claims tab. This makes it easier to review claims.

### More robust claims.

- To avoid claims failing due to invoice changes, adjustments cannot be made to invoices with claims submitted in the previous 7 days. If the invoice is incorrect, select it in the **Claims** tab and click **Voice Rejected Invoices** to remove it.
- When receipting, a warning will suggest waiting 24 hours if full payment information has not been received from Medicare.
- The Claims tab has a **Check Claim Status** button so staff can manually refresh the status of a claim or claim payment.

To learn more, see the [Review Claims guide](#) > **Claim Management enhancements**

### Specific updates for invoices and claims

Office	ZED-9289	<p><b>Add "Force Claim Suppression" to suppress submitting Medicare/DVA claims</b>  A new option under Practice Details called <b>Force Claim Suppression</b>. Ticking this box will disable the ability to submit a DVA or bulk bill claims directly from the invoice screen. Note that <u>this setting is off by default</u>.</p> 
Office	ZED-9290	<p><b>Changes to Claims Status Screen</b>  Added <b>Account Payer</b> to the claim status view.  Changed the option Not Submitted to <b>Not Submitted / Suppressed</b>. You can choose this option, then select <b>Refresh</b> to display only the Suppressed invoices queued in the <b>Claims</b> tab.</p>
Office	ZED-9291	<p><b>Restrict changes to invoices for submitted claims</b>  Disabled the Account Enquiry screen's <b>Adjustment</b> button for all claims less than 7 days old. This applies to Bulk Bill, DVA and Eclipse claims. MA Online and Tyro Easy Claim will still have the button available.</p> 
Office	ZED-9360	<p><b>Added a 'Check Claim Status' button</b>  Added a <b>Check Claim Status</b> button to the Claims Tab so staff can manually refresh the status of a Claim or Claim Payment.</p>
Office	ZED-9361	<p><b>Change the auto-void criteria for receipting off payments</b>  Added additional checks to prevent the automated receipting of claims that have been paid but where the processing report is incomplete.</p>

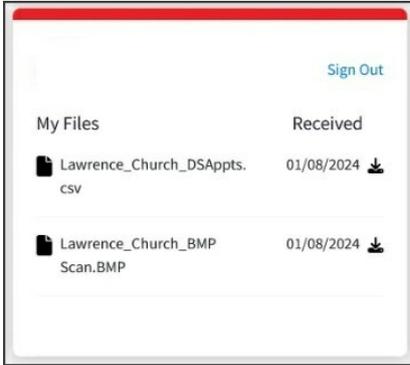
Office	ZED-9367	<p><b>Fast access to a claim's invoice from the Claims tab</b></p> <p>Changed the double-click function in the Claim tab. Double-clicking a claim will now take you to the associated invoice in the patient's Account Enquiry screen.</p>
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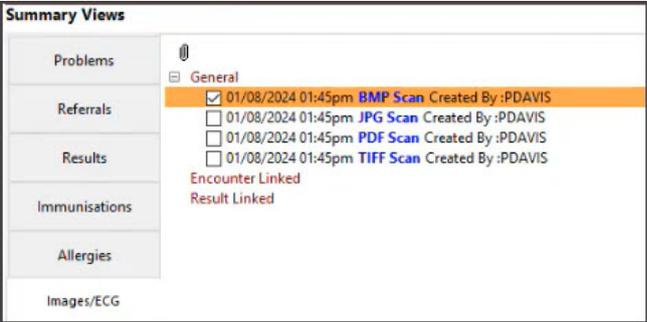
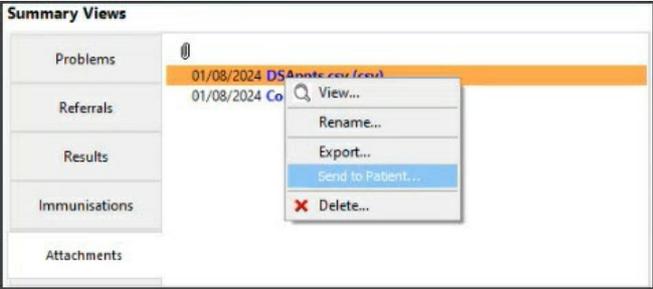
## Secure Send enhancements

### Features summary:

- Can now be used for patients without an account payer.
- Sender can override the security code requirements
- More meaningful file names
- Can now Secure Send from Summary Views > Images | Attachments | Results
- Can now Secure Send from the Results Inbox.

To learn more, see the [Secure Send guide](#).

Office	ZED-9323	<p><b>Secure Send now provides more descriptive file names.</b></p> <p>The filename is now formatted as &lt;Patient Given Name&gt;&lt;Patient Family Name&gt;&lt;File Name&gt;.</p> 
Office	ZED-9325	<p><b>Secure Send can now be used for patients without an account payer.</b></p> <ul style="list-style-type: none"> <li>• The patient will be the <b>Payer</b> in the Secure Send dialogue</li> <li>• The patient's email and mobile will prepopulate the Secure Send dialogue fields.</li> </ul>

Office	ZED-9326 ZED-9327 ZED-9369	<p><b>Secure send can be used from more <b>Summary Views</b> tabs</b></p> <ul style="list-style-type: none"> <li>• Summary Views &gt; Images (can send image files)</li> <li>• Summary Views &gt; Attachments (with file type restrictions)</li> <li>• Summary Views &gt; Results (right-click View Results &gt; Send to Patient)</li> </ul> <p>For security, some files (exe, dll etc) cannot be sent as shown in the restricted list below Right-click and select <b>Send to Patient</b>.</p>  
Office	ZED-9333	<p><b>Removed some restrictions on the file types supported by Secure Send</b></p> <p>Restrictions have been updated to allow more file types to be sent using Secure Send. The following file types are still restricted due to the security risks they pose (malware etc):</p> <pre>bat exe cmd sh php([0-9]) pl cgi 386 dll com torrent js app jar pif vb vbscript wsf asp cer csr jsp drv sys ade adp bas chm cp1 crt csh fxp hlp hta inf ins isp jse htaccess htpasswd ksh lnk mdb mde mdt mdw msc msi msp mst ops pcd prg reg scr sct shb shs url vbe vbs wsc wsf wsh</pre>

Office

ZED-9366

**Secure Send can be used without the security code requirement**

The sender can use a checkbox to override the one-time security code requirement. This is the code sent to the patient to open the portal and access files sent to the patient.

Files that required a security code when they were sent, are not displayed if the portal is opened without a security code requirement.

Send BMP Scan

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: Church, Mr Lawrence

Payer: Church, Mr Lawrence

Notifications to be sent

Recipient Email: zedmedtesting+LChurch@gmail.com

Recipient Mobile: 0491 574 632

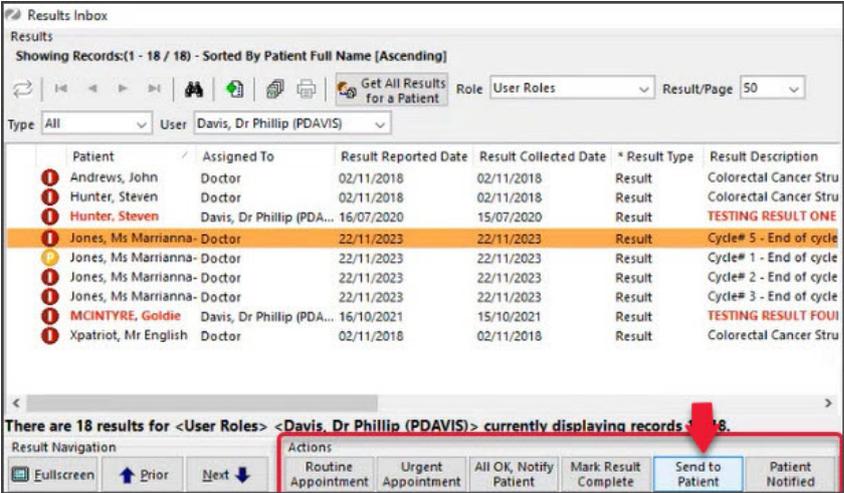
Pin not required (Less secure)

Send a copy to

Copy To Email

Copy To Mobile

Send Cancel

Office	ZED-9369	<p><b>Use Secure Send from the Results Inbox</b> Secure Send now allows you to send patient results from the Results Inbox.</p> <p>1) Select the result 2) Select <b>Send to Patient</b>.</p> <p><b>Summary Views &gt; Results</b> are also supported by Secure Send.</p>  <p>To learn more, see the <a href="#">Results Inbox guide</a>.</p>
Office	ZED-9468	<p><b>Updated where Secure Send lab reports display the phone number</b> The default Pathology and Radiology reports used for Secure Send now display the phone number in the branch name and address section.</p>

### Improved WP Tools

Zedmed v37 includes new features for creating and editing Clinical templates.

#### Table resizing

- Add a table within another table.
- Resize a table by dragging on a border; left, right, top or bottom.
- Resize columns and rows.
- Resize a table inside another table.

#### Hyperlinks

Hyperlinks can now be added using the Toolbar button and Edit menu by typing a URL in the document. E.g

[HTTPS://HyperlinkURLhere.com.au](https://HyperlinkURLhere.com.au)

#### Word wrapping around images

- Handle pictures as a character; the picture is inserted in the middle of a sentence
- Relation to paragraph – auto wrap left or right; paragraph text is wrapped to the left or the right of the picture
- Relation to paragraph – wrap left and right; paragraph text is wrapped on the left and the right of the picture
- Relation to page – no wrapping; the picture is displayed over the text
- Relation to page – wrap left and right; text on the page is wrapped on the left and the right of the picture

#### Colour picker

Provides a greater range of colours, the ability to create and save custom shades and a paragraph background colour button.

## General enhancements

### New Appointment Counts Report

A new report option, "Appointment Counts", has been added to the Appointments Report.

Appointment Report

**Style**

Appointments Only  Order by Name

Appointments and Available Slots

**Appointment Counts**

Cancelled/Missed

Cancelled Only

Missed Only

Send Appointments via SMS

**Criteria**

Date from: 28/08/2024 To: 28/08/2024

Time from: 06:00 To: 22:00

Branch: Test Branch 1

Doctor: All

Resource: All

Appointment Type: All

**Report**

**Display Options**

Addresses  Include History

Referral Details

Separator Lines

Preferred Name

Office

ZED-9079

It shows the number of appointments per practitioner with the total number of appointments for the selected time range. You can apply filters such as appointment type and select specific practitioners. This report does not capture cancelled, unavailable and non-patient appointments.

Test Branch 1 Page 1

**Appointment Counts**

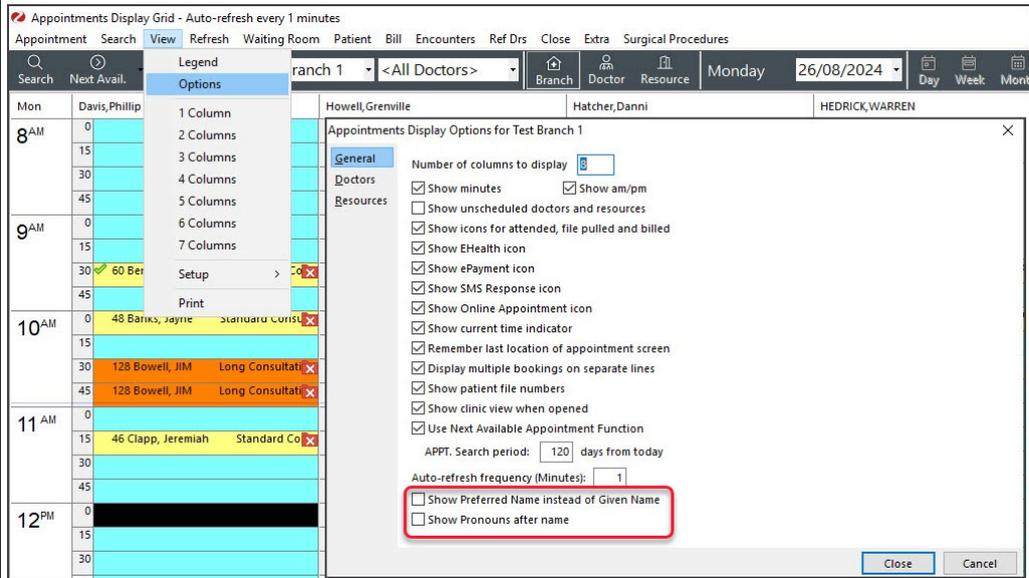
**Monday 26 Aug 2024 From 06:00 To 22:00 10 Appointment(s)**

Treating Doctor/Resource	Number of Appointments
Dr Gremille Howell	3
Mr Phillip Davis	5
Dr WARREN HEDRICK	2
<b>Total Appointments</b>	<b>10</b>

To learn more, see the [Appointment Report guide](#).

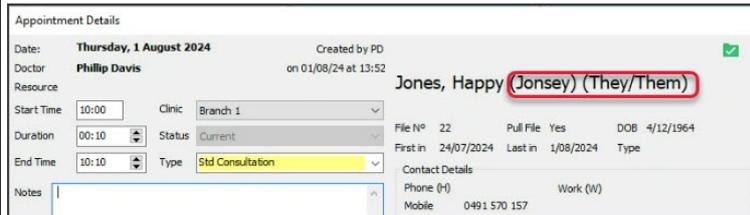
**Preferred Name and pronouns displayed in Appointment Details**  
 Added an option to display preferred name and/or pronouns in the appointment grid.

Select **View > Options** to open the **Appointment Display** options to enable the pronoun options.



Office ZED-9233

Added display of preferred name and pronouns to appointment details and the office and clinical waiting room



To learn more, see the [Appointment display options guide](#).

Office ZED-9321

**Preferred Name and pronouns displayed in Attendance Details**  
 The Attendance Details screen now shows the patient's preferred name and pronouns as shown in the screenshot above.

**A batch search for a patient's IHI number can exclude Archived and Deceased patients**  
Practice setup > Practice tab > HI Service Settings > Branch Settings tab.

The IHI Batch Update and Verification services can now be configured in Office to exclude specific Patients according to their status (Archived, Deceased etc).

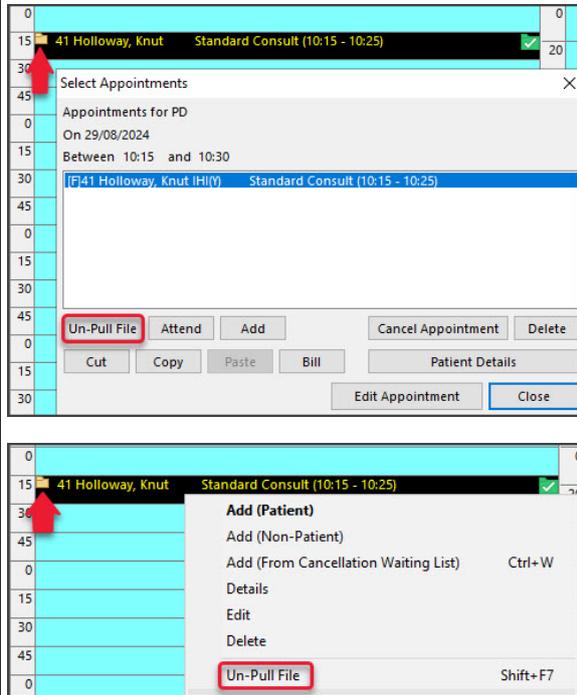
Office ZED-9237

The screenshot shows the 'HI Service Settings' dialog box in the Office software. The dialog is titled 'HI Service Settings' and is open to the 'Batch Settings' tab. It contains two main sections: 'Batch Search for IHI' and 'Batch Verification of IHIs'. Both sections have a checked checkbox for performing regular batch operations. The 'Batch Search for IHI' section includes a frequency dropdown set to 'Monthly', a starting date of '1/01/2011', a time of '00:00', and a 'Number of Records' field set to '100'. The 'Batch Verification of IHIs' section includes a frequency dropdown set to 'Monthly', a starting date of '1/01/2011', a time of '00:00', and a 'Number of Records' field set to '100'. Both sections have an 'Email exception report(s) to' text area and a 'Send intramail to' list box containing names like AUGUSTUS, CHAMINDA, CONNIE, CPV, DANNI, and DANIELA. To the right of each section is an 'Exclude Statuses' list box with checkboxes for 'Archived', 'Casual', 'Current', and 'Deceased'. In the 'Batch Search for IHI' section, the 'Archived' and 'Deceased' checkboxes are checked and highlighted with a red rectangle. The 'Batch Verification of IHIs' section has 'Archived', 'Casual', and 'Deceased' checked, while 'Current' is unchecked. The dialog has 'Close' and 'Cancel' buttons at the bottom right.

Office ZED-9265

**You can now Un-pull a file**

The Un-Pull File option has been added back to the Appointment Screen. You can now right-click Pull File or Un-Pull File, and the status will be reflected in the Appointment Detail and the folder icon. Un-Pull File will remove the Pull File icon.



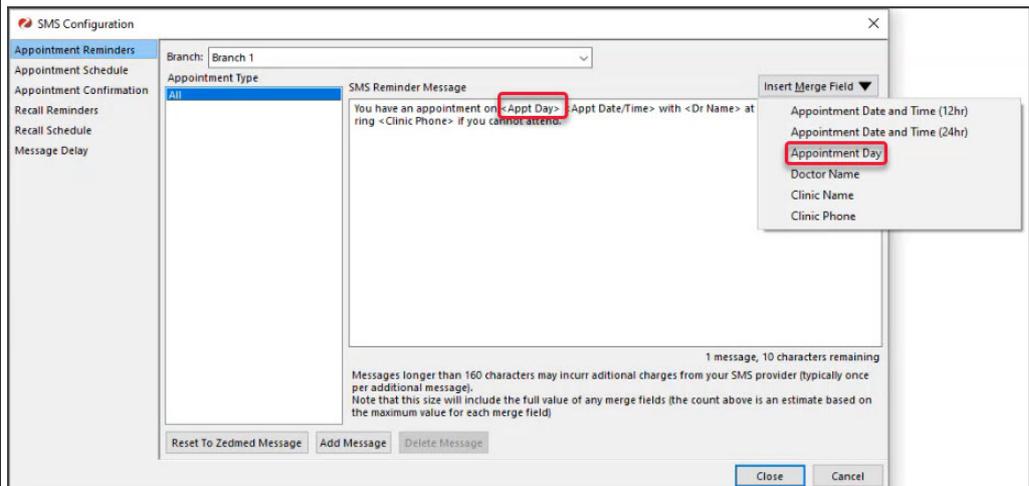
To learn more, see the [Book an Appointment guide](#).

Office ZED-9304

**SMS appointment reminders can now include the day of the week.**

A new merge field for the Day of the Week has been added to all Appointment, Recall reminder and Expired Referral templates.

This has been added to the Zedmed default reminder message and Appointment reminders sent from the Appointment Report. The Day will need to be added to custom messages.



To learn more, see the [Customise SMS text guide](#).

Office ZED-9412

**You can now SMS a doctor when an appointment is booked**  
 An SMS confirmation can be sent to a practitioner every time a patient makes an appointment with them. The message will contain the patient's name and the appointment's date and time, and incur a cost for the SMS.

Requirements:

- The doctor's mobile number must be added to the Doctor Details.
- The patient must receive a confirmation for the practitioner to receive a notification.

This means the **Send Confirmation SMS** must be manually ticked in the Appointment Details screen when the appointment is booked- unless it is an OLA booking (as it is ticked by default).

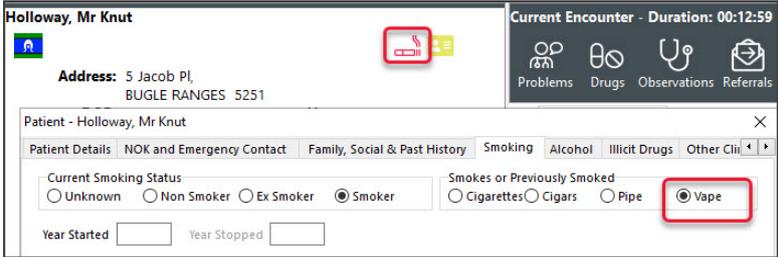
To learn more, see the [SMS Send options guide](#).

Office ZED-9472

**You can now Bill from the Appointment Grid**

Right-click a patient's appointment and select **Bill** to open a New Invoice. This will pick up a practitioner's billing information - just like billing from the Waiting Room.

**Vape has been added to the Smoking status options**  
Practitioners can now select **Vape** as a smoking method in the Patient's Clinical Record > **Smoking** tab.  
If Vape is selected, it will show as a cigarette icon.



To learn more, see [Navigating Clinical Records](#)

**An 'Illicit drugs' tab has been added to the patient's Clinical record.**  
Clinical now gives practitioners the ability to indicate if a patient is an illicit drug user and record related details in the patient details maintenance screen. Tick the box to add the injection icon.

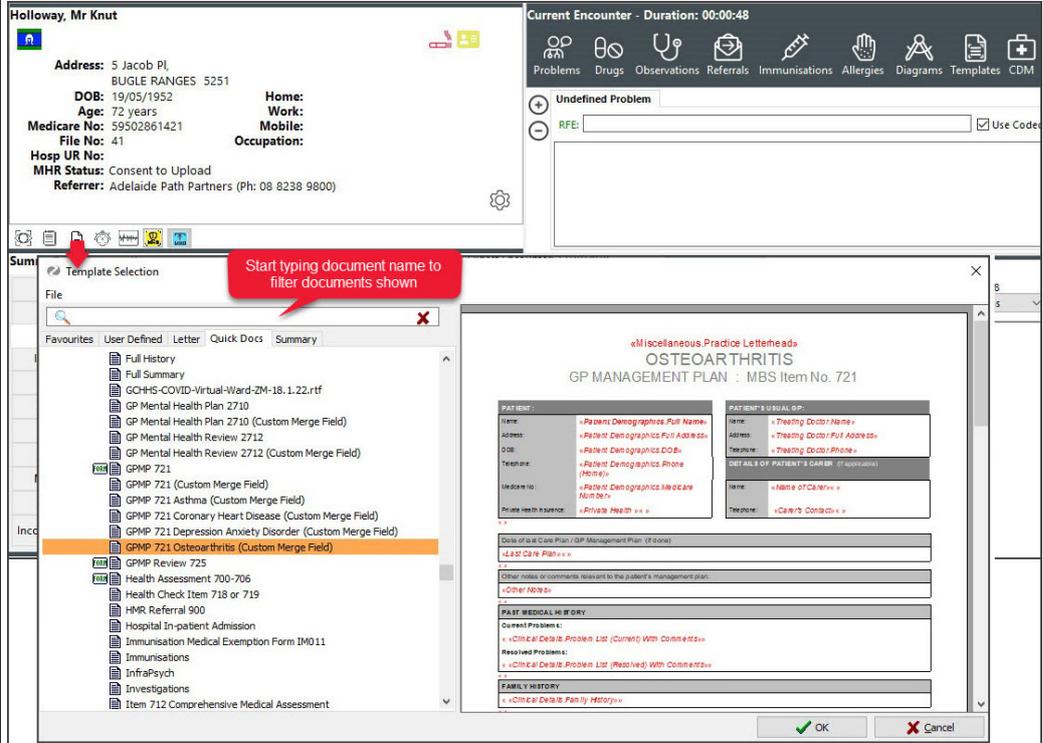


To learn more, see [Navigating Clinical Records](#)

### Quick Documents Search - Template Selection screen

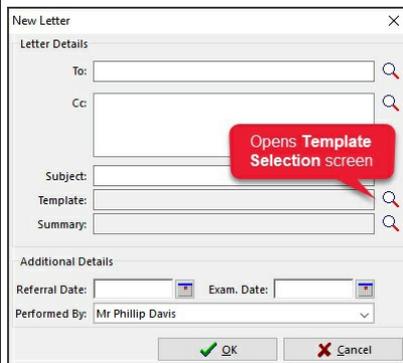
We have created a new Quick Document Search page called Template Selections. This displays all templates in a scrollable screen that will filter as you type a template's name.

Open **Quick Documents Search** using the new icon next to Quick Documents. Select the required tab and start typing the template name to filter the list.



Clinical ZED-9263

The Template Selection screen will also open if you start a New Letter and search for a template.



To learn more, see the [Quick Documents guide](#).

Clinical ZED-9322

### Changes to Clinical Waiting Room column widths are now saved

The column width and order of the clinical waiting room is now be remembered for Zedmed user.

Clinical ZED-9508

### Clinical Observations now has a paediatric WHO chart

In Clinical Observations > Physical > Measurements.

When you select a graph, the Graph type drop-down has a new option: **WHO 0-2 Years**, which displays the Length, Weight and Head circumference chart for children 0-2 years old.



To learn more, see the [Record physical measurements guide](#).

Clinical ZED-9532

### Results Inbox now has a side-by-side viewing option.

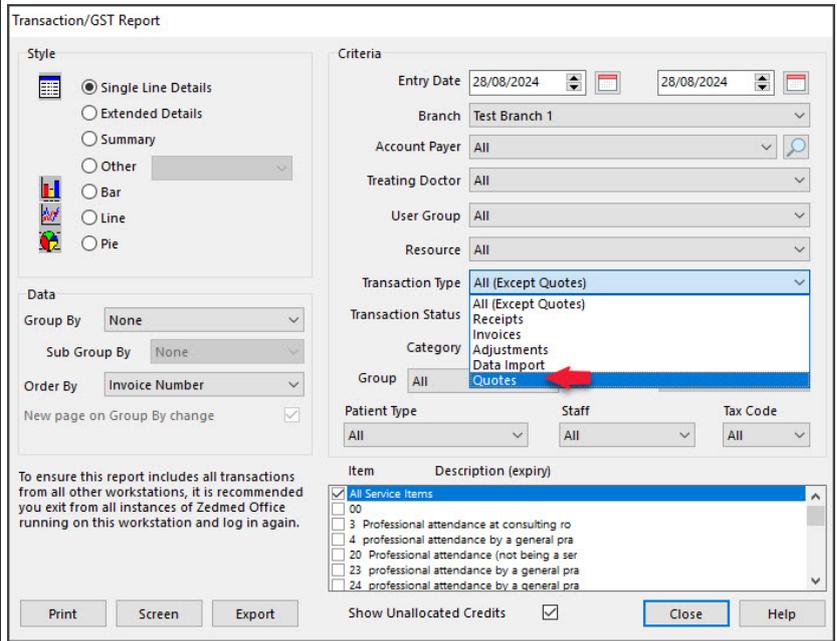
A new setting in the Clinical > My Options screen allows users to select the layout of the Results Inbox.

To change from the default to side-by-side, select **Left to right**.

To learn more, see the [Results Inbox guide](#).

Office ZED-8995

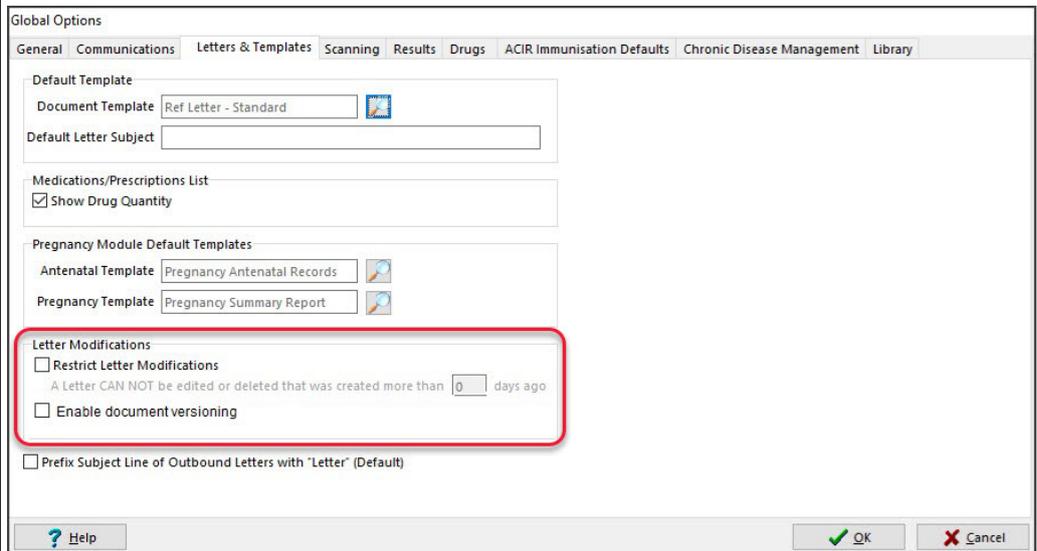
**Added Quotes to the Transaction Type of the Transaction/GST Report**  
Add the option to run the **Transaction/GST report** showing only Quotes, this does not affect the existing All function which will still exclude quotes. Note, the Report Summary will be impacted if you include quotes as there will not be receipts.



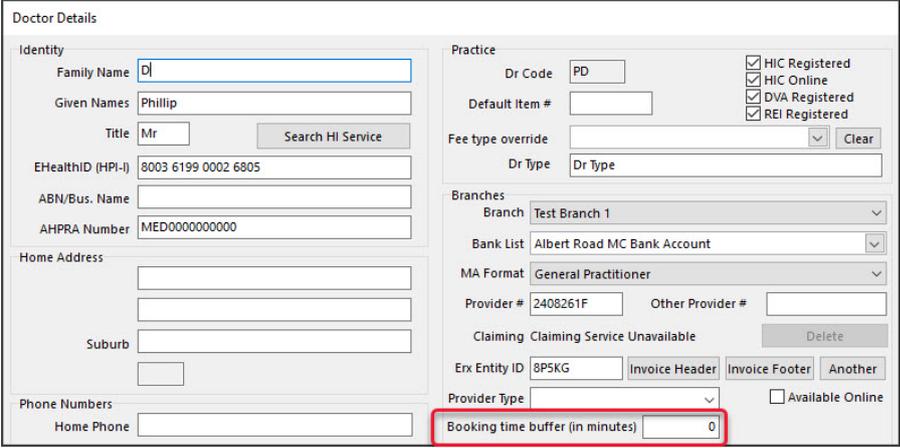
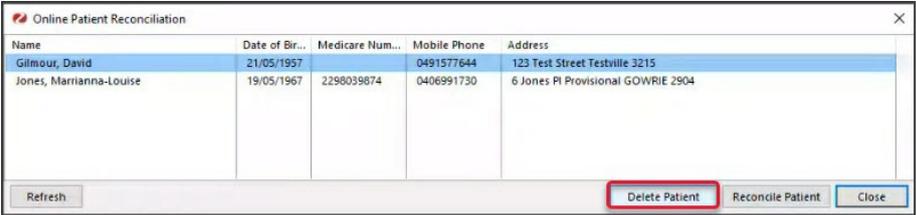
To learn more, see the [Transaction GST Report guide](#).

Clinical ZED-9651

**Updated Document versioning so it can be turned on or off**  
Document Versioning is not enabled by default and is enabled in Clinical > Global Option > Letters & Template tab > -Enable document versioning



To learn more, see the [Document versioning guide](#).

OLA	ZED-9457	<p><b>You can now add a booking time buffer to a practitioner's appointments</b></p> <p>A new setting, "Booking time buffer", has been added to the <b>Doctor Details screen</b> and is configurable by branch. The value entered is used to refine the available appointments sent to the Online Appointments (OLA) by only allowing appointment slots that begin after (Booking Time + Buffer).</p> <p>This prevents people booking online appointments close to the current time</p>  <p>To learn more, see the <a href="#">Online Appointment setup guide</a>.</p>
OLA	ZED-9238	<p><b>Reject a patient in the OLA patient reconciliation screen.</b></p> <p>When linking first-time OLA bookings to existing Zedmed patients, we have added the ability to remove provisional patients from the reconciliation process. If the patient already has an Appointment, you need to Delete their appointment first.</p>  <p>To learn more, see the <a href="#">Reconcile new OLA patient guide</a>.</p>
Clinical	ZED-9607	<p><b>Enable printing of multiple TIFF documents as one document</b></p> <p>In Zedmed Cloud, printing a multi-page image document will no longer result in one print job per page</p>

### Resolved issues

Office	ZED-9642	<p><b>Claim and payment reconciliation mismatch</b></p> <p>Fixed an issue that caused claim and payment mismatches when reconciling Medicare claims.</p>
Office	ZED-9003	<p><b>Appointment Report AV error when the Referral Details option is selected</b></p> <p>Fixed an issue that caused the Appointment report to display an error when running it with the Referral Details option selected.</p>

Office	ZED-9044	<b>Task Manager displays the same patient for all Tasks Created</b> The Task Manager screen in Zedmed Office has been fixed to display the correct linked patients in the task details.
Office	ZED-9062	<b>Unable to save more than 1 new resource at a time</b> Fixed the issue that resulted in only the first resource being saved when adding multiple resources.
Office	ZED-9063	<b>Fee update error 'Is not a valid floating point value'</b> Improved the error message shown in Item Fee Update when no value is entered for a percentage or dollar amount increase. Also fixed the error displayed if Category or Group is selected. Selections will now correctly filter the items in the list.
Office	ZED-9064	<b>Patient and Find menu items no longer work in the Waiting Room</b> The Patient and Find Patient menu options in the waiting room now work as expected.
Office	ZED-9349	<b>Internal Mail Merge Template - Unable to Preview and Edit Mail Merge Before Printing</b> When using internal templates, it is now possible to preview the results of a mail merge and make changes before printing.
Office	ZED-9375	<b>When adding a new patient, you can't add pronouns until you've saved the patient</b> Fixed an issue that prevented a pronoun from being selected when creating a new patient in Office.
Office	ZED-9398	<b>The Referral date merge field prints a random date on the Label</b> Standard patient labels (Internal Template) now print the correct referral date. This corrects a reported error that some labels print a random date.
Office	ZED-9410	<b>Claim Report missing the Claim ID s8th digit and MBS items 5th digit</b> Increased space available to display item numbers and claim IDs in the Claim Report.
Office	ZED-9434	<b>Third-Party Account Enquiry allocation Error</b> Fixed an issue in Third Party Account Enquiry that resulted in an allocation error 400.
Office	ZED-9442	<b>Error 'FireDAC[[Phys][FB]Dynamic SQL Error: Too many Contexts of Relation/Procedure/Views. The maximum allowed is 255'</b> Fixed a Firebird error that occurred when merging patients from a database that had a considerable number of Clinics.
Office	ZED-9458	<b>Duplicating schedules does not copy messages correctly</b> When duplicating or copying sessions on the doctor and resource appointment schedule dialogue, the schedule messages selected for display in OLA will now be copied.
Office	ZED-9467	<b>Appointment incorrectly removed when cancelling the cancel appointment operation</b> Cancelling the cancellation of an appointment (at either the reason or linked appointment warning phase) will no longer remove the appointment from the Select Appointments form listing.

Office / Clinical	ZED-9420	<b>Radiology/Pathology Template download notification pop up.</b> The notifications are now displayed when Report templates are downloaded from Office or Clinical,
Clinical	ZED-9018	<b>Unable to Print Results in Alphabetical Order</b> Results previewed and printed from the Results Inbox are now in the order, regardless of the column (and direction) they are sorted on.
Clinical	ZED-9081	<b>Resolved problems with re-prescribing a 'one-off' drug</b> Fixed an issue preventing re-prescribing of a one-off drug. Effected new scripts with no drug name/description.
Clinical	ZED-9218	<b>Spelling mistake in Clinical Observation Pap Smear Result input</b> "Inflamitory" has been corrected to "Inflammatory" in the pap smear observation screen - result options.
Clinical	ZED-9384	<b>Results provides no warning when clearing the patient notified date</b> Clinical will now ask for confirmation before clearing the "Patient Notified" date when viewing results.
Clinical	ZED-9437	<b>Access Violation when accessing the Outbox Viewer</b> Fixed an issue that caused an error and did not allow the Outbox viewer to open.
Clinical	ZED-9438	<b>Error 'Must be a numeric value' when modifying observation and measurement value.</b> Fixed an issue where an error was incorrectly displayed when an observation value was deleted (for correction).
Clinical	ZED-9439	<b>Access Violation when clicking the Distribute button in the letter writer,</b> Fix an error that occurred when Secure Send was enabled but the distribute dialog for letters in clinical was disabled.
Clinical	ZED-9532	<b>Results Inbox Access Violation error</b> Resolved an Access Violation error that could occur when rapidly scrolling through PDF results in the results inbox.
Clinical	ZED-9637	<b>Refresh issue when resizing the encounter notes</b> Fixed a visual corruption that occured when resizing the encounter panel during an encounter.
Clinical	ZED-9662	<b>Upgrade script failure – Index RDB\$PRIMARY95 already exists</b> Fixed an issue with upgrade scripts that could cause an error when upgrading some databases.
Clinical	ZED-9649	<b>Document names and versions not displayed in encounter notes</b> Fixed issues with the document version, renamed document and duplicated document names not displaying in Encounter notes. Note: an encounter needs to be running for the note to be written.

Clinical	ZED-9675	<b>In WP Tools, electronic results do not merge correctly in templates</b> Fixed an issue where the results merge field was not working correctly when it was part of a table and overlapped part of the text. If multiple results are selected they will no longer overlap into the next table in the template.
Clinical	ZED-9678	<b>Update for Clinical encounter notes issue</b> Made an update to address the issues encountered when drawing the text edit field for the current encounter.
Clinical	ZED-9693	<b>Results showing overlapping text</b> Fixed issue where Historical HL7 results show overlapping text.
Clinical	ZED-9697	<b>Upgraded the wPDF Viewer to the latest version</b> This upgrade fixes issues with viewing PDFs containing multiple documents or charts in the Results Inbox.
Clinical	ZED-9703	<b>Summary Views &gt; Results shows overlapping text</b> Fixed an issue with some results showing overlapping text in Summary Views Results and Incoming Documents.
Clinical	ZED-9725	<b>An AV in CRS_Client error occurs when right-clicking on a referral in the History View</b> Zedmed Clinical no longer shows an error in patient history when user right-clicks on a referral.
Cloud	ZED-9241	<b>Don't check for Tyro install on Zedmed startup</b> Updated the way Tyro starts in Zedmed Cloud so if the Tyro Eftpos option in the receipts form is not available, you only need to close and reopen the Quickpay> Receipt screen after a short pause. You no longer have to restart Office.

See all [Zedmed v36 release notes](#)