

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.

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.

Branch setup

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

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

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

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.

Can Cancel Online Appointments

If you tick this box, patients can cancel their appointments up to the appointment's start time.

5. Select the **Online Appointment Details** button.

Online Appointment Details

6. **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.

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.

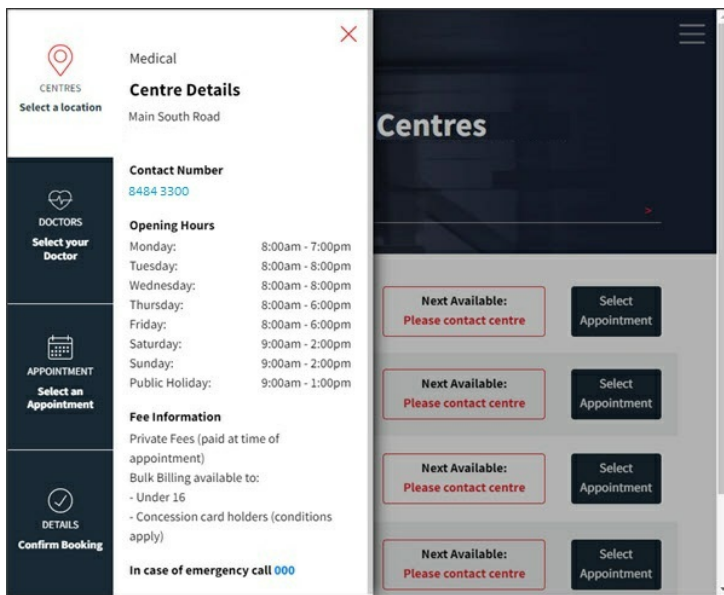
Opening Hours:	Opening Time:	Closing Time:
Monday:	08:00 am	06:00 pm
Tuesday:	08:00 am	06:00 pm
Wednesday:	08:00 am	06:00 pm
Thursday:	08:00 am	06:00 pm
Friday:	08:00 am	08:00 pm
Saturday:	09:00 am	02:00 pm
Sunday:	09:00 am	02:00 pm
Public Holidays:	08:00 am	01:00 pm

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.



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.
5. The following information must be in the Doctor's Details, or their appointments will not appear:
 - o A valid title.
 - o A valid name.
 - o A valid Doctor Code.
 - o A valid HPI-I number or a Practitioner ID if the practitioner does not have an HPI-I.
 - o Information must be entered in the **Qualification** and **Biographic Information** sections.
6. Fill in the **Qualification** section with the information you want to appear in OLA. Use a comma between each item.

The screenshot shows a 'Doctor Details' form with the following sections and highlighted elements:

- Identity:** Family Name (Davis), Given Names (Phillip), Title (Mr), EHealthID (HPI-I) (8003 6199 0002 6805).
- Practice:** Dr Code (PD), HIC Registered, HIC Online, DVA Registered, REI Registered checkboxes.
- Branches:** Branch (Test Branch 1), Bank List (Albert Road MC Bank Account), MA Format (General Practitioner), Provider # (2408261F), Other Provider #.
- Clinical Settings:** Qualification (FRACGP, MBBS, Clin Dip P), Prescriber No (98777), Email Address.
- Online Appointment System:** Practitioner ID, Biographic Information button, Generate button.
- Booking time buffer (in minutes):** 0
- Available Online:** checkbox
- Employment:** No Employment Record!

7. 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.

8. 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:

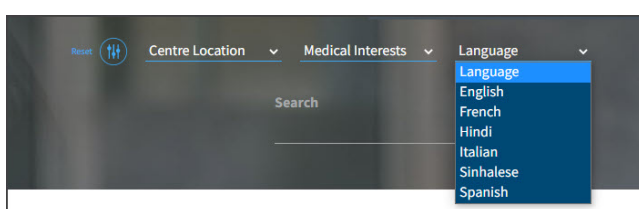
- The photo's height and width must be no larger than 800px.
- The photos must be 24-bit (32-bit is not supported).
- Use a square photo cropped to the face without the shoulders for the best results.

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.



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:
 - Selecting **Mark as Unavailable** will leave doctors in the **Available Online** column unticked.
You can then manually choose the doctors accepting Online Appointments.
 - 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. Select **Referral Letter Required** if you want to prompt patients to upload a document with this Appointment Type.

The screenshot shows the 'Appointment Types' configuration window. On the left is a list of appointment types: New Patient, Follow Up Consult, Long Consult, Review Consultation, Follow up 30min, Surgical Procedure, Immunisation - Linked, Immunisation, Midwife, Group Fitness, and TeleHealth. The 'New Patient' type is selected. The configuration panel for 'New Patient' includes: Type Name: New Patient, Type Code: NP, Default Duration: 01:00 Hrs, Text: Black, Background: Custom ... There are checkboxes for 'Unavailable', 'Linked Appointment', 'Surgical Procedure', 'Available Online' (checked), and 'Referral Letter Required' (checked). The 'Available to' section has radio buttons for 'Only New Patients' (selected), 'Only Existing Patients', and 'Both New and Existing Patients'. On the right, 'Online Appointment Billing Defaults' include: Estimated Billing Amount \$350, Credit Card token Required (checked), Bulk Billing Available Exemptions (Pension/HCC, Full DVA, Limited DVA), Age Range (Children aged under 10, Seniors aged over 65). Below is a 'Per Doctor Overrides' table:

Doctor	Duration	Available Online	Estimated Amount	Credit Card Required	Pension/HCC Exemption	Full DVA Exemption	Limited DVA Exemption	Child Exemption	Seniors Exemption
GRACE HERMAN		<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phillip Davis		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DANUTA FERNANDEZ		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Igor Fuller		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gaye Jackson		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Augustus Eason		<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maurice Knox		<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alannah Smithy		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roger Demo		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testname Htesting		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Queue System		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

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

Schedules setup

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

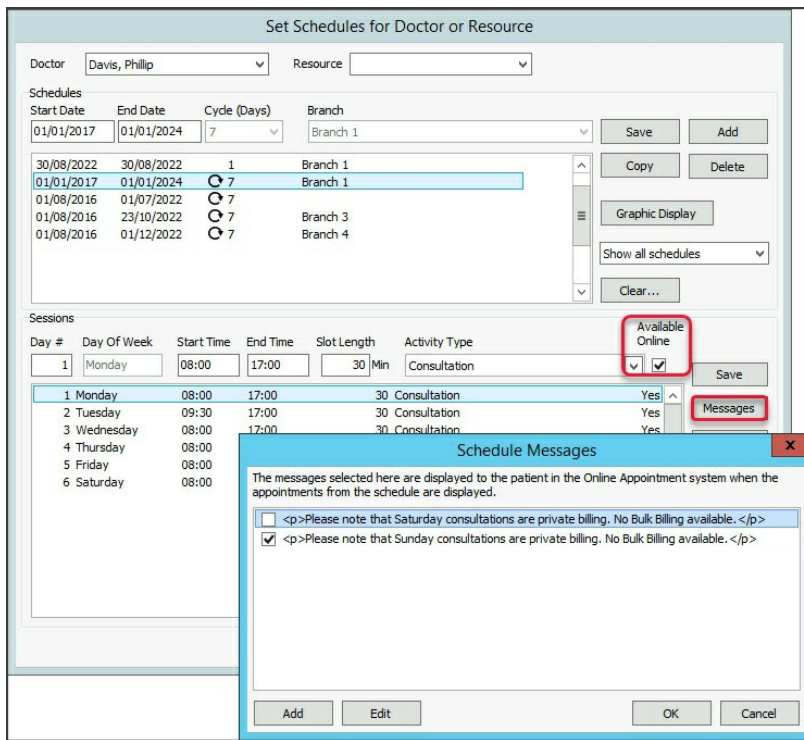
To set up a doctor's schedule for Online Appointments:

- 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.
- 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.



Using Messages

Create a set of messages and have a selected message display when a patient selects an appointment.

- The practice should create a standard set of messages.
- All messages are saved and can be used by other doctors.
- Messages are added at the session level per doctor.
- If you select multiple messages, they will be appended to the same message dialog.

Managing Messages

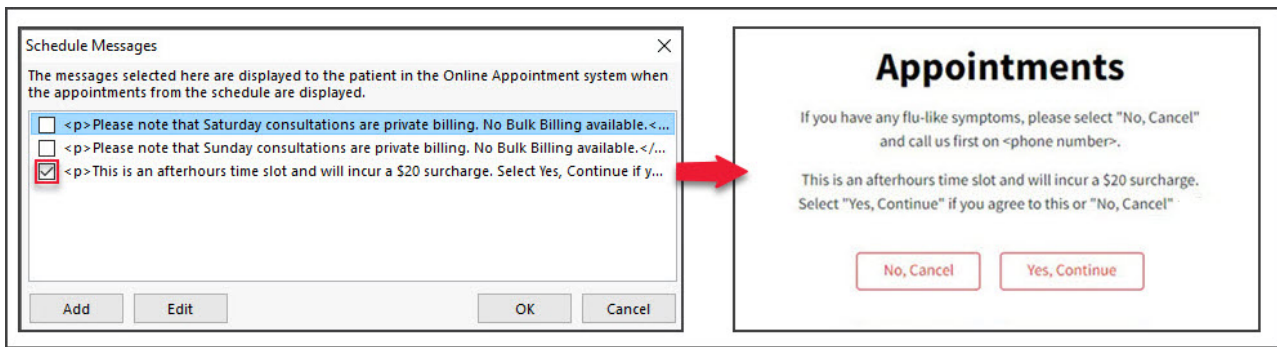
1. Follow the steps in **Schedule setup** to open a doctor's schedule.
2. Select the **Messages** button (it doesn't matter what doctor or schedule).
3. Use the **Add** button to add a new message.
4. Use the **Edit** button to update an existing message.

Patent Responses

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

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. The feature is enabled using a tick box in the Patient Details and applies to existing patients with OLA accounts that have been reconciled to their patient record. Requires Zedmed v38

Armstrong, Chris

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details

Further Details
Recalls
Notepad
eHealth
Messages
Payment Cards

Personal

Family Name: Armstrong
Given Name: Chris Initial:
Preferred Name: Former
Title: Mr Sex at Birth: M
Pronouns:
Date of Birth: 3/03/2024 Age: 1
Home: 123 Test Street
Suburb: ANYWHERE 3999
Preferred Contact Method: Mobile
Mobile: 0491570158
Do Not Send SMS Default Appointment SMS
Email:
Usual Dr: None
Medicare: Exp:
Veteran: Exp:
Health Care: Exp:
Safety Net:
Pen. Stat.: PBS Co-payment
ATSI:
Ethnicity: Set

Practice

File#: 1018 Pull File
Hosp. UR No: Clinical Warnings
Usual Branch: Medical One - QV (1018)
First In: Last In:
Type: Status: Current

Family

* Armstrong, Matt (1015)
Family Links

Payers

Fund: No fund set for this patient
Add Details Claims

Referrals

Add Details

Other Contacts

NOK Name: Relationship:
Mobile:
Emerg. Contact Name:
Mobile:

Next Appointment

No upcoming appointments

Alerts

Block patient from online bookings

Delete Print Patient Verification Find Close Cancel

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

Dr Phillip Davis
FRACGP, MBBS, BBlomedSci (Hons), Clin Dip Pall Med

Appointment Details

CENTRE: Medical One - QV
TYPE: Std Consultation