

# PrimaryClinic

## Creating and Editing Recurring Appointments

[www.primaryclinic.com.au](http://www.primaryclinic.com.au)  
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GLOBAL HEALTH

# Create and Edit Recurring Appointments

If a patient requires a recurring appointment/consultation, PrimaryClinic has the option to create recurring appointments based on Schedule Type, Date and Time.

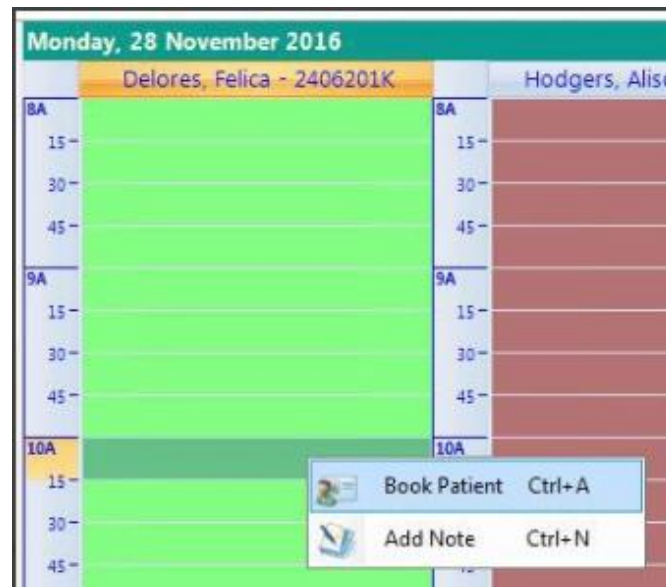
# Recurring Appointments

1. Open the **Appointment Book** by either pressing **F9** on the keyboard, selecting **Open** from the **Main Menu** or clicking the **Calendar icon** from the **Quick Link Toolbar**



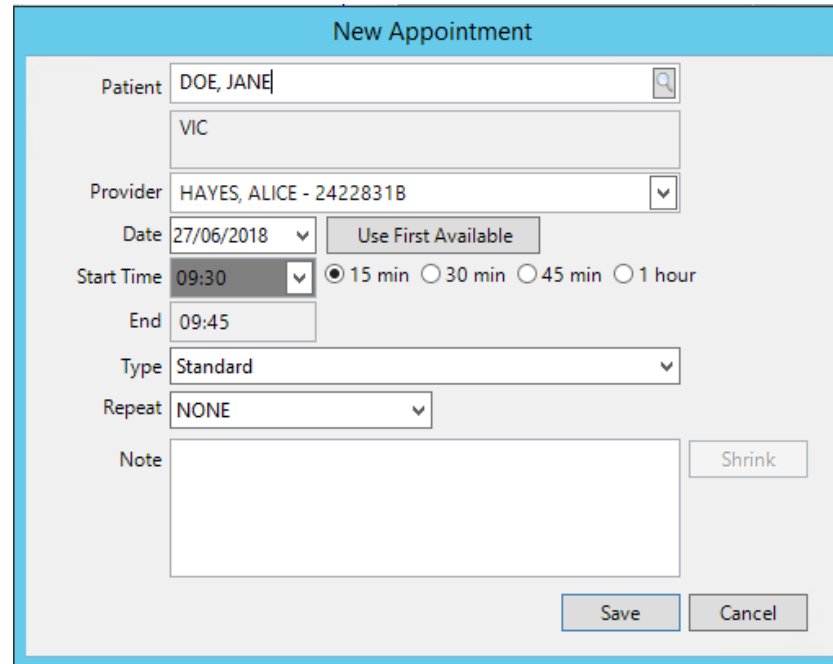
# Recurring Appointments

2. Right click on the Day/Time that the appointment is going to be booked for and select **Book Patient**



# Recurring Appointments

3. In the **Search Patient** window, find the Patient you are booking the appointment for and click **OK**
4. A **New Appointment** box will appear



The screenshot shows a 'New Appointment' dialog box with the following fields and options:

- Patient:** Text input field containing 'DOE, JANE' with a search icon on the right.
- Location:** Text input field containing 'VIC'.
- Provider:** Dropdown menu showing 'HAYES, ALICE - 2422831B'.
- Date:** Dropdown menu showing '27/06/2018' and a 'Use First Available' button.
- Start Time:** Dropdown menu showing '09:30'.
- Duration:** Radio buttons for '15 min' (selected), '30 min', '45 min', and '1 hour'.
- End:** Text input field containing '09:45'.
- Type:** Dropdown menu showing 'Standard'.
- Repeat:** Dropdown menu showing 'NONE'.
- Note:** Text area with a 'Shrink' button to its right.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

# Recurring Appointments

5. By default, the **Provider** will be set to whoever the appointment is being booked under but this can be changed.

Provider HAYES, ALICE - 2422831B

6. Select the **Date, Start time and Duration** of the recurring appointment

Start Time 09:30  15 min  30 min  45 min  1 hour  
End 09:45

7. Select the **Type** of appointment

Type Standard

8. Select **Repeat** which gives you 3 options. **Daily, Weekly and Monthly**. Select the recurring frequency for the appointment

Repeat MONTHLY

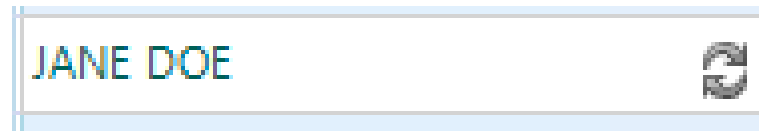
9. Set when the recurring appointment will **End** by setting either number occurrences or setting the end date.

End  
Repeat every  monthly(s)  
 After  occurrences  
 On 28/06/2018

# Recurring Appointments

10. Click **Save** to create the recurring appointment.

PLEASE NOTE: Recurring appointments will have **two circling arrows** to distinguish between **normal appointments** and **recurring appointments**.



# Editing A Recurring Appointments

If one occurrence of the recurring appointments needs to be edited, you can do this by **double-clicking** on the **appointment** and selecting whether you want the change to apply only to the **selected appointment** or **all occurrences**.

The screenshot shows a dialog box titled "Appointment Details - DOE, JANE". The form contains the following fields and options:

- Patient: DOE, JANE
- VIC
- Provider: HAYES, ALICE - 2422831B
- Date: 05/07/2018 (with a "Use First Available" button)
- Start Time: 09:30 (with radio buttons for 15 min, 30 min, 45 min, and 1 hour)
- End: 09:45
- Type: Standard
- Repeat: WEEKLY
- End: (empty field)
- Repeat every: 1 weekly(s)
- After: 1 occurrences (selected)
- On: 28/06/2018
- Update mode: Edit all occurrences (dropdown menu is open, showing "Edit all occurrences" and "Edit just this occurrence")
- Note: (empty text area)
- Buttons: Shrink, Save, Cancel



# Tutorials and FAQs

Read or watch more tutorials on the website.

<https://www.primaryclinic.com.au/tutorials/>

If you have a question or need some help please check the Frequently Asked Questions page before contacting the support team.

<https://www.primaryclinic.com.au/faqs/>

## **Support:**

You can reach support by lodging a ticket on our website:

[www.primaryclinic.com.au/support/](http://www.primaryclinic.com.au/support/)

Or email us at:

[primaryclinic@global-health.com](mailto:primaryclinic@global-health.com)

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