

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. This guide explains how to add this information and enable Online Appointments.

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**.

Requirements

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

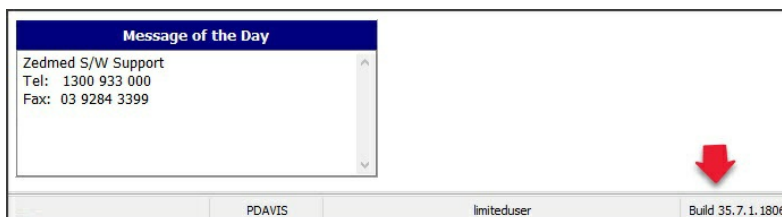
Branch setup

In the Branches screen, you enable Online Appointments for each branch and enter the opening hours, phone numbers and fee information you want to display.

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 up OLA 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 can cancel their own appointments up to the appointment's start time.

6. Select the **Online Appointment Details** button.
7. Fill in the **Online Appointment Details** fields.

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

Practice Details

Practice Name: Branch 1 Code: MED

Branch Type: General LSPN: SCP:

Address: Albert Road

Suburb: SOUTH MELBOURNE 3205

Phone 1: 03 8484 3300

Usual Opening Time: 08:00 ACIR Clinic Code:

Currently Available Check for Zedmed Updates

Available Online Can Cancel Online Appointments

Online Appointment Details

Contact Phone Number: 03 92843300

After Hours Contact Phone Number: 03 92843300

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

Day	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	06:00 pm
Friday	08:00 am	08:00 pm
Saturday	09:00 am	02:00 pm
Sunday	09:00 am	02:00 pm
Public Holidays	08:00 am	01:00 pm

Buttons: Close, Cancel

Medical Centre Details

Centre Name: Main South Road

Contact Number: 8484 3300

Day	Opening Hours
Monday	8:00am - 7:00pm
Tuesday	8:00am - 8:00pm
Wednesday	8:00am - 8:00pm
Thursday	8:00am - 6:00pm
Friday	8:00am - 6:00pm
Saturday	9:00am - 2:00pm
Sunday	9:00am - 2:00pm
Public Holiday	9:00am - 1:00pm

Fee Information:
Private Fees (paid at time of appointment)
Bulk Billing available to:
- Under 16
- Concession card holders (conditions apply)

In case of emergency call 000

Next Available: Please contact centre [Select Appointment]

Next Available: Please contact centre [Select Appointment]

Next Available: Please contact centre [Select Appointment]

Next Available: Please contact centre [Select Appointment]

Doctor's setup

The Doctor Details screen is where you enable each doctor for Online Appointments and add information like qualifications, medical interests and languages. Information added to **Medical Interests** and **Language** will become selectable options for the patient 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 or a Practitioner ID if the practitioner does not have an HPI-I (see Dr Details screenshot below).
 - For the doctor's online appointments to appear, information must be entered into the Biographic section (Step 7).
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.

Doctor Details

Identity
 Family Name: Davis
 Given Names: Phillip
 Title: Mr [Search HI Service]
 EHealthID (HPI-I): 8003 6199 0002 6805
 ABN/Bus. Name: []
 AHPRA Number: MED0000000000

Home Address
 []
 []
 Suburb: []
 []

Phone Numbers
 Home Phone: []
 Home Fax: []
 Mobile Phone: 0422555555 [SMS Appt. Confirmation]

Clinical Settings
 Qualification: FRACGP, MBBS, Clin Dip P
 Prescriber No: 987777
 Email Address: []

Online Appointment System
 Practitioner ID: [] [Biographic Information] [Generate]
 []

Practice
 Dr Code: PD [HIC Registered, HIC Online, DVA Registered, REI Registered]
 Default Item #: []
 Fee type override: [] [Clear]
 Dr Type: Dr Type

Branches
 Branch: Test Branch 1
 Bank List: Albert Road MC Bank Account
 MA Format: General Practitioner
 Provider #: 2408261F [Other Provider #: []]
 Claiming: Claiming Service Unavailable [Delete]
 Erx Entity ID: 8P5KG [Invoice Header, Invoice Footer, Another]
 Provider Type: [] [Available Online]
 Booking time buffer (in minutes): 0

Employment
No Employment Record!
 [Details] [New]

Status
 Available Assist Only External Primary Surgeon Only
 ECLIPSE Fund Schemes Show Code on Appt. Screen
 Text for specialty treatment: []
 Signature Image: []

[Find] [Close] [Cancel]

7. Use the **Qualification** field to enter the practitioner's clinical qualifications.

8. 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.

9. 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.

Biographic Details

This information is used only by the Zedmed Online Appointment System and will appear to users of that website. Place information intended for patients here.

Medical Interests

Languages Spoken

Gender

Biographic Summary (single line) | Biographic Summary

Biographic Details

Headshot

Load Image

Clear Image

Close Cancel

Reset

Centre Location

Medical Interests

Language

Language

English

French

Hindi

Italian

Sinhalese

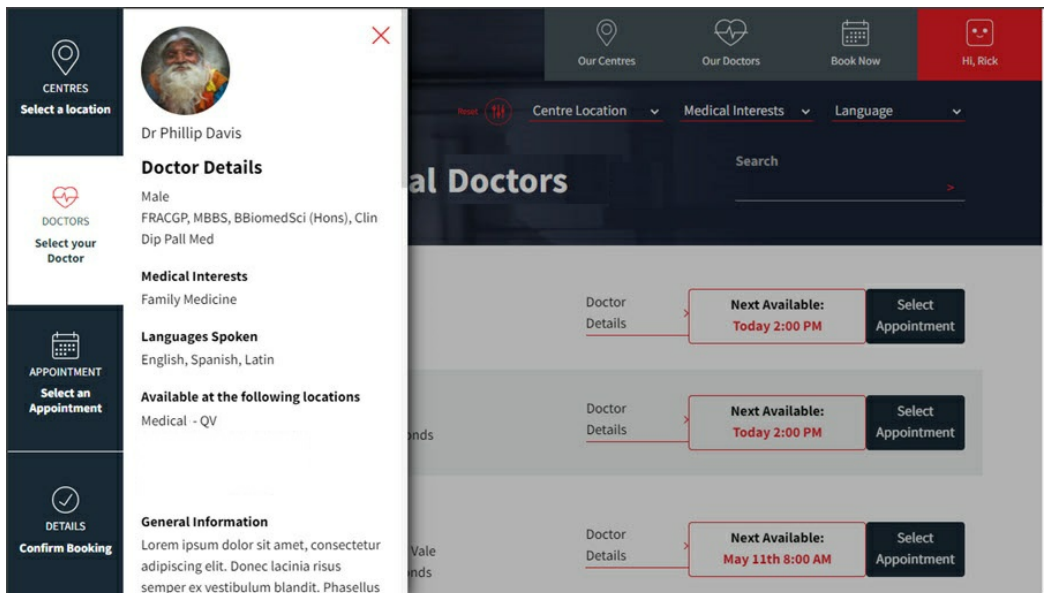
Spanish

Search

10. 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 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.
 - 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.
11. Select **Close** to save your changes.

This information will appear in the Online Appointments > Doctor Details section, 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 must be confirmed for each 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 to be made available for Online Appointments.

The Appointment Type will appear in the **Type Name** field.

4. Select **Available Online**.

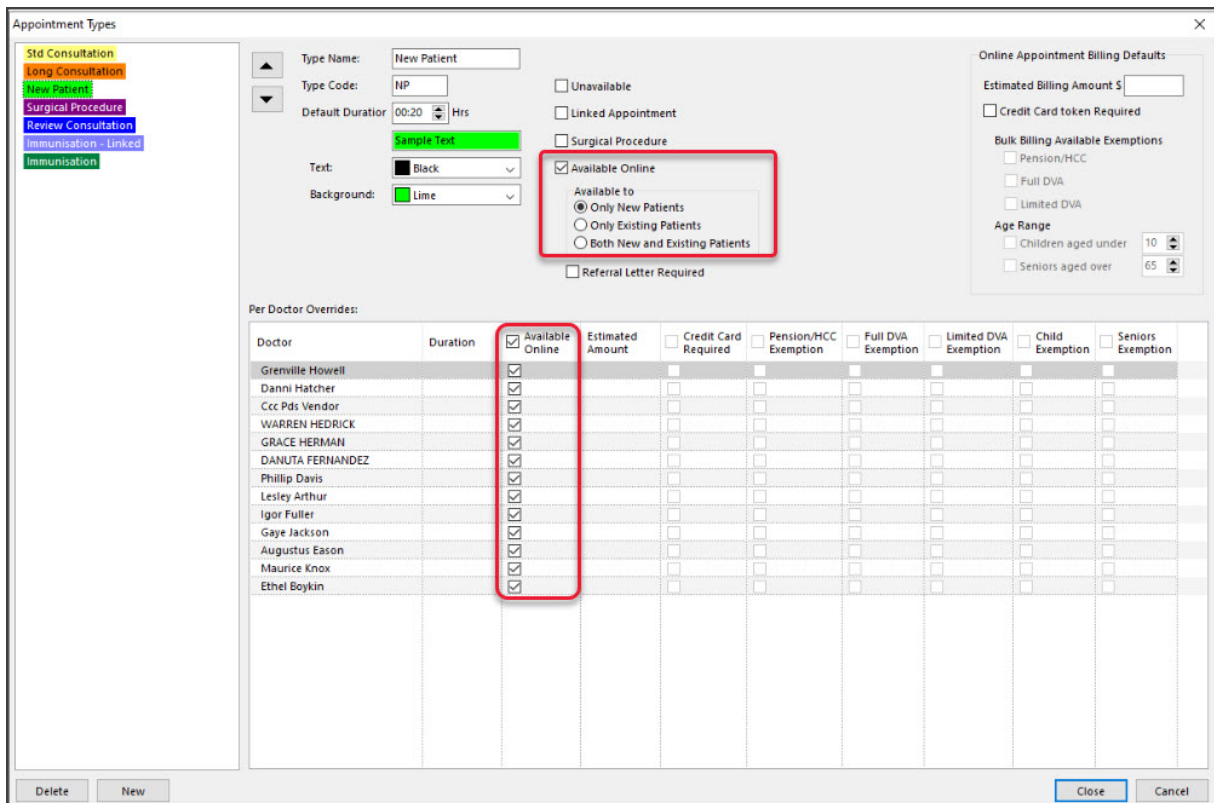
5. Respond to the prompt asking if you want to make all doctors available:

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

6. Set if the selected Appointment type should be available for new or existing patients.

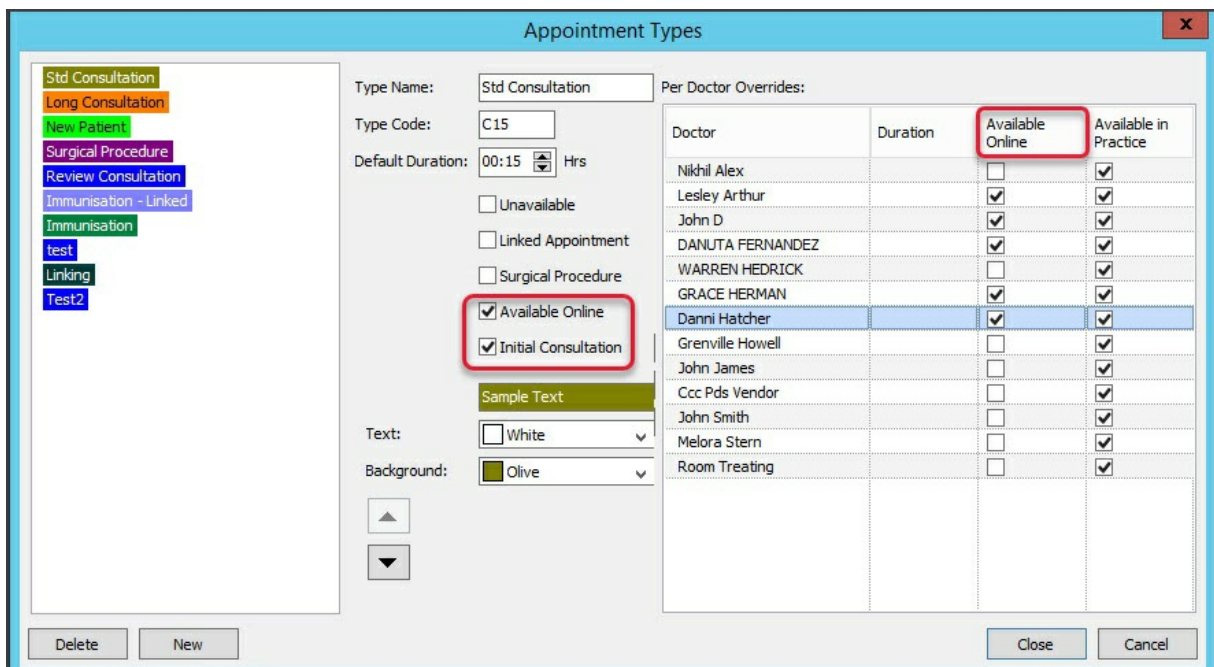
Zedmed v36.9 and later

Under the **Available to** section, select one of the three options to determine who can book the selected Appointment Type: **Only new patients**, **Only existing patients (the default)** or **Both new and existing patients**.



Zedmed v36.8 and earlier

Tick **Initial Consultation** to make the selected 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. Repeat the steps for each **Appointment Type**.
 8. Select **Close** to save and exit.

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 added in the same screen used to make sessions available online.

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**.

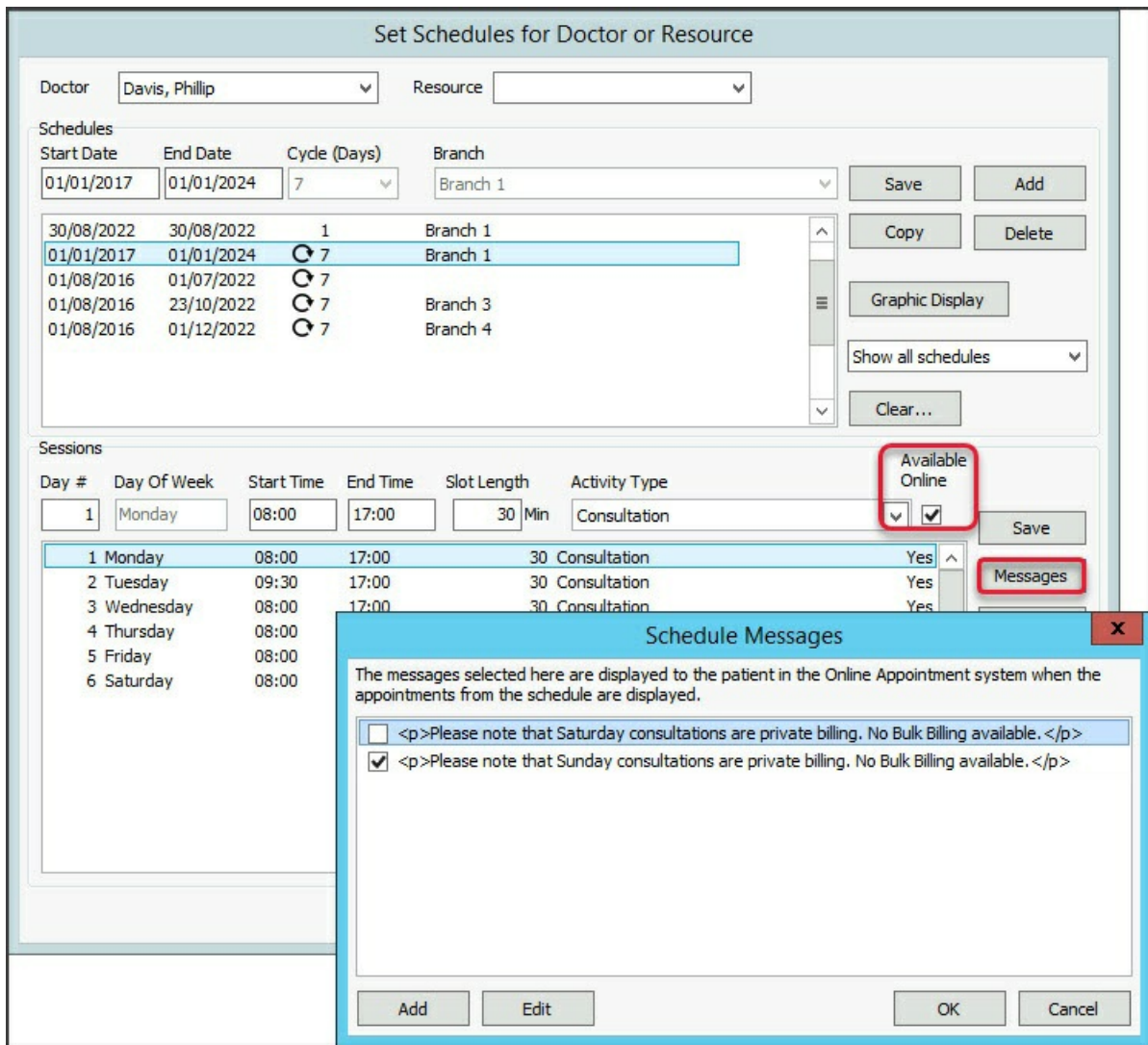
This option adds a message to a session, which will be displayed when a patient selects an appointment time during that session. All messages are saved and can be used by other doctors. If you select multiple messages, they will be appended to the same message dialog. See the [Using Messages section](#)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



Setting the doctor's order

By default, OLA displays doctors in the Appointment book order. In Zedmed v38 and later, you can set the order that doctors appear in OLA.

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Branches**.
3. Select the **Online Appointment Details** button.

The **Online Appointment Details** screen will open.

The **Doctors Name Display** fields show all OLA doctors (left pane) and the **Doctor Display Sequence** (right pane).

4. To set the order that doctors appear in OLA:
 - a. Use the arrows to move doctors in the Doctor display sequence.
 - b. Use the arrows to set the order you want doctors to appear in OLA.
5. Select **Close** to save.

The display change can take up to 30 minutes to be reflected in OLA.

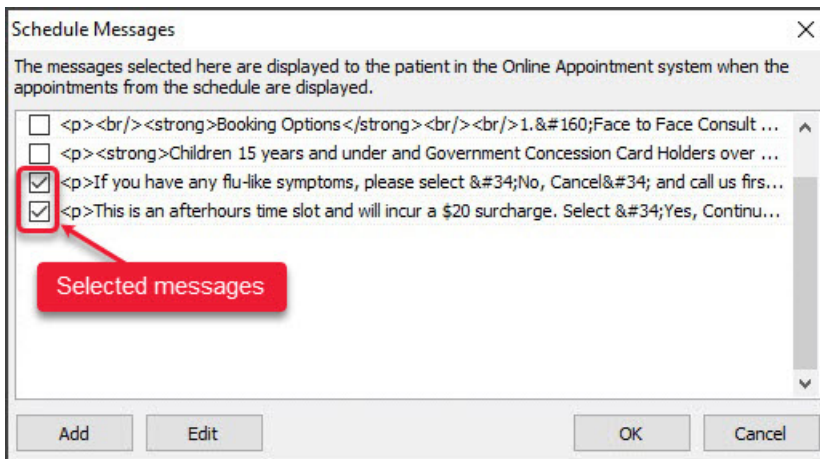
The Doctors in OLA will appear in the order defined in the Doctor display sequence.

Using Messages

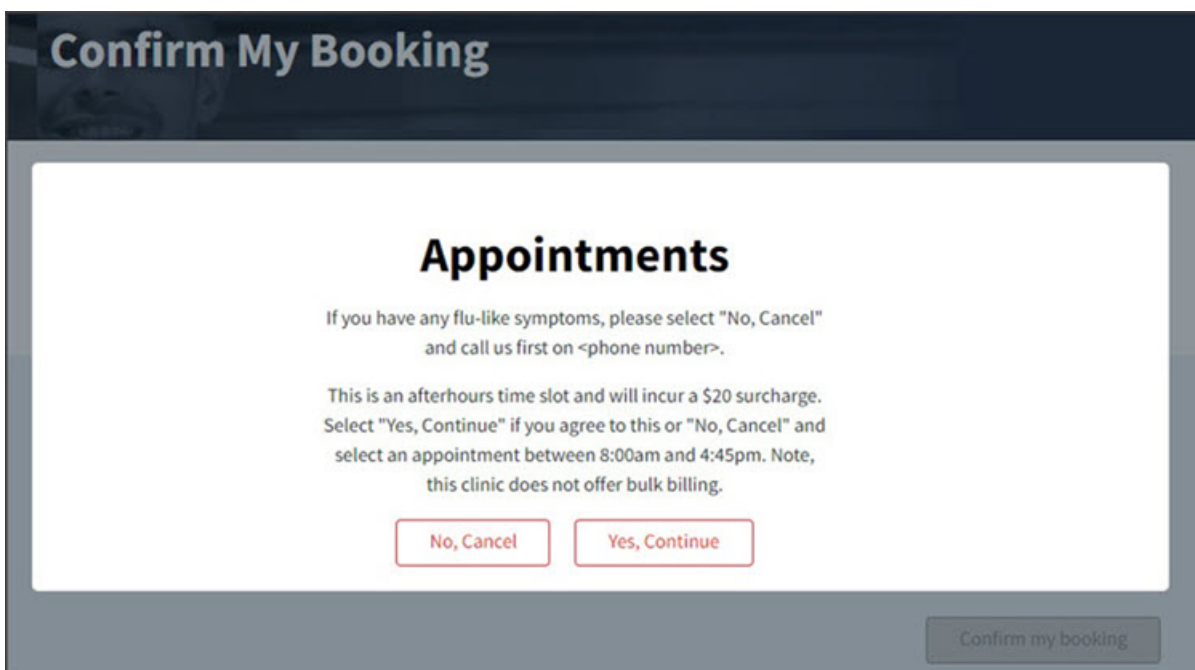
The **Schedules** section showed how to add a message to a session that will be displayed when a patient selects an appointment time during that session. Messages have a **No** or **Yes** confirmation, so the patient can confirm they understand or accept the message. For example, you could add a message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

- Selecting **No, Cancel** takes 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 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 **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 with photos properly displayed.
4. Select each doctor's details to make sure they are displayed.
5. Click **Select Appointment** next to each doctor and check if 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](#).

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

YOUR LOGO HERE

OUR CENTRES | OUR DOCTORS | BOOK NOW | LOG IN OR SIGN UP

Centre Location | Medical Interests | Language

Demo Clinic Doctors

Dr Ethel Boykin
Branch 1
Next Available: Today 2:30 PM | Select Appointment

Dr Phillip Davis
Branch 1
Next Available: Today 2:30 PM | Select Appointment

Dr Igor Fuller
Branch 1
Next Available: Today 2:30 PM | Select Appointment

Choose your consultation type: New Patient

Igor Fuller
Branch 1

2:30pm	2:45pm	3:00pm	3:15pm	3:30pm	3:45pm	4:00pm
4:15pm	4:30pm					