Setting up Reoccurring Appointments

Note: Fresno County Department of Behavioral Health does not recommend utilizing the reoccurring appointments options for individual client appointments currently.

If you choose to utilize the reoccurring appointments, make sure you did not schedule over any national or county holidays. <mark>SmartCare does not discriminate between regular workdays and holidays.</mark> If your department utilizes an automated reminder service, the reminder service will still call the client to inform them of the appointment for the day of the holiday.

A few examples of this would be the following situations: you are scheduling a reoccurring appointment for every Thursday. However, Thanksgiving is always on the last Thursday of November. As a result, you will need to then navigate through the calendar to November and delete the appointment from the day of Thanksgiving. Another example is: you are scheduling a reoccurring appointment for every other Wednesday, but July 4th is on a Wednesday this year. You will need to navigate the calendar to July 4th and delete that appointment.

To schedule a reoccurring appt:

1. Schedule the client as you normally would by utilizing the steps in the scheduling guide.
2. In the "Service Details" screen, verify that all information is correct and save the appointment. Do not navigate away from this screen yet.
3. In the top right of the screen there is a row of icons. The icon on the far left, looks like two arrows making a circle, is the "Make Recurring" button. Select this button.

4. A new menu will open asking what you would like for the recurring services.

5. Select the recurrence pattern desired and click "OK". Click Save in the top right.
6. Verify that the recurrence has saved and displays appropriately.
7. Verify and delete any of the recurring appointments that fall outside of the desired time or on holidays.