

Online Booking Set Up

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Calendar Options setup

- 1. System Administration
- 2. Appointments
- 3. Calendar options

Online Booking Setup

Default Online Booking Status

Requested

Appointment types configured?

Yes

Privacy Policy URL

https://www.privacypolicies.com/blog/privacy-policy-template/

Online Booking User

Miss System Administrator

☐ Disable existing patient form

Appointment type set up:

- 1. System Administration
- 2. Appointments
- 3. Appointment types
- 4. Tick Online Booking checkbox

Online Booking Settings

Online Booking Mode

Morning/Afternoon Slots

Day Split Time

Individual Timeslots

Booking Fee Strategy

Morning/Afternoon Slots

Booking Fee

☒ Bill at default location (as per accounting setup)?

Redirect URL after online booking

Update Appointment type

Cancel

Online Booking Setup Fields

| | |
|-------------------------------|--|
| Default Online Booking Status | Allow you to set default online booking status to "Requested" or "Booked". |
| Online Booking User | Allow you to choose user for online booking. |
| Online Booking Mode | Online Booking Mode is available in Individual timeslots and Morning/Afternoon Slots : <ul style="list-style-type: none">• Allow you to set online booking mode according to your preference . |
| Day Split Time | Allow you to choose day split time. |

| | |
|---|---|
| Bill at default location (as per accounting setup)? | By ticking the check box system will allow to bill at default location as per accounting setup. If a user uncheck this box system will bill at the location in Accounting Setup > Default Location. |
| Booking Fee Strategy | System allows you to set a fixed booking fee for an appointment type or customize through an assessment. |
| Disable existing patient form | By tick on <i>Disable existing patient form</i> user can see only new patient registration form. |

Individual Timeslots:

- If you set Online Booking Mode to Individual Timeslots user views appointment availability in individual available format.

The screenshot shows the 'Choose an available time for your Online Booking' interface. At the top, there are filters for Location (ADL), Appointment type (Online Booking), Weeks of (22/03/2023), and Provider (Any Provider). The main content displays a calendar for the week starting 20 March 2023. The days and providers shown are:

- Wednesday 22 March 2023**: Dr Darlene HALL, 16:00
- Thursday 23 March 2023**: Dr Darlene HALL (09:00-16:00), Miss M. Joy (12:00-16:00), Mr Ormond Garrison (13:00-17:00)
- Friday 24 March 2023**: Dr Darlene HALL (09:00-16:00)

Morning/Afternoon Timeslots:

- If you set Online Booking Mode to Morning/Afternoon Timeslots user views appointment availability in the format of Morning and Afternoon.
- Choosing a slot picks the first available appointment time.

Location: Appointment type: Weeks of: ☐ Provider:

Choose an available time for your Online Booking

Week Starting 20 March 2023

Wednesday 22 March 2023
Dr Darlene HALL

Afternoon Appointment

Thursday 23 March 2023
Dr Darlene HALL

Morning Appointment

Miss M Joy

Afternoon Appointment

Mr Ormond Garrison

Afternoon Appointment

Friday 24 March 2023
Dr Darlene HALL

Morning Appointment

Week Starting 27 March 2023

Note: you will need to create or update the appointment types you wish to have available for Online Booking.

This can be configured via [Appointment Types](#).

Calendar session types:

You can limit which Appointment Types can be scheduled within each Session Type.

- Under the calendar session Allowed appointment type need to set up appointment type .
- If user does not add allowed Appointment Types then by default it shows up in all the appointment session.

Update an appointment Types can be booked into a Session Type:

1. Click **Administration**.
2. Select **Appointments** from menu.
3. Select **Calendar Session Types** sub-menu.
4. Click **Show** on the session type.
5. Scroll down to **Allowed Appointment Types** section and click **Edit**.
 - a. You will be presented with a list of appointment types that match the session Category (e.g. Consultation, Procedure and so on).
6. Tick the **Allowed** box to allow users to book type of appointment into the sessions type.
7. Click **Update Calendar Session Type**.

Adding an integrated assessment

For a given appointment type, you may optionally wish to associate an assessment; to pre-screen patients or to capture additional relevant information.

This can be configured via [Appointment Types](#).

Online Booking > Assessments > Dynamically calculate booking fee based on assessment

CareRight supports custom assessments with online booking. For customers also enabling [stripe](#), we now provide two methods of determining a booking fee.

- Fixed

- Assessment based
 - After you creating an assessment, you can use Associated assessment name to link with the assessment created.
- (For more info, please refer [here](#))

This allows you to engage with your patient and provide more accurate up front fee scheduling based on fully customisable criteria, such as:

- Level of cover and expected rebates
- Indicative complexity of treatment needs based on patient health questions & answers

Integrating with your website

Depending on your hosting of CareRight, you may be required to set up a [Reverse Proxy](#). If you have previously set this up for the patient portal, this does not need to be repeated.

The Appointment System takes a number of optional URL arguments.

https://example.use.careright.com.au/patient_portal/appointments/landing?location_id=1&appointment_type_id=2&calendar_view_id=3


| URL Part | Description | Where to view this in CareRight? |
|---------------------|---|--|
| location_id | Location Identifier. Passing this in will select the default location. For example, <i>Clintel Clinic</i> | System Administration > Locations |
| appointment_type_id | Appointment Type ID. Passing this will select the appointment type. For example, <i>Telehealth Initial Consult</i> . | System Administration > Appointments > Appointment Types > Edit Check URL for identifier. |
| calendar_view_id | | |
| provider_id | Provider Identifier. Passing this in will default the selected Provider. For example, <i>Dr Smith</i> | Dashboard > Providers |
| layout | Pass 'locked' to hide the search controls | |

Example: Here, the *book online links* refer to the configured CareRight platform. They could be placed on the individual appointment types, or at a location level.

Provider Profiles

A public profile for a provider can be set via [Edit a Provider](#) - profile image, biography and more.

Location: ADL Appointment type: Online Booking Weeks of: 02/04/2023 Provider: Dr Darlene HALL Search



Dr Darlene HALL

General Practitioner

About: MBBS Fellow of the Royal Australian College of General Practitioners (FRACGP) Diplomate of the Royal Australian and New Zealand College of Obstetricians and Gynaecologists (DRANZCOG) Diploma of Child Health (DCH)

Choose an available time for your Online Booking

Adding redirected URL

When a patient books an appointment through online booking. On confirmation of the booking they can redirect to a page on website instead of the "Done" page.

This can be configured via [Appointment Types](#).

Admin -> Appointment Type -> Any appointment type with enable Online Booking -> Redirect URL after online booking

Appointment types

Code *

ON2

Description *

Online Booking

Category

Consultation

Duration (minutes) *

60

Sort Order

1

Background Colour

#5d1c1c

Text Colour

Associated Assessment Name

Select from list

Cool Down Period (working days)

0

☒ Enabled For Theatre

☐ Disabled

☒ Online Booking

Booking Fee Strategy

Fixed

Booking Fee

20.00

Redirect URL after online booking

https://www.careright.au

Update Appointment type

Cancel