

Reconcile new OLA

Last Modified on 18/11/2024 2:03 pm AEDT

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 cloud icon. 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 + symbol 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.

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

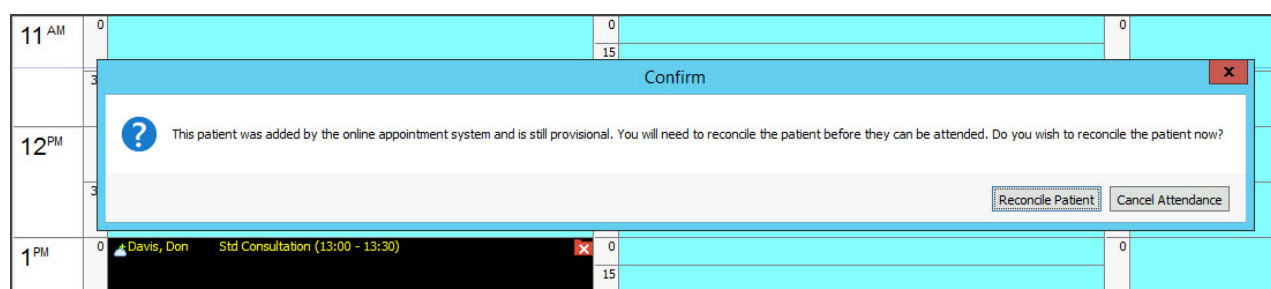
30	Roberts, Bob	New Patient (11:30 - 11:50)	30
45	Roberts, Bob	New Patient (11:30 - 11:50)	45

Reconciliation workflows

You can reconcile patients individually from the **Appointment Book** (right-click > Reconcile) or you can reconcile all outstanding 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.



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.

Name	Date of Bir...	Medicare Num...	Mobile Phone	Address
Gilmour, David	21/05/1957		0491577644	123 Test Street Testville 3215
Jones, Marianna-Louise	19/05/1967	2298039874	0406991730	6 Jones Pl Provisional GOWRIE 2904

Buttons: 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.

Online Patient Reconciliation

Name	Date of Birth	Medicare Number	Mobile Phone	Address
Atkinson, Ella	26/06/1964			585 Abuklea Place BACK CREEK 2484
Davis, Don	09/09/2001			1 Lane Ln Alexandra 3138
Rigano, Lydia	01/10/1981			50 Main Road Townsville 4810
Simkins, Sam	09/10/2009			2 main road Melbourne 3000
Smith, Peter	28/02/1964			7 Jenny Pde Mount Waverley 3149

Reconcile Patient

There were 2 patient records found with similar details to Peter Smith. If one of the listed patients is Peter Smith, select that patient, otherwise select New Patient at the top of the list to accept Peter Smith as a new patient.

If you know that there is an existing patient record for Peter Smith 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
Smith, Peter	28/02/1964			7 Jenny Pde Mount Waverley 3149

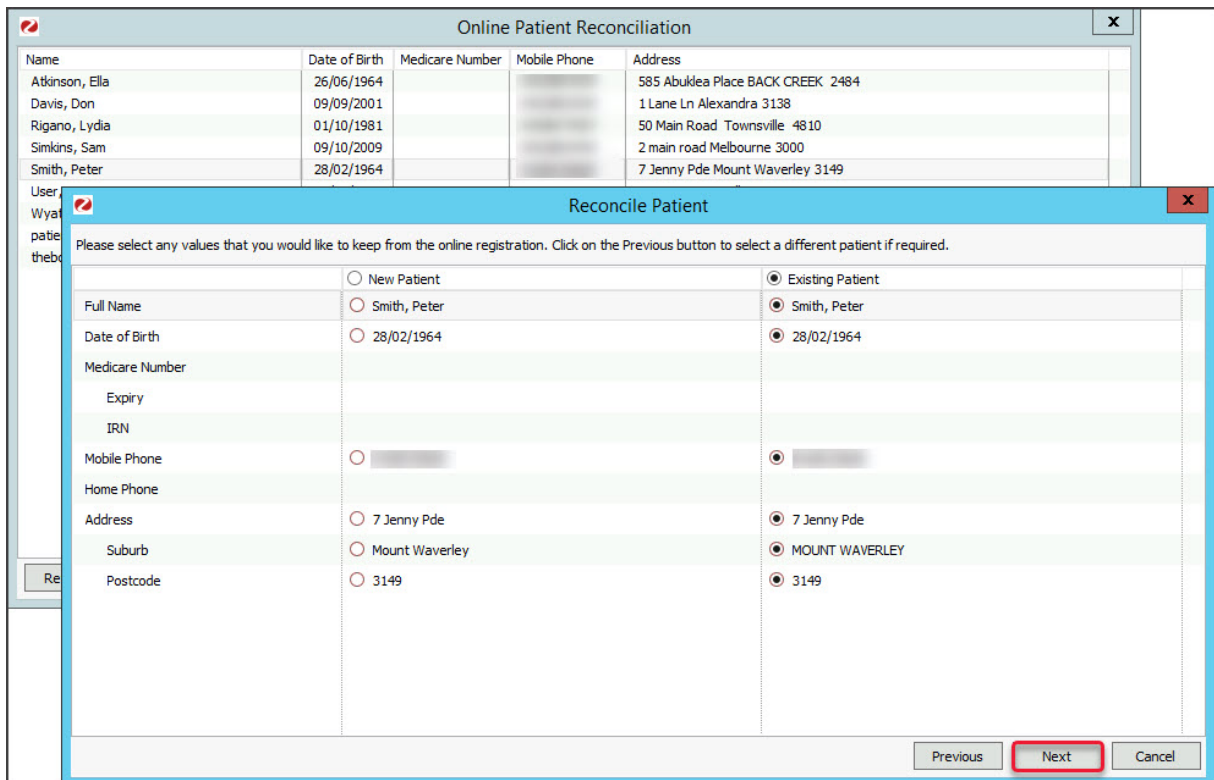
Accept Smith, Peter as a new patient

or reconcile their details with one of these patients:

<input checked="" type="radio"/> Smith, Peter	28/02/1964			7 Jenny Pde MOUNT WAVERLEY 3149
<input type="radio"/> Smith, Jane	15/12/2010			7 Jenny Parade MOUNT WAVERLEY 3149

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 does not create a new patient.
9. Select Next.



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.

Name	Date of Bir...	Medicare Num...	Mobile Phone	Address
Gilmour, David	21/05/1957		0491577644	123 Test Street Testville 3215
Jones, Marianna-Louise	19/05/1967	2298039874	0406991730	6 Jones Pl Provisional GOWRIE 2904

Buttons: Refresh, Delete Patient, Reconcile 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**.

Name	Date of Birth	Medicare Number	Mobile Phone	Address
Berg, Max	16/11/1978			

Accept Berg, Max as a new patient
 or reconcile their details with one of these patients:

<input checked="" type="radio"/> Berg, Max	16/11/1978	2950975271		9 Jerry Ava DUNDAS 2117
<input type="radio"/> Adams, Adam	05/05/1995			55 Adams Street Melbourne 3000
<input type="radio"/> Agarwal, Peter	01/01/2001			299 I3 lonsdale st melbourne 3000
<input type="radio"/> Alexander, Brian	03/09/1948	4950177891		484 Gerhardt Cct SURFERS PARADISE 4217
<input type="radio"/> Banks, Jayne	15/04/1969	2950216291		774 Dinh Pl WEST RYDE 2114
<input type="radio"/> Barker, Emily	01/06/2011	4950152241		31 Front Street INALA 4077

Buttons: Add another patient, Previous, **Next**, Cancel

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 does not create a new patient.
6. Select **Next**.

	<input type="radio"/> New Patient	<input checked="" type="radio"/> Existing Patient	
Full Name	<input type="radio"/> Berg, Max	<input checked="" type="radio"/> Berg, Max	
Date of Birth	<input type="radio"/> 16/11/1978	<input checked="" type="radio"/> 16/11/1978	
Medicare Number		<input checked="" type="radio"/> 2950975271	
Expiry			
IRN		<input checked="" type="radio"/> 1	
Mobile Phone	<input type="radio"/> [REDACTED]	<input checked="" type="radio"/> [REDACTED]	
Home Phone			
Address		<input checked="" type="radio"/> 9 Jerry Ava	
Suburb		<input checked="" type="radio"/> DUNDAS	
Postcode		<input checked="" type="radio"/> 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.