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:

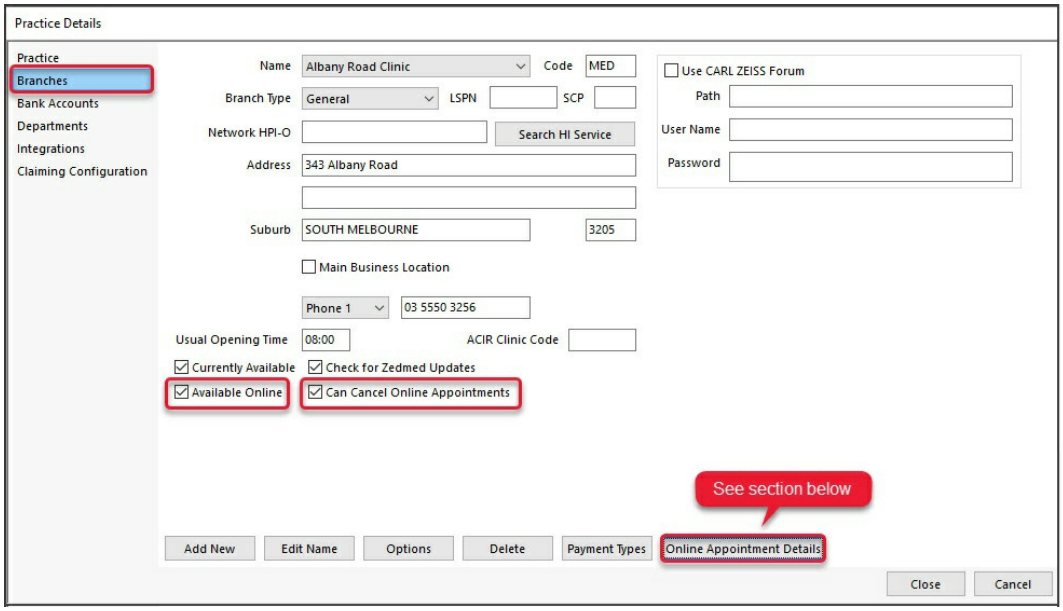
   a) Available Online

   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).



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.

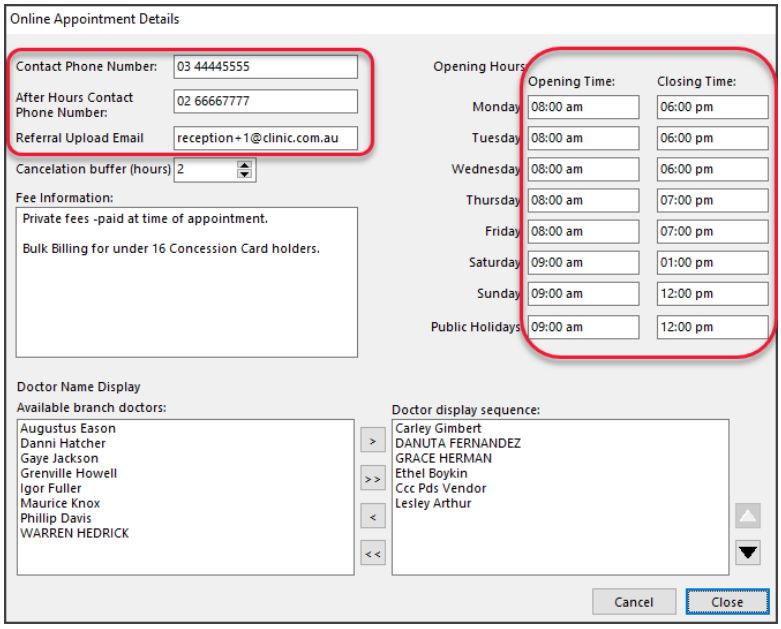
   This email address should be monitored and Referrals added to the patient's record.
6. **Cancellation buffer**

   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 Sequence** (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.

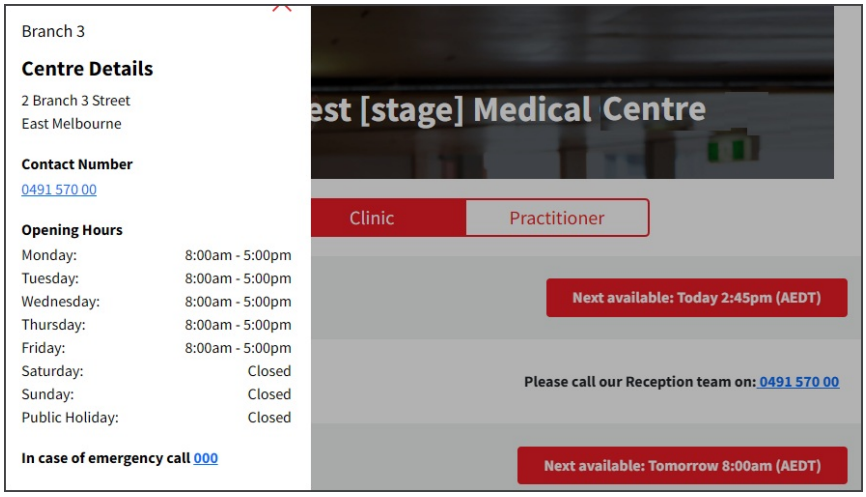


These changes take up to 30 minutes to update on the practice website.

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.



Step 2-a: Doctor's Details

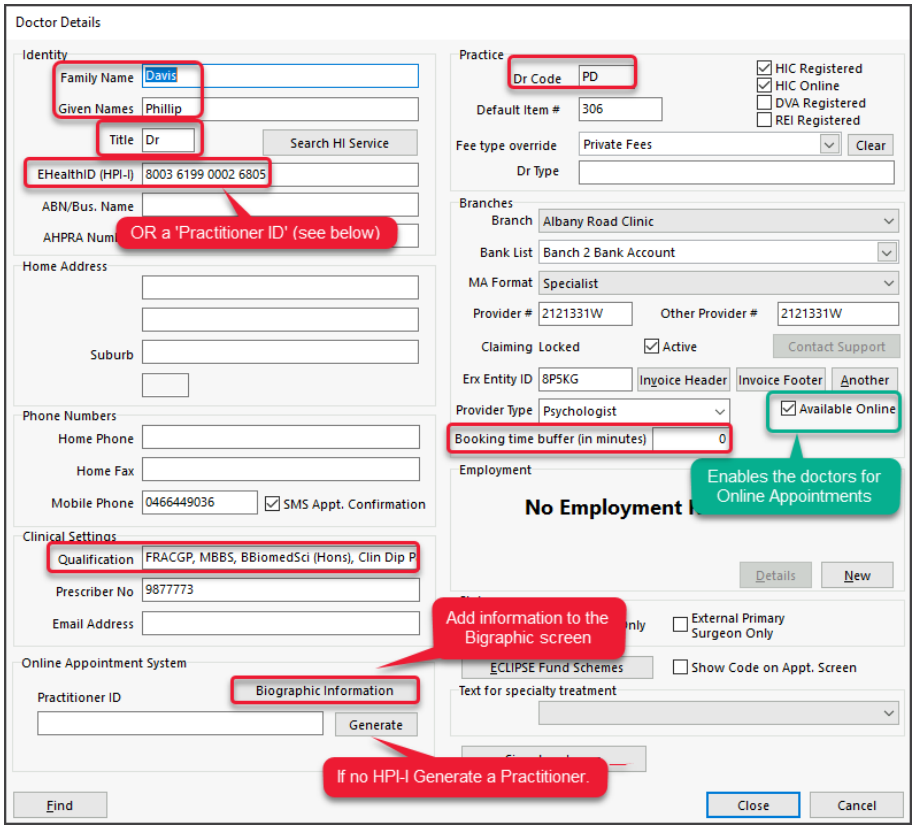
The Doctor Details screen is where you enable each doctor for Online Appointments and add information about them. Medical Interests and Language will become selectable options for the patient to filter the doctors shown in Online Appointments.

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. **Required information** in 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** field
    - Information must be entered into the **Biographic Information** sections (select the button to open the sections).
6. Fill in the **Qualification** section with the information you want to appear in OLA. Use a comma between each item.



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.

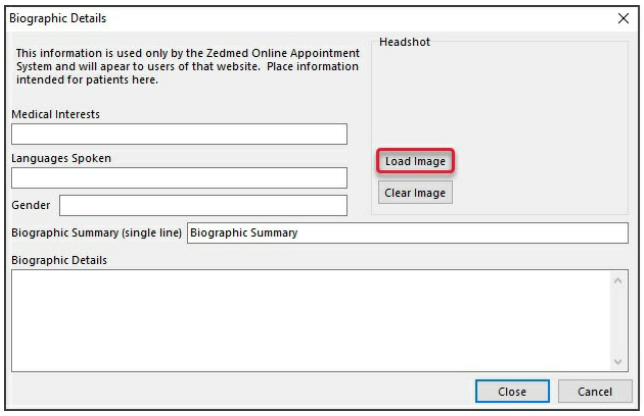
    The doctor's profile picture

    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.

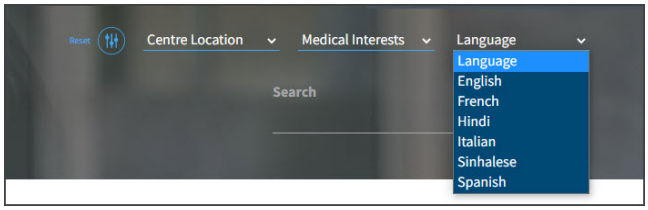
Meeting these requirements may require editing software or a free site like https://www.resizepixel.com/

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.



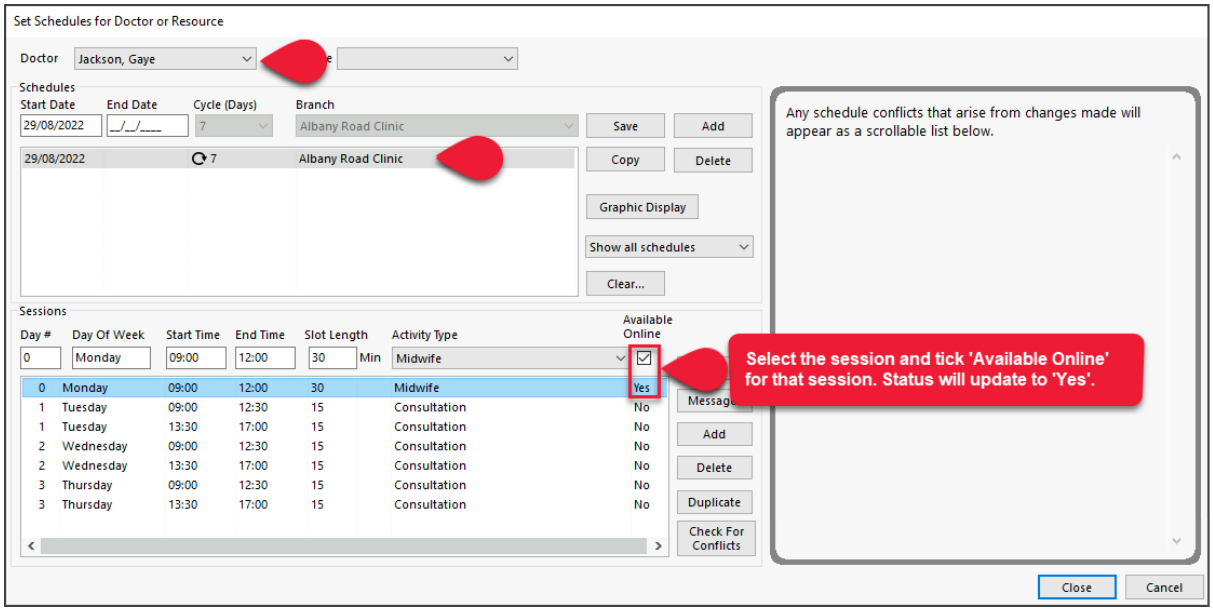
Step 2-b: Doctor's schedule

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:

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.

   To enable a message, tick the box next to it. To learn more, see Using Messages.
8. **Important**: check that all active schedules have been reviewed and the session made available as required.
9. Repeat all of these steps for each doctor.
10. Select **Close** to save and exit.

Step 2-c: Doctor's Appointment Type

In the Appointment Types setup, tick Available Online next to the doctor's name as shown in step 5 in the section below.

Step 3 - Appointment Types setup

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

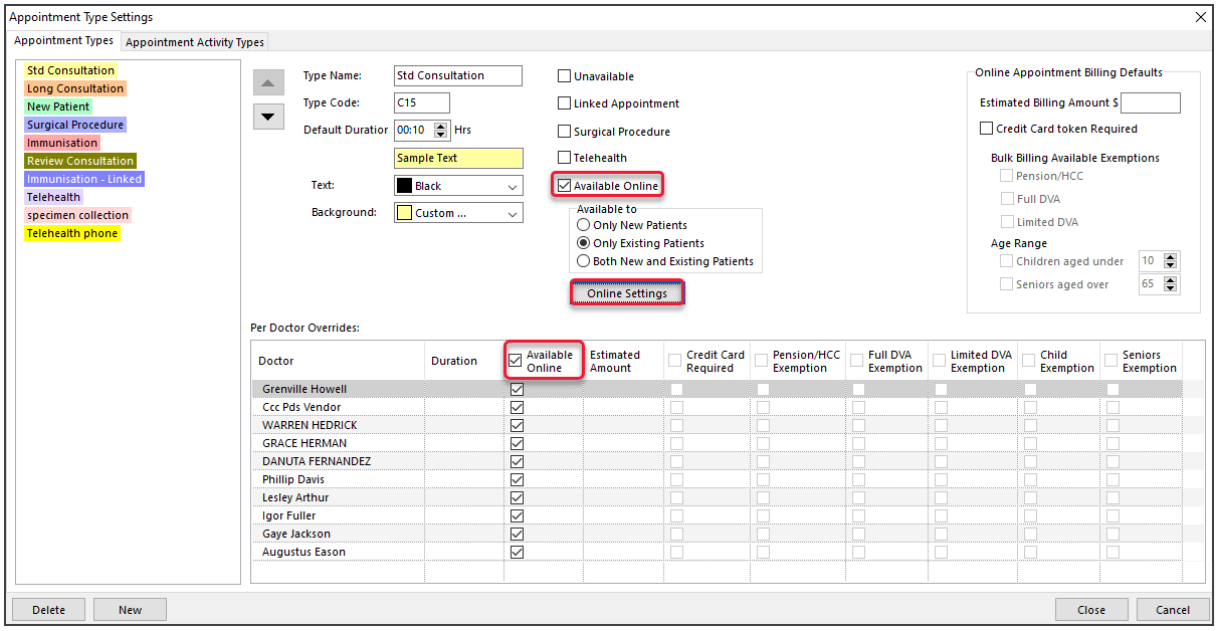
To enable up Appointment Types for OLA:

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

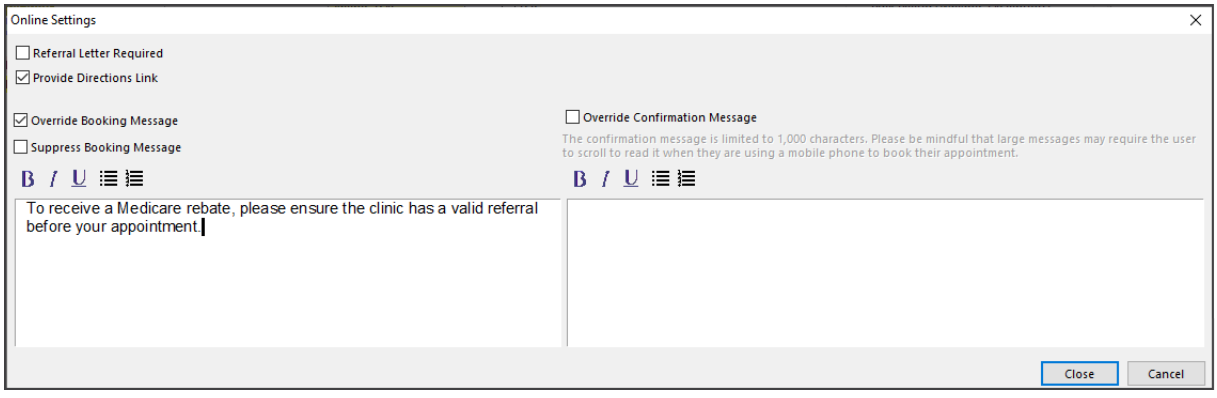
   Appointment Types in OLA are listed in the order they appear here.
8. Select the **Online Setting** button. (This option requires Zedmed v39 or later).

   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 booking confirmation message with this custom message. Untick to disable.
12. Select **Close** to save your changes



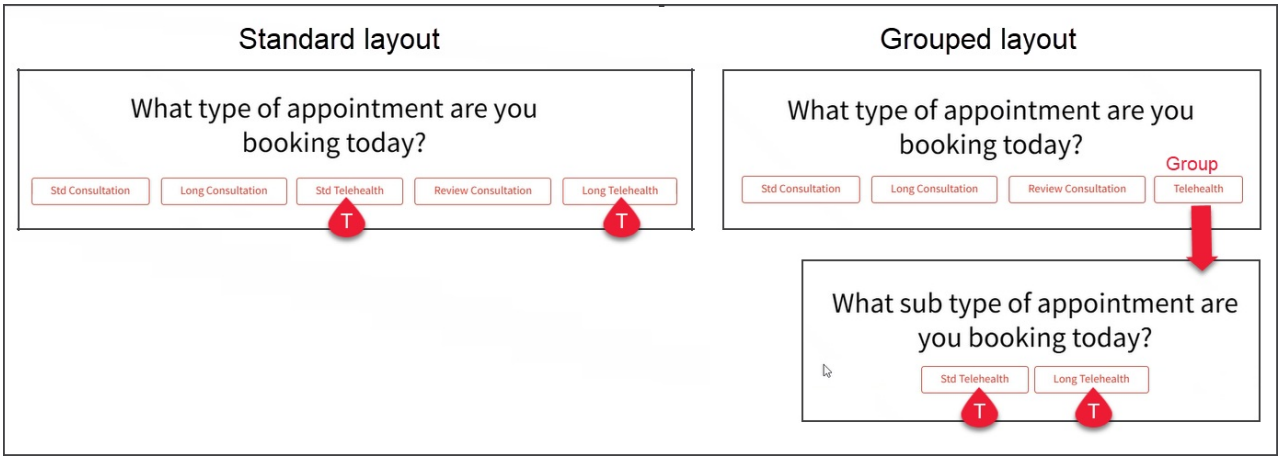
13. Repeat the steps for each **Appointment Type**.

14. 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.

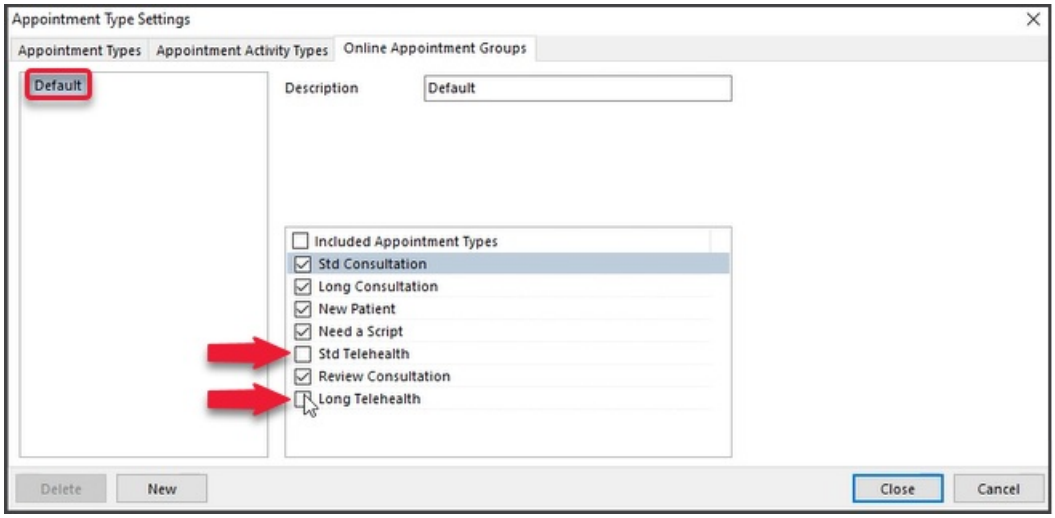
Important: Any groupings in multi-database setups must match exactly across the Zedmed databases.



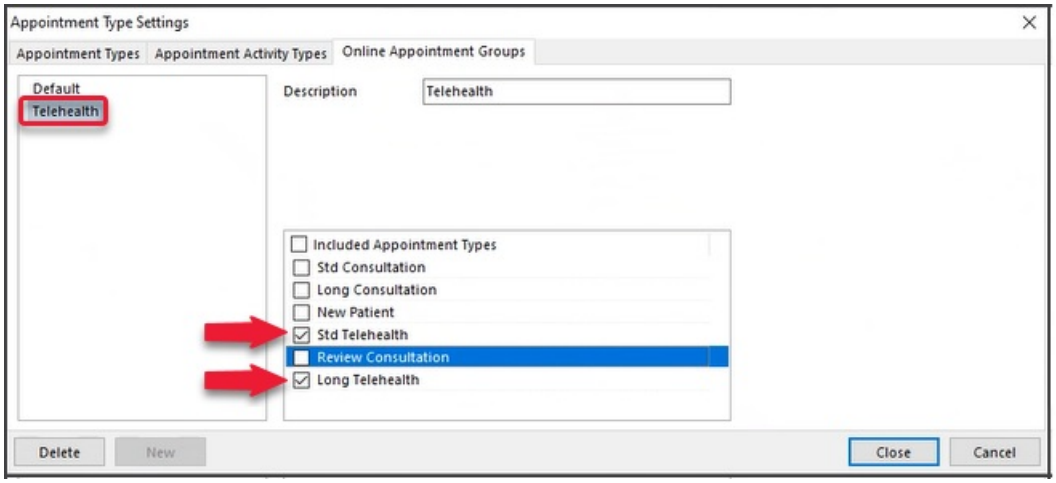
To add an Appointment Group:

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.

To learn more, see the Displaying messages to patients guide.

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.

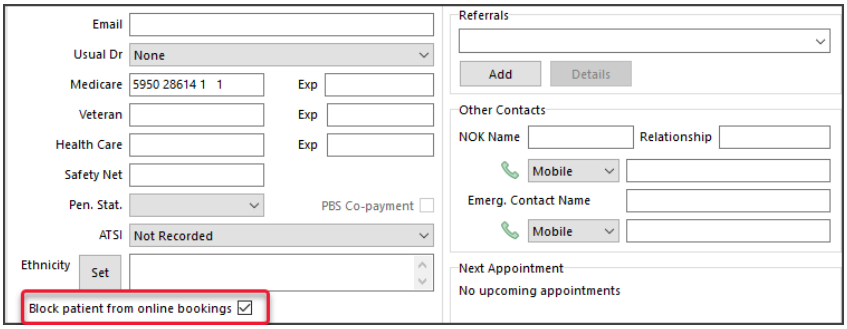
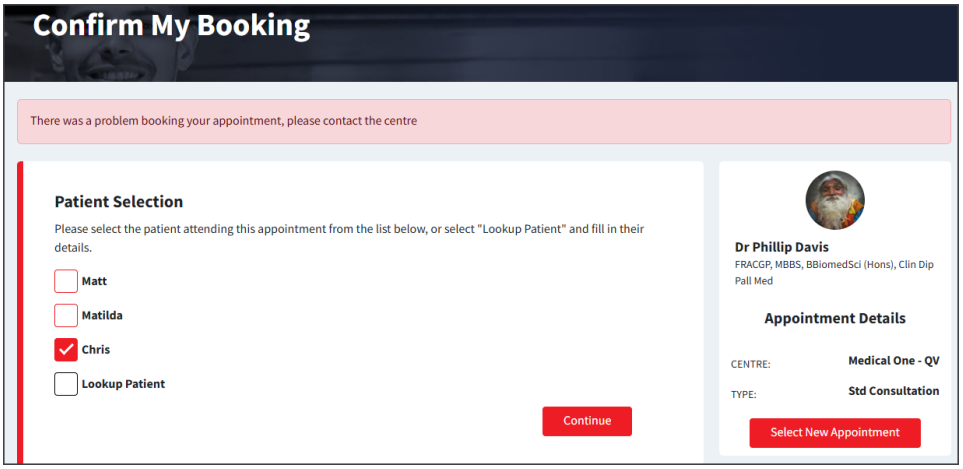
   You only reconcile a patient's booking to their record in Zedmed the first time they make an Online Appointment.

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,