Set up Online Appointments

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With a few clicks, patients can create their own appointments from a practice's website using Zedmed's Online Appointments (OLA). The interface can include your practice logo, and allows patients to choose from the doctors, Appointment Types and locations that are made available. How to add this information and enable Online Appointments is explained in this guide.

> **Important**: Zedmed provides links for Online Appointments that are added to your website. We recommend adding OLA to your website after the setup steps have been completed. Once OLA is live, we recommend Testing the setup.
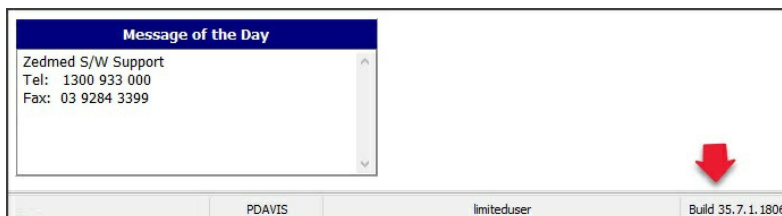
Branch setup

The Branches screen is used to enable Online Appointments for each branch, and to enter the opening hours, phone numbers and fee information that you want to be displayed.

To set up each branch:

1. Check that you are running Zedmed v35.7 or later.

   You can check the version by looking at the bottom of the Zedmed screen.

2. Go to Zedmed's **Management** tab.
3. Select **Practice Setup > Branches.**

   The **Practice Details** screen will open with the **Branches** tab selected.
4. In the **Name** field, select the branch you are setting OLA up for.
5. For each branch, review the following Online Appointments options:

   - **Available Online** - When ticked, the branch will be available for Online Appointments. If it is not ticked, the branch will show in Online Appointments with the status 'Not available'.
   - **Can Cancel Online Appointments** - If you tick this box, patients will be able to cancel their own appointments right up to the appointment's start time.
6. Select the **Online Appointment Details** button.

   The **Online Appointment Details** screen will open. This contains the practice phone numbers, fee information and opening hours, which are added to Online Appointments page as shown in the screenshots below.

   The **Contact Phone Number** should be entered with an area code then the phone number with no spaces. The area code will be removed when displayed on the OLA page.

7. Fill in the **Online Appointment Details** fields.

These changes will take 1 hour to update on the practice website.

Doctor's setup

The Doctor Details screen is used to enable each doctor for Online Appointments and to add information like qualifications, medical interests and languages. Information added to **Medical Interests** and **Language** will become selectable options that the patient can use to filter the doctors shown in Online Appointments - as shown at the top of the OLA screenshot below.

To set up a doctor for Online Appointments:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Doctors > Find Treating Doctors.**

   The **Find Doctor Details** screen will open.
3. Find and open the doctor.
4. If the doctor's schedule is to be made available for Online Appointments, select the **Available Online** tickbox.
5. The following information must be in the Doctor's Details or their appointments will not appear:

   - A valid title.
   - A valid name.
   - A valid Doctor Code.
   - A valid HPI-I number.
6. Under **Clinical Settings,** fill in the **Qualification** section with the information you want to appear in Online Appointments. There should be a comma between each item.
7. Select **Biographic Information** and fill in the **Biographic Details** screen with information about the doctor.

   For **Medical Interests** and **Languages Spoken -** separate each item with a comma, because these items are added to OLA as filters. We recommend monitoring the terms used or providing guidelines to avoid variations of the same interest/language.
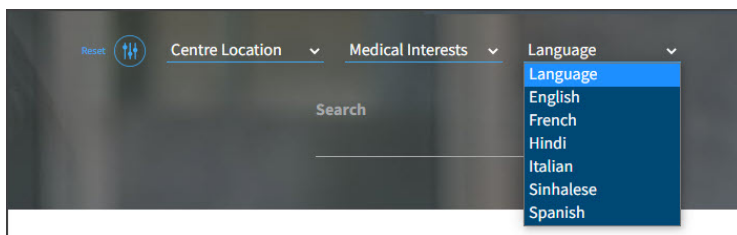
8. Use the **Load Image** button to add a photo, with the following considerations:

   - The photo's height and width must be no larger than 800px.
   - The photo's must be 24-bit (32-bit is not supported).
   - For the best results, use a square photo cropped to the face without the shoulders.
   - To make the required modifications, you may need to use image editing software or a free site like https://www.resizepixel.com/ where you can upload an image, crop it to a square and resize it to 800px.

9. Select **Close** to save your changes.

   This information will appear in the Doctor Details section of Online Appointments as shown in the screenshots below.|

   These changes will take 1 hour to update on the practice website.
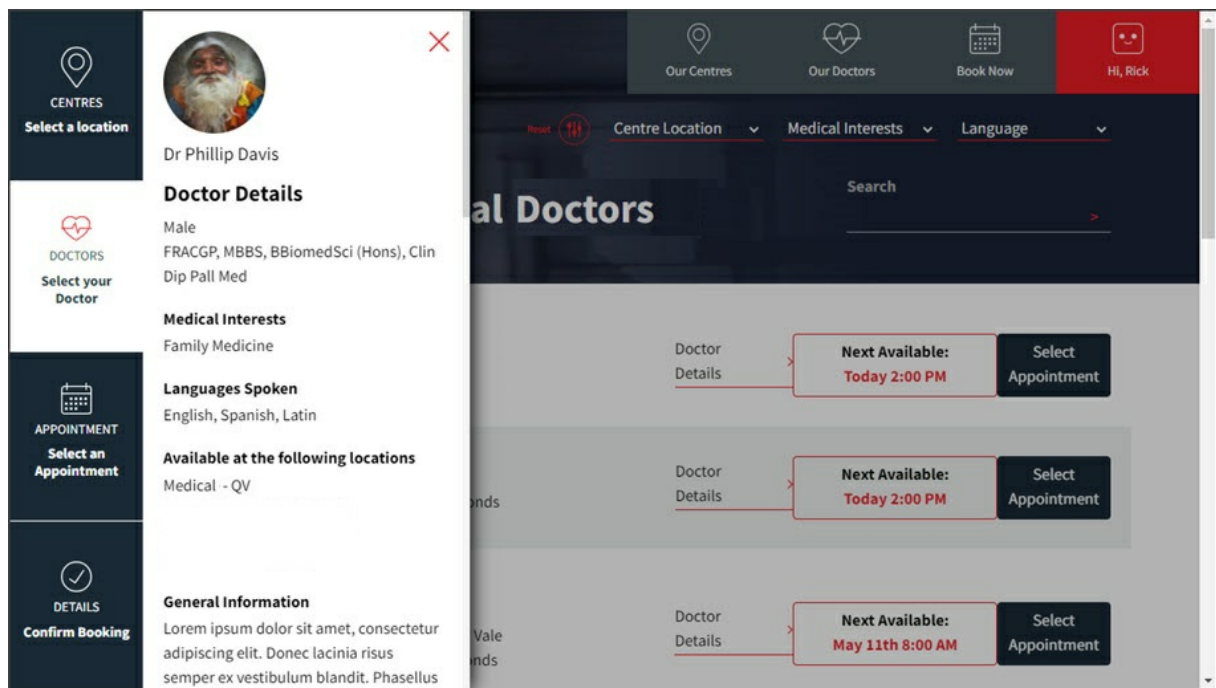
Appointment Types setup

Each Appointment Type needs to be enabled for Online Appointments in Zedmed, and doctors need to be confirmed for each Online Appointment type.

To set up Appointment Types for Online Appointments :

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Appointments** > **Appointment Types**.

   The **Appointment Types** screen will open.
3. In the left-hand pane, select an Appointment Type that is to be available for Online Appointments.

   The Appointment Type will appear in the **Type Name** field.
4. Select **Available Online**.
5. Respond to the prompt asking if you want to make all doctors available:

   - Selecting **Mark as Unavailable** will leave the doctors in the **Available Online** column unticked. You can then manually select the doctors accepting Online Appointments for the selected Appointment Type.
   - Selecting **Mark as Available** will select all doctors in the **Available Online** column.
6. Important - **Initial Consultation** setting.

   Tick **Initial Consultation** to make an Appointment Type available for new patients only. If **Initial Consultation** is not selected, the Appointment Type will only be available to existing patients.

   To make an Appointment Type available for both new and existing patients (e.g a vaccination appointment), create the Appointment Type twice - one with **Initial Consultation** selected and one without it selected.

   > **Important**- Appointment Types in OLA are selected using a drop-down that lists them in the order they appear here. The top Appointment Type is the default, and you can change the appointments' order using the up and down arrows.

7. Select **Close** to save and exit.

Repeat these steps for each Appointment Type.

Schedules setup

The sessions in each doctor's schedule need to be enabled for Online Appointments before they will appear on the website, even if the doctor has been selected in the Appointment Types screen.

Before proceeding, decide if you want to add messages to the appointment slots as messages are applied using the screen where sessions are made available online, so this can save time.

To set up a doctor's schedule for Online Appointments:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Appointments** > **Schedules**.

   The **Set Schedules for Doctor or Resource** screen will open.
3. In the **Doctor** field, select the doctor who is using Online Appointments.
4. In the **Schedules** section, select the schedule entry.
5. In the **Sessions** section, select the day.
6. Select the **Available Online** tick box.
7. **Messages**.

   This option adds a message to a session and that message will be displayed when a patient selects an appointment time during that session. All messages are saved and can be used by other doctors. If you select multiple messages, they will be appended to the same message dialog. See the Using Messages section below for suggestions and examples.

   To add a message to a session:

   a. Select **Messages**.
   b. Tick the box next to a message you want to use - or - select **Add** and create a new message.
8. Repeat all of these steps for each doctor.

   Important: check that all active schedules have been reviewed and the session made available as required.

9. Select **Close** to save and exit the screen being used.


Using Messages

The Schedules section showed how to add a message to a session that will be displayed when a patient selects an appointment time during that session. Messages have a **No** or **Yes** confirmation, so the patient can confirm they understand or accept the message. For example, you could add a message for a payment requirement that the patient will confirm (**Yes**) or reject (**No**).

- Selecting **No, Cancel** take the patient to the previous step
- Selecting **Yes, Continue** will create the appointment.

Example - Messages selected in the schedule
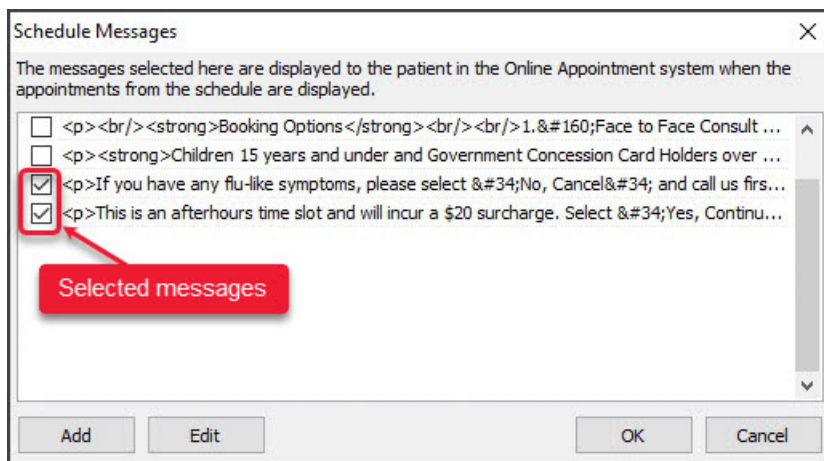
Example - How the selected messages display in OLA
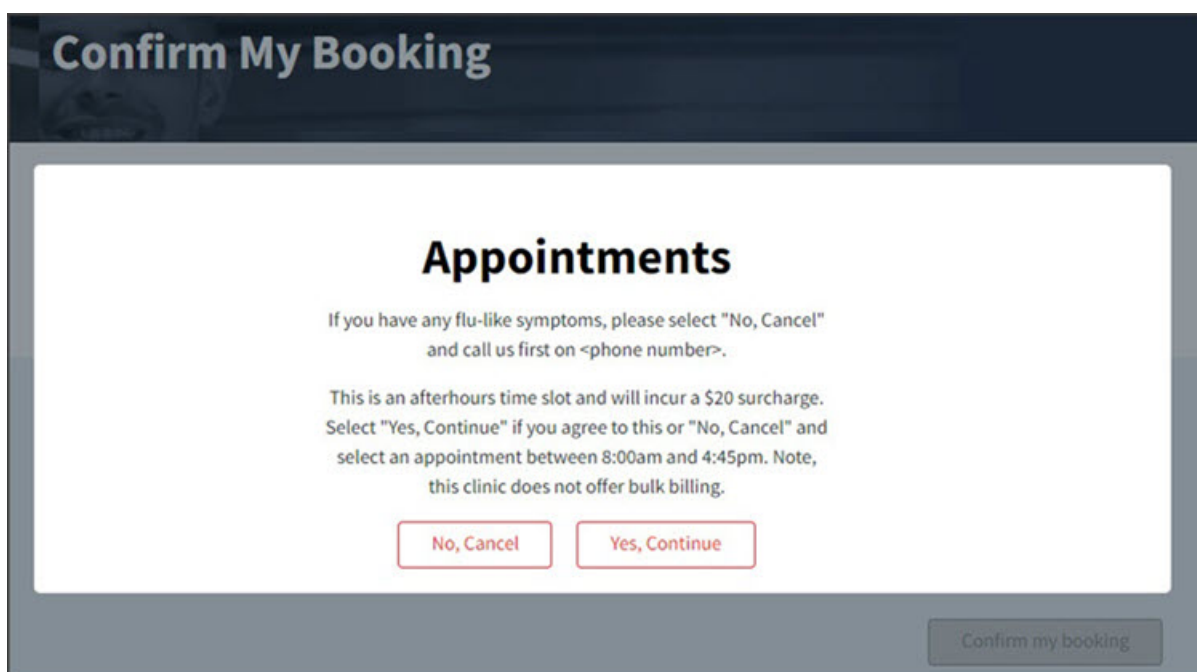
Testing the setup

Once the setup has been completed, it should be tested when Online Appointments is live on your website to make sure it functions as intended. This will also help your understanding of a patient's booking process.

To learn more about using OLA, see our guide for patients.

The recommended checks are:

1. Select **Our Centers** from the top menu and check that each branch/location you set up is there.
2. Select each branch to check their details display (contact number, hours, information).
3. Select **Our Doctors** from the top menu and check all the doctors are there and their photos display properly.
4. Select each doctor's details to make sure they are displayed.
5. Click **Select Appointment** next to each doctor and check they have appointment slots available.
6. Make a test booking. To proceed further you will need to provide some test patient information.
7. Check the booking appears in your Zedmed Appointment book.
8. Reconcile the booking to the patient in Zedmed using the Processing Online Appointments guide.

For the most up-to-date documentation version, visit https://help.zedmed.com.au/help

You only reconcile a patient's booking to their record in Zedmed the first time they make an Online Appointment.