

Reconcile new OLA

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Online Appointments (OLA) allow patients to make online bookings, which are added to Zedmed's Appointment Book. This guide explains how to process patients who have made their first online appointment, and need to have their OLA account reconciled with their patient record. This reconciliation only needs to be performed once.

Overview

New Patients

If there is no existing patient record to reconcile the online booking with, it will mean the patient is new and a patient record will need to be created. Reconciliations should always be made where possible, and new patients should only be added when it has been confirmed there is no existing record. If this is not done, you will have duplicate records that will need to be merged.

Identifying Online Appointments

Bookings made via Online Appointments will show in the Zedmed Appointment Book with a <u>cloud icon</u>. If it's the patient's first online booking and their booking has not been reconciled with a patient record, the cloud icon will have a <u>+ symbol</u> on it.

You only have to do the reconciliation once. After the patient's Online Appointment information has been reconciled with their patient record, all subsequent Online Appointments can be processed the same as any other appointment.

0 15 30 683 Roberts, Bob New Patient (11:30 - 11:50)	45		45
15 30 683 Roberts, Bob New Patient (11:30 - 11:50)	0		0
30 683 Roberts, Bob New Patient (11:30 - 11:50)	15		15
	30	683 Roberts, Bob New Patient (11:30 - 11:50)	30
45 683 Roberts, Bob New Patient (11:30 - 11:50)	45	683 Roberts, Bob New Patient (11:30 - 11:50)	45
	30	Roberts, Bob New Patient (11:30 - 11:50) 30	
30 Roberts, Bob New Patient (11:30 - 11:50)	45	Roberts, Bob New Patient (11:30 - 11:50)	

Reconciliation workflows

You can reconcile patients <u>individually</u> from the **Appointment Book** (right-click > Reconcile) or you can reconcile <u>all outstanding</u> patients from the **Online Patient Reconciliation** screen (Utilities tab> Online Patient Reconciliation - or - click on the Notification).

If you expect a lot of initial reconciliations as patients start using Online Appointments, we recommend having staff check for first-time online bookings and reconcile them using the **Online Patient Reconciliation** screen to save time when Attending.

If you try to Attend a first-time online booking without reconciling the, a message will advise they need to be reconciled.

11 AM	0	
	3	Confirm
12 ^{PM}		This patient was added by the online appointment system and is still provisional. You will need to reconcile the patient before they can be attended. Do you wish to reconcile the patient now?
	3	Reconcile Patient Cancel Attendance
1 ^{PM}	0	A Davis, Don Std Consultation (13:00 - 13:30) Image: Consultation (13:00 - 13:30)

Reconciliation mistakes

You cannot reverse the reconciliation of a patient's OLA account with the wrong patient record. For this reason, care should be taken and attention paid to birth dates. If there is any doubt, wait for the patient to arrive before performing the reconciliation.

Important: If an OLA account is reconciled with the wrong patient record:

- Zedmed support should be contacted to reverse the reconciliation.
- Any demographic information that was merged must be manually corrected.
- If clinical information is recorded, you can remove the information on the same day. If it is not the same day, information will need to be commented and, if required, Zedmed can provide assistance.

Reconciling all outstanding patients

Patients' Online Appointment information can be reconciled to their patient records using the **Online Patient Reconciliation** screen, which lists all the patients who have made their first online appointment but have not been reconciled.

The **Online Patient Reconciliation** screen is accessed via Zedmed's **Utilities** tab, and it will also open if you select a yellow **Notifications** message for unreconciled bookings.

To reconcile outstanding patient records:

- 1. Select the Zedmed Utilities tab.
- 2. Select Online Patient Reconciliation.

The Online Patient Reconciliation screen will open, and list all patients that need to be reconciled.

To remove a patient without reconciling them:

a) Select the patient.

- b) Select Delete Patient.
- c) Confirm at the prompt.

If the patient has an appointment, you will be prompted to cancel the appointment before deleting the patient.

Online Patient Reconciliation						×
Name	Date of Bir	Medicare Num	Mobile Phone	Address		
Gilmour, David	21/05/1957		0491577644	123 Test Street Testville 3215		
Jones, Marrianna-Louise	19/05/1967	2298039674	0406991730	6 Jones PI Provisional GOWRIE 2904		
Refresh				Delete Patient	Reconcile Patient	Close

- 3. Select the first patient.
- 4. Select the Reconcile Patient button.

The Reconcile Patient screen will open.

The OLA details provided by the patient are shown in **bold**. All patient records with matching details are listed below them.

5. Look for a matching patient record, and continue with one of the following 3 options:

• If there is a matching patient:

Proceed to step 6 and reconcile to the existing patient record.

• If no matching patients are shown, and it is a NEW patient

Create a new patient record. To do this, leave the Accept <patient name> as a new patient selected and click Next, then Finish. This creates a new patient record using the information provided in the OLA form and ends the workflow.

• If no matching patients are shown, but it is NOT a NEW patient

Select Add another patient and search for the patient. When you select them, they will be added to the list of matching patient records to reconcile, as explained in step 6.

- 6. Select the matching patient as shown in the screenshot below.
 - 1. Check they have the same birth date.
 - 2. Check the other demographics.

If in doubt, do the reconciliation when the patient arrives. Attending them will open the reconciliation screen.

7. Select Next.

0			Online	Patient	Reconciliatio	n	x	
Name		Date of Birth Medi	are Number	Mobile Pho	ne Address			
Atkins	on, Ella	26/06/1964		-	585 Ab	uklea Place BACK CREEK 2484		
Davis,	, Don	09/09/2001			1 Lane	In Alexandra 3138		
Rigano	o, Lydia	01/10/1981			50 Main	Road Townsville 4810		
Simkin	is, Sam	09/10/2009			2 main i	oad Melbourne 3000		
Smith,	, Peter	28/02/1964			7 Jenny	Pde Mount Waverley 3149		
User, Wyat patie thebo	C There were 2 patient records accept Peter Smith as a new p	found with similar details to Pe vatient.	ter Smith. If o	R ne of the lis	Reconcile Pati	ent ter Smith, select that patient, otherwise select New P	atient at the top of the list t	to
	Name	Date of Birl	h Medicar	re Number	Mobile Phone	Address		
	Smith, Peter	28/02/1	964		-	7 Jenny Pde Mount Waverley 3149		
	 Accept Smith, Peter a or reconcile their details with 	s a new patient						
	 Smith, Peter 	28/02/196	4			7 Jenny Pde MOUNT WAVERLEY 3149		
Re	 Smtih, Jane 	15/12/201	0			7 Jenny Parade MOUINT WAVERLEY 3149		
	Add another patient							
						Previous	Next Car	ncel

The Reconcile Patient screen (below) compares the information provided in OLA with the information in the patient's record.

- 8. Use the radio button next to each demographic to select the information that should be included in the reconciled record.
 - Existing Patient will be selected by default with all demographics selections below it.
 - You can select specific items under New Patient to update the Existing Patient record. E.g. to change the address.
 - New Patient is used to easily select all the new information and apply it to the record. It <u>does not</u> create a new patient.
- 9. Select Next.

0		Online	Patient Reco	onciliation		x	
Name	Date of Birth	Medicare Number	Mobile Phone	Address			
Atkinson, Ella	26/06/1964			585 Abuklea Place BA	ACK CREEK 2484		
Davis, Don	09/09/2001			1 Lane Ln Alexandra	3138		
Rigano, Lydia	01/10/1981			50 Main Road Towns	sville 4810		
Simkins, Sam	09/10/2009			2 main road Melbourn	ne 3000		
Smith, Peter	28/02/1964			7 Jenny Pde Mount V	Vaverley 3149		
User, Wyat			Reco	ncile Patient			x
patie Please select any values th	at you would like to keep fr	om the online regist	tration. Click on th	ne Previous button to selec	ct a different patient if required.		
uiebt	O New	Patient			Existing Patient		
Full Name	🔘 Smi	th, Peter			 Smith, Peter 		
Date of Birth	○ 28/	02/1964			28/02/1964		
Medicare Number							
Expiry							
IRN							
Mobile Phone	0				۲		
Home Phone							
Address	O 7 Je	enny Pde			I Jenny Pde		
Suburb	O Mou	int Waverley			MOUNT WAVERLEY		
Re Postcode	○ 314	9			③ 3149		
					Previous	Next Cano	cel

- 10. Confirm the information and select Finish.
 - The patient will disappear from the Online Patient Reconciliation screen.
 - Any updates to the patient's record will be made.
 - The + symbol will be removed from the Appointment Book entry.

Reception will now be able to Attend the patient.

11. Repeat these steps for the next patient.

Reconciling patients from Appointment Book

If a booking in the Appointment Book has a + symbol on the cloud icon, it's a first-time online appointment and the patient's OLA information must be reconciled to their patient record before they can be attended.

To reconcile a first-time online booking:

1. Right-click the patient's booking and select **Reconcile**.

The Reconcile Patient screen will open.

Online Patient Reconciliation					×
Name	Date of Bir	Medicare Num	Mobile Phone	Address	
Gilmour, David	21/05/1957		0491577644	123 Test Street Testville 3215	
Jones, Marrianna-Louise	19/05/1967	2298039874	0406991730	6 Jones PI Provisional GOWRIE 2904	
Refresh				Delete Patient Recon	cile Patient Close

The OLA details provided by the patient are shown in bold.

All patient records with matching details are listed below them.

- If you want to remove the patient without reconciling, select them and select Delete Patient.
- 2. Look for a matching patient record, and continue with one of the following 3 options:

• If there is a matching patient:

Proceed to step 3 and reconcile to the existing patient record.

• If no matching patients are shown, and it is a NEW patient

Create a new patient record. To do this, leave the **Accept <patient name> as a new patient** selected and click **Next**, then **Finish**. This creates a new patient record using the information provided in the OLA form and ends the workflow.

• If no matching patients are shown, but it is NOT A NEW patient

Select **Add another patient** and search for the patient. When you select them, they will be added to the list of matching patient records to reconcile, as explained in step 3.

- 3. Select the matching patient as shown in the screenshot below.
 - Check they have the same birth date.

4. Select Next.

Area were 11 patient records found with similar details to Max Berg. If one of the listed patients is Max Berg, select that patient, otherwise select New Patient at the top of the list to a max Berg as a new patient. If you know that the there is an existing patient ecord for Max Berg that isn't listed, you can add that patient by clicking on the Add Patient button. Name Date of Birth Medicare Number Mobile Phone Address Berg, Max Date of these patient Medicare Number Mobile Phone Address O Accept Berg, Max as a new patient Iof 11/1978 2950975271 9 Jerry Ava DUNDAS 2117 9 Jerry Ava DUNDAS 2117 O Adams, Adam 05/05/1995 Iof 2950975271 9 Jerry Ava DUNDAS 2117 55 Adams Street Melbourne 3000 Adams, Adam 05/05/1995 Iof 299 I3 lonsdale st melbourne 3000 299 I3 lonsdale st melbourne 3000 Adams, Adam 03/09/1948 4950177891 484 Gerhardt Ct SURFERS PARADISE 4217	×					💋 Reconcile Patient
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Berg, Max16/11/1978Image: Constraint of the constr		Address	Mobile Phone	Medicare Number	Date of Birth	Name
Accept Berg, Max as a new patient or reconcile their details with one of these patients: Berg, Max 16/11/1978 2950975271 9 Jerry Ava DUNDAS 2117 Adams, Adam 05/05/1995 55 Adams Street Melbourne 3000 Agarwal, Peter 01/01/2001 29913 lonsdale st melbourne 3000 Alexander, Brian 03/09/1948 4950177891 484 Gerhardt Cct SURFERS PARADISE 4217	^				16/11/1978	Berg, Max
Adams, Adam 05/05/1995 55 Adams Street Melbourne 3000 Agarwal, Peter 01/01/2001 299 I3 lonsdale st melbourne 3000 Alexander, Brian 03/09/1948 4950177891 484 Gerhardt Cct SURFERS PARADISE 4217		9 Jerry Ava DUNDAS 2117		2950975271	nese patients: 16/11/1978	Accept berg, Max as a new or reconcile their details with one o Berg, Max
Agarwal, Peter 01/01/2001 299 I3 lonsdale st melbourne 3000 Alexander, Brian 03/09/1948 4950177891 484 Gerhardt Cct SURFERS PARADISE 4217		55 Adams Street Melbourne 3000			05/05/1995	🔿 Adams, Adam
O Alexander, Brian 03/09/1948 4950177891 484 Gerhardt Cct SURFERS PARADISE 4217		299 13 lonsdale st melbourne 3000			01/01/2001	O Agarwal, Peter
		484 Gerhardt Cct SURFERS PARADISE 4217		4950177891	03/09/1948	O Alexander, Brian
O Banks, Jayne 15/04/1969 2950216291 774 Dinh Pl WEST RYDE 2114		774 Dinh PI WEST RYDE 2114		2950216291	15/04/1969	🔘 Banks, Jayne
O Barker, Emily 01/06/2011 4950152241 31 Front Street INALA 4077	~	31 Front Street INALA 4077		4950152241	01/06/2011	O Barker, Emily

The **Reconcile Patient** screen (below) compares the information provided in OLA with the information in the patient's record.

- 5. Use the radio button next to each demographic to select the information that should be included in the reconciled record.
 - Existing Patient will be selected by default with all demographics selections below it.
 - You can select specific items under **New Patient** to update the **Existing Patient** record. E.g to change the address.
 - New Patient is used to easily select all the new information and apply it to the record. It <u>does not</u> create a new patient.
- 6. Select Next.

Please select any values that yo	u would like to keep from the online registration. Click on t	he Previous button to select a different patient if required.
	O New Patient	Existing Patient
Full Name	O Berg, Max	Berg, Max
Date of Birth	0 16/11/1978	16/11/1978 16/11/1978
Medicare Number		
Expiry		
IRN		1
Mobile Phone	0	
Home Phone		
Address		9 Jerry Ava
Suburb		O DUNDAS
Postcode		2117

- 7. Confirm the information and select **Finish**.
 - The patient will disappear from the **Online Patient Reconciliation** screen.
 - Any updates to the patient's record will be made.
 - The + symbol will be removed from the Appointment Book entry.

You can now Attend the patient without needing to perform the reconciliation at check-in.