OLA document requests

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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.

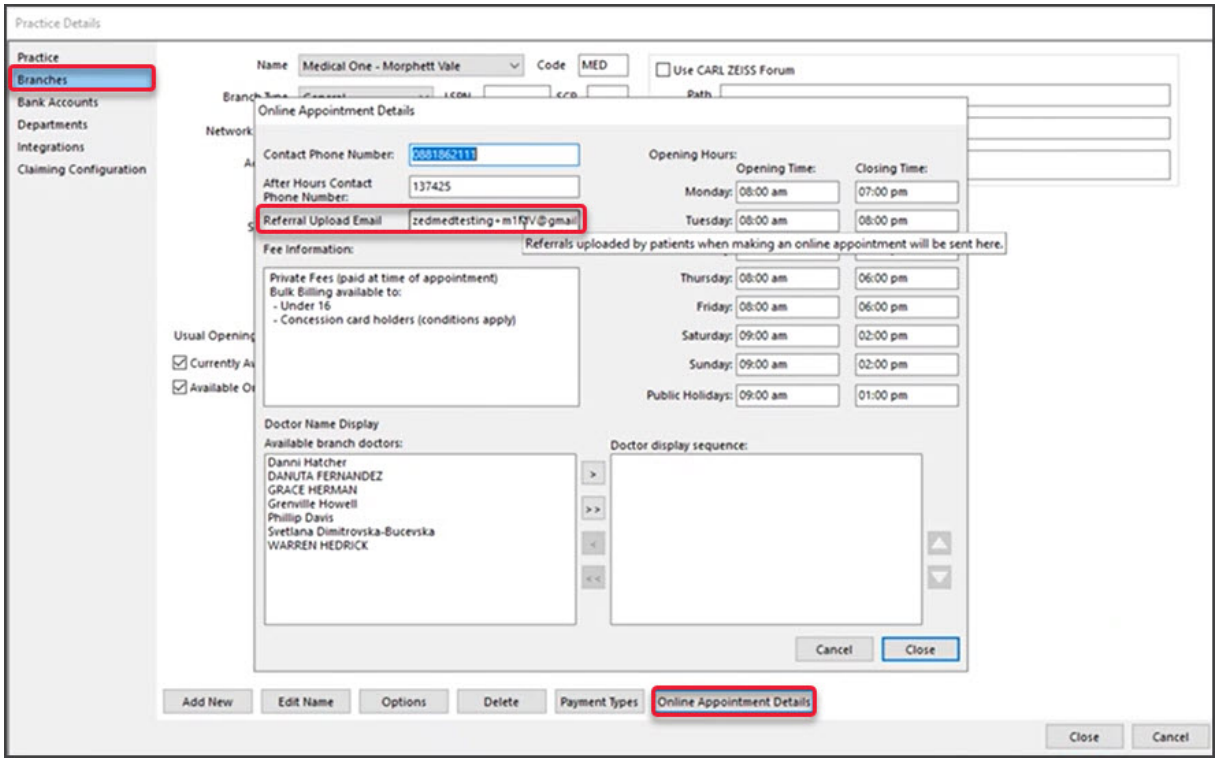
Enable document requirements:

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.

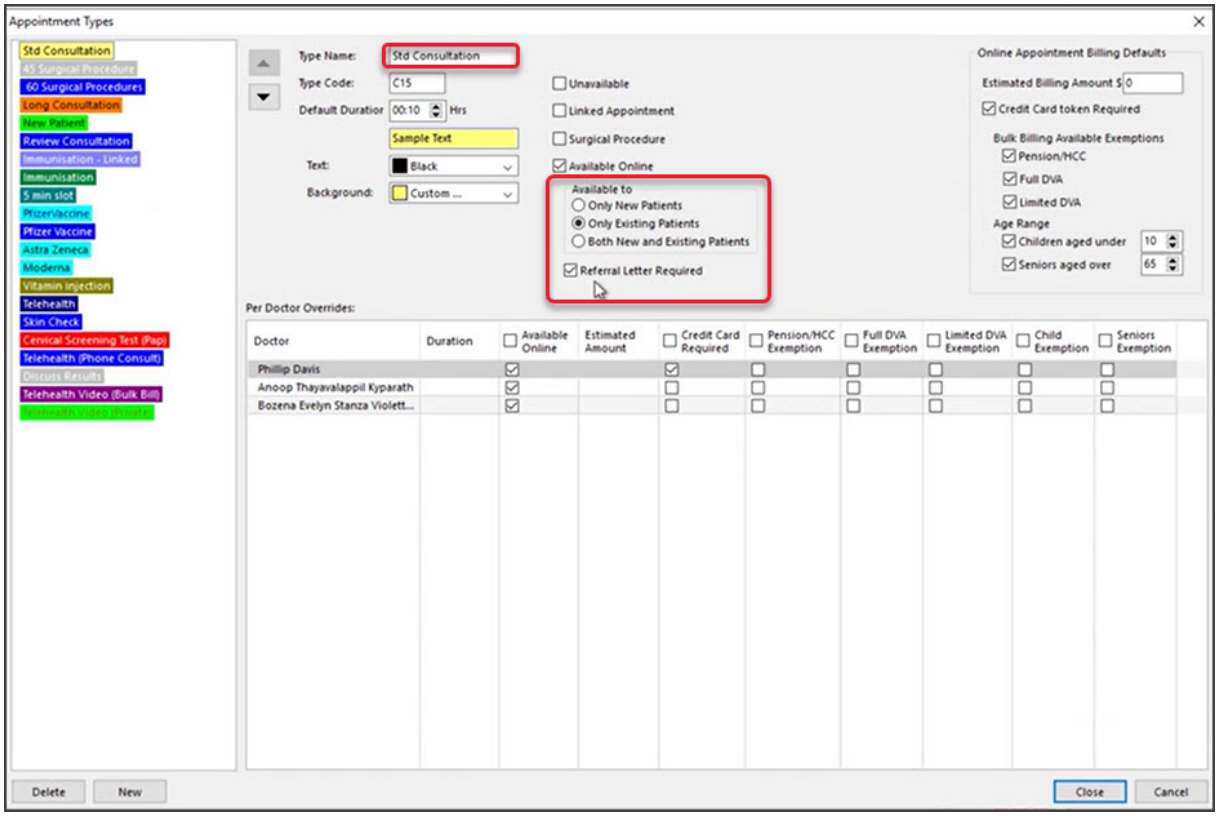
   Important: This email address needs to be monitored the Referral should be added to the patient's record.



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

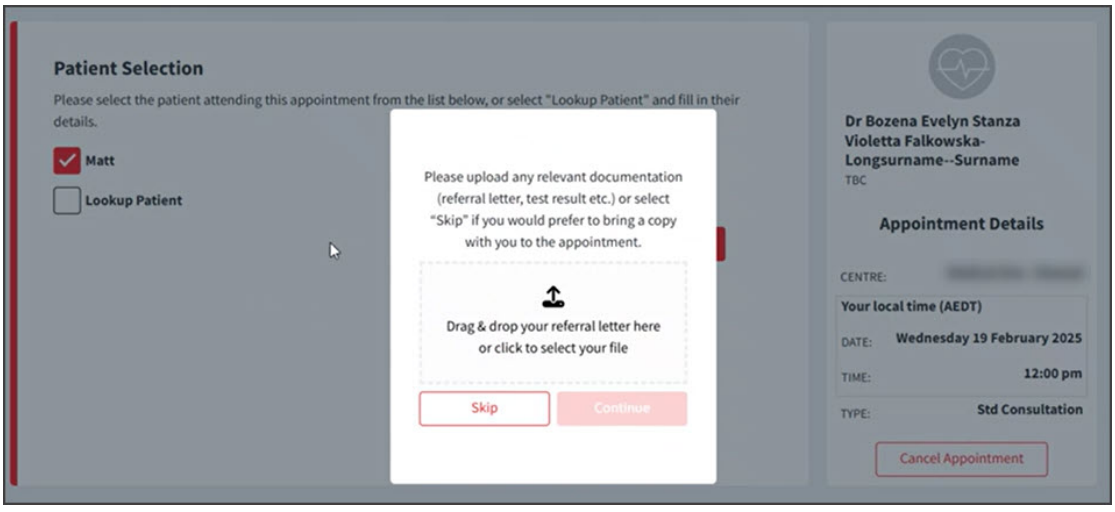
   The **Appointment Types** screen will open.
9. Select the **Appointment Type** that requires a document (referral).

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



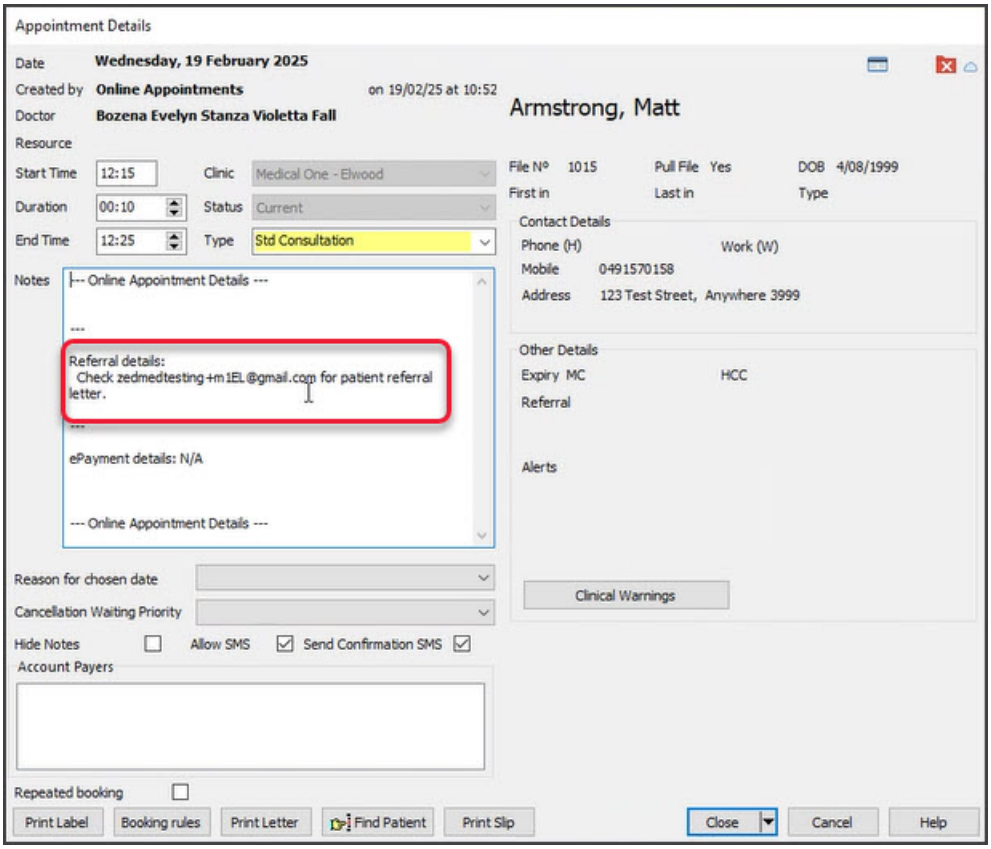
The patient provides a document

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.



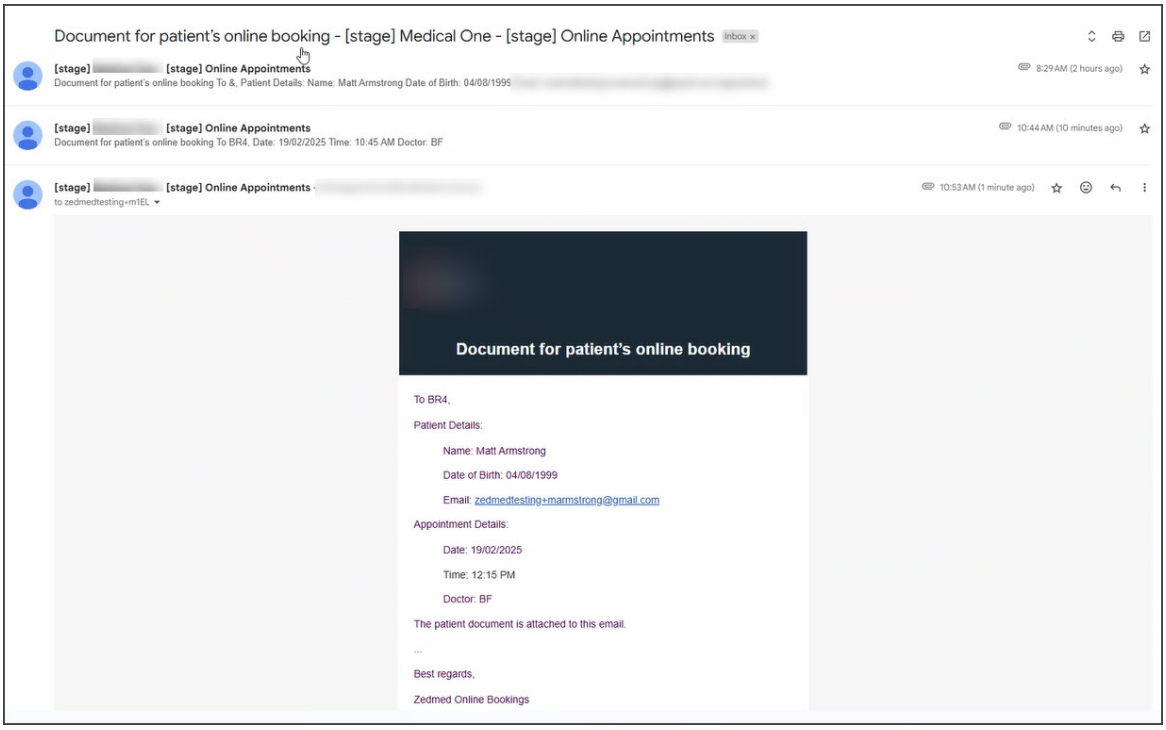
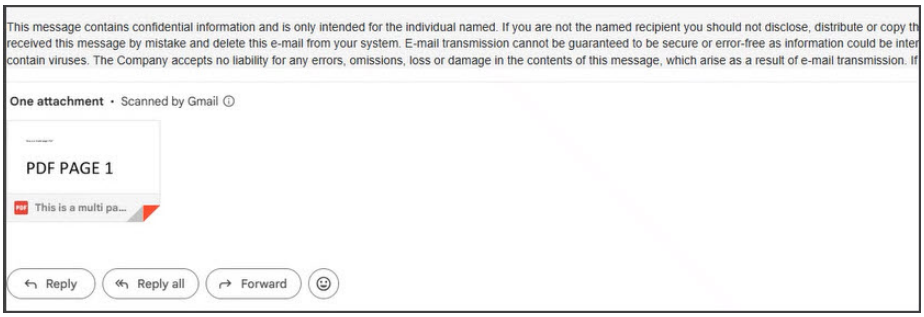
Practice receives the document

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