

Set up Online Appointments

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Zedmed's Online Appointments (OLA) allows patients to book their own appointments from a practice's website. The OLA interface will include your practice logo and allows patients to choose from the doctors, Appointment Types and locations that are made available. This guide explains how to add this information and enable Online Appointments.

Quick setup video

When setting up OLA for the first time, we recommend following the quick setup video, which covers the minimum steps required.

We also have the steps in this video as a **quickstart guide**.

Step 1 - Branch setup

Requirements

- Zedmed v35.7 or later. Zedmed v38 or later for document/referral uploads
- An HPI-I number or a Practitioner ID for each participating practitioner.
- Biographic information is also needed for each practitioner, and photos are recommended.

OLA is configured separately for each branch. Ensure that the steps in this section are performed for each branch.

To set up each branch:

1. Select **Practice Setup > Branches**.

The **Practice Details** screen will open with the **Branches** tab selected.

2. In the **Name** field, select the branch you are configuring OLA for.
3. Review the following settings:

a) Available Online

The branch is made available for OLA when this box is ticked. Until then, the branch will show 'Not Available' in OLA.

Do not tick this box until you are ready to go live with OLA. Complete the other steps in this guide first.

b) Can Cancel Online Appointments

If you tick this box, patients can cancel their appointments up to the appointment's start time. Ticking the box applies the cancellation buffer in hours, as configured in the Online appointment Details (shown below).

The screenshot shows the 'Practice Details' form with the following fields and options:

- Practice:** Name: Albany Road Clinic, Code: MED
- Branches:** Branch Type: General, LSPN: [], SCP: []
- Network HPI-O:** [] Search HI Service
- Address:** 343 Albany Road
- Suburb:** SOUTH MELBOURNE, 3205
- Main Business Location
- Phone 1:** 03 5550 3256
- Usual Opening Time:** 08:00, ACIR Clinic Code: []
- Currently Available, Check for Zedmed Updates
- Available Online, Can Cancel Online Appointments
- Use CARL ZEISS Forum
- User Name:** []
- Password:** []
- Buttons:** Add New, Edit Name, Options, Delete, Payment Types, Online Appointment Details (highlighted), Close, Cancel

4. Select the **Online Appointment Details** button.
5. **Referral Upload Email** (Zedmed v38 and later)

Enter an email address to receive documents provided by patients making appointments. To learn more, see [Document Requests](#).

This email address should be monitored and **Referrals** added to the patient's record.

6. **Cancellation buffer**

The optional setting allows you to set a time buffer (in hours) within which the patient cannot cancel or change an Online Appointment. If they try, a message will advise that the appointment cannot be altered. Set the number of hours for the **Cancellation buffer (hours)** in Office, for example, '2'. Requires Zedmed v38.8 or later.

7. **Doctors Name Display** (Zedmed v28 and later)

This optional setting allows you to determine how doctors are ordered in OLA. If this feature is used, it overrides the default order, which is determined by the order of doctors in the Appointment book.

- Use the arrows to move doctors in the **Doctor display sequence**.
- Use the Up/Down arrows to set the order you want doctors to appear in OLA.

Online Appointment Details

Contact Phone Number: 03 44445555
 After Hours Contact Phone Number: 02 66667777
 Referral Upload Email: reception+1@clinic.com.au

Cancellation buffer (hours): 2

Fee Information:
 Private fees -paid at time of appointment.
 Bulk Billing for under 16 Concession Card holders.

Opening Hours

	Opening Time:	Closing Time:
Monday	08:00 am	06:00 pm
Tuesday	08:00 am	06:00 pm
Wednesday	08:00 am	06:00 pm
Thursday	08:00 am	07:00 pm
Friday	08:00 am	07:00 pm
Saturday	09:00 am	01:00 pm
Sunday	09:00 am	12:00 pm
Public Holidays	09:00 am	12:00 pm

Doctor Name Display

Available branch doctors:

- Augustus Eason
- Danni Hatcher
- Gaye Jackson
- Grenville Howell
- Igor Fuller
- Maurice Knox
- Phillip Davis
- WARREN HEDRICK

Doctor display sequence:

- Carley Gimbert
- DANUTA FERNANDEZ
- GRACE HERMAN
- Ethel Boykin
- Ccc Pds Vendor
- Lesley Arthur

Cancel Close

These changes take up to 30 minutes to update on the practice website.

8. Fill in the **Contact numbers, Fee Information and Opening hours.**

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

The screenshot below shows how this information is displayed in OLA.

Branch 3

Centre Details

2 Branch 3 Street
 East Melbourne

Contact Number
[0491 570 00](tel:049157000)

Opening Hours

Monday:	8:00am - 5:00pm
Tuesday:	8:00am - 5:00pm
Wednesday:	8:00am - 5:00pm
Thursday:	8:00am - 5:00pm
Friday:	8:00am - 5:00pm
Saturday:	Closed
Sunday:	Closed
Public Holiday:	Closed

In case of emergency call [000](tel:000)

West [stage] Medical Centre

Clinic Practitioner

Next available: Today 2:45pm (AEDT)

Please call our Reception team on: [0491 570 00](tel:049157000)

Next available: Tomorrow 8:00am (AEDT)

Step 2- Doctor's setup

The Doctor Details screen is where you enable each doctor for Online Appointments and add information about them. **Medical Interests** and **Language** will become selectable options for the patient to filter the doctors shown in Online Appointments.

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. Select the **Available Online** tickbox to make the doctor's schedule available in OLA.

- 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 or a Practitioner ID if the practitioner does not have an HPI-I.
 - Information must be entered in the **Qualification** and **Biographic Information** sections.
- Fill in the **Qualification** section with the information you want to appear in OLA. Use a comma between each item.

The screenshot shows the 'Doctor Details' form with several fields highlighted by red callouts:

- Identity:** Family Name (Davis), Given Names (Phillip), Title (Dr), EHealthID (HPI-I) (8003 6199 0002 6805). A callout points to the EHealthID field with the text 'OR a 'Practitioner ID' (see below)'.
- Practice:** Dr Code (PD), Default Item # (306), Fee type override (Private Fees), Dr Type (empty). Checkboxes for HIC Registered, HIC Online, DVA Registered, and REI Registered are present.
- Branches:** Branch (Albany Road Clinic), Bank List (Banch 2 Bank Account), MA Format (Specialist), Provider # (2121331W), Other Provider # (2121331W), Claiming Locked, Active (checked), Contact Support button.
- Employment:** Erx Entity ID (8P5KG), Invoice Header, Invoice Footer, Another, Provider Type (Psychologist), Booking time buffer (in minutes) (0), Available Online (checked). A green callout points to the Available Online checkbox with the text 'Enables the doctors for Online Appointments'.
- Clinical Settings:** Qualification (FRACGP, MBBS, BBiomedSci (Hons), Clin Dip P), Prescriber No (9877773), Email Address.
- Online Appointment System:** Practitioner ID, Biographic Information, Generate button. A red callout points to the Biographic Information field with the text 'Add information to the Biographic screen'. Another red callout points to the Generate button with the text 'If no HPI-I Generate a Practitioner.'

- Use the **Booking time buffer** field to enter a value in minutes.

This will restrict the available appointments sent to the Online Appointments (OLA) by only allowing appointment slots that begin after (Booking Time + Buffer) and preventing bookings close to the current time. Requires Zedmed v37 and later.

- Select **Biographic Information**

Biographic Details screen.

Medical Interests & Languages Spoken

Enter this information and separate items with commas, because they are used as filters.

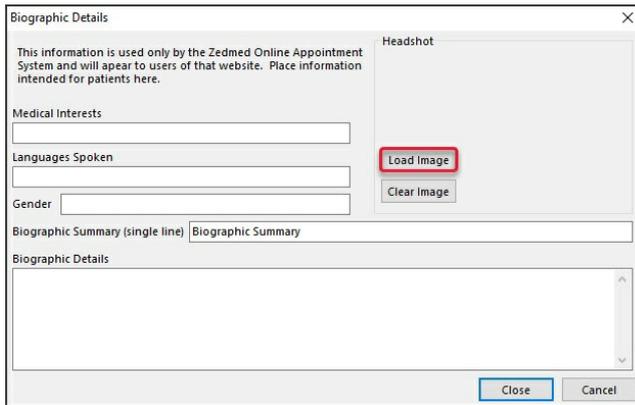
The doctor's profile picture

Use the Load Image button to add a photo of the doctor, with the following considerations:

- The photo's height and width must be no larger than 800px.
- The photos must be 24-bit (32-bit is not supported).
- Use a square photo cropped to the face without the shoulders for the best results.

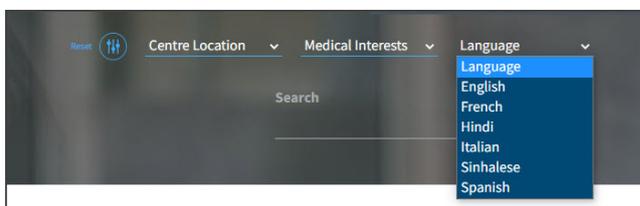
Meeting these requirements may require editing software or a free site like <https://www.resizepixel.com/>

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



We recommend monitoring the terms used or providing guidelines to avoid variations of the same interest/language.

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



Step 3 - Appointment Types setup

Each Appointment Type must be enabled for OLA, and each doctor must be made available for each Appointment Type.

To enable up Appointment Types for OLA:

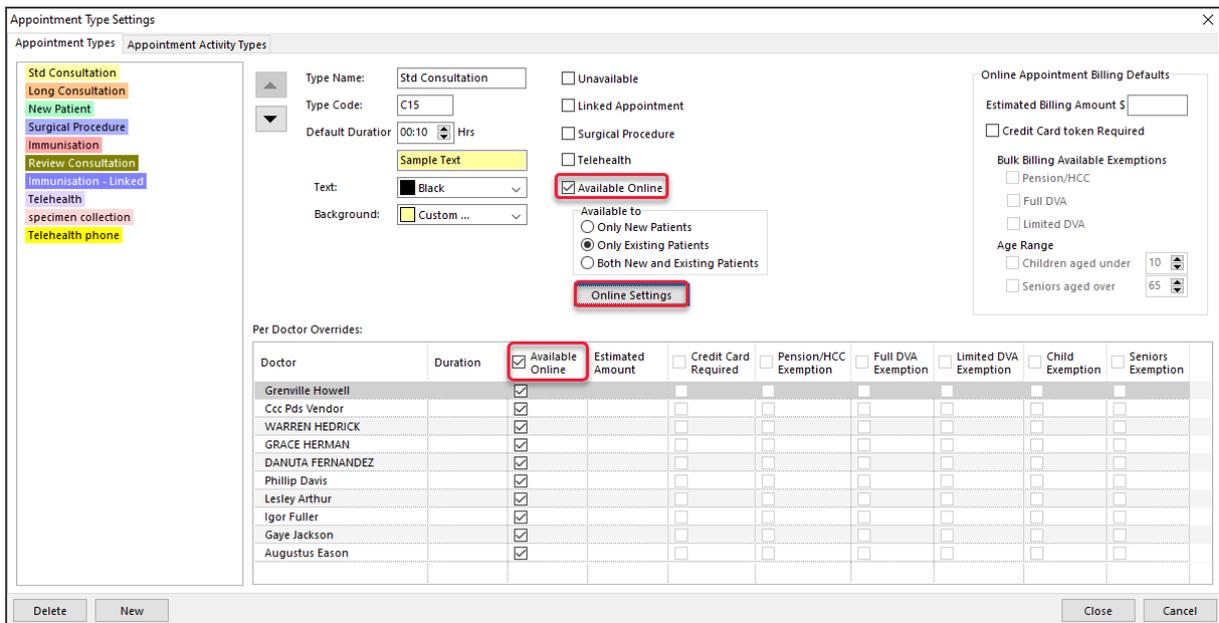
1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Appointments > Appointment Types**.

The **Appointment Types** screen will open.

3. In the left-hand pane, select an Appointment Type to be made available for OLA.

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:
 - o Selecting **Mark as Unavailable** will leave doctors in the **Available Online** column unticked.
You can then manually choose the doctors accepting Online Appointments.
 - o Selecting **Mark as Available** will select all doctors in the **Available Online** column.
6. Under **Available to**, select who can book an Appointment: New or Existing patients or both.



7. Use the up/down arrow to change the order of Appointment Types on the left pane.

Appointment Types in OLA are listed in the order they appear here.

8. Select the **Online Setting** button. (This option requires Zedmed v39 or later).

The Online Settings screen will open.

9. Select **Referral Letter Required** to prompt patients to upload a document for this Appointment Type.

This option presents a 'click here to upload' step that the patient can skip.

10. Review **Provide Directions Link** (ticked by default).

Unticking this option turns off the clinic address and directions displayed when the patient confirms their appointment.

11. **Message overrides** for this Appointment Type.

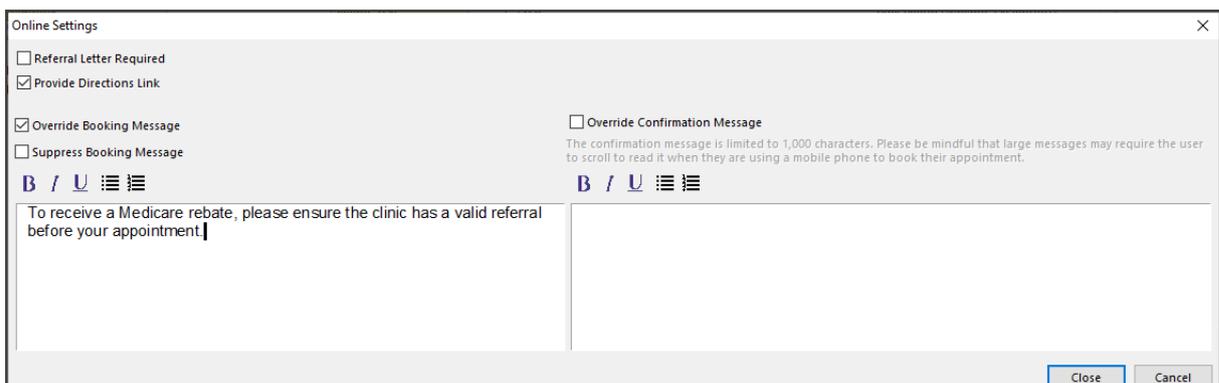
Use the text boxes to display a custom message when the patient makes a booking (left pane) and when they confirm a booking (right pane).

a. **Override booking Message:** Will override all custom messages added by doctors at the session level (for this appt type).

b. **Suppress Booking Message:** Disables any Booking Messages.

c. **Override Confirmation Message:** Replaces the default cooking confirmation message with this custom message. Untick to disable.

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



- Repeat the steps for each **Appointment Type**.
- Select **Close** to save and exit.

Step 4 - Schedules setup

The sessions in each doctor's schedule must be enabled for OLA, even if the doctor has been selected in Appointment Types.

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

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

The **Set Schedules for Doctor or Resource** screen will open.

- In the **Doctor** field, select the doctor who is using Online Appointments.
- In the **Schedules** section, select the schedule entry.
- In the **Sessions** section, select the day.
- Select the **Available Online** tick box.

Set Schedules for Doctor or Resource

Doctor: Jackson, Gaye

Schedules

Start Date	End Date	Cycle (Days)	Branch
29/08/2022	/ /	7	Albany Road Clinic

Sessions

Day #	Day Of Week	Start Time	End Time	Slot Length	Activity Type	Available Online
0	Monday	09:00	12:00	30 Min	Midwife	<input checked="" type="checkbox"/>
1	Tuesday	09:00	12:30	15	Consultation	No
2	Wednesday	09:00	12:30	15	Consultation	No
3	Thursday	09:00	12:30	15	Consultation	No

Any schedule conflicts that arise from changes made will appear as a scrollable list below.

Select the session and tick 'Available Online' for that session. Status will update to 'Yes'.

7. Messages.

This option adds a message to a session, which will be displayed when a patient selects an appointment time during that session.

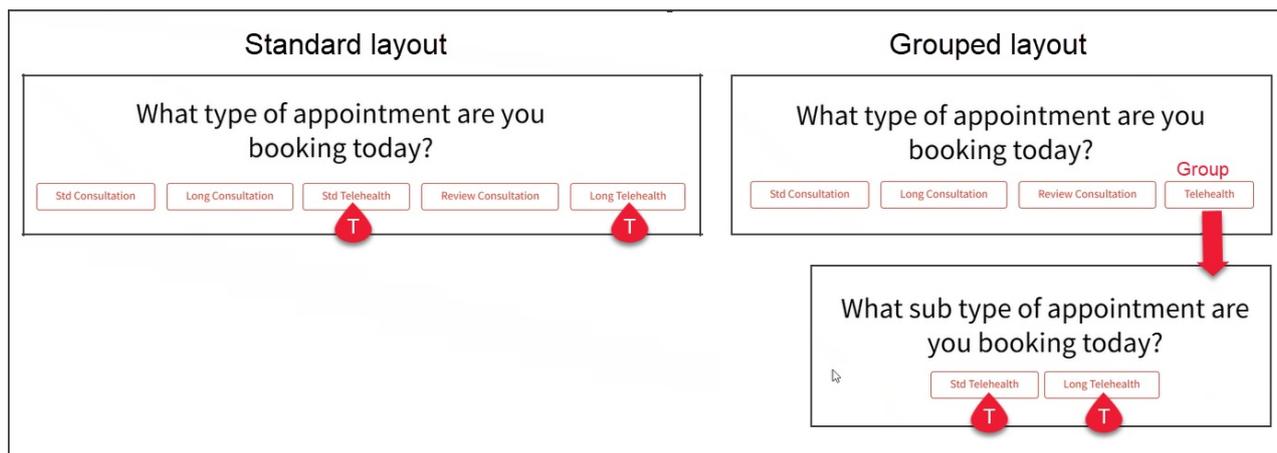
To enable a message, tick the box next to it. To learn more, see [Using Messages](#).

- Important:** check that all active schedules have been reviewed and the session made available as required.
- Repeat all of these steps for each doctor.
- Select **Close** to save and exit.

Optional: Appointment Grouping

If the practice has many Appointment Types, some or all of them can be grouped so the patient chooses an Appointment Category, then an Appointment Type. For example, if there are 2 types of Telehealth Appointments, you could create a group so the patient taps Telehealth, and then selects the specific Appointment Type: Std Telehealth or Long Telehealth. **Note:** this feature requires Zedmed v39 or later.

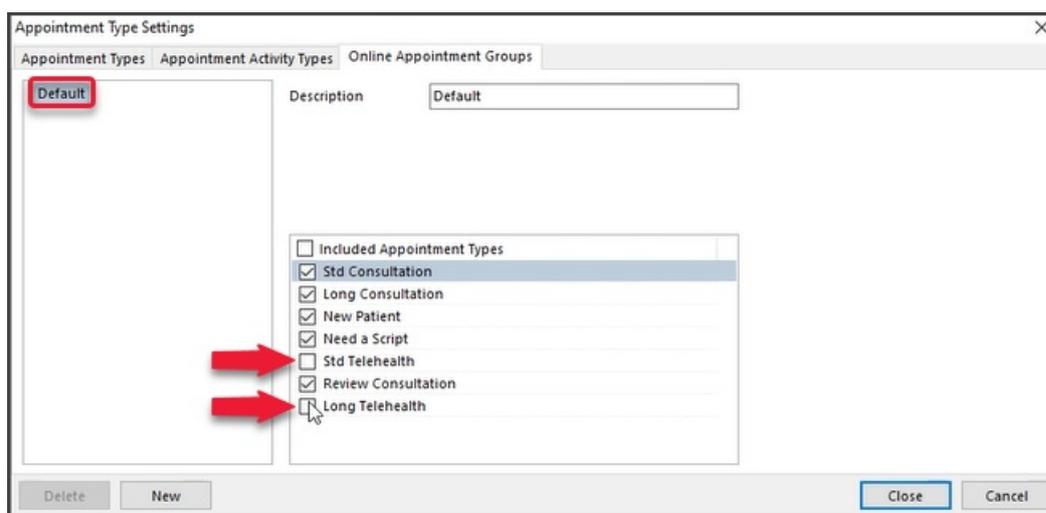
Important: Any groupings in multi-database setups must match exactly across the Zedmed databases.



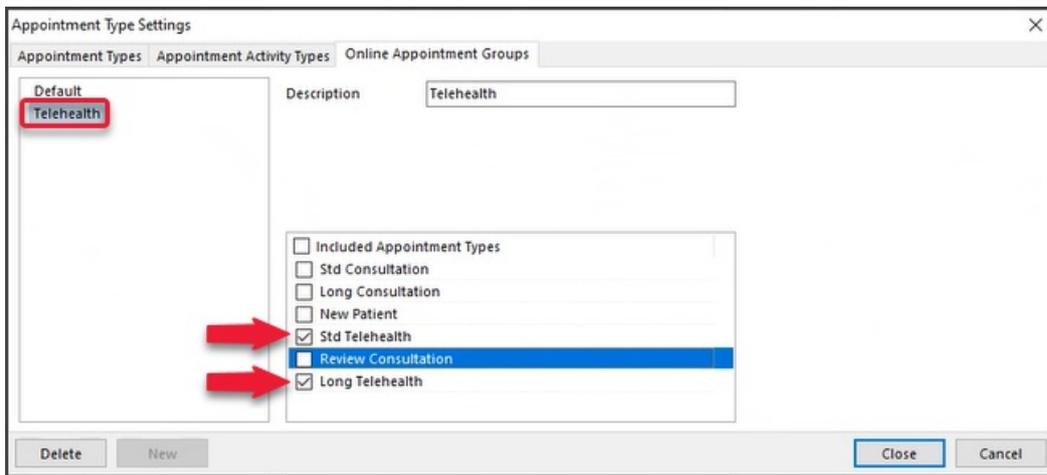
To add an Appointment Group:

1. Open **Appointment Type Settings**.
2. Select the **Online Appointment Groups** tab.
3. Select **Default** - any Appointment Types in here are not grouped.
4. Untick the Appointment Types that you want to group.

If you do not do this, the Appointment Types will appear at the top level and in the group.



5. Select the **New** button.
6. In the **Description**, type in a group name.
7. Tick the 'Appointment Types' to be grouped under this new category.



8. Select **Close** to save and exit.
9. Open your OLA page and check that the changes were made.

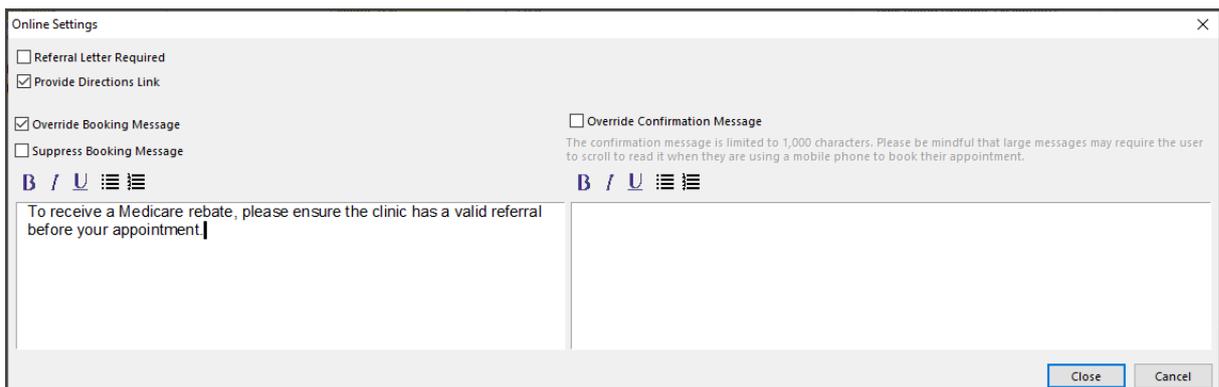
Optional: Booking Messages

Practitioners can add messages that will appear for all bookings. The practice can add messages for specific Appointment Types, which will override any messages defined by a practitioner.

Practice messages for Appointment Types

To add a message to appear for all practice bookings for a specific Appointment Type:

1. Open **Appointment Type Settings**.
2. Select the **Online Settings** button.
3. Tick **Override Booking Message**.
4. Type the text into the field provided.
5. Select **Close** to save.



Practitioner messages for scheduled sessions

Create a set of messages that can be enabled on a per-practitioner-session basis.

Considerations:

- The practice should create a standard set of messages.
- 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.
- There is no character limit, but too much text can push the message beyond a phone's screen size.
- Selectable hyperlinks are not supported.

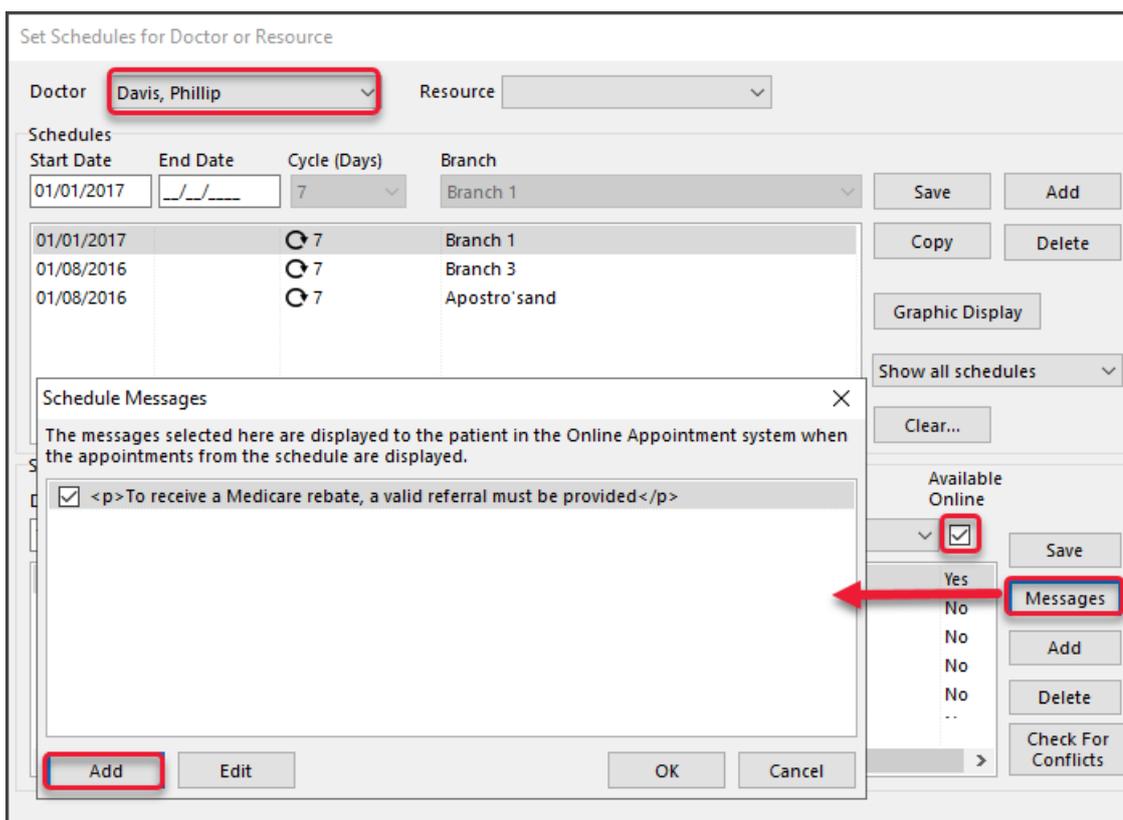
Adding Messages:

1. Select Practice Setup > Appointment > Schedules.
2. Select a doctor.
3. Select the session to add the message to.
4. Select the **Messages** button to open the **Schedule Messages** screen.
5. Select the **Add** button to open the Editor (or **Edit** to update an existing message).
6. Type the message text.
7. Select **Close** to save the message.

You now have a message that can be applied to any doctor's schedule.

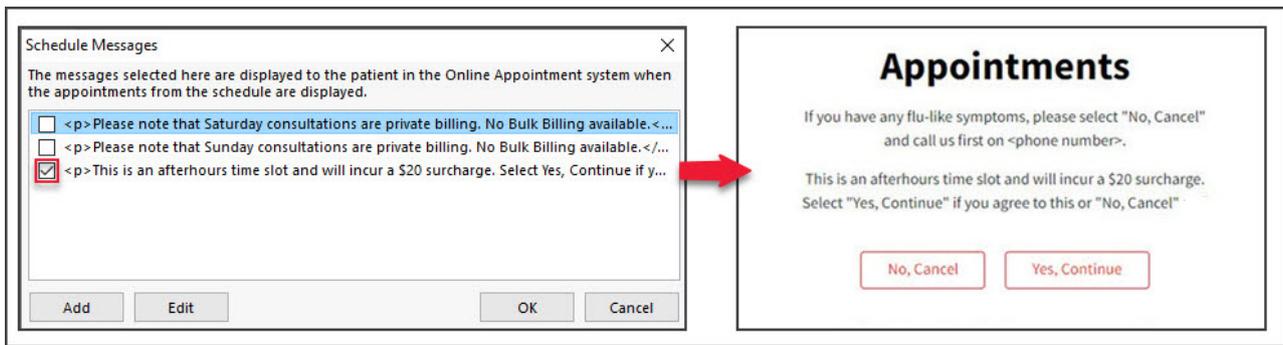
8. Tick the box next to the message to apply it to the selected schedule.
9. To add the message to other schedules:
 - a. Select the schedule.
 - b. Select the **Message** button.
 - c. Tick the box next to the message.
 - d. Repeat for each doctor.

The message will display when a patient selects an appointment during that session.



Patent Responses

- Patients must confirm they understand or accept the message
- Selecting **No, Cancel** takes the patient to the previous step. Selecting **Yes, Continue** will create the appointment



Testing the setup

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

To learn more about using OLA, see our [guide for patients](#).

The recommended checks are:

1. Select each branch to check their details display (contact number, hours, information).
2. Select each doctor's details to make sure they are displayed.
3. Make a test booking. To proceed further, you will need to provide some test patient information.
4. Check the booking appears in your Zedmed Appointment book.
5. Reconcile the booking to the patient in Zedmed using the [Processing Online Appointments guide](#).

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

Blocking specific patients

Practices can block existing patients from booking appointments using OLA.

To enable this feature, open the patient's record and tick the box next to **Block patient from online bookings**.

Requires Zedmed v38.7 or later. Applies to existing patients with OLA accounts that were reconciled to their patient records.

This is what the patient will see in OLA,

Confirm My Booking

There was a problem booking your appointment, please contact the centre

Patient Selection

Please select the patient attending this appointment from the list below, or select "Lookup Patient" and fill in their details.

- Matt
- Matilda
- Chris
- Lookup Patient

Continue



Dr Phillip Davis

FRACGP, MBBS, BBiomedSci (Hons), Clin Dip
Pall Med

Appointment Details

CENTRE: **Medical One - QV**

TYPE: **Std Consultation**

Select New Appointment