

Book an appointment

Last Modified on 18/12/2023 2:32 pm AEDT

Make an appointment for a patient in the Zedmed appointment book. This includes multiple and linked bookings and bookings from the waitlist. To book a surgery, see the [Book a surgical procedure article](#).

Considerations:

- The Appointment Book that opens is for the branch you logged into. This is the default branch.
- The change branch, press **F3** and choose from the **Select Branch** screen
- If you select a time slot that's been booked by another workstation, you will be prompted to refresh your screen.
- If you answer **No** to the screen refresh prompt, this will make a double booking in that time slot.
- If you don't find a match for the patient, you can select **Register the patient now** or **Cancel** and make a non-patient booking.
- Book using a scheduled time that supports the appointment type. To learn more, see the [create Appointment Type article](#).
- A daily [Appointment Report](#) can be distributed to staff. It includes cancelled or missed appointments and SMS activity.

Make a patient appointment

This section explains how to create an appointment for an existing patient.

To make an appointment:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.

The **Appointments Display Grid** screen will open. If the screen was already open, select **Refresh**.

3. Right-click a time slot for the appointment, under the required doctor and select **Add (Patient)**.

The **Patient Search** screen will open.

4. Search for the patient and select them.

The **Appointment Details** screen will open.

To learn about searching, see the [find a patient's record article](#).

5. Fill in the relevant appointment details:

- In the **Type** field, select the Appointment Type.
- Change the **Duration** if required. The **End Time** will update to reflect any **Duration** change.
- Use the **Notes** section to record information relevant to the booking.
- Any **Referrals** will appear on the right side.
- The space by **Alerts** shows information from the Alerts section of the patient's record. For example, it could note that the patient needs to pay in advance or that they have missed past appointments.
- The operator's code and booking time are recorded and shown on the **Booking** screen.

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

Appointment icons:

- When a patient is attended, a green tick will display on the left side of their time-slot entry on the Appointment Grid.
- If the patient replies YES to a reminder SMS, a phone icon will appear on the appointment.
Icon is replaced with a green tick when attended if 'Show SMS Response' selected in the Appointments > View > Options.
- If the patient made the appointment via Online Appointments, a cloud icon will appear on the appointment.
- If the booking has not been reconciled with a patient record the cloud icon will have a + symbol on it.
- If the patient has My Health Record available, a green tick will appear on the right of the appointment

The screenshot displays the ZedMed Appointment Details interface. On the left, a weekly grid shows appointment slots. The right-hand pane contains the following information:

- Appointment Details:** Date: Monday, December 18, 2023; Doctor: Phillip Davis; Clinic: Test Branch 1; Start Time: 11:30; End Time: 11:50; Type: Long Consultation.
- Contact Details:** Patient Name: Holloway, Knut; File No: 41; DOB: 19/05/1952; Mobile: 0422803434; Address: 5 Jacob Pl, BUGLE RANGES 5251.
- Other Details:** Expiry: MC; Referral: To Mr Phillip Davis By Adelaide Path Partners On 08/11/2023 for 12 months; Alerts: test.
- Account Payers:** Department of Veterans Affairs (DVA \$53.50), Employers Mutual Work Cover (WC \$0.00), AHSa (IF2 \$0.00).
- Repeated booking:** Checked. Repeat bookings start from this appointment date. Generate booking every 4 week(s).

Repeat, linked and multiple bookings

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

Repeat bookings

Selecting **Repeated booking** (see screenshot above) 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. Deselect appointments to resolve any conflicts, and use the **Search/Delete** functions to remove multiple forward bookings.

Linked bookings

If the selected **Appointment Type** supports linked bookings, the **Linked Appointment Details** screen will open when you select **Close** to save the appointment. Linked appointments allow you to select two practitioners. One

can be a non-attending practitioner to charge the attendance to.

In the example below, an immunisation appointment has been booked with a nurse and a doctor has been added to charge the attendance to. The appointment will appear in both the nurse and doctor's schedules, so the doctor may have multiple (two) bookings in that time slot.

Linked Appointment Details

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

Name

Alexander, Brian

DOB

3/09/1948

Address

484 Gerhardts Cct, SURFERS PARADISE 4217

Original Appointment Details

Date

Wednesday, 28 July 2021

Doctor/Resource

Nurse

Start Time

08:15

Duration

00:15

End Time

08:30

Linked Appointment Details

Date

Wednesday, 28 July 2021

Davis, Phillip

Start Time

08:15

Duration

00:15

End Time

08:30

Health Provider Availability

Date

Wednesday, 28 July 2021

Time	Duration	Activity Type
08:15 am	15 Mins	Consultation
08:30 am	15 Mins	Consultation
08:45 am	15 Mins	Consultation
09:00 am	15 Mins	Consultation
09:15 am	15 Mins	Consultation
09:30 am	15 Mins	Consultation
09:45 am	15 Mins	Consultation
10:00 am	15 Mins	Consultation
10:15 am	15 Mins	Consultation
10:30 am	15 Mins	Consultation
10:45 am	15 Mins	Consultation

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

☐ Nurse

☒ Davis, Phillip

Close

Print Appt

Cancel

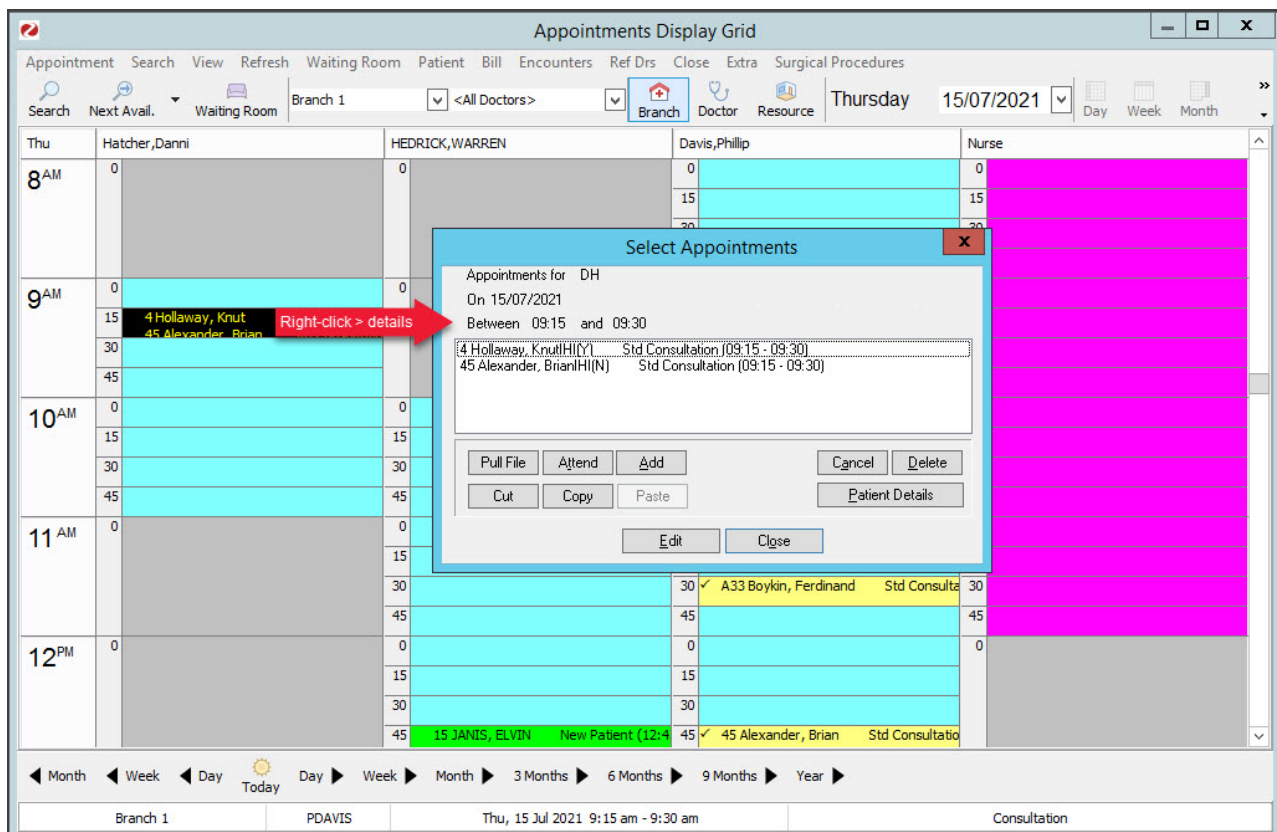
Help

Branch 1

PDAVIS

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 be displayed 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 a 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.
3. In the **Cancellation Waiting Priority** field, select a **Low**, **Medium** or **High** priority.

The patient's appointment is now on 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**

Doctor: **Phillip Davis**

Resource

Start Time: 10:30 Clinic: Branch 1

Duration: 00:30 Status: Current

End Time: 11:00 Type: Std Consultation

Notes

Created by RD **Holloway, Knut** ✔

on 16/01/23 at 08:26

File No 4 Pull File Yes DOB 19/05/1952

First in 26/07/2022 Last in 9/01/2023 Type

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 ☐

Contact Details

Phone (H) Work (W)

Mobile 0422803434

Address 5 Jacob Pl, BUGLE RANGES 5251

Other Details

Expiry MC HCC

Referral

Alerts

Clinical Warnings

Print Label Booking rules Print Letter Find Patient Print Slip

Close Cancel Help

Book an appointment from the Cancellation Waiting list

If your practice uses the Cancellation Waiting List, follow these steps whenever an appointment is cancelled.

To move a waitlisted appointment:

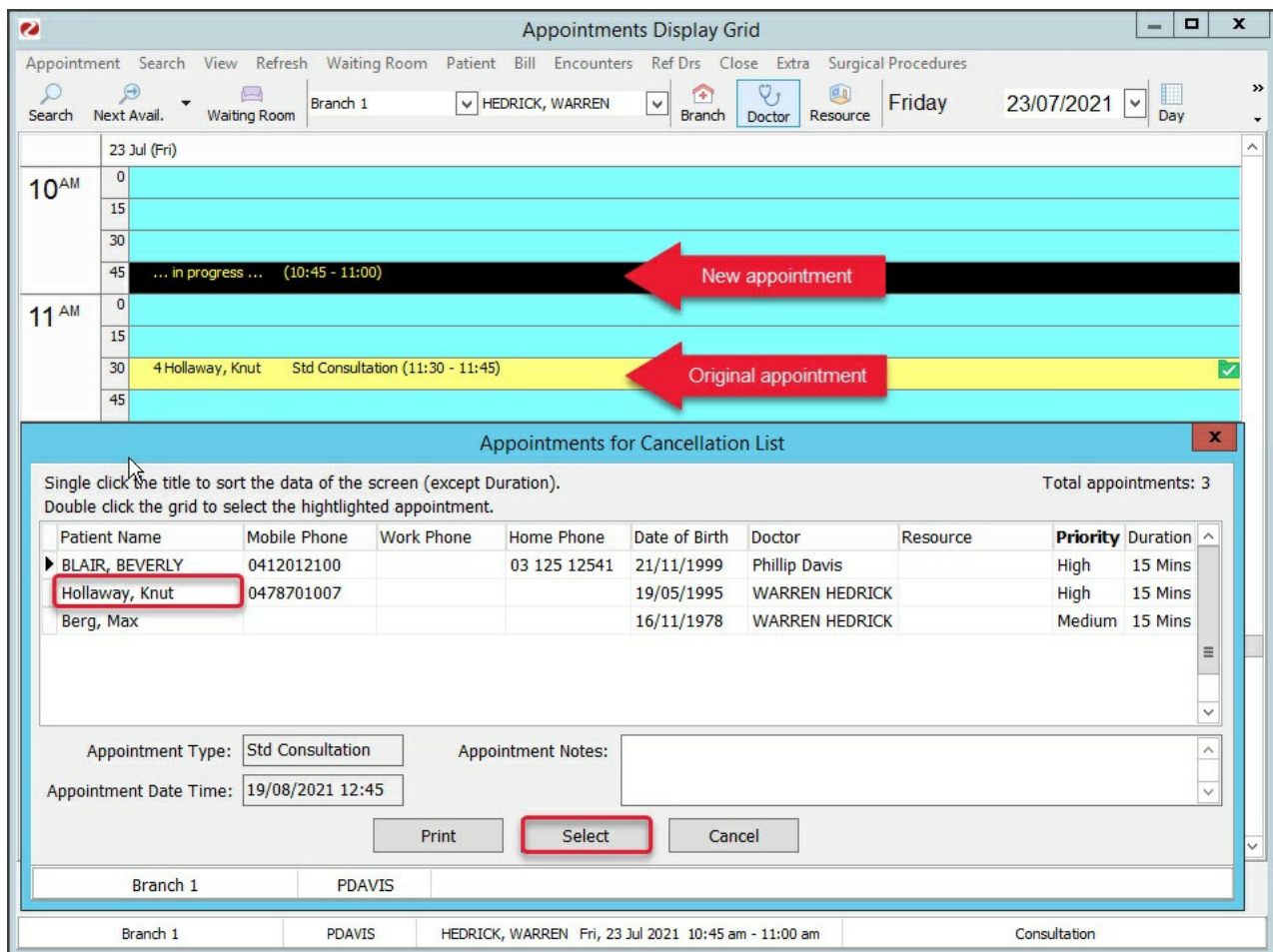
1. Right-click the spot made available by the **cancele**d appointment.
2. Select **Add (From Cancellation Waiting List)**.

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 cancelled, and they will be removed from the Cancellation Waiting List.



Make a non-patient appointment

New patients often have a **patient record created** for them before an appointment is made. However, there are times when you will 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**.

The **Appointments Display Grid** screen will open. If the screen was already open, select **Refresh**.
3. Right-click the appointment's 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.
 - Change the **Duration** if required. The **End Time** will update to reflect any **Duration** change.
 - Use the **Notes** section to record information relevant to the booking.
 - Any **Referrals** and **Alerts** will appear on the right side.
 - The operator's code and booking time are recorded and shown on the **Booking** screen.
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.

The screenshot shows the 'Appointment Details' window. At the top, it displays the date 'Friday, 23 July 2021' and the doctor 'WARREN HEDRICK'. Below this, there are fields for 'Start Time' (12:15), 'Duration' (00:15), 'End Time' (12:30), 'Clinic' (Branch 1), 'Status' (Current), and 'Type'. A 'Notes' section with a text area is present. To the right, there are sections for 'Contact Details' (Phone (H), Mobile, Address) and 'Other Details' (Expiry MC, Referral, Alerts). At the bottom, there are buttons for 'Print Label', 'Booking rules', 'Print Letter', 'Find Patient', 'Print Slip', 'Close', 'Cancel', and 'Help'. A 'Repeated booking' checkbox is also visible.

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
First in Last in 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

To learn more, see:

- [Appointment book time slot options](#)
- [Appointment display options](#)