

Manage the Appointment Grid

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Make and manage appointments using the functionality available on Zedmed's Appointment Grid.

Additional resources

- [Appointment display options](#) to change what is shown in the Zedmed Appointment Book.
- [Appointment Report](#) to view cancelled or missed appointments and SMS patients.
- [Surgical bookings procedure](#).
- [Right-click option descriptions](#).

Quickstart video

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](#). Zedmed v38.8 and later.
6. Select **Close** to save the appointment.

Find or Cancel an appointment




Use our dedicated guides to:

- [Find an Appointment](#)
- [Cancel an Appointment.](#)

Appointment icon explanations

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

Icon	Description	Explanation	
	Barr, Lydia Std Cons	Green tick (left)	Patient has been attended to the Waiting Room.
	Barr, Lydia Std Cons	Red folder + cross	The patient's IHI is unavailable.
	Simkins, Talia --- Onlin	Green folder + tick	The patient's IHI is available.
	Simkins, Talia --- Onlin	Cloud icon	The patient made the appointment via Online Appointments.
	Smith, Dave --- Online	Cloud icon with +	A patient's first Online Appointment needs reconciling.
	C82 Smith, Henry Std Co	Credit card	Credit card provided.
	C82 Smith, Henry Std Cc	File folder	File pulled & patient not attended. Replaced by a green tick when attended.
	62 Black, Emma (18:00)	Phone icon	Patient replied YES (green tick) to reminder SMS. Replaced when attended.
	Best, Gertie	Yellow dollar	An invoice has been raised. Replaces the attended tick.

 Black, Emma	Green dollar	An invoice has been receipted. Replaces the attended tick.
 Alston, Mia	Grey dollar	An invoice has been voided. Replaces the attended tick.
 4 Holloway, Knut	Camera + green tic	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** **Black, Emma**

Resource

Start Time 10:00 Clinic **Albany Road Clinic** File N^o Pull File Yes DOB 13/12/1990

Duration 00:10 Status **Current** First in 08/09/2022 Last in 09/12/2024 Type

End Time 10:10 Type **Immunisation - Linked** 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	
End Time 10:10	End Time	

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

Phillip Davis

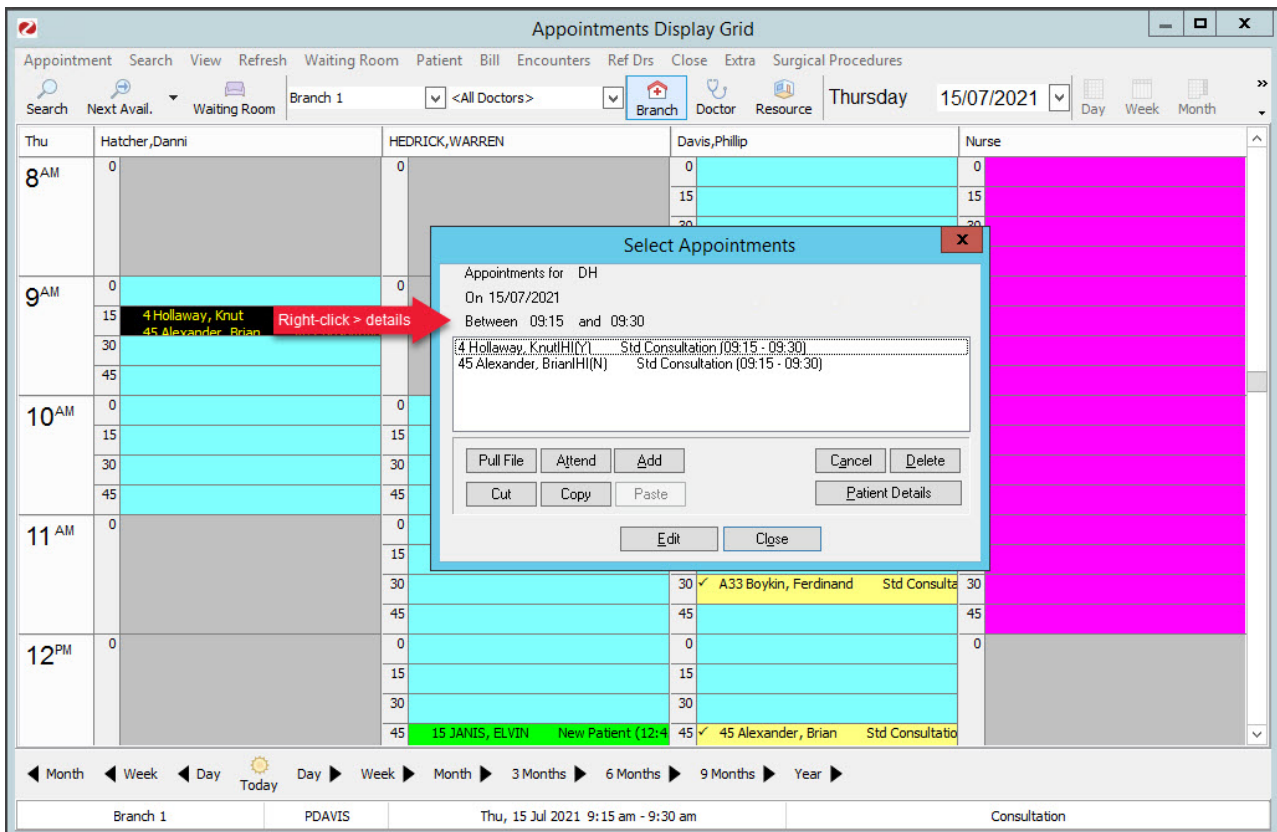
Close Print Appt Cancel Help

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

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	\$.00

Repeated booking

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

Contact Details

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

Other Details

Expiry MC HCC
 Referral

Alerts

Clinical Warnings

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.

The screenshot shows the 'Appointments Display Grid' interface. At the top, there are navigation tabs: Appointment, Search, View, Refresh, Waiting Room, Patient, Bill, Encounters, Ref Drs, Close, Extra, and Surgical Procedures. Below these are search and filter options for Branch 1, HEDRICK, WARREN, and Friday, 23/07/2021. The main grid shows time slots from 10 AM to 11 AM. A black bar at 10:45-11:00 is labeled 'New appointment' with a red arrow. A yellow bar at 11:30-11:45 is labeled 'Original appointment' with a red arrow. Below the grid is a table titled 'Appointments for Cancellation List' with columns for Patient Name, Mobile Phone, Work Phone, Home Phone, Date of Birth, Doctor, Resource, Priority, and Duration. The entry for 'Hollaway, Knut' is highlighted with a red box. Below the table are fields for Appointment Type (Std Consultation), Appointment Notes, and Appointment Date Time (19/08/2021 12:45). A 'Select' button is also highlighted with a red box.

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:
 - o In the **Type** field, select the Appointment Type.
 - o If required, change the **Duration**, the **End Time** will update accordingly.
 - o 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** Created by PD
 Doctor: **WARREN HEDRICK** on 28/07/21 at 13:48

Resource: File No: Pull File: DOB: Type:

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

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 an appointment book with a time slot at 10:15 AM for a patient named '41 Holloway, Knut'. A context menu is open over this appointment, with the 'Pull File' option highlighted. A second window titled 'Select Appointments' is also open, showing a list of appointments for the same patient, with the 'Un-Pull File' option highlighted.

To learn more, see:

- [Appointment book time slot options](#)

