

Recurring Appointments

This article describes how to create recurring appointments in your practiceQ calendar.

Creating a Recurring Series

1. The first step is to create the first appointment in the series.
2. Once the first appointment is saved, open it again and click on **"More > Recurring"**.

The screenshot shows the 'Edit Appointment' interface. At the top, it says 'Edit Appointment' with a clock icon and 'Confirmed' with a checkmark. A user profile icon 'BS' is in the top right. The form contains the following fields:


- Client Name: Brian Smith (0127) [Check-in button] [update client link]
- Client Email: ryan@intakeq.com
- Client Phone: (902) 740-3365
- Client DOB: January 01, 1995
- Client Timezone: (UTC-04:00) Atlantic
- Location: Ryan's Office
- Service: Diagnosis (60 min)
- Date/Time: 07/20/2022
- Reminder: None
- Send Form: None
- Note: This note is for your
- Invoice: Actions
- ☐ Send confirmation e

A dropdown menu is open from the 'More' button at the bottom. The menu items are:

- Charge Automation
- Add Client
- Change Client
- Billing Details
- Create Claim
- Mark as Missed
- Confirm Attendance
- Transfer
- Create Note
- Recurring** (highlighted with a red box)
- Delete Appointment

At the bottom of the form, there are buttons: Close, More (with a red arrow pointing to it), Cancel, and Save.

3. Set the recurrence parameters and click on "Create Appointments".

 Recurring

Repeats:

Weekly

Repeats Every:

1 weeks

Days of the week:

☐ S ☐ M ☐ T ☐ W ☐ T ☐ F ☐ S

Starts On:

Jul 20, 2022

Ends:

☒ After occurrences

☐ On

Cancel

✓ Create Appointments

You're able to set how often appointments recur and on what day of the week, as well as how many appointments are in the series and/or an end date.

Please note that the system is limited to allow up to 30 appointments to be created at one time through recurrence. We would suggest setting up a task reminder to setup further recurring appointments if needed: Task Management ([//support.intakeq.com/article/362-task-management](https://support.intakeq.com/article/362-task-management))


Display Overlaps When Scheduling Recurring Appts

There is a setting that will warn you if the appts you are about to book in a recurring appt series will overlap already existing appts on the calendar. To enable this setting. Go to "Bookings > Booking Settings > Settings Tab > Recurring Appointments section

Recurring Appointments

☒ Warn when a recurring appointment will overlap an existing one ([learn more](#))

With this enabled, you will see the overlaps and can select a different appt time on the spot!



Recurring Appointment Conflicts

Resolve any conflicts below and click "Create Appointments" when done

Aug 10, 2023 at ~~9:00 AM~~

→

08/10/2023

No spots available

Aug 11, 2023 at ~~9:00 AM~~

→

08/11/2023

1:00 PM

2:00 PM

3:00 PM

4:00 PM

Cancel

☒ Create Appointments

Stopping a Recurring Series

If you need to stop a recurring series of appointments, load up the last actual appointment you want in the series, then click "**More > Stop Recurrence**".

🕒

Edit Appointment

✓ Confirmed

🔄 recurring

BS

Client Name:

Brian Smith (0127)

Check-in

update client

Client Email:

ryan@intakeq.com

Client Phone:

(902) 740-3365

Client DOB:

January 01, 1995

⚙️ Charge Automation

Client Timezone:

(UTC-04:00) Atlantic

➕ Add Client

Location:

Ryan's Office

👤 Change Client

Service:

Diagnosis (60 min)

📄 Billing Details

Date/Time:

07/20/2022

📄 Create Claim

Reminder:

None

👤 Mark as Missed

Send Form:

None

✓ Confirm Attendance

Note:

This note is for your

🔄 Transfer

Invoice:

Actions ▾

📄 Create Note

☐ Send confirmation

🔄 Recurring

☒ Stop Recurrence

✕ Delete Appointment

Ryan A

Close

More ▾

Cancel

Save

Assuming this is not the last appointment in the series, you'll be prompted asking what you'd like to have happen with the remaining appointments.

ⓘ Attention

✕





Do you want to delete all recurring appointments after this one?

No

Yes

If you select **"Yes"** here the remaining appointments after the one you're on will be deleted, otherwise the series will not be stopped and no appointments are impacted.

RELATED ARTICLES

-  [How to Block Time Availability from my IntakeQ Calendar? \(/article/77-how-to-block-time-availability-from-my-practiceq-calendar\)](/article/77-how-to-block-time-availability-from-my-practiceq-calendar)
-  [Add Availability Outside of Your Regular Hours \(/article/121-add-availability-outside-of-your-regular-hours\)](/article/121-add-availability-outside-of-your-regular-hours)
-  [Setting Up Alternative Hours for a Service \(/article/139-setting-up-alternative-hours-for-a-service\)](/article/139-setting-up-alternative-hours-for-a-service)
-  [How to Change the Duration of an Appointment \(/article/202-how-to-change-the-duration-of-an-appointment\)](/article/202-how-to-change-the-duration-of-an-appointment)