

What's New at Zanda:

2025 Mid-Year Update



Damien

Zanda Co-Founder &
Head of Customer Success



Claire

Zanda Product Engagement
& Insights Manager

Introductions

Meet your speakers!



Damien

Zanda Co-Founder &
Head of Customer Success

- + Registered psychologist
- + Co-founder of psychology group private practice



Claire

Zanda Product Engagement &
Insights Manager

- + 11 years with Zanda
- + Past roles include: Customer Success, Data Imports, Product Owner

What We'll Be Covering Today

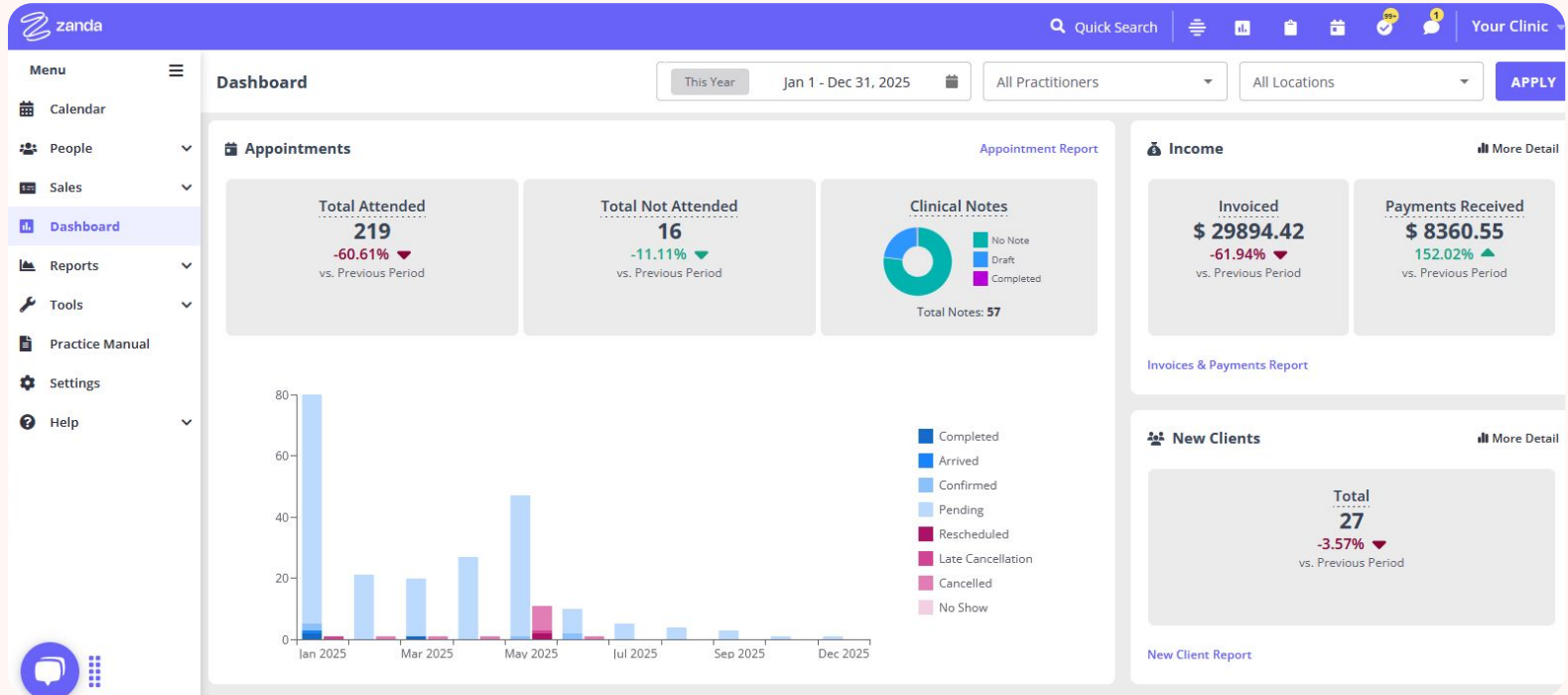


- 1 Major Releases
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- 3 Upcoming Releases
- 4 Zanda Ideas Board

Major Releases

MAJOR RELEASES

Practice Dashboard



MAJOR RELEASES

BizzyAI: Scribe

The screenshot displays the BizzyAI Scribe interface. On the left is a sidebar menu for 'Julie Bell (747) Client' with options for Profile, Appointments, Billing, Records, Notes (selected), Files, Correspondence, Forms, Diagnoses, Communication, and Admin. The main 'Edit' window shows a recording session for '16/6/2025' using a 'SOAP' template. A recording progress bar is visible with a 'Recording 00:01:14' indicator and a 'FINISH & UPDATE NOTE' button. Below the recording area, there is a 'SOAP' section with a toggle for 'Informed consent for recording obtained' which is currently turned on. A 'Context Notes' section contains the text: 'Client first name is Julie, a 39 year old Female with the pronouns she/her.'

The screenshot shows the 'AI Settings' dialog box. It is titled 'Configure your note style preferences'. Below the title is a text block: 'Tell BizzyAI how you would like your notes to be written (e.g. format, length, abbreviations etc.). Bizzy will use these rules for formatting your note output. You can always modify this later by opening AI Settings in the note.' There are two columns of radio button options: 'I prefer the note to be formatted in:' with 'Paragraphs' selected and 'List (Bullet Points)' unselected; and 'I prefer the note level of detail to be:' with 'Detailed' unselected and 'Concise' selected. A 'Learn More' link is located to the right of the second column. Below these options is a 'Custom Preferences' section with a text input field containing 'Use the client name when referring to them in the note'. A 'SAVE PREFERENCES' button is at the bottom right.

MAJOR RELEASES

BizzyAI: Refine



 TRANSCRIBE

 VIEW TRANSCRIPT

 **REFINE**

 AI SETTINGS

→ Make More Detailed

→ Make Less Detailed

→ Add Quotes For Relevant Facts

Tell BizzyAI how you'd like your note updated



AI can make mistakes. Please check for accuracy.

MAJOR RELEASES

Automations

Automation Name:

Automation Type:

Conditions:

Immediately after client created

Days after client created

Days after client created

Client Type

Conditions:

Days before Appointment Date

Appointment Location

Appointment Status

Service

Appointment Flag

Client Status

Practitioner

Client Classifications

MAJOR RELEASES

Shared Profiles

Bell Family (750) Shared

Profile

- Details
- Classifications
- Contacts
- Referrals
- Appointment Reminders
- Tasks
- Appointments
- Billing
- Records
- Communication
- Admin

Profile Details

Shared Profile Name:

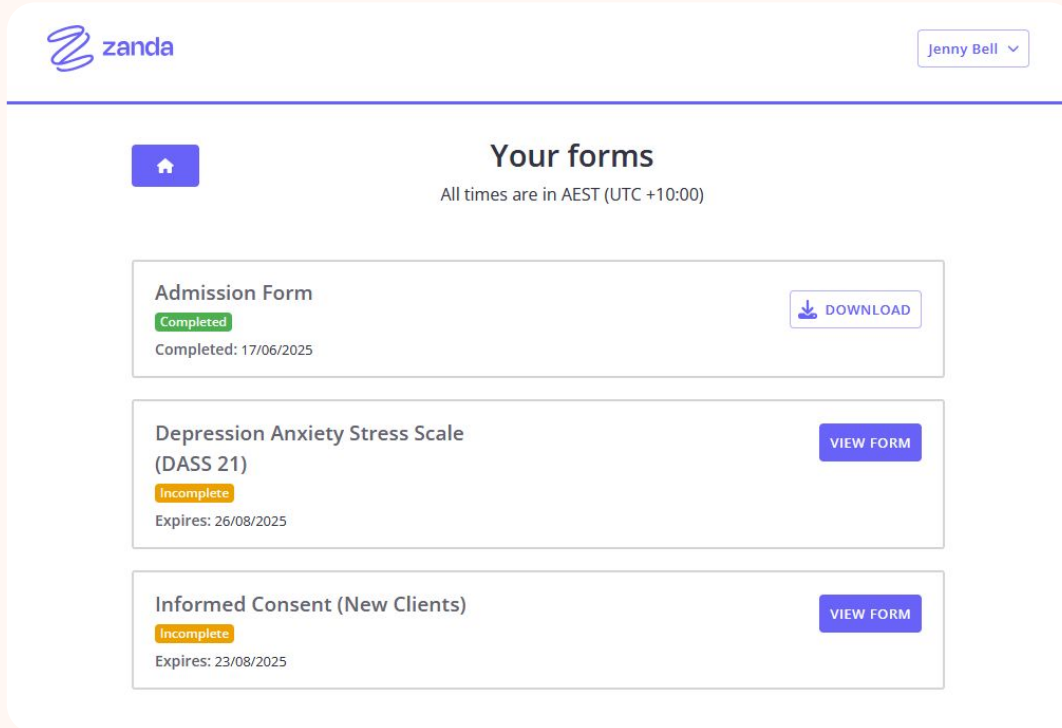
[+ ADD MEMBER](#)

SHARED PROFILE MEMBERS					
NAME	MOBILE	EMAIL	DISCLOSURE	PRIMARY MEMBER	RECEIVES REMINDERS
Jenny Bell			None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Peter Bell			None	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments

[✓ SAVE CHANGES](#)

Portal Forms Page



The screenshot shows the Zanda portal interface. At the top left is the Zanda logo. At the top right is a user profile dropdown menu showing 'Jenny Bell'. Below the header is a section titled 'Your forms' with a home icon on the left and a note that 'All times are in AEST (UTC +10:00)'. There are three form cards listed below:

- Admission Form**: Status is 'Completed' (green tag), completed on 17/06/2025. A 'DOWNLOAD' button is present.
- Depression Anxiety Stress Scale (DASS 21)**: Status is 'Incomplete' (orange tag), expires on 26/08/2025. A 'VIEW FORM' button is present.
- Informed Consent (New Clients)**: Status is 'Incomplete' (orange tag), expires on 23/08/2025. A 'VIEW FORM' button is present.

MAJOR RELEASES

Updated Portal Settings

Access and Settings ?

✔ Your Client Portal is enabled for clients. To view what is available see Portal Access under Access and Settings.

PORTAL ACCESS

Accept Online Bookings ? Show Invoices Page ? Show Forms Page ? Show Upcoming Appointments ?

Your Client Portal Link <https://clientportal.zandahealth.com/clientportal/yourclinic> [COPY LINK](#)
Copy and send this link to your clients so they can access the client portal.
[Learn more about integrating it with your website and social media.](#)

Portal Url Name

GENERAL SETTINGS

Allow New Clients to Register ? Client Verification Method ?

Home Page Instructions For Clients ?

ONLINE BOOKINGS

Clients Can Book With Any Practitioner ? Earliest Time Clients Can Book ?

MAJOR RELEASES

Linking Services & Products to Locations

EDIT SERVICE

Name:	<input type="text" value="Initial Consultation via Telehealth"/>
Item Number / Code:	<input type="text" value="589265"/>
<small>For Insurance claiming, list the Item Number or Code here</small>	
Description:	<input type="text" value="Telehealth consult for new clients"/>
Duration:	<input type="text" value="50"/>
Tax:	<input type="text" value="Tax Exempt"/>
Category:	<input type="text" value="No Category Selected"/>
Cost:	<input type="text"/>
Price:	<input type="text" value="150.00"/>
Portal Deposit:	<input type="text"/>
<small>Stripe must be connected</small>	
Location:	<input type="text" value="Telehealth"/>
<small>Select one or more locations or leave blank for all locations</small>	
Active:	<input checked="" type="checkbox"/>

MAJOR RELEASES

Zoom Telehealth

Start a Telehealth Session

You are using an integrated (BYO) Zoom account. Sessions will be licensed according to the terms of your integrated Zoom account.

 All sessions are secure and encrypted

Your appointment with **Julie Bell** is booked for **17 Jun 25** at **12:30 pm**

START IN BROWSER

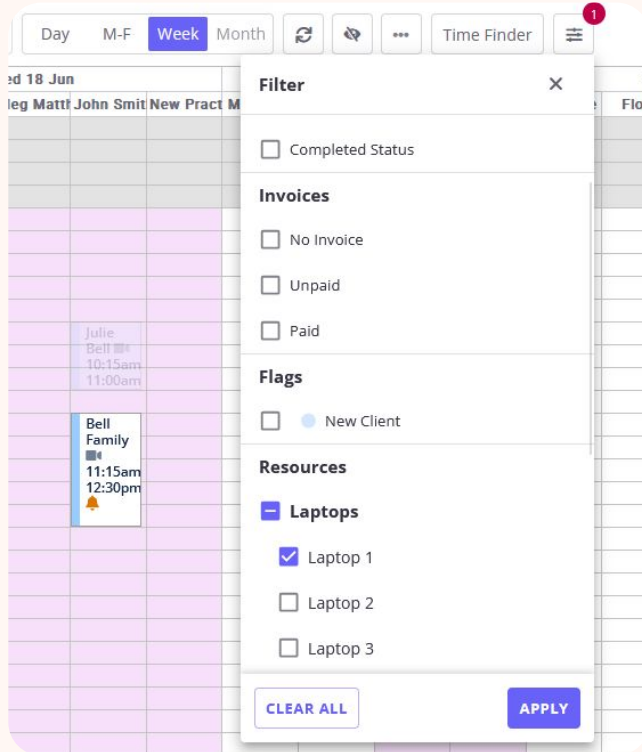
START WITH APP

Test your internet connection, video and audio by joining a test meeting.

START A TEST MEETING

Minor Releases & Updates

Filter Appointment by Resources



De-Identify Client Details in Google Sync

Mary Lee

- Details
- Settings
- Insurers
- Calendar Sync** ^
- Google Calendar**
- Outlook Calendar
- Online Payments
- Zoom BYO Integration
- Available Services
- Availability

Google Calendar Sync ⓘ

Connect to Google and manage the synchronisation of appointments between Zanda and Google.

- TEST CONNECTION TO GOOGLE** Test your stored Google Calendar Api authentication details.
- GET CHANGES FROM GOOGLE CALENDAR** Retrieves new appointments and changes from your Google Calendar
- DELETE CALENDAR IN GOOGLE** Permanently delete this calendar in your Google Account. It will not delete anything in Zanda
- REVOKE CALENDAR CREDENTIALS** This will remove the Google Calendar Api authentication details we use to background sync to Google. It will not delete the Calendar in Google and you will be able to reconnect.

De-identify client details sent to Google Calendar
Last updated: 17/06/2025 16:02:21

✔ Google Calendar setting to de-identify client details toggled ON ✕

New User Permissions

- ✓ Access all Referrer and Third Party Profiles
- ✓ Access Log File
- ✓ Access Financial/Client Reports
- ✓ View all Users Notes
- ✓ Can Change Assigned Practitioners for all Clients

MINOR RELEASES & UPDATES

Linked Accounts

Linked Zanda Accounts Quick Tips

↻ Change Account View Details ^

Select Another Account to Access

Account Name
Your Clinic

➔ Request Access to a Different Zanda Account View Details ^

Use this section to request access to a different Zanda account

- Generate a request code to share with account you want to request access to.
- Share the code with the account holder for them to allow access.
- The code remains valid for 72 hours.
- Once access is granted, use the Change Account drop-list above to change into the account you need to access.

[➔\] GENERATE REQUEST CODE](#)

🔑 Allow Access to this Zanda Account View Details ^

Use this section to grant another Zanda account access to switch into to your account.

Step 1 - Validate the code provided

- Enter and validate the code provided to you by the account that you are granting access to.

Access Code

Enter Code [VALIDATE CODE](#)

Step 2 - Grant access

- Select the user that the linked account will use when accessing your account.
- The permissions set for the selected user in your account will apply for any users accessing your account from the linked account.
- Granted access can be viewed and revoked in the "Accounts with Access" section below.

User Account

Select a User [GRANT ACCESS](#)

US Claiming

Menu

- Calendar
- People
- Sales**
 - New Sale
 - New Payment
 - Invoices
 - Insurance**
 - Claims
 - Claim Payments
 - Eligibility**
 - Payments

Insurance Eligibility Check

Upcoming Appointments: Next 7 Days

CHOOSE COLUMNS **+ RUN CHECK FOR SELECTED CLIENTS**

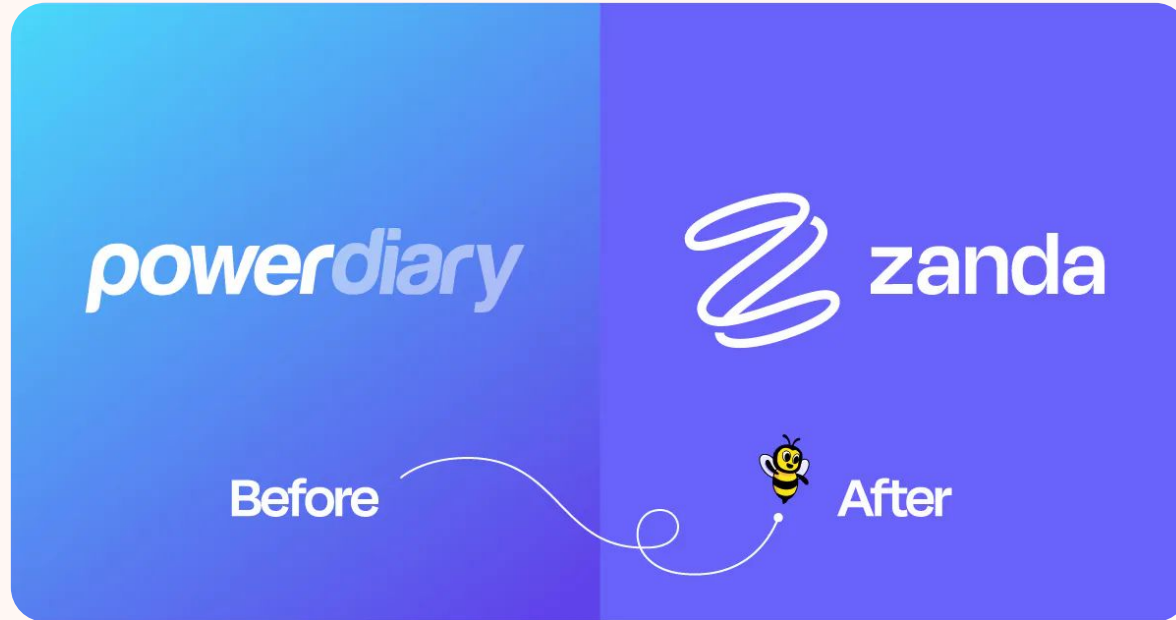
Drag a column and drop it here to group by that column

<input checked="" type="checkbox"/>	Client	Appointment	Insurer	Insurance Type	Effective Dates	Last C...	Eligibility Service	Respon...	Acti...
<input checked="" type="checkbox"/>	Jose Luis Lopez	18/06/2025, 21:0...	TEST T...	TRICARE	19/05/2025	17/06/...		Unavai...	

Go to page: Show rows: 1-1 of 1

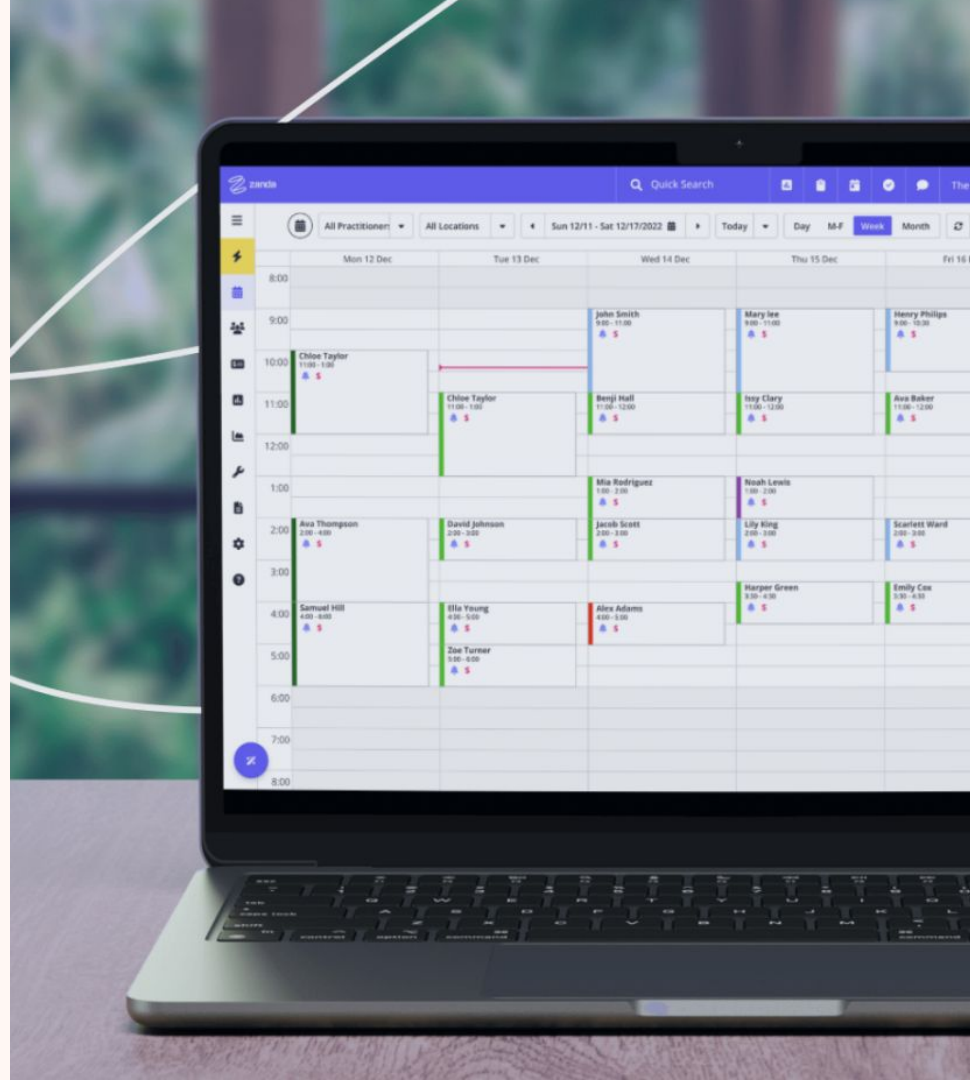
MINOR RELEASES & UPDATES

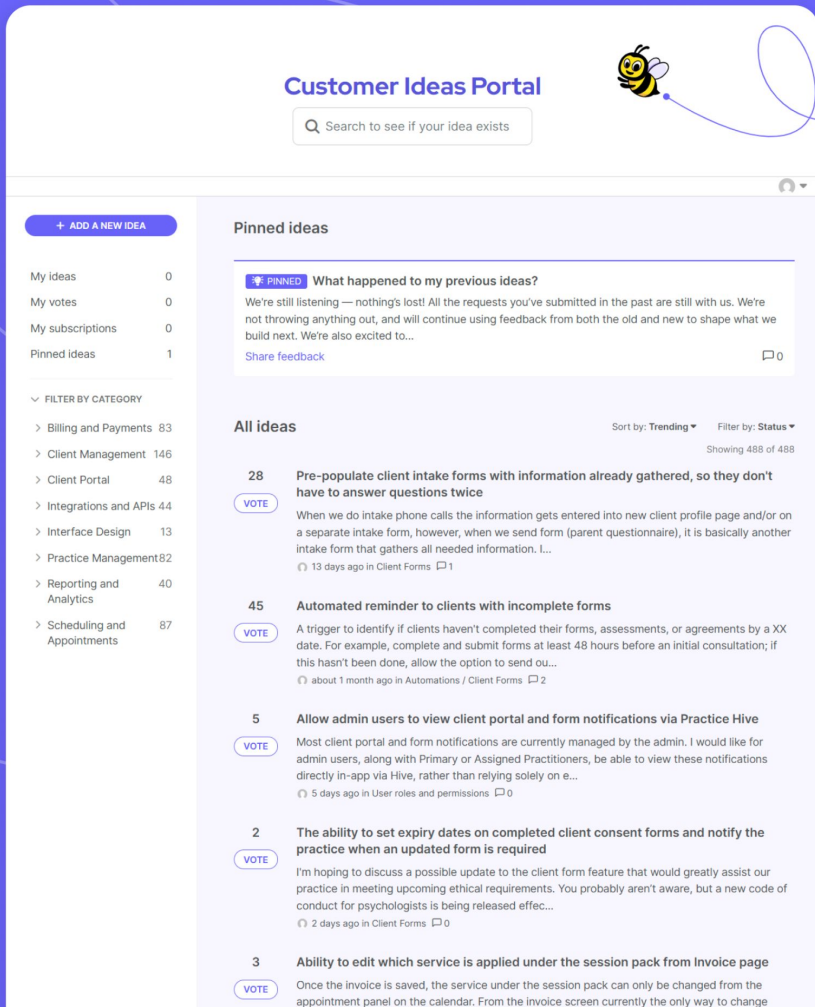
Rebrand & UI Changes



Upcoming Releases

- BlizzyAI: Refine & Insights
- Practice Hive: Team Chat
- ePrescription Integration (AU)
- Configurable Client Portal Branding
- Pass Stripe Processing Fee on to Clients





Zanda Ideas Board

If there are automations you'd like to see, use the **Ideas Board** to share your thoughts and vote on ideas!

To add an idea from your Zanda account: go to **Help > Submit Idea**



For More Information & Resources



Email

Get in touch with us at support@zandahealth.com



Website

Visit us at zandahealth.com for support resources



Support Call

Book a **live call** (video or phone) from our website or directly from your account



Practice Hive

Check out the **Zanda Practice Hive** to stay up-to-date with the latest and upcoming releases



**Thank you
for joining us!**

