

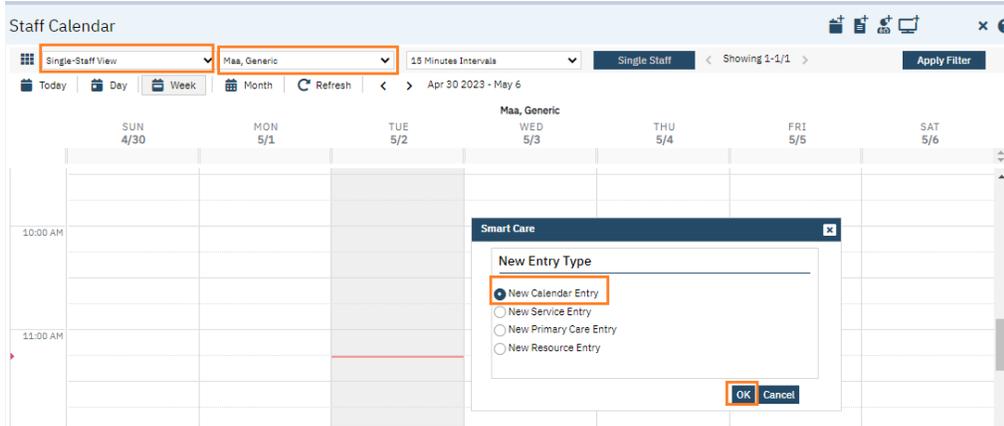
How to Add Reoccurring Events to Staff Calendar

Search **Staff Calendar (My Office)**.

Select Single-Staff View and Staff.

Click and drag your mouse to the desired start date and time of the reoccurring appointment.

Select New Calendar Entry and click OK.



In this window, you need to enter the subject (it doesn't populate when you select an appointment type.

You may enter a location/specific location although it's not required but will make it easier when searching for available appointments at a specific location.

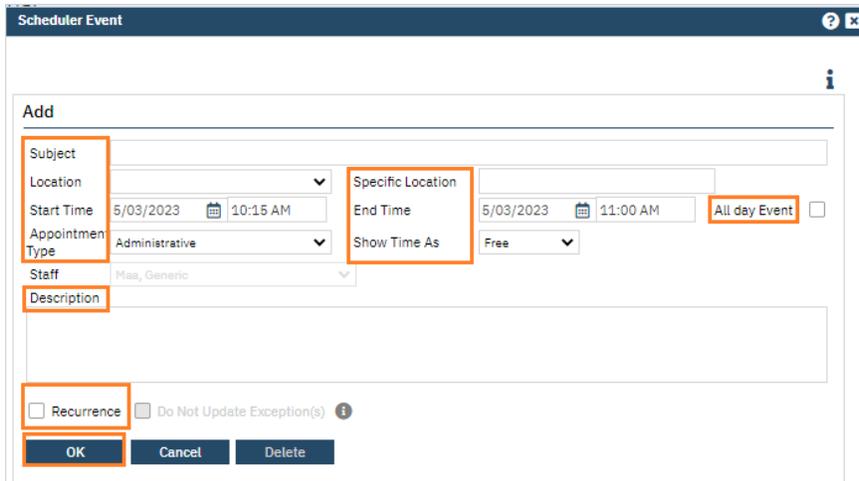
Enter start time and end time information. You can select "all day event" if applicable.

Choose from drop down the appointment type.

Select from drop down for "show time as".

You may enter a description, but not required.

Select choose recurrence and click OK.



In this example, I am scheduling a reoccurring intake from 10am to 12pm, every weekday from 5/03/2023, for 20 occurrences. (You can specify an end date if you choose.)

Scheduler Event

Add

Subject: Intake

Location: [Dropdown] Specific Location: [Text Box]

Start Time: 5/03/2023 10:00 AM End Time: 05/03/2023 12:00 PM All day Event:

Appointment Type: Intake Show Time As: Free

Staff: Maa, Generic

Description: [Text Area]

Recurrence Do Not Update Exception(s) ⓘ

Daily Every 1 day(s)

Weekly Every Weekday day(s)

Monthly

Yearly

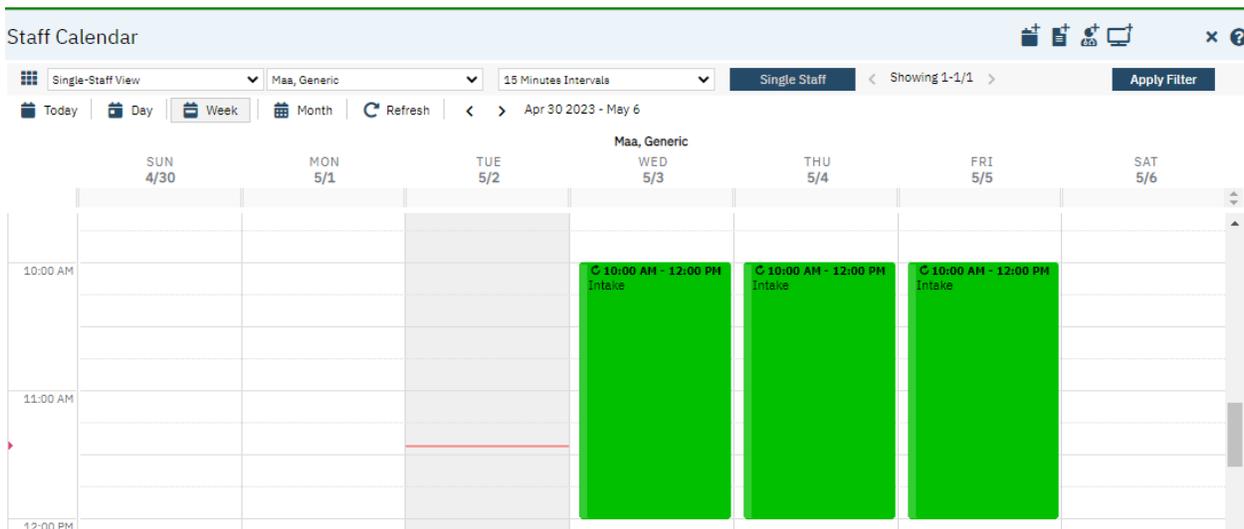
Start: 5/03/2023 No end date

End after 20 occurrences

End by 5/2/2023

OK Cancel Delete

This is how it will be displayed on the Staff's calendar.



Now you can do **Appointment Search (My Office)**.

Enter all search parameters and click Search.

Appointment Search

Plan: Any Service Area: Any Programs: Any

Location: Any Staff: **Maa, Generic** License: Any License Group: Any

Sex: Any Speciality: Any Category: Any Allow Overbooking Up to: Appointment(s)

Minutes: 15 From: 8:00 AM To: 8:00 PM Any Weekday M T W T F S S

Only show time slots marked as Free Appt. Type: Intake Start Date: 05/02/2023 **Search**

Ignore Age Range Preference Search for Client: Maa, Generic [Unable to Offer a Timely Appt.](#)

Staff Name	Date/Time	Duration	Type	Location Name
No Appointment(s) Available				

You will now see all available intake appointments for that staff.

Appointment Search (11)

Plan: Any Service Area: Any Programs: Any

Location: Any Staff: Maa, Generic License: Any License Group: Any

Sex: Any Speciality: Any Category: Any Allow Overbooking Up to: Appointment(s)

Minutes: 15 From: 8:00 AM To: 8:00 PM Any Weekday M T W T F S S

Only show time slots marked as Free Appt. Type: Intake Start Date: 05/18/2023 **Search**

Ignore Age Range Preference Search for Client: Maa, Generic [Unable to Offer a Timely Appt.](#)

	Staff Name	Date/Time	Duration	Type	Location Name
	Maa, Generic	05/03/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/04/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/05/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/08/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/09/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/10/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/11/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/12/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/15/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/16/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/17/2023 10:00 AM	120 mins	Intake	

If you would like to schedule, you click A.

If client declines offered appointment, you click B and select reason from drop-down. (Central Access function tied to timeliness reporting.)

Appointment Search (11)

Plan: Any | Service Area: Any | Programs: Any

Location: Any | Staff: Maa, Generic | License: Any | License Group: Any

Sex: Any | Speciality: Any | Category: Any | Allow Overbooking Up to: | Appointment(s):

Minutes: 15 | From: 8:00 AM | To: 8:00 PM | Any Weekday: M T W T F S S

Only show time slots marked as Free | Appt. Type: Intake | Start Date: 05/18/2023 | **Search**

Ignore Age Range Preference | Search for Client: Maa, Generic | [Unable to Offer a Timely Appt.](#)

		Staff Name	Date/Time	Δ	Duration	Type	Location Name
	A	Maa, Generic	05/03/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/04/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/05/2023 10:00 AM		120 mins	Intake	
	B	Maa, Generic	05/08/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/09/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/10/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/11/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/12/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/15/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/16/2023 10:00 AM		120 mins	Intake	
		Maa, Generic	05/17/2023 10:00 AM		120 mins	Intake	