Online Booking Set Up

Last Modified on 30/04/2025 11:22 am ACST

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

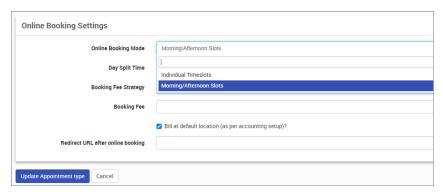
Calendar Options setup

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



Appointment type set up:

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



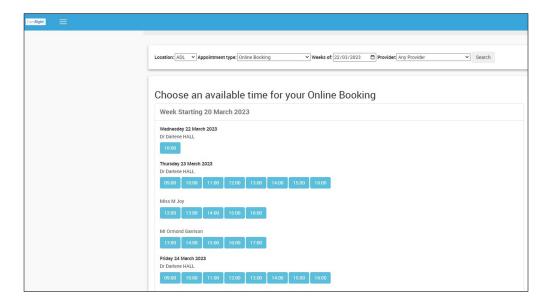
Online Booking Setup Fields

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: • 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	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 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</i> form user can see only new patient registration form.

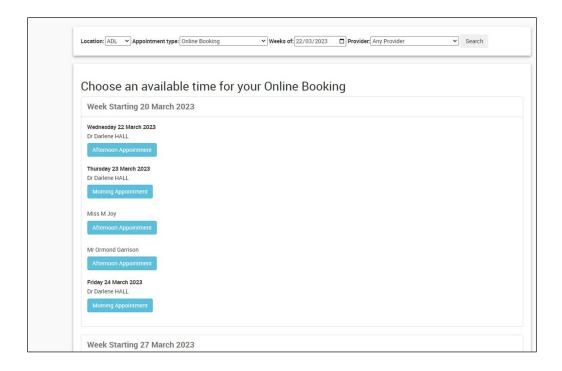
Individual Timeslots:

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



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...



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).
- $\hbox{6. Tick the $\textbf{Allowed}$ 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.

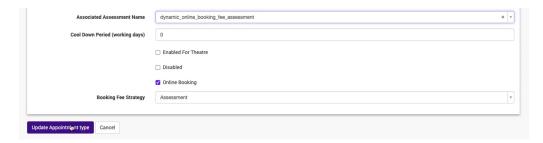
This can be configured via Appointment Types.

${\tt Online\ Booking\ > Assessments\ >\ Dynamically\ calculate\ booking\ fee\ based\ on\ assessment}$

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.

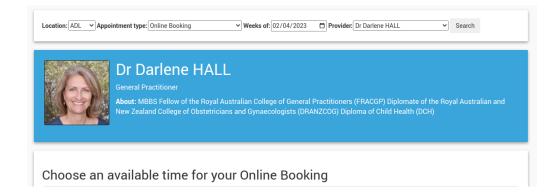
 $https://example.use.careright.com.au/patient_portal/appointments/landing? \textbf{location_id-1} \& appointment_type_id-2 \& \textbf{calendar_view_id-3} \\$

URL Part	Description	Where to view this in CareRight?
	Location Identifier. Passing this in will	
location_id	select the default location.	System Administration > Locations
	For example, Clintel Clinic	
	Appointment Type ID. Passing this will	System Administration > Appointments >
appointment_type_id	select the appointment type.	Appointment Types > Edit
	For example, Telehealth Initial Consult.	Check URL for identifier.
calendar_view_id		
	Provider Identifier. Passing this in will	
provider_id	default the selected Provider.	Dashboard > Providers
	For example, <i>Dr Smith</i>	
layout	Pass 'locked' to hide the search controls	5

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.



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.

 $\label{lem:admin-sol} \mbox{Admin -> Appointment Type -> Any appointment type with enable Online Booking -> Redirect URL after online booking -> Redirect URL$

