Introduction to Online Appointments
Contents

About Online Appointments ................................................................. 3
  What Is It? .......................................................................................... 3
  How Do I See It? ................................................................................ 3
Getting Started with Online Appointments .......................................... 4
Registering with the Online Appointments Service ............................ 5
  Welcome ........................................................................................... 5
  How Setup Works .............................................................................. 7
  Pricing ............................................................................................... 7
Terms and Conditions ........................................................................... 8
Practice Details ................................................................................... 9
  Practice Name Tips: ........................................................................ 9
Contact Details ................................................................................... 9
  Email Address Tips: ......................................................................... 10
  Web Page Address Tips: ................................................................. 10
Payment Details .................................................................................. 11
Data Synchronisation .......................................................................... 11
Dashboard Overview .......................................................................... 12
  MedicalDirector PracSoft Subscription ........................................ 12
  Online Appointments Status ......................................................... 12
Configuring Appointments .................................................................. 13
  Flagging Appointment Slots as 'Unavailable'.............................. 15
Accessing Your Practice’s Online Appointment Book ....................... 16
  Option 1: Use the Free MedicalDirector Web Page .................... 16
  Option 2: Use Your Own Web Site .............................................. 16
Invoicing and Payments ..................................................................... 17
Where To From Here? ........................................................................ 19
  Changes to the Appointment Book .............................................. 19
FAQ .................................................................................................... 20
About Online Appointments

What Is It?
In its simplest form, MedicalDirector’s Online Appointments is two things:

- A way for you to publish your PracSoft Appointment Book to a secure, easy-to-access web site.
- A way for your patients to then access your Appointment Book online, and book their own appointments with your Practice, at any time.

How Do I See It?
There are two different parts to Online Appointments - two different ways to access it:

- **The Portal**: We created a special part of Online Appointments and called it the ‘Portal’. It’s where you set-up your online Appointment Book, and configure a few Practice settings – information for your patients. It’s also a way for you to tell the Online Appointments service which of your practitioners are available to take appointments.

  To access the Portal, open your MedicalDirector PracSoft ‘Appointment Book’, and click the **Online** button. *...make sure you’re connected to the Internet too.*

- **The Booking Site**: This is the web site where your patients go to book appointments with you; we’ll provide your Practice its own, secure, dedicated web site that you can direct patients to. From there, your patients will be able to see which of your practitioners are available to make appointments with, and what their schedule is. When they schedule an appointment via your Booking Site, it will appear almost instantly within your MedicalDirector PracSoft Appointment Book. Your staff will be able to manage the online appointment with all the same flexibility as any other appointment made with MedicalDirector PracSoft.

  To access your booking site, we’ll give you a unique web site address to share with your patients, and you’ll be able to name it yourself. Here’s an example:

  http://my.medicaldirector.com/OurBookingSite
# Getting Started with Online Appointments

It’s easy to get started with Online Appointments. The information on the following pages will guide you through the steps. Print the checklist below as a guide for setting-up Online Appointments for your practice:

## 1. Registering with the Online Appointments Service

- 1a) **Review pricing, read and accept the terms-and-conditions.**
- 1b) **Record your Practice details** – *some basic contact details to show your patients online:*
  - Choose your practice’s name, as you want it to appear online. *We’ll create one for you, but you can choose your own.*
  - Record your practice’s email address.
  - Choose a web page address for your practice. *We’ll create one for you, but you can change it.*
- 1c) **Record your contact details**
- 1d) **Record your payment details**
- 1e) **Upload your Appointment Book**

## 2. Familiarise Yourself with the Dashboard

- 2a) **Familiarise yourself with the different sections of the Dashboard**
- 2b) **View your MedicalDirectorPracSoft Subscription Details**
- 2c) **View which Online Appointments Plan you are on**

## 3. Configuring your Online Appointment Book

- 3a) **Set the scope of your online Appointment Book**
- 3b) **Select billing practitioners**

## 4. Examine Invoicing and Payments

- 4a) **Familiarise yourself with the Invoicing and Payments section.**
Registering with the Online Appointments Service

Here’s what you’ll need to know before you register for Online Appointments:

- You’ll need to be using MedicalDirector PracSoft, and logged-in as a ‘Level-9’ user (if you don’t know what this means, you’re probably not a Level-9 user – it’s a security setting for user accounts in MedicalDirector PracSoft).
- You’ll need to have your MedicalDirector PracSoft Appointment Book open. If you use multiple Appointment Books, it doesn’t matter which one you open; Online Appointments can be accessed from any of your Appointment Books.
- You’ll need to be connected to the Internet.

Then, within your Appointment Book, click the Online button.

A browser window will open – it’s within this window you access the Online Appointments Portal. At first, you’ll see the Welcome screen:

Welcome to your Practice Portal

Your practice can now sign-up for:

1. Jayex
   Jayex is a service that enables patients to self check-in.

2. Online Appointments
   Online Appointments allows patients to book their appointments over the Internet.
   Please note: Online Appointments are currently supported only for practices with a single street address. If your practice has multiple street addresses, please close this window and contact your MedicalDirector Account Manager on 1300 300 161 to discuss your options.

Please click Sign up to proceed with the setup.

Click **Sign up** to enter the portal.

Within the portal, the various registration screens give you some information about Online Appointments. You’ll also be asked to provide us with some information about your Practice – that’s coming up soon. Have a read through the Welcome screen now. You can always move back and forth through the registration screens by using the navigation buttons at the bottom:
After the Welcome screen, you will be asked to indicate which of our products you wish to configure. Select **Online Appointments** and (optionally) **Jayex**.

Next there’s information about how the system works, pricing, terms-and-conditions and so on. Read through the info until you arrive at the Practice Profile screen – *this is where we’ll need some info from you, and this is covered in the next section.*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td><strong>Welcome</strong></td>
</tr>
<tr>
<td><strong>2</strong></td>
<td><strong>How it Works</strong></td>
</tr>
<tr>
<td><strong>3</strong></td>
<td><strong>Pricing</strong></td>
</tr>
<tr>
<td><strong>4</strong></td>
<td><strong>Terms and Conditions</strong></td>
</tr>
<tr>
<td><strong>5</strong></td>
<td><strong>Update your Webpage</strong></td>
</tr>
<tr>
<td><strong>6</strong></td>
<td><strong>Contact Details</strong></td>
</tr>
<tr>
<td><strong>7</strong></td>
<td><strong>Payment Details</strong></td>
</tr>
<tr>
<td><strong>8</strong></td>
<td><strong>Start Sync</strong></td>
</tr>
</tbody>
</table>

---

1. With a Jayex Patient Self Check-In Kiosk at your practice, patients check themselves into your MedicalDirector PracSoft Waiting Room via the Kiosk when they arrive. The MedicalDirector PracSoft Appointment Book flags the patient as ‘Waiting’, and they are automatically added to MedicalDirector PracSoft’s Waiting Room.
Introduction to Online Appointments

How Setup Works

Only PracSoft users with Level-9 (Full Access) can set-up PracSoft Online Appointments.

The set-up process allows MedicalDirector to synchronise your PracSoft appointments and limited patient identification data to verify existing patients, to our secure online server located within Australia. This data will only be used for running this service and related facilities, and in doing so we will comply with the Privacy Act 1988 (Cth).

We’ll email you once your data is synchronised. Your practice management staff can then begin to configure and manage available Online Appointment slots and practitioners, according to your practice’s needs and policies.

PracSoft Online Appointments is best suited for the following practices:

- Those with a single practice location
- Those practices which accept both existing and new patients (controls are in place to verify new patients)

If you have any questions, please call your MedicalDirector Account Manager on 1300 300 161 or email sales@medicaldirector.com.

Pricing

Your practice will be charged just 20 cents (+ GST) per appointment booked online. Pay only for what you use. We’ll bill you monthly by credit card. Appointments are payable in full. However, if you spend more than $25/doctor/month, the excess is rebated off your next annual PracSoft subscription cost. With 5 or more registered doctors the rebate threshold is capped at $125.

For example:

- 10 online appointments in a month will cost you just $2.20 (10 x 20 cents + GST)
- 50 online appointments in a month will cost you just $11 (50 x 20 cents + GST)

What do I get?

- FULLY secure, highly reliable online bookings service:
  PracSoft’s online booking service is user-friendly.

- Control over available appointment slots:
  You maintain full control over the number and time of available online appointments, as well as available practitioners.

- Dedicated webpage:
  We’ll provide your practice with a personalised webpage, dedicated to online appointments. This page can be embedded in your website, or hosted by us, free of charge.

- Peace of mind:
  PracSoft prides itself on providing the very best technology to keep your business primed and your data safe.

- Monthly billing:
  We’ll automatically calculate your monthly booking fees and bill your debit or credit card each month. You’re free to stop using the service any time, and there is no minimum monthly spend.
Rebate amount for a monthly billing period that will be applied as a discount on the next MedicalDirector PracSoft annual subscription, is calculated as follows:

\[ \text{Rebate} = \text{Full amount charged for use of Online Appointments (excl. GST)} - \text{Threshold amount} \]

Rebate threshold amount is determined based on the number of practitioners that had appointments booked via MedicalDirector’s Online Appointments.

<table>
<thead>
<tr>
<th>Practitioners using the Service</th>
<th>Monthly Rebate Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$25</td>
</tr>
<tr>
<td>2</td>
<td>$50</td>
</tr>
<tr>
<td>3</td>
<td>$75</td>
</tr>
<tr>
<td>4</td>
<td>$100</td>
</tr>
<tr>
<td>5 or more</td>
<td>$125</td>
</tr>
</tbody>
</table>

**Example:** Medical Practice published five practitioner calendars in a single monthly billing period. In this period;

- only three practitioners had appointments booked online in that period
- the practice accumulated $175.00 worth of online bookings in total

In this example,

- The rebate threshold amount is $75.00, as only three practitioners had appointments booked online in the given billing period.
- The rebate amount to be applied as a discount on the next PracSoft annual subscription is $100.00 ($175.00 - $75.00).

**Terms and Conditions**

You must confirm your agreement at the end of the terms before you can proceed. The terms of using the Online Appointments service are an addendum to the MedicalDirector Clinical and MedicalDirector PracSoft and Sidebar subscription.

I have read, understand and agree to the terms of use for online appointments
Practice Details

For convenience, your Practice's name, address, suburb, postcode, state, phone number, fax and email address is populated automatically from your MedicalDirector PracSoft database. You can change this information, as explained following. Note that when you make a change to your Practice's details, it can take up to five minutes before it appears online for your patients to see. Note also that changes you make here are seen online only, for your online Appointment Book – these changes are not saved back to your MedicalDirector PracSoft database at your Practice. Furthermore, any subsequent changes you make to your Practice details in the MedicalDirector PracSoft database will not appear on the online Appointment Book.

Practice Name Tips:

When your Practice's name is presented here, it will appear exactly as it does in your MedicalDirector PracSoft database. This is also how patients will see it on your personalised Online Appointments web site, unless you change it – feel free to do so, ensuring that the name you choose is alphanumerical, and does not contain all capital letters.

For example, this Practice's full registered name is “For Your Health Pty Ltd”.

For Your Health Pty Ltd

...but their patients know them as “For Your Health”, so they changed their Online Appointments name accordingly:

For Your Health

In another example, this Practice’s official name is “J&A Clinical Research and Patient Care Ltd”.

J&A Clinical Research and Patient Care Ltd

...however, everyone in their local community knows them as the Allen family's practice, so they too have changed their Online Appointments name to suit what their patients are familiar with:

Allen Family Practice

Note that you can change this name later if you wish. Keep in mind though, that if you do choose to make a change later, you’ll have to remember to tell all your patients!

Contact Details

On this screen, let us know who is registering your Practice for Online Appointments. These details will not be made public, and are only used by us to contact you about the registration process if we need to.
Email Address Tips:
We need an email address to alert you to patient booking confirmations i.e. when a patient uses your Online Appointments web site to make a booking, we’ll notify you by email. You’ll also see the appointment appear in your Appointment Book in MedicalDirector PracSoft. Note that this email address is not seen by your patients. You don’t have to use your primary email address either – for convenience, you could create a special email account on your email server just for receiving Online Appointments, and use this address here. *Please see your Systems Support people if you need help to set that up.*

Web Page Address Tips:
Your Practice will have its very own web page that your patients can visit to make a booking. By default, that web page address will be a combination of your Practice’s name and Post Code as it appears in your MedicalDirector PracSoft database (with any spaces or special characters removed). This is also how patients will see it on your personalised Online Appointments web site, unless you change it – feel free to do so.

For example, the following Practice’s full web site name was generated as “ForYourHealthPtyLtd2540”.

ForYourHealthPtyLtd2540

If they accepted the suggestion generated for them, their web site address for Online Appointments would end up looking like this: [https://my.medicaldirector.com/ForYourHealthPtyLtd2540](https://my.medicaldirector.com/ForYourHealthPtyLtd2540) - this is the address they would give patients to make online bookings.

However, because they want their web page name to be short, memorable and accurately reflect their Practice’s name, they decided to shorten the name to simply “ForYourHealth”, and make the necessary adjustment in the registration form:

ForYourHealth

Now their web site address is: [https://my.medicaldirector.com/ForYourHealth](https://my.medicaldirector.com/ForYourHealth) - a much simpler name, and one that’s easy to remember. Note that you can change this name later if you wish. Keep in mind though, that if you do choose to make a change later, you’ll have to remember to tell all your patients!

All details entered on the Practice Details screen will appear on your booking website, except for the following:

- Email address
- Fax number
- Time zone

For Your Health
123 Button Street, Burrier,
NSW, 2540

(02) 9906 6633
**Payment Details**

Enter your practice’s credit card details.

Notes:
- You must read and agree to the terms and conditions.
- You can change or remove/re-enter these details at any time. Note however, that if you choose to re-enter these details, you will be placed on the standard, **paid plan, regardless of which plan you were on prior**.
- Once you have registered, your credit card will be direct-debited when your invoice is due.
- When you initially register your credit card details (or if you ever change them) you will be charged 1c to test for validity. You will also immediately be refunded this fee.
- If you ever choose to remove your payment details, your appointment book data will no longer be displayed online, and patients will not be able to book appointments.
- Payments made with American Express incur a 1.25% surcharge.

**Data Synchronisation**

In order to allow your patients to make online bookings with your Practice, we need to upload some information about your Practice to our Online Appointments ‘Cloud Server’. We call this process “synchronisation”. In simple terms, we’ll basically be making a copy of your Appointment Book to put online.

This process uploads data about your Practitioners, Appointment Books, Appointments, Patients (name, surname, DOB), and appointment sessions. We use this data to show available appointments, and to determine whether patients have visited your Practice previously. No other data is visible to patients.

Before we upload the information, we’ll do a quick analysis of your MedicalDirector PracSoft database, and let you know how long it might take. You don’t have to do anything – we’ll do all the work from here.

Once started, the data synchronisation will run in the background and won’t impact your Practice’s operations. During synchronisation you can turn off your workstation computers, but please don’t turn off your internet connection or server computer.

After registering for Online Appointments locate the link on your portal Dashboard.
Dashboard Overview

After synchronising your data, you will be presented with the Online Appointments Dashboard, from which you can:

- View the Patient Portal i.e. what your booking website looks like to your patients
- Configure which appointments are displayed to patients
- Configure payment details
- View invoicing and payments
- Update your practice details
- Update your contact details

MedicalDirector PracSoft Subscription

The subscription section located at the top of your Dashboard home shows you:

- **Expires**
  - The expiry date of your current subscription. Your subscription is current up-to and including this day.

- **Amount**
  - The base fee for your next subscription. This is the cost of your subscription renewal, assuming you accumulate no appointment rebates.

- **Rebates Year To Date**
  - The value of rebates you have accumulated. This value is updated monthly, essentially after your monthly-invoice is paid.

- **Next Amount**
  - The actual fee for your subscription renewal, after rebates have been taken into account.

Online Appointments Status

This section indicates when your Online Appointments service became active, and what sort of plan you are on.
### Configuring Appointments

After activating your Online Appointments service, you’ll need to tell us a little bit about how you want your online appointment book configured, such as which of your practitioners will be available to accept bookings, and how far in advance you’ll let patients make appointments.

To start configuring your Online Appointments, click the **Configure Appointments** button.

Firstly, tell us how far in advance you wish to show appointments for. The default is 1 month. Other options include 1 week, 2 weeks, 2 months, 6 months or 1 year. Don’t worry – you can adjust this at any time, and the change will take place immediately.

![Configure Appointments](image)

Next, tell us about how available your practitioners are to take appointments. Each of your practitioners will be listed here, but your patients won’t see them yet – by default, they’re hidden from your Online Appointments web site, like our Dr Mackie here:

![Hide practitioner](image)

For each practitioner you do wish to advertise on your web site, you’ll have a couple of choices for how they appear; you can display their name and indicate that they’re accepting online appointments, or you can simply display their name only - you might choose this option if you want to advertise that a particular practitioner works at your Practice but they’re not currently taking online appointments.

Now that you’ve selected the billing practitioners you want to show online, you need to link them to your Online Appointment Book. In the following example, we’ve elected to display our Dr Mackie in our Online Appointment Book, and show the appointments she’s available for.
We link her to our online Appointment Book by clicking Link. Linking a practitioner like this can take up to five minutes. De-linking or hiding a practitioner occurs immediately.

Now, tell us which of your PracSoft Appointment Book doctors represents the Billing Practitioner you just selected, by placing a tick in the box next to each practitioner name.

At our Surgery, Dr Mackie works in two different rooms, so she appears twice in our PracSoft Appointment Book (once for each room). We need to tell our online Appointment Book that both of these PracSoft Appointment Book doctors need to be linked to the billing practitioner “Gillian Mackie”, so we tick both boxes.

By doing this, we’re telling our online Appointment Book that all appointments made with Dr Gillian Mackie (regardless of whether they’re for Room 2 or Room 4) will be allocated to the billing practitioner “Gillian Mackie”.

Click Save to confirm your selections.

You’ll need to tell us about all the practitioners you wish to appear in your Online Appointment Book. In our example, the next practitioner we configured was Dr Danielle Allan. She only appears once in our PracSoft Appointment Book, so there was only one instance of her to link to our online Appointment Book, as shown below. Notice also that references to Dr Mackie’s are greyed-out – this is because we already linked her.
Here’s an example of what your patients might see when they visit your Online Appointments web site to make a booking.

![Online Appointments Example](image)

**Flagging Appointment Slots as ‘Unavailable’**

Note that by default, all available slots in your MedicalDirector PracSoft Appointment Book will also be available in your online Appointment Book. So, how do you flag specific slots as ‘unavailable’?

Consider the situation where one of your practitioners takes a few hours off in the afternoon - you’d want to ensure that those times are no longer available for patients to book appointments in. To do this, simply select the slot(s) in your MedicalDirector PracSoft Appointment Book, type a description in the slot, and press CTRL + Enter. This creates what we call a Non-Patient Appointment – in this case though, it’s not an appointment as such – but the process will hide such slots from your online Appointment Book. You can create reserved appointment slots in this way, as well as recurring non-patient slots.
Accessing Your Practice’s Online Appointment Book

Patients access your Online Appointment Book via a web page, and there are two options available to you:

**Option 1: Use the *Free* MedicalDirector Web Page**

MedicalDirector provides you with a *free* web page on which to host your Online Appointment Book – you don’t need your own web site – just use ours, *for free*!

Once you have signed-up and synchronised your practice’s data (as explained above), this option is immediately available to you – simply give your patients the following web address, and they can start booking appointments with you:

https://my.medicaldirector.com/your_practice

Using our example practice name we created earlier, our web address would read:

https://my.medicaldirector.com/ForYourHealth

**Option 2: Use Your Own Web Site**

You can use a web page on your *own* web site (a web site you already have for your practice).

If you choose this option, MedicalDirector will provide you with a snippet of code you’ll need to embed in your web page. Once you’ve inserted this code into a page on your web site, your Online Appointment Book will appear within the web page too.

Here’s an example of what the code looks like:

```html
<iframe src="https://my.medicaldirector.com/Embed/fdd9dccc-664c-4646-addf-39e1d034e26a/Slots/Day?ShowHeader=True&Theme=4" width="100%" height="1000" frameborder="0"></iframe>
```

**Notes:**

- Don’t use the example shown above – your *actual* code snippet will be slightly different!
- It is recommended that you create a separate page on your web site for your Online Appointment Book. Alternatively, if you wish to embed your Online Appointment Book in an existing page, ensure you provide enough space for the Book to be easy for your patients to see and navigate. In our example above, we’ve ensured that our Book fits the entire width of our page (width="100%"), and made it high enough to show enough information to be practicable (height="1000").

After synchronizing your data with us, simply click this button in the Portal, and we’ll email you your customised code snippet, along with instructions of embedding it in your web page.

[Email embedding instructions]

*Note that you may need help from your Web Site Administrator to add this code to your web site.*
Your Online Appointments service invoice and payment history is available by clicking "Invoicing and Payments". You will be presented with the following sections. Note that this data is updated nightly.

*The Rebate is calculated on usage charges, excluding GST.*

View and download your latest invoice:
View all your transactions in chronological order:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Number</th>
<th>Amount</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>31/03/12</td>
<td>Invoice</td>
<td>21005772</td>
<td>$55.00</td>
<td>28/04/12</td>
</tr>
<tr>
<td>29/02/12</td>
<td>Invoice</td>
<td>21002407</td>
<td>$55.00</td>
<td>28/03/12</td>
</tr>
<tr>
<td>19/02/12</td>
<td>Receipt: Mastercard 521893 68</td>
<td>21001045</td>
<td>$(121.00)</td>
<td></td>
</tr>
<tr>
<td>3/02/12</td>
<td>Invoice</td>
<td>21000484</td>
<td>$0.00</td>
<td>2/03/12</td>
</tr>
<tr>
<td>31/01/12</td>
<td>Invoice</td>
<td>21000450</td>
<td>$55.00</td>
<td>28/02/12</td>
</tr>
<tr>
<td>31/10/11</td>
<td>Invoice</td>
<td>20987905</td>
<td>$66.00</td>
<td>28/11/11</td>
</tr>
</tbody>
</table>

Search your transaction history (2 years). For invoices older than two years, please contact your MedicalDirector Account Manager.

Search for transactions (last 2 years):

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Number</th>
<th>Amount</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>31/03/12</td>
<td>Invoice</td>
<td>21005772</td>
<td>$55.00</td>
<td>28/04/12</td>
</tr>
<tr>
<td>29/02/12</td>
<td>Invoice</td>
<td>21002407</td>
<td>$55.00</td>
<td>28/03/12</td>
</tr>
<tr>
<td>19/02/12</td>
<td>Receipt: Mastercard 521893 68</td>
<td>21001045</td>
<td>$(121.00)</td>
<td></td>
</tr>
<tr>
<td>3/02/12</td>
<td>Invoice</td>
<td>21000484</td>
<td>$0.00</td>
<td>2/03/12</td>
</tr>
<tr>
<td>31/01/12</td>
<td>Invoice</td>
<td>21000450</td>
<td>$55.00</td>
<td>28/02/12</td>
</tr>
<tr>
<td>31/10/11</td>
<td>Invoice</td>
<td>20987905</td>
<td>$66.00</td>
<td>28/11/11</td>
</tr>
</tbody>
</table>
Where To From Here?

Changes to the Appointment Book

With the introduction of Online Appointments, MedicalDirector PracSoft has some new features we’d like to share with you. Below is a snapshot of our Appointment Book, and here’s what’s changed:

- Appointment slots for Practitioners who are available for Online Appointments are displayed in blue highlight. Appointments made at your Practice itself are still displayed in white. You can change the colour setting in your Appointment Book by selecting the View menu > Legend.
- Our Dr Mackie has two appointments scheduled that were made online. Apart from the blue highlight, we can tell they’re Online Appointments because of the format of the patient’s details; Austin, Adrianne, 0415123456, 23/09/1997, a.austin@some where.com, Standard (short) appointment. You can also right-click the appointment and select Full Detail.
- Mark Noble made an online appointment, and he’s a new patient, as indicated by the icon next to his name.
- Clement Evans made an online appointment, to see Dr Allan at 8:30. Next to Clement’s name is an icon to tell us that there are two patients in our database who share the same name and date-of-birth. We’ll have to decide which patient this appointment is for. This may require us contacting both patients. Once we’ve determined who’s who, we can right-click the appointment and select Link to link the appointment to the correct patient in our database.
- Kim Oliver also made an appointment online, to see Dr Allan. She made the appointment for 10:00. As luck would have it, whilst Kim was making her appointment online, our Receptionist at the Practice was also making an appointment – for Blajoia Gould – for 10:00. To account for this clash, the Online Appointments system automatically rescheduled Kim’s appointment, and made it appear as a Fit-in appointment (a standard MedicalDirector PracSoft feature) - Kim’s appointment was pushed back by 1 minute, to 10:01.

It’s very rare that two appointments would be scheduled simultaneously like this, but when it does occur, the appointment made at your Practice will always take priority over the online appointment – the online appointment will still be made successfully, but it will be rescheduled. The Practice must manage such situations and contact any affected patients to resolve these conflicts.
FAQ

Q: What happens if I remove payment details and then re-enter them?
A: When you provide payment details after removing them, you will be placed on the Standard (Paid) Plan, regardless of the plan you were on previously.

Q: What happens with rebates around the time my MedicalDirector PracSoft subscription renewal letter is sent?
A: Your MedicalDirector PracSoft subscription renewal letter is issued approximately 2 months prior to your licence expiring. Any rebates you accrue in that 2-month period are rolled over into the next billing cycle i.e. they will be deducted from your next licence renewal.

Q: What happens if I don’t pay my invoice on time?
A: Our billing system is designed to direct-debit your credit card on the due date. If a payment attempt fails for any reason, we will notify you of this, and make 3 more attempts to bill you over the next 3 days, after which we will commence suspension of your Online Appointments service with us – we will email you to notify you of this also. A second invoice will be sent to you, and further payment attempts will be made. If these fail, your account will be suspended. If your account is suspending, please contact MedicalDirector Customer Care for assistance.

Q: What sort of feedback do I receive from using Online Appointments billing?
A: Our billing system will notify you of:
  o Invoices – sent monthly on the invoice issue date
  o Payment receipts – sent monthly on payment due date
  o Payment declined advice – sent after each unsuccessful payment attempt
  o Credit Card expiry warnings - 60, 30, 14 and 1 day prior to your credit card expiry date
  o Online Appointments suspension warnings - 20, 30, 40 and 48 days after the Invoice issue date

Q: What happens if my account is suspended due to it being overdue?
A: Contact your Account Manager to arrange payment, at which point your Online Appointments service will be re-enabled.

Q: What happens if my account is suspended due to MedicalDirector PracSoft’s licence expiry?
A: Contact your Account Manager to renew your MedicalDirector PracSoft subscription, at which point your Online Appointments service will be re-enabled.