

# Book an appointment

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Make a patient appointment, including multiple and linked bookings and bookings from the waitlist. To book a surgery, see the [Book a surgical procedure article](#).

An [Appointment Report](#) can be produced to view cancelled or missed appointments and SMS patients.

## Book an appointment

This section explains how to create an appointment for an existing patient. To learn more, see the [Appointment options](#) guide.

To make an appointment:

1. On the **Reception** tab, select **Appointments**.

The Appointment Book that displays is relevant to the branch you logged into.

2. Under the relevant practitioner/resource, double-click or right-click the time slot.
3. Search for and select the patient

The **Appointment Details** screen will open.

**Referrals** or **Alerts** will appear on the right under **Other Details**.

4. In the **Type** field, select the **Appointment Type**, and the duration and end time will adjust automatically.
5. Optional:













- **Duration** - can be changed and the **End Time** will update accordingly.
- **Start Time** - can be changed in Zedmed v38.7. It does not need to match the slot's start time.
- **Notes** - to record information relevant to the booking.
- **Include all appointment types** - overrides [limitations on Appointment types](#) that can be booked in that time. Zedmed v38.8 and later.

6. Select **Close** to save the appointment.

Fri		Davis, Phillip		Appointment Details	
8 AM	0			Date	Friday, 5 December 2025
	15			Created by	Dr Phillip Davis on 05/12/2025 at 14:42
	30			Doctor	Phillip Davis
	45			Resource	Holloway, Knut
9 AM	0	C85 Chapman, William	New Patient (09:00 - 09:20)	Start Time	10:45
	15			Clinic	Branch 1
	30	C72 Ashley, Isabelle	Std Consultation (09:30 - 09:40)	Duration	00:10
	45	A56 Holloway, Andrea	Std Consultation (09:45 - 09:55)	Status	Current
10 AM	0			End Time	10:55
	15	62 Black, Emma	Long Consultation (10:15 - 10:35)	Type	Std Consultation
	30			Include all appointment types	<input type="checkbox"/>
	45	... in progress ...	(10:45 - 11:00)	Notes	
11 AM	0			Reason for chosen date	
	15			Cancellation Waiting Priority	
	30			Hide Notes	<input type="checkbox"/>
	45			Allow SMS	<input type="checkbox"/>
12 PM	0			Send Confirmation SMS	<input type="checkbox"/>
	15			Account Payers	
	30			Holloway, Knut	P1 \$0.00
	45			Medicare	MC \$0.00
1 PM	0			Repeated booking	<input type="checkbox"/>
	15			Print Label	Booking rules
	30			Print Letter	Find Patient
	45			Print Slip	Close
2 PM	0			Cancel	Help
	15				
	30				
	45				

## Appointment icon explanations

The following icons are used to indicate the patient's status.

Icon	Description	Explanation
	Green tick (left)	Patient has been attended to the Waiting Room.
	Red folder + cross	The patient's IHI is unavailable.
	Green folder + tick	The patient's IHI is available.
	Cloud icon	The patient made the appointment via Online Appointments.
	Cloud icon with +	A patient's first Online Appointment needs reconciling.
	Credit card	Credit card provided.
	File folder	File pulled & patient not attended. Replaced by a green tick when attended.
	Phone icon	Patient replied YES (green tick) to reminder SMS. Replaced when attended.
	Yellow dollar	An invoice has been raised. Replaces the attended tick.
	Green dollar	An invoice has been receipted. Replaces the attended tick.
	Grey dollar	An invoice has been voided. Replaces the attended tick.
	Camera + green tick	Telehealth appointment. Green tick is part of the icon not a status indicator

## Repeat, linked and multiple bookings

These topics are extensions of the **Make a Patient Appointment** section above.

### Repeat bookings

Selecting **Repeated booking** on the **Appointment Details** screen will enable the **week(s)**, **frequency**, and **Booking period** fields. Use these fields to repeat the appointment every X weeks for a selected number of weeks (up to 52). When you select **Close**, the list of appointments will be displayed and conflicts will be checked. De-select appointments to resolve conflicts, and use the **Search/Delete** functions to remove multiple forward bookings.

### Linked bookings

Some appointment types support **Linked Appointments**, allowing you to connect two practitioners/resources. This is useful when the practitioner providing the service is different from the one who will be billed for it. For example, an immunisation appointment may have a nurse for the attendance and a doctor to charge it to. After you save (Close) an appointment that supports linked bookings, the **Linked Appointment Details** screen will appear, simply select the second practitioner from there.

Appointment Details

Date

Friday, 12 September 2025

Created by

Dr Phillip Davis

on 15/09/25 at 11:04

Doctor

Phillip Davis

Resource

Black, Emma

Start Time

10:00

Clinic

Albany Road Clinic

File N°

Pull File

Yes

DOB

13/12/1990

Duration

00:10

Status

Current

First in

08/09/2022

Last in

09/12/2024

Type

Immunisation - Linked

End Time

10:10

Contact Details

Phone (H)

Work (W)

Linked Appointment Details

You have selected a linked appointment type for this patient appointment. Please enter the following information to complete the linked appointment.

Patient

Black, Emma

DOB

13/12/1990

Address

30 3rd Street, ELLEN GROVE 4078

Original Appointment Details

Linked Appointment Details

Health Provider Availability

Friday, 12 September 2025

Friday, 12 September 2025

Friday, 12 September 2025

Doctor/Resource

Phillip Davis

Pick a healthcare provider

Time

Duration

Activity Type

Start Time

10:00

Start Time

\_\_:\_

Duration

00:10

Duration

\_\_:\_0

End Time

10:10

End Time

\_\_:\_0

Please nominate which healthcare provider is to be billed as the service provider.

☒ Phillip Davis

☐

Close

Print Appt

Cancel

Help

Albany Road Clinic

PDAVIS

Print Label

Booking rules

Print Letter

Find Patient

Print Slip

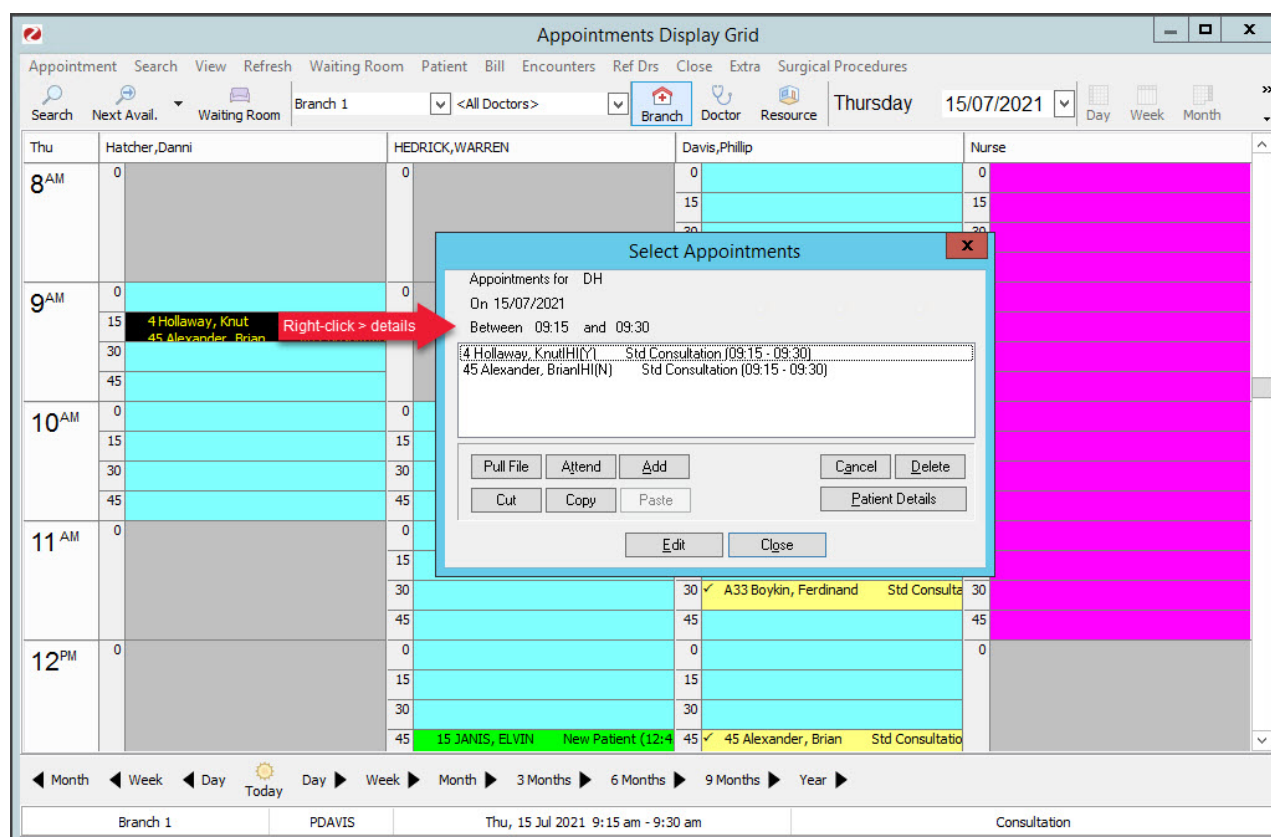
Close

Cancel

Help

### Multiple bookings

It's possible to create multiple bookings in any time slot. You will be warned of possible conflicts and multiple bookings in the same time slot will display in red. There is limited space to show the details, so right-click the booking and select **Details** for more information.



## Use the Cancellation Waiting List

If a patient makes an appointment but wants an earlier time, they can be added to the Cancellation Waiting List and given priority. When another patient's appointment is cancelled, you can check the waitlist and move a patient to the new appointment time based on their priority.

### Add an appointment to the Cancellation Waiting list

To waitlist an appointment:

1. Open the **Appointment Details** screen.
2. Create the appointment.

If the patient already has an appointment, locate and open their appointment.

3. In the **Cancellation Waiting Priority** field, select a **Low**, **Medium** or **High** priority, this adds the patient to the Cancellation Waiting List.

To remove a patient from the waitlist, change the **Cancellation Waiting Priority** field back to blank.

**Appointment Details**

Date: **Monday, 16 January 2023** Created by RD **Holloway, Knut** ✔  
 Doctor **Phillip Davis** on 16/01/23 at 08:26 File No 4 Pull File Yes DOB 19/05/1952  
 Resource First in 26/07/2022 Last in 9/01/2023 Type  
 Start Time 10:30 Clinic Branch 1  
 Duration 00:30 Status Current  
 End Time 11:00 Type **Std Consultation**

Notes

Contact Details  
 Phone (H) Work (W)  
 Mobile 0422803434  
 Address 5 Jacob Pl, BUGLE RANGES 5251

Other Details  
 Expiry MC HCC  
 Referral  
 Alerts

Clinical Warnings

Reason for chosen date  
 Cancellation Waiting Priority **Medium**

Hide Notes ☐ Allow SMS ☒ Send Confirmation SMS ☐

Account Payers

Medicare	MC	\$3,777.50
Holloway, Knut	P1	\$598.55
Gall	WC	\$107.16
Department of Veterans Affairs	DVA	\$0.00

Repeated booking ☐

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

## Book an appointment from the Cancellation Waiting list

To move a waitlisted appointment:

1. Right-click the spot made available by the **cancelled appointment**.
2. Select **Add (From the Cancellation Waiting List)**.

The **Appointments for Cancellation List** screen will open.

This lists the patients who want an earlier appointment time, their waiting list priority and contact phone numbers.

3. Select the patient to add in the new time slot.
4. Click **Select** and the patient will be moved to this spot.

The patient moved to the new appointment will have their previous appointment removed and they will be removed from the Cancellation Waiting List.

**Appointments Display Grid**

Appointment Search View Refresh Waiting Room Patient Bill Encounters Ref Drs Close Extra Surgical Procedures

Search Next Avail. Waiting Room Branch 1 HEDRICK, WARREN Branch Doctor Resource Friday 23/07/2021 Day

23 Jul (Fri)

10 AM

0

15

30

45 ... in progress ... (10:45 - 11:00) New appointment

11 AM

0

15

30 4 Hollaway, Knut Std Consultation (11:30 - 11:45) Original appointment

45

**Appointments for Cancellation List**

Single click the title to sort the data of the screen (except Duration).  
Double click the grid to select the highlighted appointment.

Total appointments: 3

Patient Name	Mobile Phone	Work Phone	Home Phone	Date of Birth	Doctor	Resource	Priority	Duration
BLAIR, BEVERLY	0412012100		03 125 12541	21/11/1999	Phillip Davis		High	15 Mins
Hollaway, Knut	0478701007			19/05/1995	WARREN HEDRICK		High	15 Mins
Berg, Max				16/11/1978	WARREN HEDRICK		Medium	15 Mins

Appointment Type: Std Consultation Appointment Notes:

Appointment Date Time: 19/08/2021 12:45

Print Select Cancel

Branch 1 PDAVIS

Branch 1 PDAVIS HEDRICK, WARREN Fri, 23 Jul 2021 10:45 am - 11:00 am Consultation

## Make a non-patient appointment

New patients often have a **patient record created** before an appointment is made. Sometimes you may want to make an appointment for someone without a patient record. For example, if you're not sure, the patient will turn up.

To book an appointment for a non-registered patient:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.
3. Right-click the relevant time slot and select **Add (Non-Patient)**.

The **Appointment Details** screen will open with many of the fields disabled.

4. Fill in the relevant appointment details:
  - In the **Type** field, select the Appointment Type.
  - If required, change the **Duration**, the **End Time** will update accordingly.
  - Use the **Notes** section to record information relevant to the booking..
5. Select **Close** to save the appointment.

When the patient arrives, you can open the appointment and use the **Find Patient** button then select **New** to start the **Add Patient process**. When you have completed their registration details, you will be returned to the **Appointment Details** screen and can **Attend** them directly.

6. The **Add (Non-Patient)** feature may also be used to book a practitioner's time for non-patient activities such as meetings or report writing.

### Appointment Details

Date: **Friday, 23 July 2021**  
Doctor: **WARREN HEDRICK**  
Resource:

Created by PD  
on 28/07/21 at 13:48  
File No  
First in

Pull File  
Last in  
DOB  
Type

Start Time: 12:15  
Duration: 00:15  
End Time: 12:30  
Clinic: Branch 1  
Status: Current  
Type:

Notes:

Reason for chosen date:

Cancellation Waiting Priority:

Hide Notes: ☐ Allow SMS: ☐

Account Payers:

Repeated booking: ☐

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

Contact Details  
Phone (H) Work (W)  
Mobile  
Address

Other Details  
Expiry MC HCC  
Referral  
Alerts

## Pull a physical file

For practices using physical patient files, you can right-click an appointment and select **Pull File**. This will place a folder icon next to the patient in the Appointment Book to indicate the patient file has been pulled for the doctor.

You can then right-click **Un-Pull File** when the file is returned.

The screenshot shows the Appointment Book interface with a right-click context menu open over an appointment. The appointment is for 10:15 AM on 29/08/2024, for patient 41 Holloway, Knut, with a Standard Consult (10:15 - 10:25). The context menu includes options: Add (Patient), Add (Non-Patient), Add (From Calendar), Details, Edit, Delete, and Pull File. The Pull File option is highlighted with a red box. A red arrow points to the Pull File option. The 'Un-Pull File' option is also visible in the menu, also highlighted with a red box. The 'Un-Pull File' option is located below the 'Pull File' option. The 'Un-Pull File' option is located below the 'Pull File' option. The 'Un-Pull File' option is located below the 'Pull File' option.

To learn more, see:

- [Appointment book time slot options](#)

- Appointment display options
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