

## Change a schedule (ongoing)

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Change an existing schedule, for example, if you want to change or remove some sessions. This is done by creating a new schedule to take over from the existing schedule on a specified date. For one-off extensions to a schedule, see the Extend a schedule article.

In the steps below, you will copy the existing schedule and make the required changes in the new one. This is so you don't lose any historical information by deleting sessions in the current schedule. For a 7-day schedule, it's as easy as making the current schedule's end date the current day and making the new (copied) schedule's start date the next day. For a 28-day schedule, we recommend starting the new schedule on week 1 so the new schedule has the same distribution of days across the month. For example, if a 28-day schedule starts on the 1st Monday of the month, you want the new schedule to do the same and not start in the middle of the month.

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

The Appointments Display Grid screen will open.

3. Go to View on the top menu and select Setup > Schedules.

| 0                     |  |                                  | Appointments  | Display Grid   | _ □                       | x      |
|-----------------------|--|----------------------------------|---|--|---------------------------|--------|
| Appointr<br>Sea       | ment Search View<br>Legend<br>Options                        | Refresh Waiting<br>Room Branch 1 | Room Patient Bill Encounters       V <all doctors=""></all> | Ref Drs Close Extra Surgical Proced                              | ures<br>y 9/07/2021 V Day | »<br>• |
| Fri<br>8 <sup>4</sup> | 1 Column<br>2 Columns<br>3 Columns<br>4 Columns<br>5 Columns |                                  | HEDRICK,WARREN  | Davis,Phillip           0           15           30           45 | Nurse 0 15 30 45          | ^      |
| 9 <sup>4</sup>        | 6 Columns<br>7 Columns<br>Setup                              | Schedules                        | 0   | 0 15 30 55   | 0<br>15<br>30             |        |
| 10 <sup>AM</sup>      | 0<br>15<br>30  | Chavanabilit                     | 0<br>15<br>30   | 15<br>30   | 45<br>0<br>15<br>30       |        |

The Set Schedules for Doctor or Resource screen will open.

4. Select the **Doctor** or **Resource** you need to change the schedule for.

The schedules for the selected doctor or resource will appear.

The **Cycle** column shows the number of days in the schedule, and the **Graphic Display** button shows the selected schedule in a format that is easy to understand when planning changes.

5. Select the schedule to change.

The Schedules section lists existing schedules, and when you select one, its sessions are displayed in the **Sessions** section.

6. In the **End Date** field, enter an end date and press **Tab**.

If the schedule runs from a Sunday to Saturday, Sunday will be your 0 day. If this is not the case, check the

sessions to see what day your schedule begins. This determines the End Date and subsequent Start Date.

7. Select Copy.

The Select Doctor or Resource screen will open.

You will now set this copy of the current schedule to start the day after the old schedule ends and make the requested changes to the schedule.

8. In the **Start Date** field, enter a new date.

Make sure it corresponds with your current schedule's 0 day. For example, if Sunday is your zero day, begin on a Sunday.

9. Select **Close** to save and exit.

|   | Set Schedules for Doctor or  | Resource  |
|---|--|---|
| Doctor Davis, Phillip                   | Resource   | ¥   |
| Schedules<br>Start Date End Date Cycle  | e (Days) Branch  | Sava Add  |
| 1/01/2021                               | 7 Branch 1   | Copy     Delete   |
| 1/01/2017 11/07/2021 C<br>1/08/2016 C   | 7         Branch 1           7         Apostro'sand  |   |
| 1/08/2016 O                             | Select D   | Doctor or Resource  |
| Sessions<br>Day # Day Of Week Start Tim | Please select the doctor or resource for the<br>Doctor Davis, Phillip<br>Branch Branch 1<br>Please Note You may need to set an<br>If you do not end previous schedules, more | Resource Start Date Ill/07/2021 n end date for previous schedules. a than one schedule will be active at the same |
|   | Cla<br>Branch 1  | PDAVIS  |

Now that you have a new schedule, you can make the required changes.

- 10. Select Graphic Display.
- 11. Right-click the new schedule and select **Edit**.
- 12. Make the required changes to the schedule.

This could be adding, removing or changing the times of the current sessions or changing the Activity Type. 13. Select **Close** to save and exit.

| anch    | Test Branch 1 |          | $\sim$                 |                   |              |             |          | Display slot size | 30 mins | ` |
|---------|---------------|----------|------------------------|-------------------|--------------|-------------|----------|-------------------|---------|---|
| octor   |               |          | Start Date             | End Date          | $\checkmark$ | Cycle in Da | iys      |                   |         |   |
| Phillip |               |          | 01/01/2017             | 11/01/2019        | •            | • 7         | 0 14     | <u></u> 21        | 0 28    |   |
|         | Sun           | Mon      | Tue                    | Wed               |              | Thu         |          | Fri               | Sat     | , |
| 08:00   |               |          |                        | Consultation      |              |             | Consulta | ation             |         |   |
| :30     |               |          |                        | 08:00-12:00 15min |              |             | 08:00-1  | 2:00 15min        |         |   |
| 09:00   |               |          | Consultation           | slots             |              |             | slots    |                   |         |   |
| :30     |               |          | 09:00-10:00 15min      |                   |              |             |          |                   |         |   |
| 10:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               |          |                        |                   |              |             |          |                   |         |   |
| 11:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               |          |                        |                   |              |             |          |                   |         |   |
| 12:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               | 1        | Daily Schedule - Docto | or                |              |             |          |                   |         |   |
| 13:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               | Т        | est Branch 1           |                   |              |             | Day:     | 2                 |         |   |
| 14:00   |               |          |                        |                   |              |             |          | _                 |         |   |
| :30     |               | 5        | tart Time 09:00        |                   |              | Slot lengt  | th 15    |                   |         |   |
| 15:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               |          |                        |                   |              |             |          |                   |         |   |
| 16:00   |               | E        | nd Time 10:00          |                   |              |             |          |                   |         |   |
| :30     |               |          |                        |                   |              |             |          |                   |         |   |
| 17:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               | 4        | const Const            | ultation          |              |             | ~        |                   |         |   |
| 18:00   |               | <i>F</i> | cuvity type            |                   |              |             |          | -                 |         |   |
| :30     |               |          | Ava                    | ilable Online     |              |             |          |                   |         |   |
| 19:00   |               |          |                        |                   |              |             |          |                   |         |   |
| :30     |               |          |                        |                   |              | -           |          |                   |         |   |
| 20:00   |               |          | Delete                 | Clos              | e            | Car         | ncel     |                   |         |   |
| :30     |               |          |                        |                   | _            |             |          |                   |         |   |
| 21:00   |               |          |                        |                   |              |             |          |                   |         |   |