



ESM – Copying appointments to schedule multiple appointments



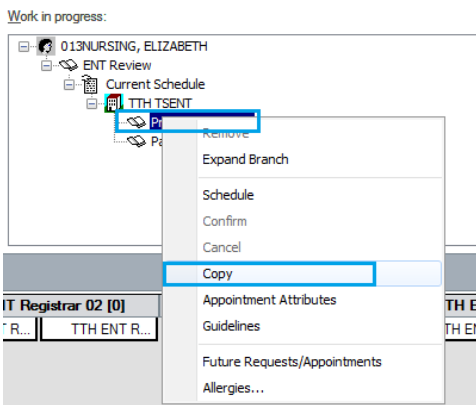
Please note: This function is only for Review Appointments. **Do Not Use for New Case Appointments.**

Pre-Arrival Encounters will need to be created for each appointment.

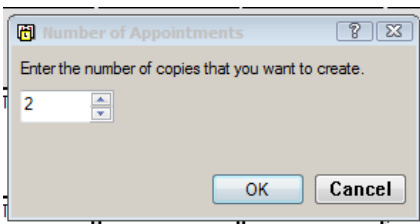
Community Appointments will not need to add an encounter if they are using a Community Registration.

The copy function can be used for unavailable slot types to close more than one appointment slot.

1. Create a Review Appointment. For steps on how to make a review appointment see *QRG Scheduling Review Appointment*.
2. Right click on the *Primary Resource* in the WIP and select *Copy*.

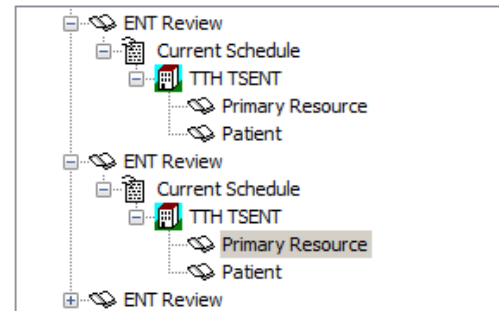


3. The *Number of Appointments* window will open. Enter the *number of new copies* you would like to create, click *OK*.



4. There will now be multiple Appointments in the WIP. Select the *Primary Resource* of an *Appointment* in the WIP.

Work in progress:



5. Find an *appropriate time Slot* in the Appointment Grid and *Schedule* the Appointment.
6. As you schedule and confirm the appointments they will *drop out* of the Work in Progress. For steps on scheduling an appointment see *QRG Scheduling Review Appointment*.
7. Pre-Arrival Encounters will need to be created for each appointment.
8. Once appointment confirmed right click the *appointment* in the grid, select *Person* then *Add Encounter*. Do this for each appointment.



Please note: If using this function for Unavailable Appointment type you will not need to add an encounter.