Internal Tool: Trigger Recurring Appointments
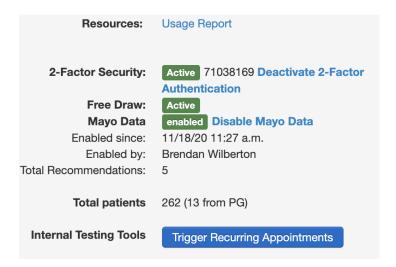
07/24/2024 6:20 pm EDT

Recurring appointments do not become actualized appointments until 3 days before the scheduled appointment.

Normally, we have a daily job that runs once a day This looks for all the upcoming recurring appointments that need to be actualized and makes them "real" appointments on the schedule.

We have introduced a tool on the CRM page that serves 2 purposes:

1. On staging we can test the recurring appointments

2. On production, in the event that the recurring appointments were not actualized, we can make them "real".

On production, employees have access to the Trigger Recurring Appointments button. If needed they can click the button to change the recurring appointments to "real" appointments.

This will make all recurring appointments actual appointments for the next 2 days on the provider's schedule.

If the **Recurring Appointment Reminders** box in checked under Account > Provider Settings > Email with reminders enabled for the account, then the job will look at recurring appointments to actualize for the next 4 weeks.

Incoming Email

Daily Agenda Emails	☑ Send a HIPAA compliant daily agenda email
Daily Billing Problems Emails	☑ Send a daily billing problems email
Recipients of Billing Email	[sample.billing@samplepractice.com, practice.manager@samplepractice.com] Recipients of daily billing problems email, separated by comma "," or space " ". Leave blank to use default setting.
Online Scheduling Emails	☐ Send an email each time an appointment is scheduled online
Recipients of Online Scheduling Notification	[scheduling@samplepractice.com, doctor1@samplepractice.com] Recipients of the online scheduling notifications email, separated by comma "," or space " ". Leave blank to use default setting.
Include Notes in Emails	☑ Reason and notes will be included in daily emails

Outgoing Email

Use Alternative Email for Fax	☐ Using alternative email address for fax and referral
Alternative Email for Fax	[ ] Alternative email address displayed in fax and referral
Custom Email Signature	[ ]
Recurring Reminders	☐ Send Recurring Appointment Reminders

Update Entire Profile