



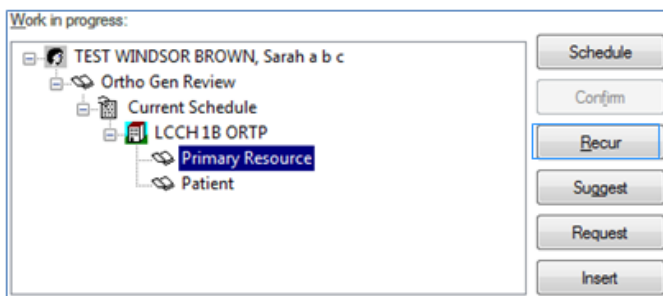
ESM – Schedule a series of recurring appointments

Please note: Only the first appointment has a pre-arrival encounter attached, all the other appointments will get one at point of check-in.

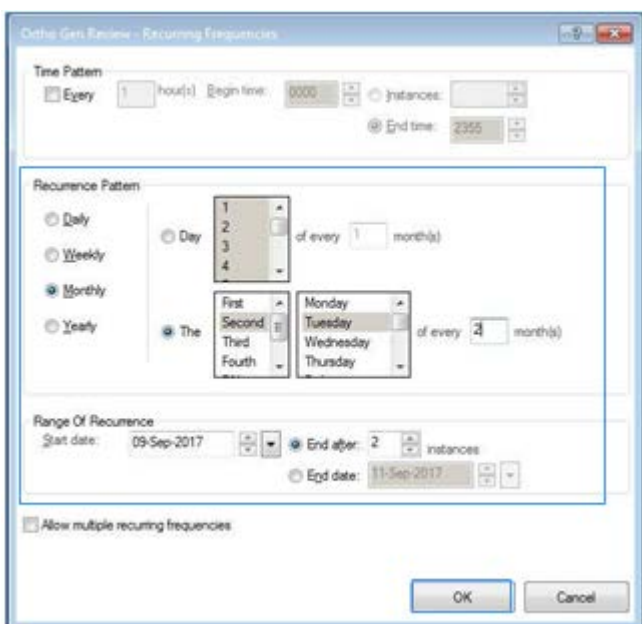
1. Click the *scheduling appointment book* icon in the *AppBar* to load ESM. Click the *appointment inquiry* button.



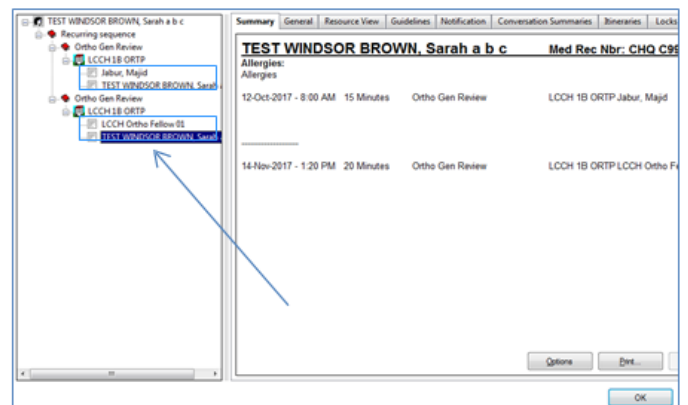
2. Conduct a *person search* to locate the patient who requires recurring appointments.
3. Right click on the corresponding appointment from the search results and click *schedule*. Perform a *next/move* process, ensuring the copy of the appointment in the *WIP* is now a review.
4. Before you schedule the first review appointment, click the *primary resource, recur*.



5. The *recurring frequencies* box appears. Select the recurrence pattern for the future appointments (e.g. the second Tuesday of each month, for the next two months). *OK*.



6. Two appointments now appear in the *WIP*. To schedule the first, click the *primary resource*, and click *schedule*. **Do not click confirm** for the appointment at this stage (all appointments must be allocated first).
7. Once you have finalised the first appointment, click the *+* next to the second appointment. Click the *primary resource*, and click *schedule*. Repeat for all the appointments in the *WIP*.
8. When all appointments have been allocated, click *confirm*. Untick the boxes for each appointment. If you wish to print a letter for each appointment, click the *notification* tab. You will need to select a letter for each appointment. Click *OK* once finalised.



9. Go back to your first appointment, right click *person* and select *Add Encounter*.
10. *Available conversations* window select *Pre-arrival Add Encounter, OK*
11. Complete the *treating clinician, Medical Service, Chargeable Status* and *Payment Class, OK*

Cancel recurring appointments

A warning box will appear if you cancel an appointment that has been booked in a recurring sequence. If you wish to remove the entire series, click *open all occurrences*.

