

# OLA document requests

Version: 1.00 | Last Modified on 12/03/2025 8:53 am AEDT

Document uploads are now supported for Online appointments (OLA). Practices can require document uploads for specific Appointment Types based on the patient being New or Existing. Requires Zedmed v38.

## Enable document requirements:

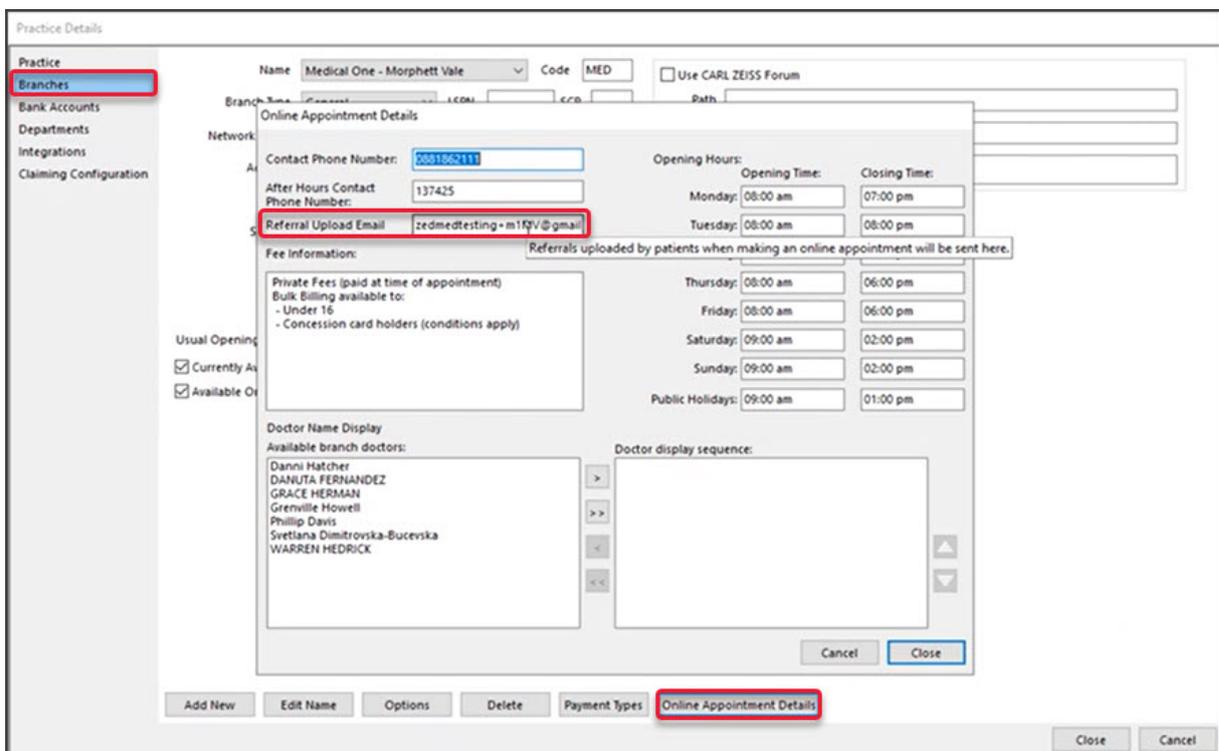
To configure Zedmed:

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

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

3. Select the **Branch** tab.
4. Open **Online Appointment Details**.
5. Enter an email address into the **Referral Upload Email** field.
6. Select **Close** to save the changes.

**Important:** This email address needs to be monitored the **Referral** should be added to the patient's record.



The screenshot shows the 'Practice Details' interface. On the left, a sidebar menu has 'Branches' highlighted. The main area displays 'Practice Details' for 'Medical One - Morphett Vale'. An 'Online Appointment Details' dialog box is open, showing fields for 'Contact Phone Number' (0881062111), 'After Hours Contact Phone Number' (137425), and 'Referral Upload Email' (zedmedtesting+m1@v@gmail.com). The 'Referral Upload Email' field is highlighted with a red box. Below this, there is a 'Fee Information' section and an 'Opening Hours' table. The 'Online Appointment Details' button at the bottom of the dialog is also highlighted with a red box.

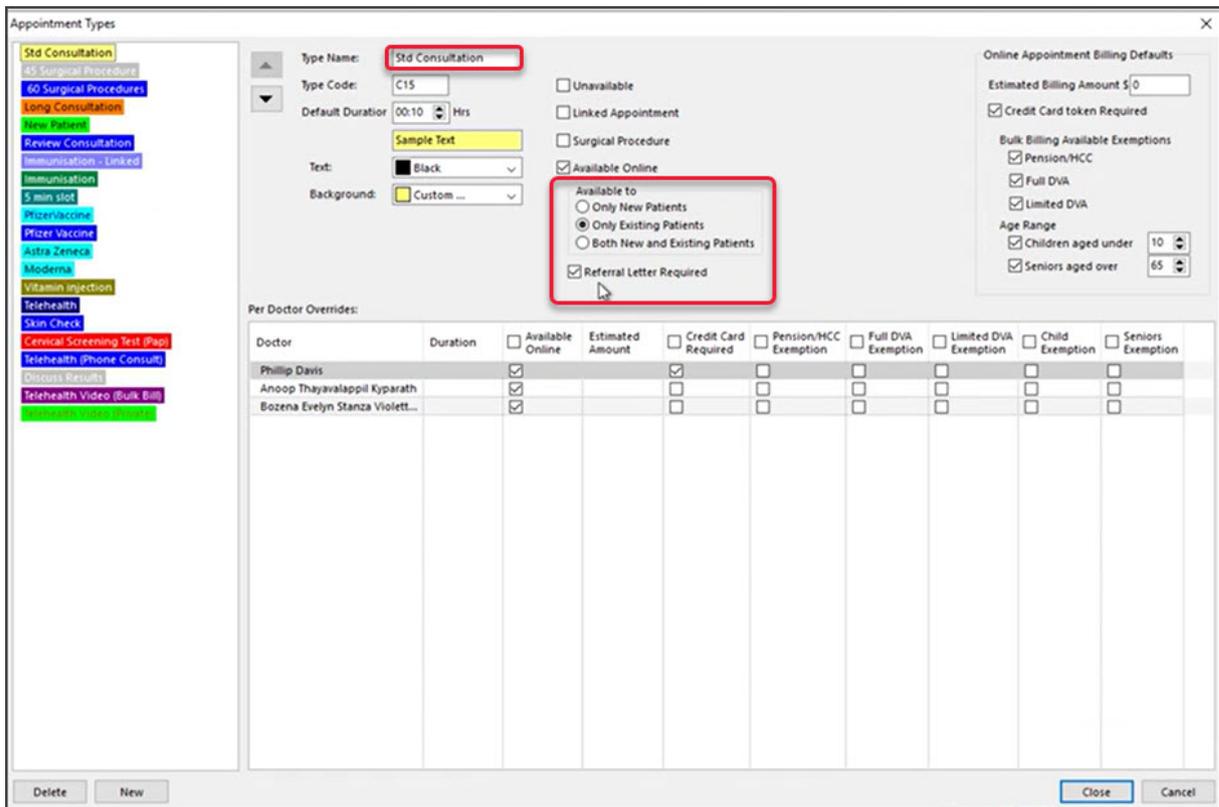
| Day             | Opening Time | Closing Time |
|-----------------|--------------|--------------|
| Monday          | 08:00 am     | 07:00 pm     |
| Tuesday         | 08:00 am     | 08:00 pm     |
| Thursday        | 08:00 am     | 06:00 pm     |
| Friday          | 08:00 am     | 06:00 pm     |
| Saturday        | 09:00 am     | 02:00 pm     |
| Sunday          | 09:00 am     | 02:00 pm     |
| Public Holidays | 09:00 am     | 01:00 pm     |

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

The **Appointment Types** screen will open.

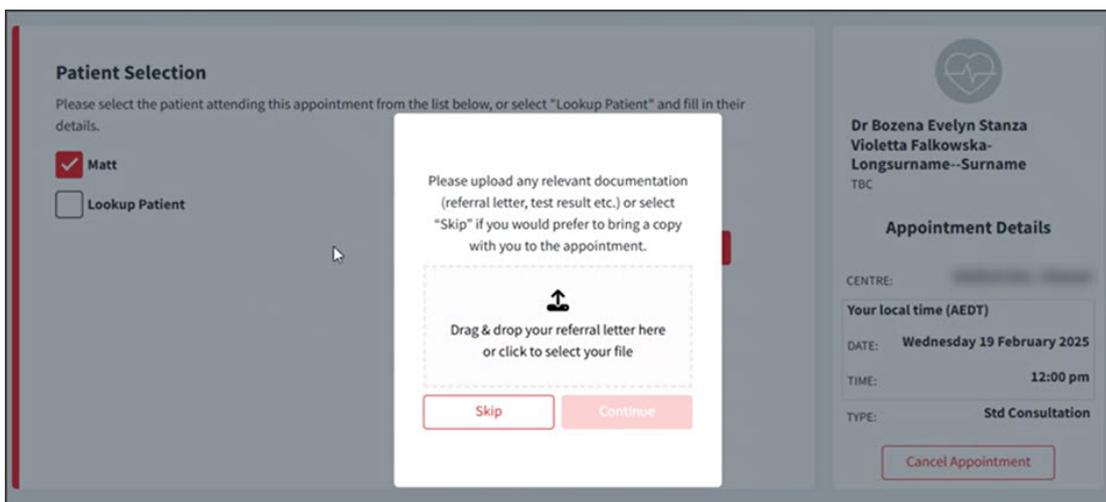
9. Select the **Appointment Type** that requires a document (referral).

10. Tick **Referral Letter Required**.
11. Repeat for each **Appointment Type**.
12. Select **Close**.



The patient provides a document

The patient will be prompted to upload a referral when making an OLA booking.



Selecting **Skip** allows the patient to continue making the appointment without providing a document.

To check if a document was provided, open the **Appointment Details** and check the **Notes**, as shown below.

Appointment Details

Date **Wednesday, 19 February 2025**

Created by **Online Appointments** on 19/02/25 at 10:52

Doctor **Bozena Evelyn Stanza Violetta Fall** **Armstrong, Matt**

Resource

Start Time 12:15 Clinic Medical One - Elwood File N° 1015 Pull File Yes DOB 4/08/1999

Duration 00:10 Status Current First in Last in Type

End Time 12:25 Type **Std Consultation**

Notes

--- Online Appointment Details ---

Referral details:  
Check zedmedtesting+m1EL@gmail.com for patient referral letter.

ePayment details: N/A

--- Online Appointment Details ---

Contact Details

Phone (H) Work (W)

Mobile 0491570158

Address 123 Test Street, Anywhere 3999

Other Details

Expiry MC HCC

Referral

Alerts

Clinical Warnings

Reason for chosen date

Cancellation Waiting Priority

Hide Notes  Allow SMS  Send Confirmation SMS

Account Payers

Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

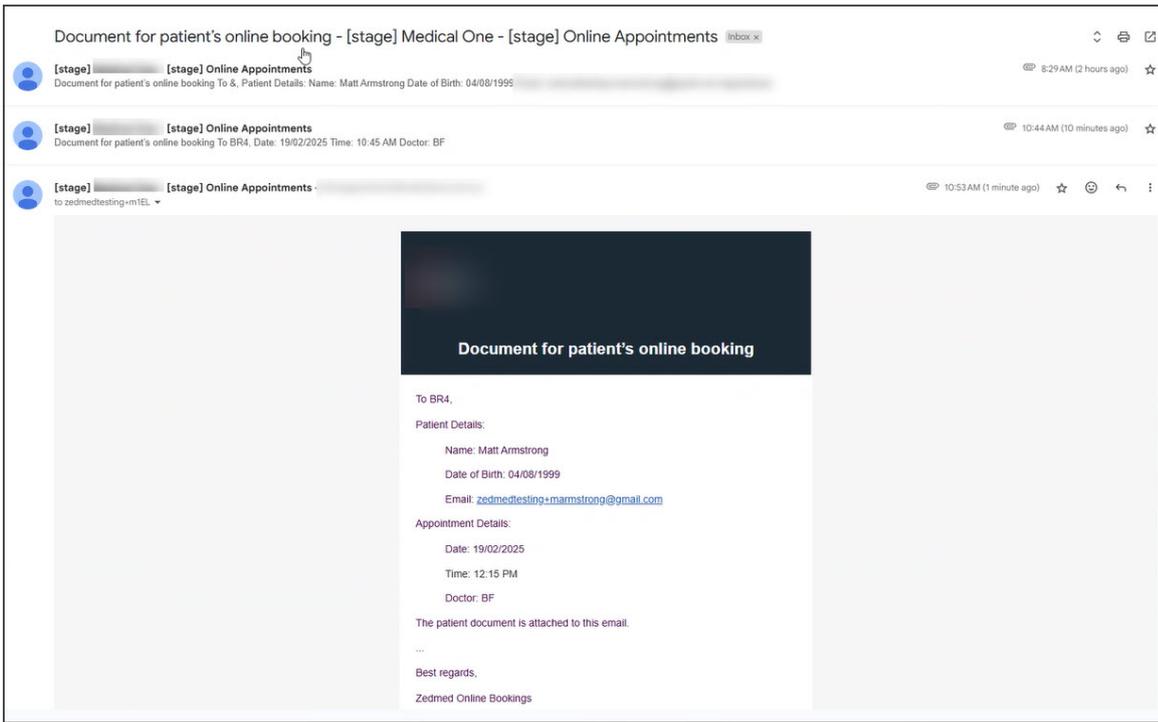
## Practice receives the document

Documents uploaded with OLA bookings are delivered to the email account provided in Step 3 (at the top of this guide).

Monitor incoming emails and action them by **uploading the referral** to the patient's record and **Adding the Referral Information**.

The email body will contain key information about the booking, and the document provided will be attached to the email.

### Email body



## Email attachment

