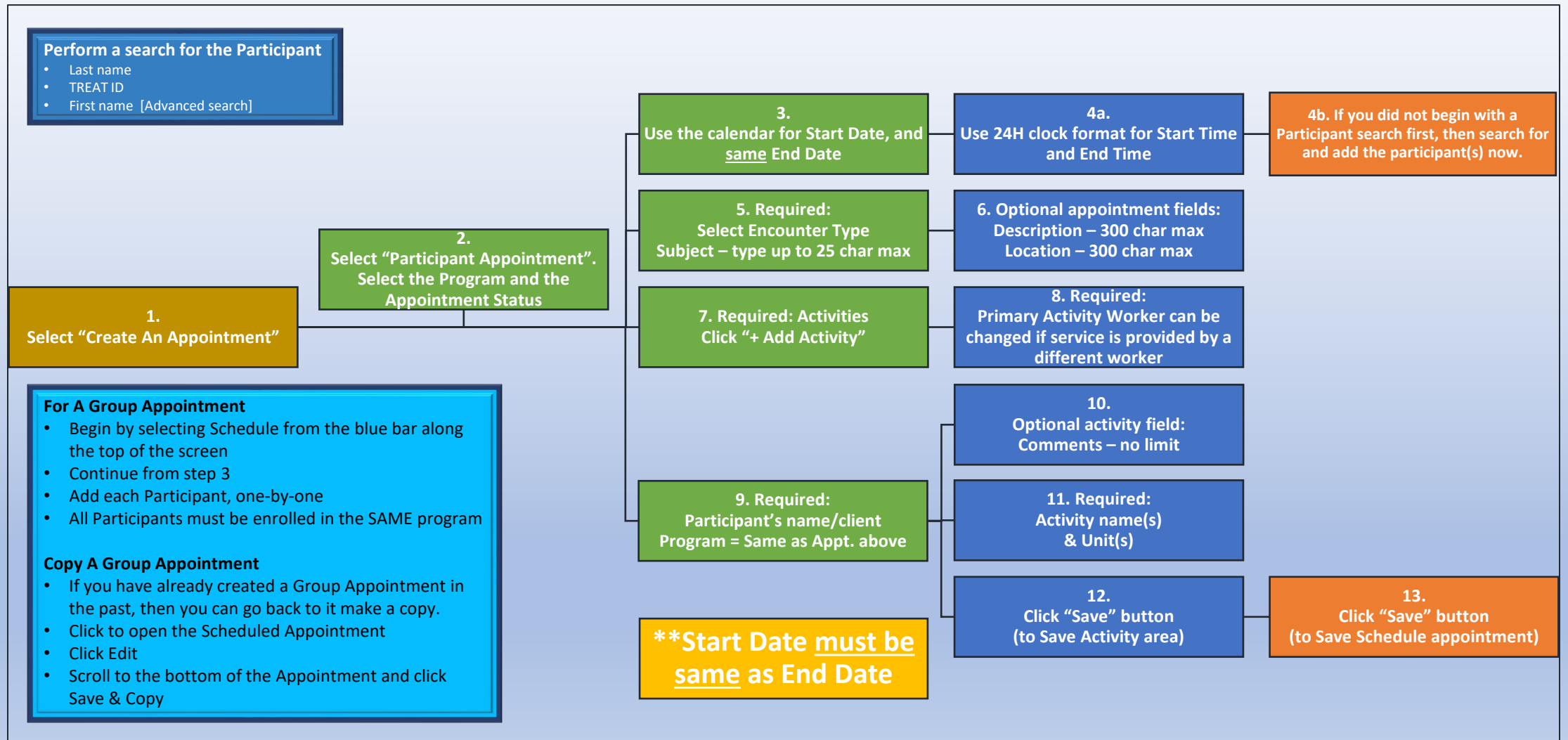


Copy Activity Items
when making a
clone or
duplication of
Scheduled
Appointments.



OCASE TREAT

Create A Scheduled Appointment



Types of Scheduled Appointments

One Scheduled Appointment with one Participant – one-on-one

Recurring Appointments with one Participant – one-on-one

One Scheduled Appointment with more than one Participant - group

Recurring Appointments with more than one Participant – group

[Review the Quick Reference: Scheduled Appointments & Progress Notes](#)

(press Ctrl+Click to follow this link)

To Copy or Clone:

Open and Edit an Existing Scheduled Appointment

Locate your client's file by using the TREAT ID or search by Name. Navigate to the Participant's Schedule.

Select an Appointment and click the Edit icon to copy an existing Scheduled Appointment. Scroll down to the bottom of the Appointment. Click Save & Copy.

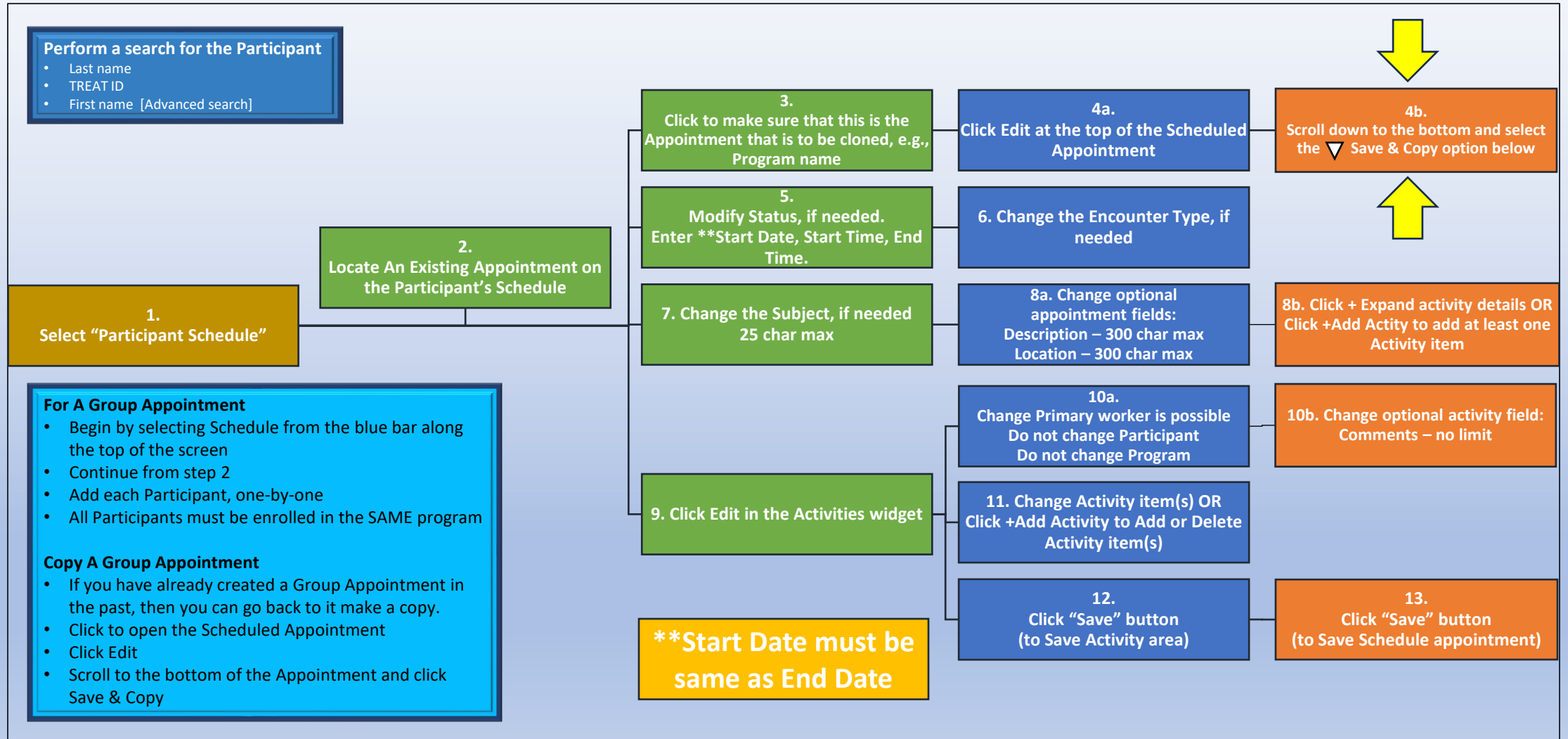
Fill-in the details. The Program on the Scheduled Appointment must match the Program on the Appointment Activity Widget at the bottom. If it's not the same, it would be an Exception, (i.e., invalid).

A Scheduled Appointment must be in Edit mode if you need to change the Activity Widget or other required fields – Service Activity items, Primary worker or Participant(s).

If you do not click Save, i.e., if you click Cancel, on the copied appointment, the copy will not be Saved.

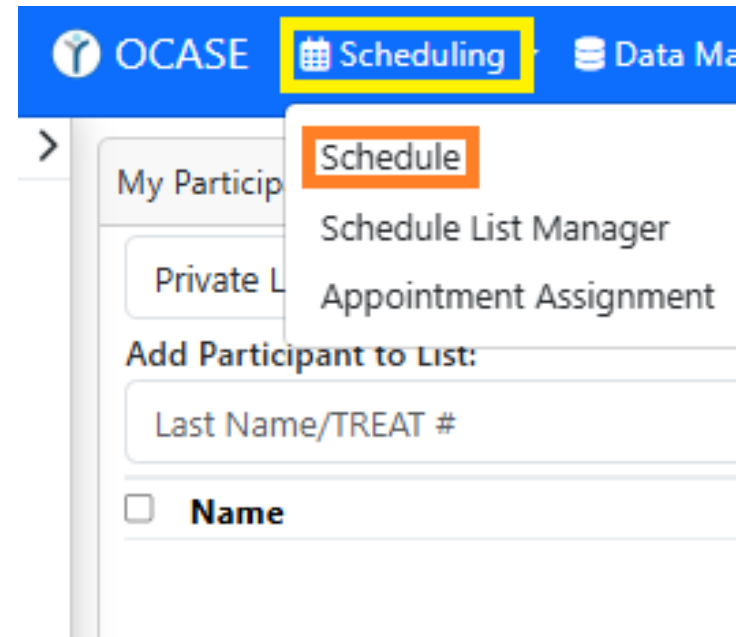
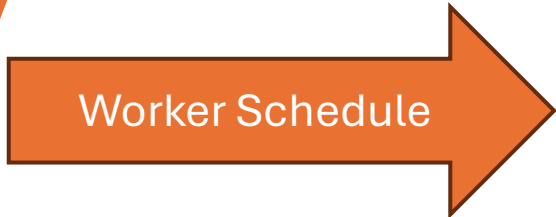
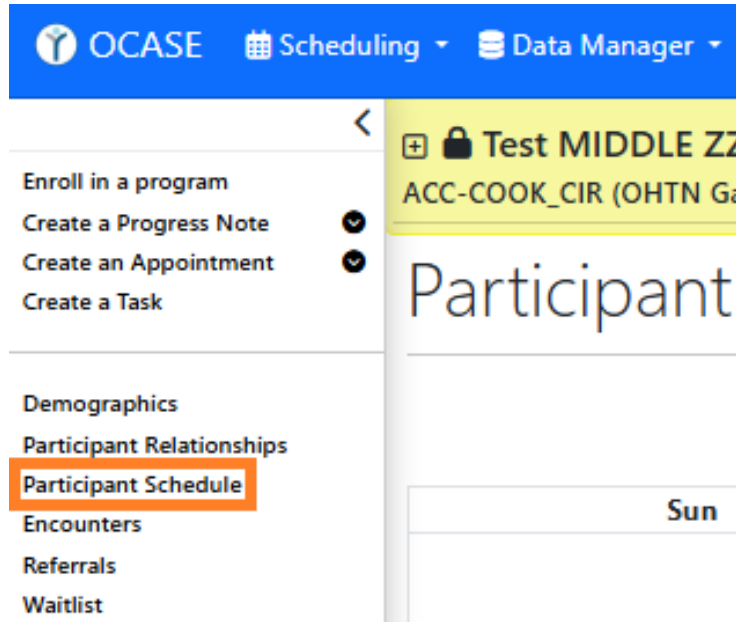
If a Scheduled Appointment has been entered in Error, you can Edit it and change the Status to either No-Show, Cancelled, Re-Scheduled or Entered in Error.

Edit An Existing Scheduled Appointment



To find the Appointment:

Click either Participant Schedule or navigate to Worker Schedule



Open the Scheduled Appointment and Click Edit.

Scroll to the bottom and select Save and Copy

View Schedule Entry

 Edit

Appointment Type: Participant Appointment

Program: Support

Status: Attended

Start Date: 06-Jan-2026 13:27

End Date: 06-Jan-2026 13:41

Duration 00 : 00 : 14

Recurring: No

Save and Copy

Cancel

Save



Save & Link To Individual Note



Note: Recurring appointments cannot be cloned as recurring, but you can copy an Individual or Group appointment and then turn on recurring in the copy.

The copy
opens right
away:

Initial
details
about this
new feature

The screenshot shows a form with the following fields:

- Status:** A dropdown menu currently showing "Scheduled".
- Start Date:** A text input field containing "dd-mmm-yyyy", with a calendar icon and a help icon.
- Start Time:** A time input field showing "00:00".
- End Date:** A text input field containing "dd-mmm-yyyy", with a calendar icon and a help icon.
- End Time:** A time input field showing "00:00".

- The copy will open immediately and reset the following information:
 - Status reverts to Scheduled
 - Start Date reverts to Select from Calendar
 - Start Time reverts to 00:00 – 24H clock
 - End Date reverts to Select from Calendar (auto filled with the same as Start Date)
 - End Time reverts to 00:00 – 24H clock (must be after the Start Time)
- The NEW aspect of this copy feature is that it also copies the Activity Widget Service Items
- The copy of an Appointment will be an exact replica of the original, except for the field resets indicated above
- 24-hour time format is like regular AM/PM time, except that you keep counting after you get past 12 PM (noon). So 1 PM in 24-hour format is 13:00, 2 PM is 14:00, and so on. All you need to do is add 12 to any time in the PM to get 24-hour format time.

Program Enrollment is required

Error: Why can't I save my Scheduled Appointment?

- One-on-one Appointment : The TREAT ID for the Participant must be enrolled in a Program
- Group Appointment: All TREAT IDs for the Participants must be enrolled in the **same** Program
 - *An error message indicates that a process has failed and cannot continue, a change is required*

Type	Question	Description	Source
Error	Visit Type (Enrollment)	The program selected is not an active program for First/Last Name . Active programs available are: PROGRAM SHORTNAME(s)...	Encounter

Activity Widget – Primary Worker

Warning: Why can't I save my Scheduled Appointment without having to click Save two times?

- One or more Primary Worker(s) can be added to a Scheduled Appointment
- Activity widget Primary Worker can be one of the same on the Scheduled Appointment
 - If not the same, click 'Save' again to bypass the Warning message and Save anyway
 - *Note: A warning message flags a potential problem but will allow the operation to proceed*

Type	Question	Description	Source
Warning	Primary Worker	There is one or more Primary Worker(s) referenced in the Activity Widget that is not in the appointment. Consider editing the Activity widget to remove the Primary Worker(s) First/Last Name	Activity

Widget: a small section on a larger screen used to view or modify information. It is self-contained and provides quick access for a single purpose, to obtain specific information or to perform a specific action. Possible field types are Search-as-you-type, Text, Memo, Number, Date, and Drop-down options.

Examples in TREAT OCASE: Activity Widget, Profile Widgets

Recurring Appointments

**Recommendation:
set up a few to test
this feature**

(OCASE TREAT does not allow deletions)

**Appointment Start Date and End Date
must always be the same**

Frequency: Daily; Weekly; Monthly; Yearly

Recurrence End: Date OR Number of
Appointments

Occurs daily every: 1-92 days

Occurs weekly every: 1-92 weeks; On
S,M,T,W,T,F,S

Occurs monthly every: 1-92 months; On Day 1-
31

Occurs yearly every: 1-92 years; On Month (Jan-
Dec); On Day (1-31)

OCASE TREAT

Send questions to OCASE Support:
<https://ohtn.freshdesk.com/support/tickets/new>

Send emails to: ocase@ohtn.on.ca

Prepared by the
Ontario Community-Based AIDS Services
and Evaluation (OCASE) team.

The Ontario HIV Treatment Network
(OHTN)

<https://www.ohtn.on.ca/ocase-resources-training/>

Call: 647-952-4936



*Promoting excellence
and innovation in HIV
research and care*