Create a schedule

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Create a schedule to help manage what a doctor's time is used for. The schedule will be assigned an Activity Type, which determines the types of appointments that can be booked in that schedule's time slots.

Overview

A practitioner's **Schedule** in the Appointment Book is allocated an **Activity Type** with a colour, for example, blue for Consultation time and purple for Theatre time. This tells staff what **Appointment Types** they should book in the doctor's schedule. Appointment types have a colour that replaces the colour of the Activity Type in the **Appointment Book**.

Example: A practice has a green **Activity Type** - **Theatre** used for the **Appointment Type** > **Surgery** and a blue **Activity Type** -**Consultation** used for the **Appointment Types**: **Long Consultation**-30min, **Std Consultation**-15min and **New Patient**-30min. Reception wants to book a **Std Consultation** and sees 2 doctors with a blue schedule and 1 doctor with a green schedule, and make the appointment in a blue block of time.

Create a schedule

To create a schedule:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Appointments** > **Schedules**.

   The **Set Schedules for Doctor or Resource** screen will open.
3. Select the **Doctor** or **Resource** you need to create a schedule for.

   The **Schedules** section shows all schedules currently set for the doctor. The **Sessions** section shows the sessions that occur each week for the selected schedule.
4. Select **Add**.

   This will clear the fields that are used to create a new schedule.
5. In the **Start Date** field, enter a date using the dd/mm/yyyy format and press **Tab.**
6. If this is an ongoing schedule, leave the **End Date** blank. If there is an **End Date**, enter one.
7. Select a cycle from the **Cycle(Days)** drop-down.

This is how long the schedule runs before repeating.

8. Select **Graphic Display**.

This will open the **Doctor Schedule** screen (below).

9. Use the **Display slot size** field to divide the schedule into time increments that are appropriate for the schedule.

When the schedule is created, it will use this slot size as the default for appointments booked in the schedule.

For example, if you were making a schedule for short 15-minute consults, you would select **15 mins**.

10. Double-click the time slot where the schedule will start.

The **Daily Schedule** will open.

The **Start Time** and **End Time** will reflect the period of the slot you opened. You can select any start or end time to add the schedule.
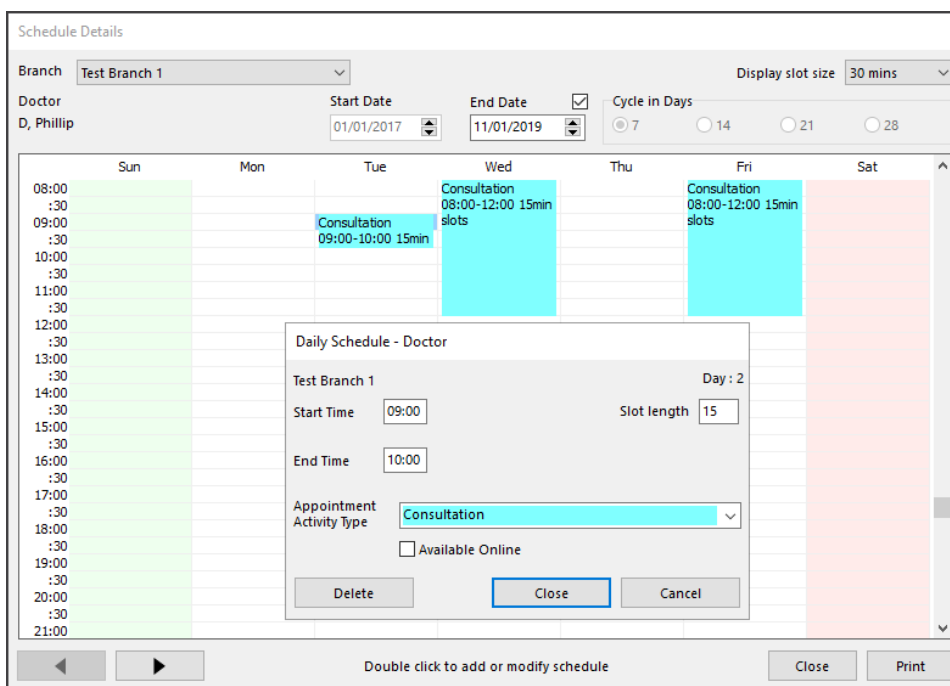
11. Review the **Slot Length**.

This is the schedule's duration divided by the slot size. A 4-hour schedule with 15-minute slots will have a slot length of 16.

12. Set your **End Time** as appropriate.

13. Select an **Activity Type**.

To learn more, see the Create an Activity Type article.

14. Repeat this process to add more schedules as required.
15. Select **Close** to save and exit

    This will take you back to the **Set Schedule** screen.
16. Select **Check for Conflicts**

    If there are any conflicts, you will need to change one of the conflicting schedules so that they do not overlap.

    See the **Resolve Schedule conflicts** section below to learn more.
17. **Close** to save and exit the **Set Schedules** screen.
18. **Configure Online Appointments**

    If the practice is using Zedmed Online Appointments, you will now select each session in each schedule and tick **Available Online** as required. Follow the steps in the Set up Online Appointments guide to complete these steps.

Resolving Schedule conflicts

If a practitioner has a schedule conflict, it must be resolved before the schedule set can be saved. Conflicts often occur when changes are made, and those conflicts will be displayed on the right pane with a red border. Requires Zedmed v38.

To resolve a conflict:

1. Review the conflict description/s and identify the conflicts.

   A description of each conflict will be provided with the data and times.

   Select each branch and review the session times for the day of the conflict.
2. Remove or modify one or more conflicting sessions so there is no overlap.
3. Select **Check for Conflicts.**
4. If there are still conflicts repeat the steps above.
5. If there are no conflicts, select **Close** to save the schedule set.

   Important: No changes to the schedules or sessions will be saved until you select **Close**.