

## Chapter 4: Appointment Scheduler

### Section 5: Rescheduling

#### Lesson: Special User – Mass Rescheduling

#### **Objectives:**

Upon completion of this lesson the user will be able to:

- identify and explain the purpose of mass rescheduling; and
- perform a mass reschedule.

#### **Overview:**

In every WIC clinic, circumstances arise where you might need to reschedule all the clinic appointments for a day or for a specific staff member. The mass reschedule functions of TWIST allow you to handle these issues in one screen. The screen is clinic-specific which allows you to reschedule either an entire day's worth of appointments for a clinic or to reschedule all of the appointments from one staff member to another for any specific day.

#### **Instruction:**

#### **Mass Rescheduling Appointments**

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Manual Scheduler ⇒ Mass Reschedule

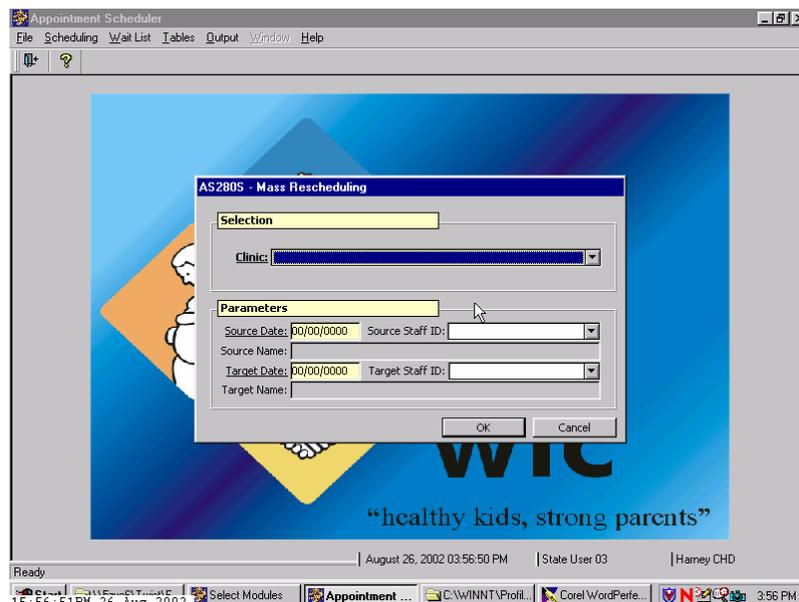


Figure 1: "Mass Reschedule" Pop-Up

1. **Select the “Clinic” for which you wish to perform a mass reschedule.**
2. **Tab to the “Source Date” field and enter the date from which the appointments are to be rescheduled.**
3. **Tab to the “Source Staff ID” field and select the staff person from whom the appointments are to be rescheduled.**
  - This field is only used if you wish to reschedule a specific staff member’s appointments.
  - If this field is populated, the “**Target Staff ID**” field is also mandatory.
  - Once the “**Source Staff ID**” field is populated, the “**Source Name**” field displays the staff member’s name.
4. **4. Tab to the “Target Date” field and enter the date to which the appointments are to be rescheduled.**

The “**Target Date**” must be open and void of an existing schedule.

5. **Tab to the “Target Staff ID” field and select the staff person to whom the appointments are to be rescheduled.**
  - This field is mandatory if the “**Source Staff ID**” is populated.
  - Once the “**Target Staff ID**” field is populated, the “**Target Name**” field displays the staff member’s name.
6. **Click the “OK” button to mass reschedule the appointments and close the pop-up.**

Click the “**Cancel**” button to close the pop-up without saving any changes or rescheduling any appointments.

### ↳ **Practice Activity #1:**

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Manual Scheduler ⇒ Mass Reschedule

1. Select the “Clinic” from the drop down list.
2. Enter the “Source Date” from which you wish to reschedule.
3. Enter the “Target Date” to which you wish to reschedule.
4. Click the “OK” button to reschedule the appointments.

## Replacing Staff Appointments

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Manual Scheduler ⇒ Replace Staff

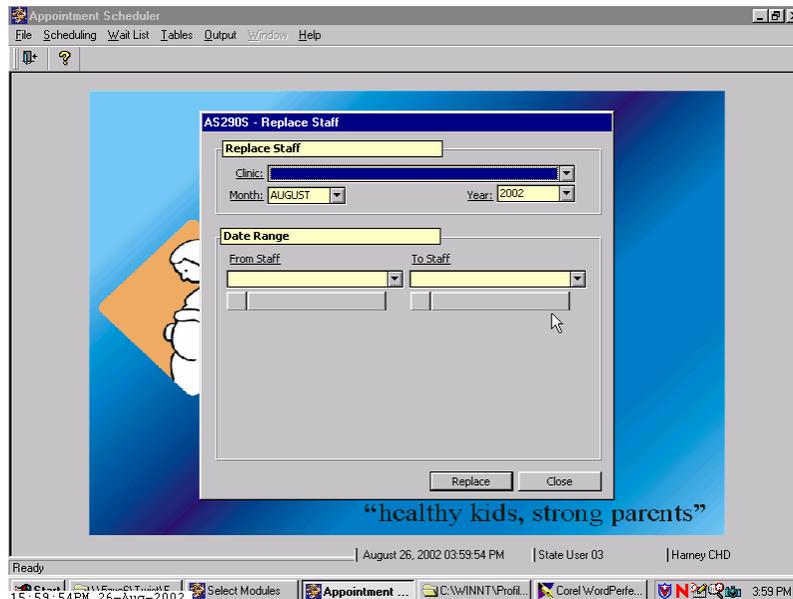


Figure 2: “Replace Staff” Pop-Up

1. **Select the “Clinic,” “Month,” and “Year” from which you wish to replace staff appointments.**
2. **Tab to the “From Staff” field and select the staff member whose schedule you wish to replace.**

Once this field is selected, the system displays all current and future schedule dates within the selected month for this staff member.

3. **Tab to the “To Staff” field and select the staff member to whom you wish to assign the schedule.**
  - The assigned risk level of the **“To Staff”** person must be greater than or equal to the assigned risk level of the **“From Staff”** person.
  - The **“To Staff”** person must not have an existing schedule for the days you are rescheduling.
4. **Double click on the first date you wish to reschedule.**

- The system moves the date from under the “**From Staff**” field to under the “**To Staff**” field.
  - You may repeat this action for as many days within the selected month as needed.
  - All appointments and non-client activities will be replaced for the staff member.
  - To move a specific date back to the “**From Staff**” person, double click on that date under the “**To Staff**” field.
5. **Click the “Replace” button to reschedule the appointments and close the pop-up.**

Click the “**Cancel**” button to close the pop-up without saving any changes or rescheduling any appointments.

### ↪ **Practice Activity #2:**

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Manual Scheduler ⇒ Replace Staff

1. Select the “Clinic” from the drop down list.
2. Select the “Month” and “Year” from the drop down list.
3. Select the “From Staff” from the drop down list.
4. Select the “To Staff” from the drop down list.
5. Double click on the first date for which you wish to perform a staff replacement.
6. Double click on the second date for which you wish to perform a staff replacement.
7. Click the “Replace” button to perform the staff replacement.

### ✓ **Skill Check:**

Now it’s your turn to do some mass rescheduling and staff replacement on your own. Using your own clinic schedule, mass reschedule your appointments for one day to the same day in the following month. Before you perform the reschedule, make a screen print of the “Daily Clinic Schedule” you are going to reschedule. After the mass reschedule has been completed, make a screen print of the new “Daily Clinic Schedule” showing the appointments moved to the new date.

Then, you need to replace two days of appointments for one staff member in your clinic, using the “Replace Staff” function. Make a screen print of the two days of your staff member’s “Daily Clinic Schedule”, perform the replacement and make a screen print of the two days “Daily Clinic Schedule” for the staff member who took the appointments.

 **Notes:**

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## **Chapter 4: Appointment Scheduler**

### **Section 5: Rescheduling**

#### **Lesson 2: Rescheduling an Appointment**

##### ***Objectives:***

Upon completion of this lesson the user will be able to:

- understand the business rules related to rescheduling all types of appointments; and
- reschedule an appointment from a variety of screens.

##### ***Overview:***

Rescheduling client appointments is an every day occurrence in the WIC clinic and TWIST makes the process quick and easy, and helps you keep records on the rescheduled appointments.

Rescheduling an individual can be done in two ways. One way to do this is to start in the “Family Appointment Record” screen and use the “Find Appointment” button to find the client a new appointment. Another way is to select the schedule of the staff person in the “Daily Clinic Schedule” screen. We will explore both ways. There is also a “mass reschedule” function with the TWIST System that allows you to move an entire clinic or staff person’s appointments all at one time. Mass rescheduling is covered in a different lesson.

Up to three family members who have coordinated appointments can all be rescheduled at the same time, and the system will find blocks of appointments for you to choose from in order to reschedule all the family members.

##### ***Instruction:***

##### ***Rescheduling an Appointment from the “Family Appointments” Screen***

This is the preferred method for rescheduling an appointment. Using this screen for rescheduling allows the user to search for the appointment by client name rather than knowing the exact date and staff member assigned to the appointment. It also gives the user a chance to look at other family member appointments and requests.

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Record

1. Find your client and return with them to the “Family Appointment Records” screen.
2. In the “Client Appointments” section, locate the appointment you wish to reschedule, and check the corresponding “Select” checkbox.

The “Reschedule” button is activated. If you need to get more client information, double-click in the “WIC ID” field to view the “Client Information” pop-up.

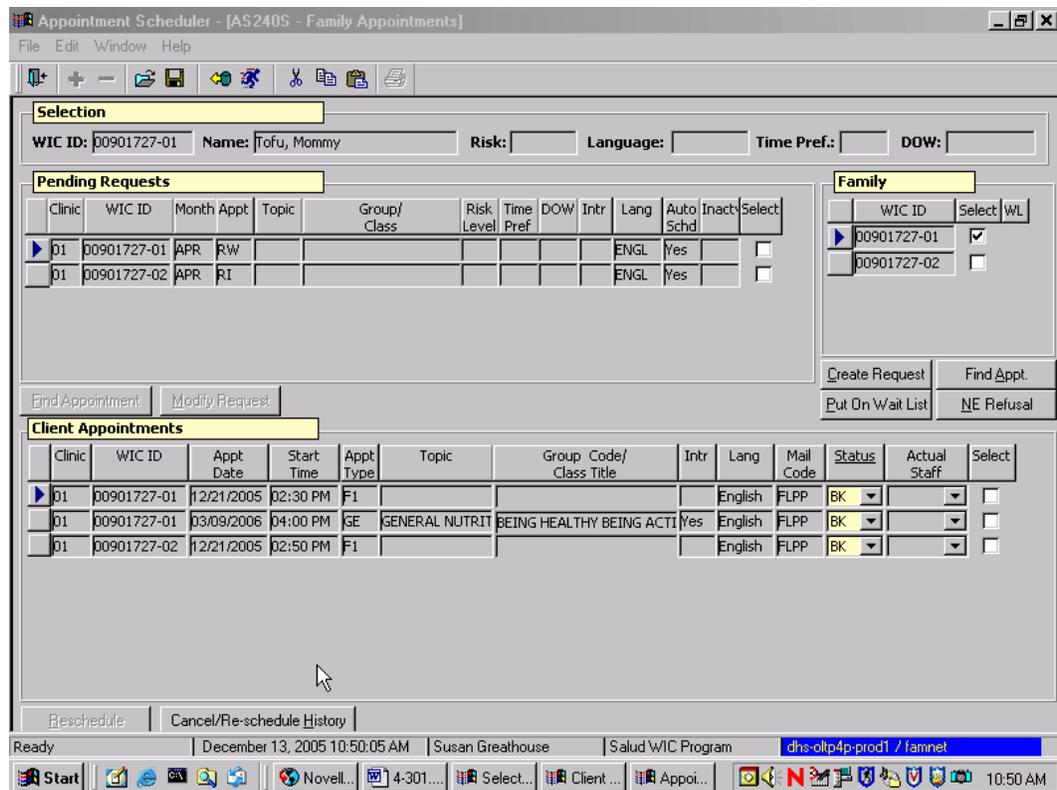


Figure 1: “Family Appointments” Screen

3. Click the “Reschedule” button to bring up the “Find Appointment” pop-up.

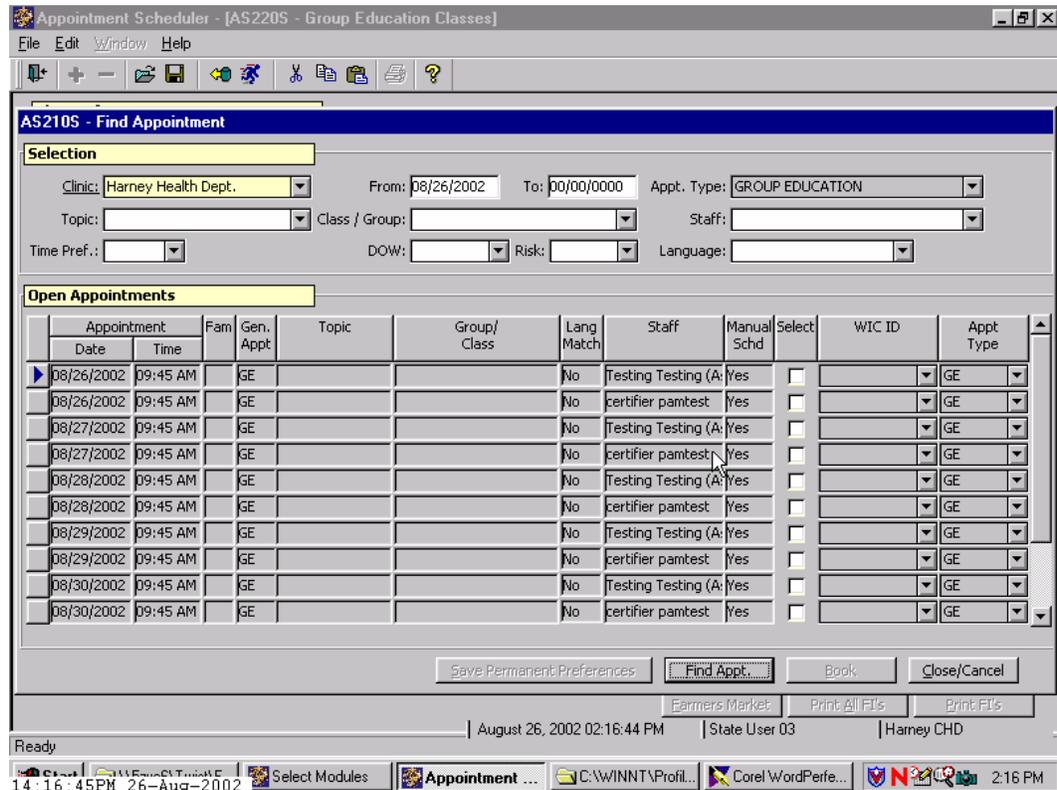


Figure 2: "Find Appointment" Pop-Up

4. In the "Selection" section, select the "Clinic" from the drop down list and enter any other needed selection criteria.
  - The system defaults the "Clinic," "Appt. Type," and "Staff" fields in the "Selection" section to the same values as the appointment being rescheduled.
  - To change these values, click on the corresponding drop down list and select the new value desired.
5. Click the "Find Appt." button.
6. Locate the appointment date, time and type to which you wish to reschedule to.
7. Click the "Select" checkbox that corresponds to the desired appointment.
  - The system fills in the "WIC ID" field with your client's ID number and the "Book" button is activated.

- If the appointment type chosen is a generic appointment type, you must use the drop down in the “**Appointment Type**” field to select the real appointment type you want in the client’s record.
8. **Click the “Book” button to schedule the appointment for this client and return to the “Family Appointments” screen.**
- The new appointment is displayed in a separate row with the “**Status**” of “BK (booked).”
  - The rescheduled appointment row is cleared on the “**Daily Clinic Schedule**” screen and the “**Status**” changes to “OP (Open).”
  - The rescheduled appointment is captured in the client record under the “**Cancel/Reschedule History**” button, which is now activated.
  - The system changes the “**Status**” field of the rescheduled appointment to “RS (Rescheduled).”
9. **Save.**
10. **Exit.**

### ***✂ Tips and Shortcuts:***

Up to three family members can be rescheduled at the same time. To accomplish this, in the “**Client Appointments**” section, click the “**Select**” checkbox beside each appointment you wish to reschedule. Follow steps 3 through 10 above to reschedule appointments.

- In the “**Selection**” area of the “Find Appointment Screen” DO NOT use appointment type as a selection criterion. Since you are rescheduling multiple appointment types, you do not want to limit your search.
- Once you select an appointment, the WIC ID of client 01 will fill into the “**WIC ID**” field. Use the drop down in this field to choose the correct participant for each appointment.
- If the appointment type chosen is a generic appointment type, you must use the drop down in the “**Appointment Type**” field to select the real appointment type you want in each client’s record.
- Hit the “Refresh” icon if you don’t see your rescheduled appointment in the “Family Appointment Record” screen.

**↳ Practice Activity #1:**

Using the information on your Activity Sheet, follow the steps below to reschedule appointments for your client by using the Family Appointments screen.

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Records

1. Find and retrieve your client's record and return with it to the "Family Appointments" screen.
2. In the "Family" section, click the "Select" checkbox corresponding to your client's WIC ID.
3. In the "Client Appointments" section, locate the appointment you wish to reschedule and click the corresponding "Select" checkbox.
4. Click the "Reschedule" button to display the "Find Appointment" pop-up.
5. Select the "Clinic" and any other needed selection criteria.
6. Click the "Find Appt." button.
7. Locate the new appointment you wish to reschedule.
8. Click the corresponding "Select" checkbox.
9. After the system populates the "WIC ID" row with your client's ID number, click the "Book" button.
10. Save.
11. Exit.

**Rescheduling an Appointment from the "Daily Clinic Schedule" Screen**

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

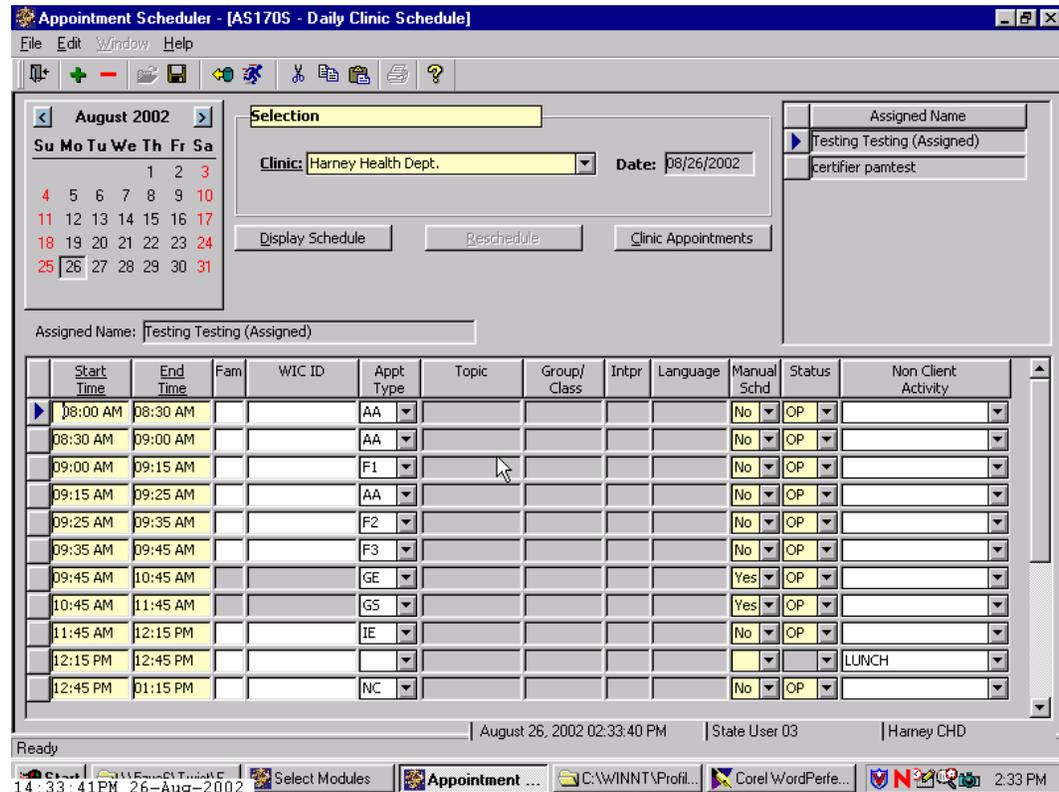
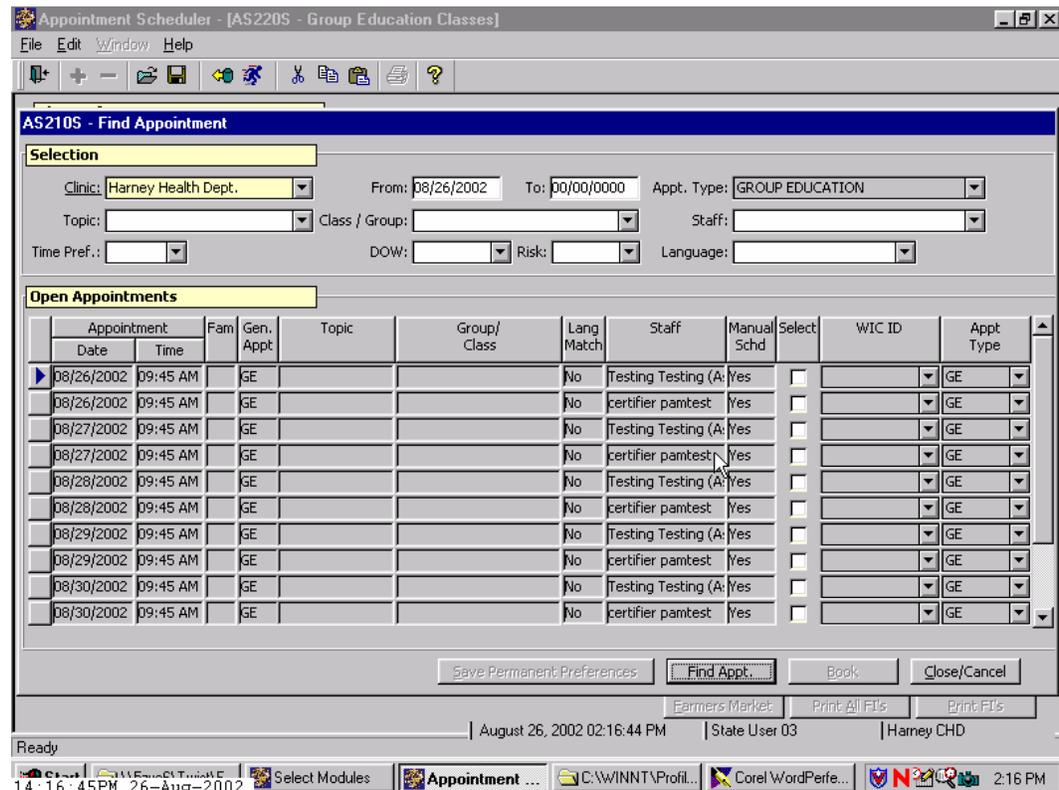


Figure 3: “Daily Clinic Schedule” Screen

1. **Click on the “Clinic” drop down arrow and select the clinic for which you wish to view the schedule.**
2. **On the Calendar, select the date/month and year corresponding to the date for which you wish to reschedule the appointment.**
3. **Click the “Display Schedule” button.**
4. **In the lower half of the screen, locate the appointment you wish to reschedule.**
  - You may need to click on another “**Assigned Name**” to locate the staff person assigned to this appointment.
  - If you need to get more client information, double-click in the “**WIC ID**” field to view the “**Client Information**” pop-up.
5. **Click on the row corresponding to the appointment to be rescheduled.**

6. **Click on the “Reschedule” button, which is now activated.**

The “Find Appointment” pop-up is displayed.



**Figure 4: “Find Appointment” Pop-Up**

🎵 NOTE: Please refer to the previous section, “Rescheduling an Appointment from the Family Appointments Screen” for further instruction on the functions of this pop-up.

7. **Reschedule the appointment in the same manner as you did for “Rescheduling an Appointment from the Family Appointments Screen.”**
  - The rescheduled appointment row is cleared and the “**Status**” changes to “OP (Open).”
  - On the “Family Appointments” screen, the new appointment is displayed with the “**Status**” of “BK (booked).”
  - The rescheduled appointment is captured in the “**Cancel/Reschedule History**” area, for which the button is now activated.
8. **Save.**
9. **Exit.**

**✂ Tips and Shortcuts:**

You can also use the “cut and paste” function in Windows to reschedule a client’s appointment from the Daily Clinic Schedule. Simply put your cursor on the client’s ID number in the Daily Clinic schedule and click on the “cut” or scissors icon to remove that appointment. Then select the appointment slot where you want to reschedule the client, click on the open WIC ID field, and click on the “paste” icon. You may need to change the appointment type to fit with the original appointment type for that client. You can “paste” the appointment to a different time for the same date and staff, to a different staff person, to a completely different date and staff, and even to another clinic within your agency.

🎵 NOTE: When using this method to reschedule a client’s appointment, the reschedule is not documented in the “cancel/reschedule history” pop-up. If your agency needs to have clear documentation of this, you might choose not to use this scheduling option. Also remember that you must “paste” the client into a new appointment once you have “cut” out the old one, or the client will not be scheduled anywhere.

**↪ Practice Activity #2:**

Using the information on your 📄 Activity Sheet, follow the steps below to reschedule appointments for your client from the “Daily Clinic Schedule” screen.

The starting point for this section is: Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. Select the “Clinic” from the drop down list.
2. Select the appointment date on the calendar.
3. Click the “Display Schedule” button.
4. In the “Assigned Name” section, click on the staff person assigned to the appointment to view their schedule.
5. In the lower half of the screen, locate the appointment you wish to reschedule.
6. Click on the row corresponding to the appointment to be rescheduled.
7. Click the “Reschedule” button to bring up the “Find Appointment” pop-up.
8. Reschedule the appointment the same way as you did for “Rescheduling an Appointment from the Family Appointments Screen.”
9. Save.
10. Exit.

**✓ Skill Check:**

Now you are going to reschedule appointments for your client. You are the WIC client and you already have several appointments scheduled. First, reschedule an appointment from the “Family Appointments” screen. Then, reschedule an appointment from the “Daily Clinic Schedule” screen. You will need to know your appointment date and assigned staff person before you enter the Daily Clinic Schedule, so make sure you note this appointment in the “Family Appointments” screen if you do not already have this information.

Print out a “Family Appointments” screen print showing the rescheduled appointment.

** Notes:**

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## **Chapter 4: Appointment Scheduler**

### **Section 5: Rescheduling**

#### **Lesson: Canceling an Appointment**

##### ***Objectives:***

Upon completion of this lesson the user will be able to:

- cancel a client's existing appointment and/or appointment requests and document status; and
- correctly identify and describe the "Appointment Status" field and codes.

##### ***Overview:***

There are times in the WIC clinic that you need to simply cancel a client's appointment and not reschedule. The TWIST system allows you to quickly locate the appointment, cancel it and keep a record of the cancellation in the client's appointment history.

There are also times when you will need to cancel an appointment request so the Automatic Scheduler doesn't needlessly schedule an appointment for a client who does not need it. This is also easily done in TWIST.

##### ***Instruction:***

#### ***Canceling an Appointment from the "Family Appointment Record" Screen***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Record

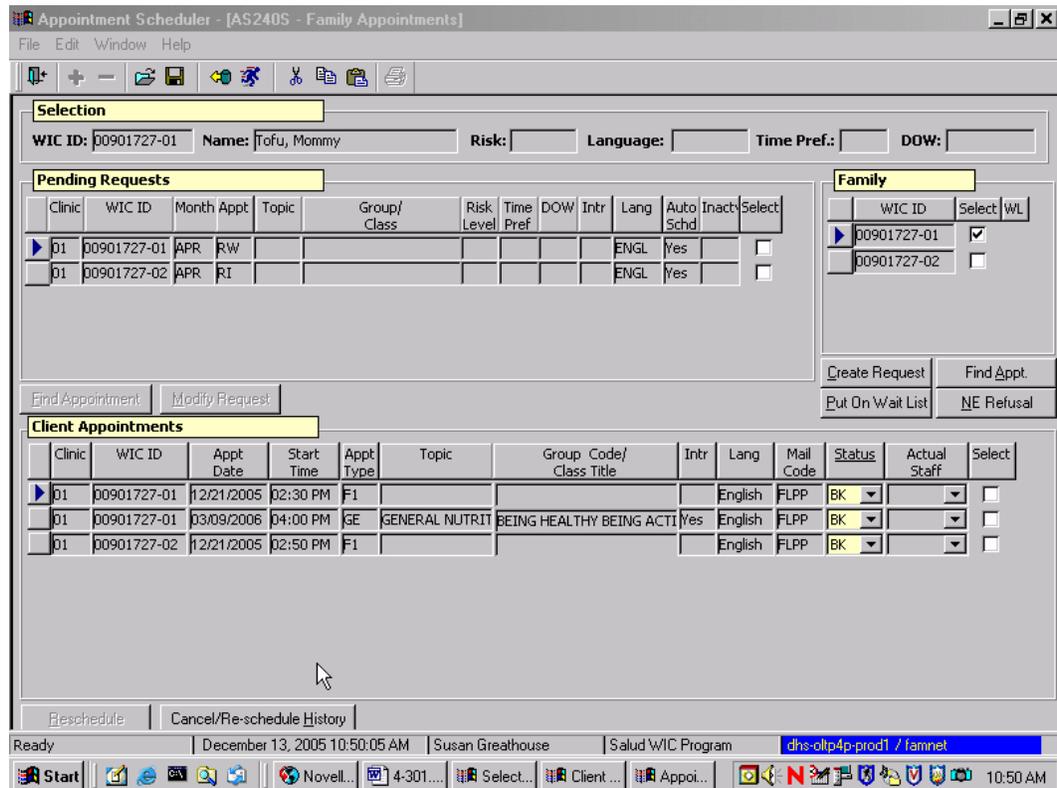
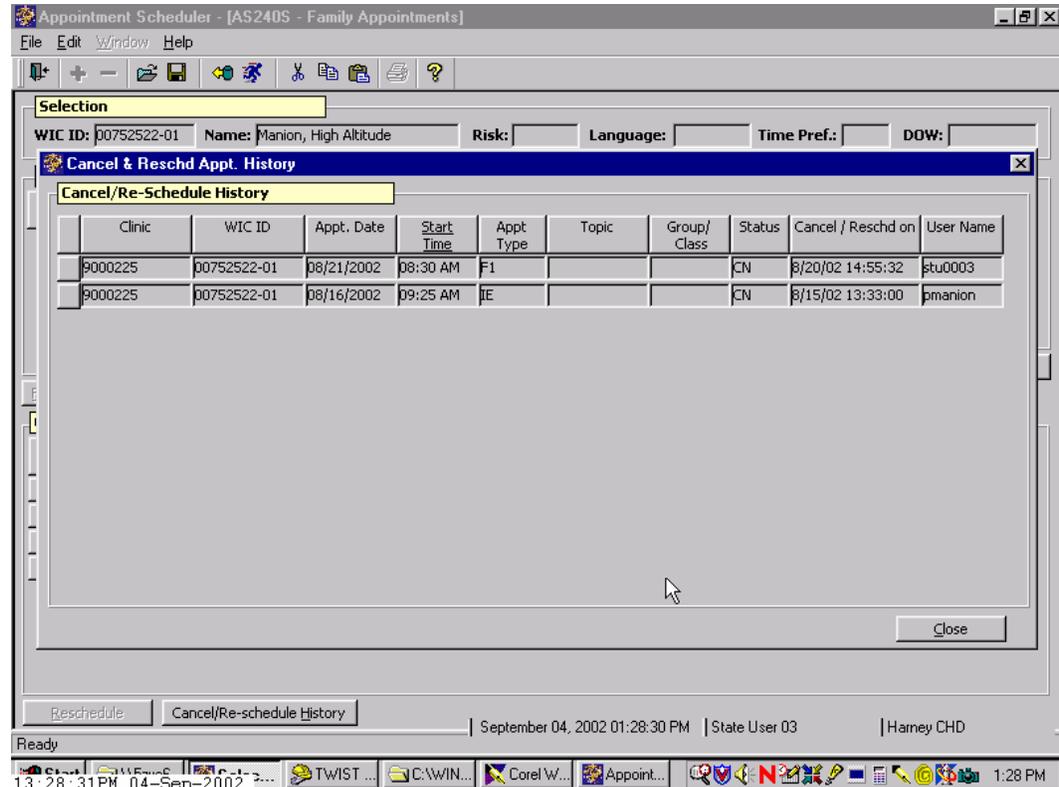


Figure 1: “Family Appointments” Screen

1. Retrieve the client for whom you wish to cancel an appointment.
2. In the “Client Appointments” section, locate the appointment you wish to cancel, and click in the “Status” field.
  - 2.1 The “Status” field displays the current status of the appointment.
  - 2.2 The Status codes include:
    - **BK** (Booked), which means the appointment has been assigned to a client;
    - **NS** (No Show), which means the client missed their appointment;
    - **SH** (Show), which means the client has kept their appointment; and
    - **CN** (Cancel), which means that the appointment has been canceled. This code can only be used if the appointment is canceled prior to the scheduled appointment.

3. **Select “CN (Cancel)” from the drop down list.**

You will see a pop-up explaining that cancel will clear the appointment from client’s record and re-open it to the scheduler. A record of the cancel will be kept in the client’s record in the “Cancel/Reschedule History” screen.



**Figure 2: “Cancel/Reschedule History” Screen**

4. **Save.**

5. **Exit.**

### ***Canceling an Appointment Request from the “Family Appointment Record” Screen***

The starting point for this section is:

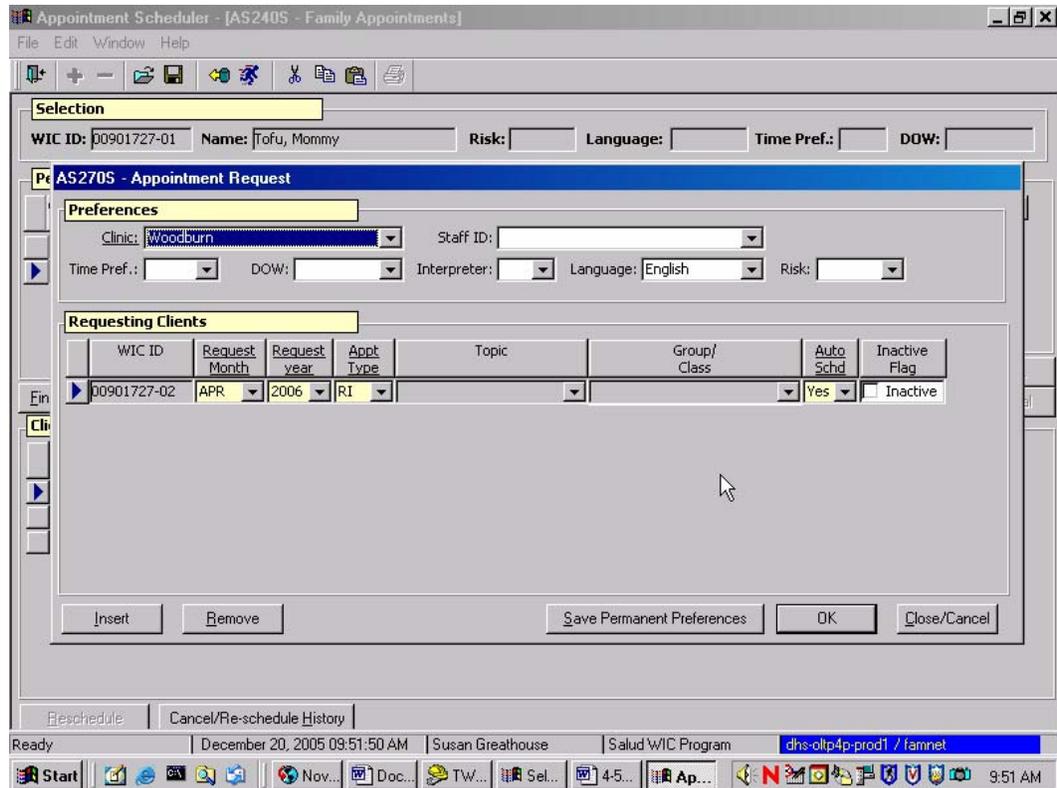
Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Records

1. **Retrieve the client for which you wish to cancel an appointment request.**
2. **In the “Pending Requests” section, click the “Select” checkbox on the request you wish to cancel.**

The “Find Appointment” and “Modify Request” buttons become activated.

3. **Click the “Modify Request” button.**

The “Appointment Request” pop-up is displayed.



**Figure 3: “Appointment Request” Pop-Up**

4. **Click the “Remove” button.**

The system will display the message, “Are you sure you wish to remove this row?”

5. **Click “Yes.”**

The request is deleted.

6. **Click “OK” to return to the “Family Appointments” screen.**

7. **Exit.**

**↳ Practice Activity #1:**

Using the information on your Activity Sheet, follow the steps below to cancel appointments and appointment requests for your client by using the “Family Appointment Record” screen.

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Record

1. Retrieve the client for whom you wish to cancel an appointment.
2. In the “Client Appointments” section, locate the appointment you wish to cancel and click on the drop down list to change the status to “CN.”
3. Save, but do not exit the screen.

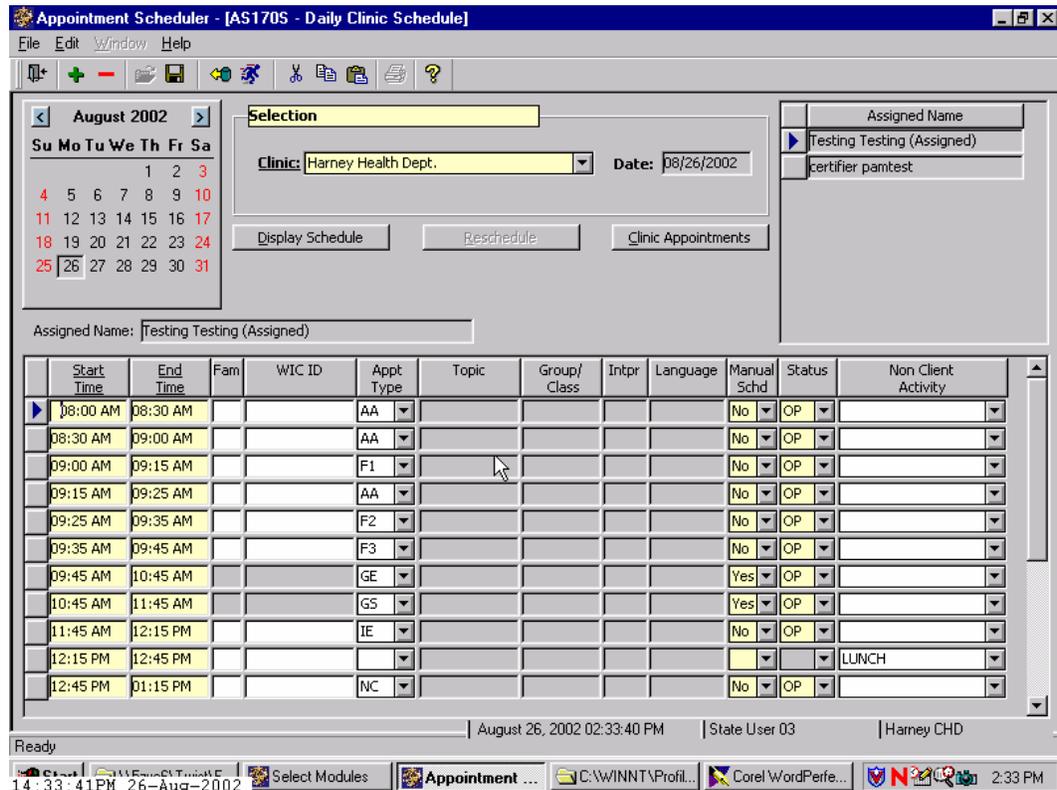
Now let’s practice canceling an Appointment Request!

1. In the “Pending Requests” section, locate the appointment request you wish to cancel and click the corresponding “Select” checkbox.
2. Click the “Modify Request” button.
3. Click the “Remove” button.
4. Click “Yes” to respond to the message, “Are you sure you wish to remove this row?”
5. Click “OK” to save the cancellation.
6. Exit.

**Canceling an Appointment from the “Daily Clinic Schedule” Screen**

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

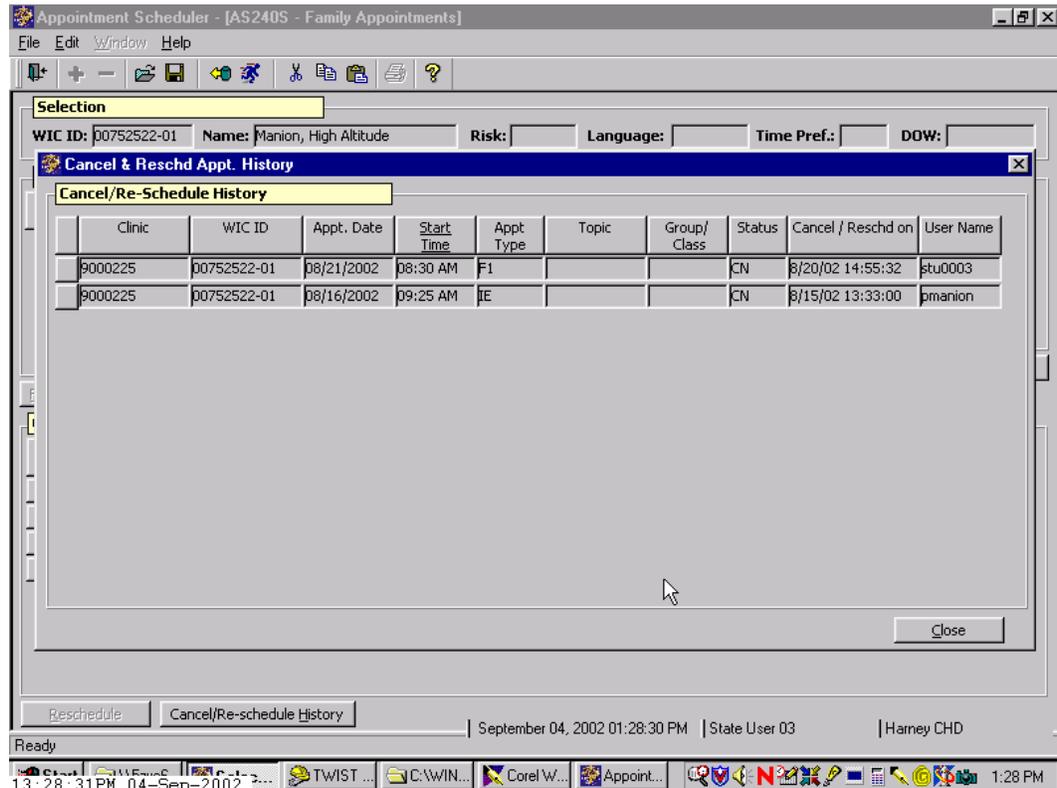


**Figure 4: “Daily Clinic Schedule” Screen**

🎵 NOTE: Please refer to the “Daily Clinic Schedule” lesson for further instruction on the functions for this screen.

1. **From the “Clinic” drop down, select the clinic for which you wish to view the schedule.**
2. **On the Calendar, click on the date/month and year corresponding to the date for which you wish to cancel the appointment.**
3. **Click the “Display Schedule” button.**
4. **In the lower half of the screen, select the appointment you wish to cancel.**
  - You may need to scroll and/or click on another “Assigned Name” to locate the staff person assigned to this appointment.
  - If you need to view more client information, double-click in the “WIC ID” field to view the “Client Information” pop-up.
5. **Change the “Status” field to “Cancel.”**

This records the cancellation of the appointment in the “Cancel/Reschedule History” screen, which is accessed from the “Family Appointment Record” screen.



**Figure 5: “Cancel/Reschedule History” Screen**

7. **Save.**

The system automatically changes the “Status” field from “BK (Booked)” to “OP (Open).”

8. **Exit.**

**➔ Practice Activity #2:**

Using the information on your Activity Sheet, follow the steps below to cancel appointments for your client from the “Daily Clinic Schedule” screen.

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. Select the “Clinic” from the drop down list.
2. Click the appointment date on the calendar.

3. Click the “Display Schedule” button.
4. In the “Assigned Name” section, click once on the staff person assigned to the appointment to view their schedule.
5. In the lower half of the screen, select the appointment you wish to cancel.
6. Change the “Status” to “cancel.”
7. Save.
8. Exit.

**✓ Skill Check:**

1. You are answering the phones in the WIC clinic and a client calls to cancel her appointment. Cancel her appointment and *print the screen that shows the appointment cancellation.*
2. You are scheduling appointments in the “Daily Clinic Schedule.” You accidentally schedule a client for the wrong day. Cancel her appointment. *Print the “Daily Clinic Schedule” screen before and after you cancel her appointment.*

**✍ Notes:**