

# OLA quick setup guide

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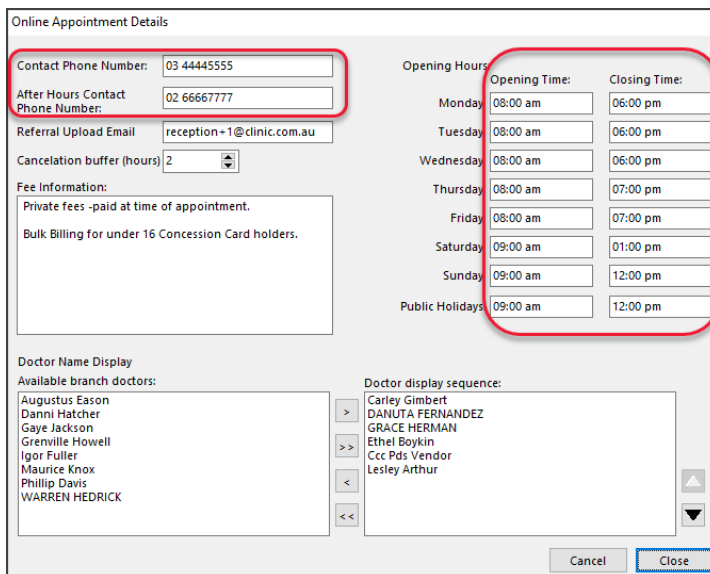
This guide covers the minimum steps required to get OLA up and running.

Once you have started using OLA, you can review all features and options in the [Full OLA setup guide](#).

## Quickstart Video

### Step 1 - Add the clinic information to be displayed in OLA

1. Select **Practice Setup > Branches**.
2. In the **Name** field at the top, select the branch you are configuring OLA for.
3. Select the **Online Appointment Details** button.
4. In **Online Appointment Details** update the following fields:
  - o **Contact Phone number** (and **After Hours** if applicable).
  - o **Opening Hours** using the format shown.
  - o Optional: Add any **Fee Information**.
5. Select **Close** to save and exit.



Online Appointment Details

Contact Phone Number: 03 44445555

After Hours Contact Phone Number: 02 66667777

Referral Upload Email: reception+1@clinic.com.au

Cancellation buffer (hours): 2

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

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	07:00 pm
Friday	08:00 am	07:00 pm
Saturday	09:00 am	01:00 pm
Sunday	09:00 am	12:00 pm
Public Holidays	09:00 am	12:00 pm

Doctor Name Display

Available branch doctors:

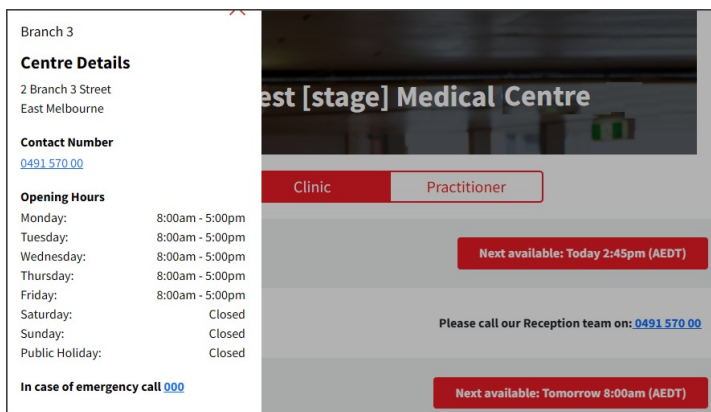
- Augustus Eason
- Danni Hatcher
- Gaye Jackson
- Grenville Howell
- Igor Fuller
- Maurice Knox
- Phillip Davis
- WARREN HEDRICK

Doctor display sequence:

- Carley Gimbert
- DANLITA FERNANDEZ
- GRACE HERMAN
- Ethel Boykin
- Ccc Pds Vendor
- Lesley Arthur

Cancel Close

- The screenshot below shows how this information is displayed in OLA.
-



## Step 2- Enable a practitioner and add information to be displayed

### 1. Open Doctors Details.

Select **Practice Setup > Doctors > Find Treating Doctors** then Find and open the doctor.

### 2. Enable the practitioner for OLA by selecting the **Available Online** tickbox.

### 3. Verify the following fields are completed. The practitioner will not appear in OLA if any of these are not completed:

- **Title.**
- **Family Name and Given Name.**
- **Dr Code.**
- A valid **HPI-I** number.

If the practitioner has no HPI-I number, use **Generate** to create a **Practitioner ID** (an OLA-specific identifier).

### 4. Complete the following OLA information fields. The practitioner will not appear in OLA if any of these are not complete:

- **Qualification** field. Use a comma between each item.
- **Biographic Information.** This button opens the Biographic screen, where medical interests and languages are added.

The Practitioner's photo is also added here and should be added later, as detailed in the full setup guide.

### 5. Select **Close** to save your changes.

Doctor Details

Identity

Family Name:  (Red callout: Add information to the Biographic screen)

Given Names:  (Red callout: Add information to the Biographic screen)

Title:  (Red callout: Add information to the Biographic screen)

EHealthID (HPI-I):  (Red callout: If no HPI-I Generate a Practitioner.)

ABN/Bus. Name:

AHPRA Num:  (Red callout: OR a 'Practitioner ID' (see below))

Home Address:

Suburb:

Phone Numbers

Home Phone:

Home Fax:

Mobile Phone:   SMS Appt. Confirmation

Clinical Settings

Qualification:  (Red callout: Add information to the Biographic screen)

Prescriber No:

Email Address:

Online Appointment System

Practitioner ID:   (Red callout: If no HPI-I Generate a Practitioner.)

Practice

Dr Code:  (Red callout: Add information to the Biographic screen)

Default Item #:

Fee type override:

Dr Type:

HIC Registered

HIC Online

DVA Registered

REI Registered

Branches

Branch:

Bank List:

MA Format:

Provider #:  Other Provider #:

Claiming Locked  Active

Ex Entity ID:  Invoice Header  Invoice Footer  Another

Provider Type:   Available Online (Green callout: Enables the doctors for Online Appointments)

Booking time buffer (in minutes):

Employment

No Employment  (Green callout: Enables the doctors for Online Appointments)

External Primary Surgeon Only

ECLIPSE Fund Schemes

Show Code on Appt. Screen

Text for speciality treatment:

### Step 3 - Enable each Appointment Type for OLA

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

1. Open the **Appointment Type Settings**.

**Practice Setup > Appointments > Appointment Types.**

2. Select an **Appointment Type** to be made available for OLA.
3. Select **Available Online**.
4. Respond to the prompt asking if you want to make all doctors available.
5. Optional: Select **Referral Letter Required** if you want to prompt patients to upload a document with this Appointment Type.

Appointment Type Settings

Appointment Types | Appointment Activity Types

New Patient (Green callout: 1 - Select the Appointment Type)

Follow Up Consult

Long Consult

Review Consultation

Follow up 20min

Surgical Procedure

Immunisation - Linked

Immunisation

Midwife

Group Fitness

TeleHealth

Type:  (Red callout: 1 - Select the Appointment Type)

Type Code:

Default Duration:  Hrs

Text:  (Red callout: 2 - Tick Available Online)

Background:

Available to:  Both New and Existing Patients (Red callout: Limits Appt type to patients who just created an OLA account, are an existing patient or both.)

Available Online (Red callout: Tick allows patients to upload a letter when booking.)

Referral Letter Required (Red callout: Tick allows patients to upload a letter when booking.)

Online Appointment Billing Defaults

Estimated Billing Amount \$

Credit Card token Required

Bulk Billing Available Exemptions

Pension/HCC

Full DVA

Children aged under

Per Doctor Overrides:

Doctor	Available Online	Referral Letter Required	Children aged under	Seniors Exemption
GRACE HERMAN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phillip Davis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DANUTA FERNANDEZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Igor Fuller	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gayle Jackson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Augustus Eason	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maurice Knox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alannah Smithy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roger Demo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Red callout: 3 - Tick doctors to be available online for that Appointment Type)

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

## Step 4 - Enable each practitioner's scheduled time for OLA

Each practitioner's scheduled time must also be enabled for OLA - even if the doctor has selected for an Appointment Type.

1. Open the **Set Schedules for Doctor or Resource** screen.  
Select **Practice Setup > Appointments > Schedules**.
2. Select the **doctor**.
3. Select the **Schedule**.
4. Select the **Session**.
5. Select **Available Online**.

**Important:** check that all active schedules have been reviewed and the session made available as required.

Set Schedules for Doctor or Resource

Doctor: Jackson, Gaye

Schedules

Start Date	End Date	Cycle (Days)	Branch
29/08/2022		7	Albany Road Clinic

Sessions

Day #	Day Of Week	Start Time	End Time	Slot Length	Activity Type	Available Online
0	Monday	09:00	12:00	30 Min	Midwife	<input checked="" type="checkbox"/>
1	Tuesday	09:00	12:30	15	Consultation	No
1	Tuesday	13:30	17:00	15	Consultation	No
2	Wednesday	09:00	12:30	15	Consultation	No
2	Wednesday	13:30	17:00	15	Consultation	No
3	Thursday	09:00	12:30	15	Consultation	No
3	Thursday	13:30	17:00	15	Consultation	No

Any schedule conflicts that arise from changes made will appear as a scrollable list below.

Select the session and tick 'Available Online' for that session. Status will update to 'Yes'.

Close Cancel

6. Repeat all of these steps for each doctor.
7. Select **Close** to save and exit.

## Step 5 - Make OLA live

Once everything is set up and ready, the final tick makes OLA live for the public to start making bookings.

1. Select **Practice Setup > Branches**
2. Tick **Available Online**.

Practice

**Branches**

Bank Accounts

Departments

Integrations

Claiming Configuration

Name  Code

Branch Type  LSPN  SCP

Network HPI-O

Address

Suburb

Main Business Location

Phone 1

ACIR Clinic Code

Usual Opening Time

Currently Available  Check for Zedmed Updates

Available Online  Can Cancel Online Appointments

**Makes OLA live to the public for bookings**