

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 (30 min), Std Consultation (15 min), and New Patient (30 min). Reception wants to book a Std Consultation and see two doctors with a blue schedule and one doctor with a green schedule, and make the appointment in a blue block of time.

Mon	Davis, Phillip	Fuller, Igor	Jackson, Gaye
8 ^{AM}	0	0	0
	15	15	
	30	30	
	45	45	
9 ^{AM}	0	0	0
	15	15	30
	30	30	45
	45	45	0
10 ^{AM}	0	0	0
	15	15	30
	30	30	45
	45	45	0

Note: The table above is a simplified representation of the visual content. In the actual image, the cells contain appointment details such as doctor names, appointment types, and durations. For example, at 9:15 AM, Davis, Phillip has a 'Long Consultation (11:00 - 11:20)' and Fuller, Igor has a 'Std Consultation (09:15 - 09:30)'. At 9:30 AM, Jackson, Gaye has a 'Surgical Procedure (09:30 - 10:30)'. At 10:00 AM, Jackson, Gaye has another 'Surgical Procedure (09:30 - 10:30)'. Red callouts point to 'Activity Type' and 'Appointment Type' labels.

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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**.

Set Schedules for Doctor or Resource

Doctor: **Davis, Phillip** Resource:

Schedules

Start Date	End Date	Cycle (Days)	Branch
1/01/2017	1/01/2024	7	Branch 1
30/08/2022	30/08/2022	1	Branch 1
1/01/2017	1/01/2024	7	Branch 1
1/08/2016	1/07/2022	7	
1/08/2016	23/10/2022	7	Branch 3
1/08/2016	1/12/2022	7	Branch 4

Buttons: Save, **Add**, Copy, Delete, **Graphic Display**, Show all schedules, Clear...

Sessions

Day #	Day Of Week	Start Time	End Time	Slot Length	Activity Type	Available Online
1	Monday	08:00	17:00	30 Min	Consultation	<input checked="" type="checkbox"/>
1	Monday	08:00	17:00	30	Consultation	Yes
2	Tuesday	09:30	17:00	30	Consultation	Yes
3	Wednesday	08:00	17:00	30	Consultation	Yes
4	Thursday	08:00	17:00	30	Consultation	Yes
5	Friday	08:00	17:00	30	Consultation	Yes
6	Saturday	08:00	12:00	30	Consultation	Yes

Buttons: Save, Messages, Add, Delete, Duplicate, Close, Cancel

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.

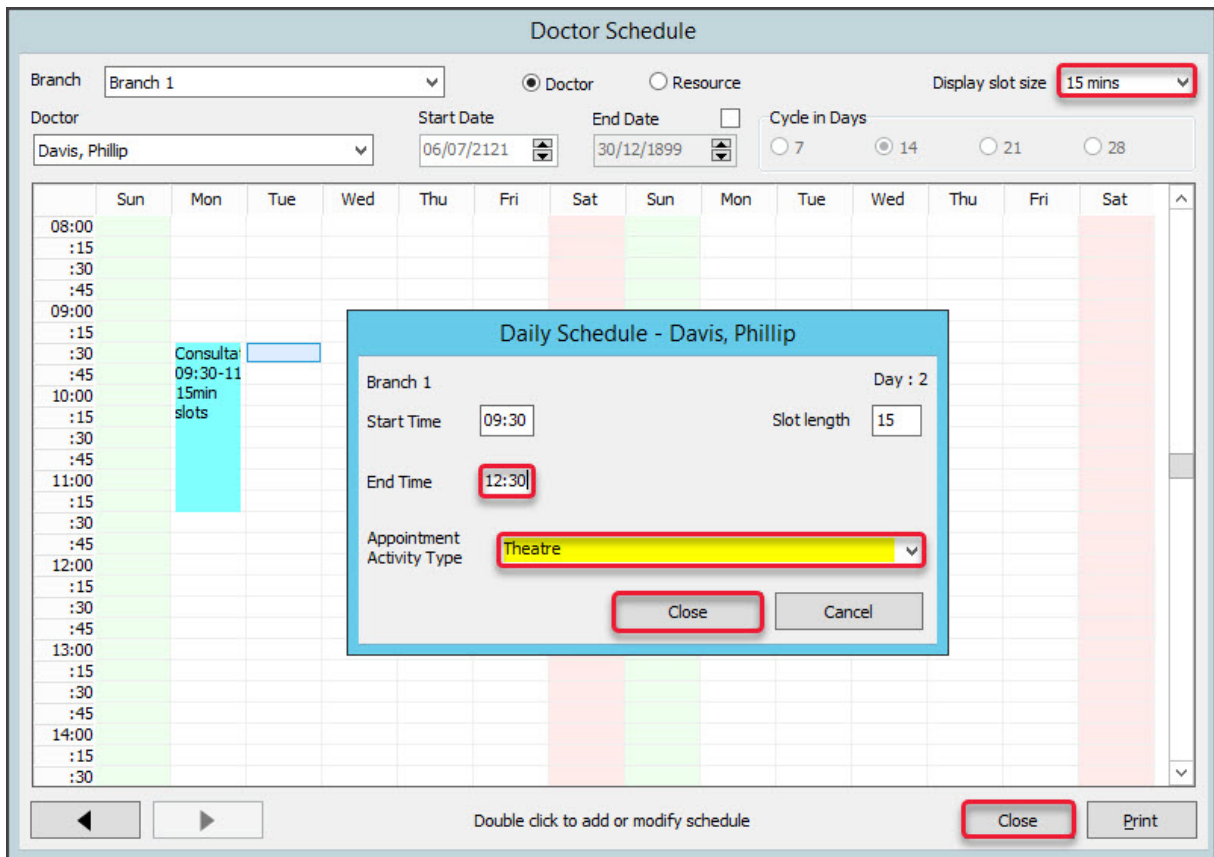
11. Review the **Slot Length**.

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.

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. To complete these steps, follow the steps in the Set up Online Appointments guide.