

**Chapter 4: Appointment Scheduler**  
**Section 3: Automatic Scheduler**  
**Lesson: Appointment Requests**

***Objectives:***

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

- set up appointment requests;
- set up appointment requests for a client with preferences;
- explain the business rules and messaging of the appointment request;
- set up requests for coordinated family appointments; and
- change an appointment request.

***Overview:***

In order to ensure that families can attend their appointments, we need to provide them with appointment times that fit their busy schedules. Appointment requests allow you to set up a client record incorporating a family's appointment preferences, and then make appointments using the Automatic Scheduling function.

When an appointment request has been saved in the system and the Automatic Scheduler is run, the system automatically matches the client to an appointment that meets whatever requests and preferences the client has made, which could include day of week, time, staff member, skill level, language or interpreter needs, etc. If an appointment cannot be found that matches the client's needs, an exception list is printed out so that the appointment can then be manually scheduled or the daily schedule can be adjusted to accommodate the preferences.

Appointment requests can be made months in advance. This allows you to schedule up to three family members together. When a client is certified, TWIST will automatically create an appointment request for the next recertification appointment. TWIST will also automatically create a request for a mid-certification health assessment and mid-certification breastfeeding assessment depending on infant's age at enrollment.

TWIST will make certain future appointment requests "inactive" in certain situations. The appointment types include any follow-up, GE or IE appointment requests in the following situations:

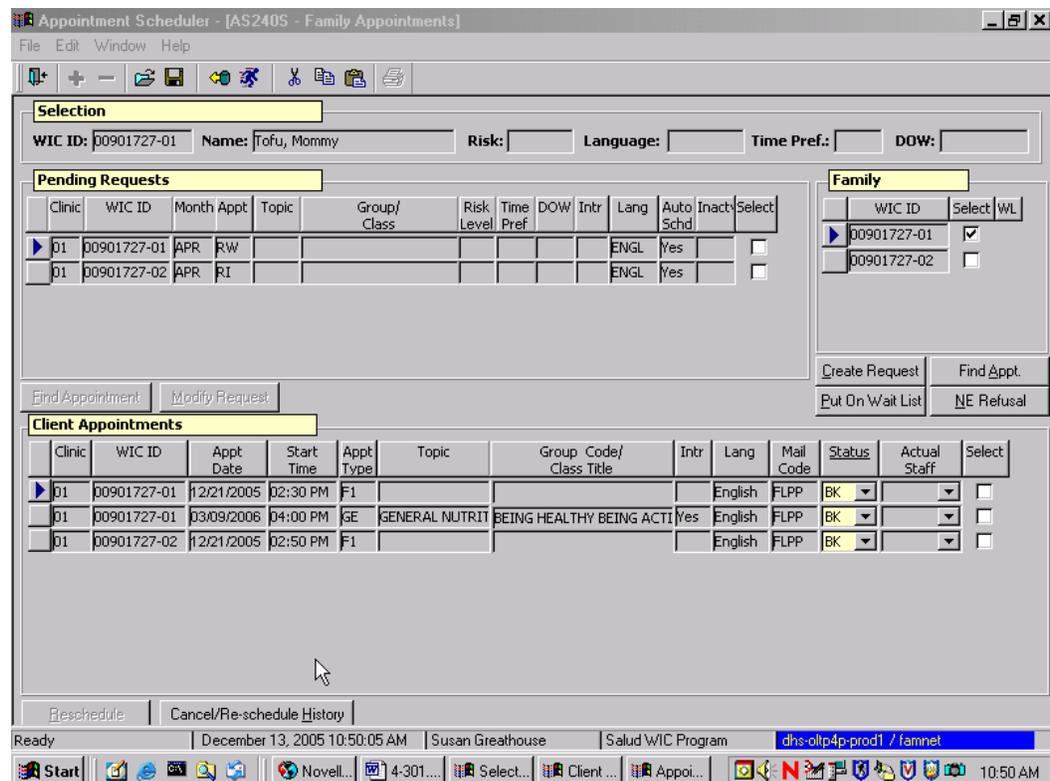
- When a client is transferred within Oregon,
- when a client is terminated either manually or automatically, or
- when a breastfeeding woman (WE or WB) changes category to a non-BF woman (WN).

When a request is inactive, the auto scheduler will not schedule it. If the client is reactivated, the “inactive” flag will automatically be removed from the request and the request will be available to be auto scheduled. In the above situations, any future recert or mid-cert assessment requests will be removed and then re-created if the client is reactivated. Clients who transfer out of state and deceased clients will have all future requests removed.

### ***Instruction:***

### ***Reviewing the “Family Appointments” Screen***

- Double click on the “Appointment Scheduler” icon.
- Click “Scheduling” on the menu bar.
- Click “Family Appointment Records.”



**Figure 1: “Family Appointments” Screen**

There are four sections to the “Family Appointments” screen: “**Selection**,” “**Pending Requests**,” “**Family**,” and “**Client Appointments**.”

- The “**Selection**” section displays the Client’s “WIC ID,” “Name,” and, if known, “Risk,” “Language,” and appointment preferences for “Time Pref.” and “DOW” (day of week).

- The “**Pending Requests**” section shows any appointment requests currently pending. We will review this section in more detail later.
- The “**Family**” section displays the “WIC ID” of any family members on WIC, and allows you to select a specific client in order to create a request, put them on a wait list or find them an appointment. We will also discuss this section later in this lesson.
- The “**Client Appointments**” section displays scheduled appointments for all the family members on WIC.

### ***Creating an Appointment Request***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Records

1. **Retrieve the client for whom you wish to create a request.**
2. **In the “Family” section, click the “Select” check box corresponding to the client for whom you want to make an appointment request.**
  - You may select more than one family member at a time.
  - When you click the “Select” check box, the “Create Request,” “Find Appt,” “Put on Wait List”, and “Refused” buttons are activated.

♪ NOTE: All family members need an appointment request for the same appointment types (either all group or all individual) in the same month in order for the Automatic Scheduler to coordinate family appointments.

3. **Click the “Create Request” button to open the “Appointment Request” pop-up.**

AS270S - Appointment Request									
Preferences									
Staff ID:	[Dropdown]			Risk:	[Dropdown]				
Time Pref.:	[Dropdown]	DOW:	[Dropdown]		Interpreter:	[Dropdown]		Language:	[Dropdown]
Requesting Clients									
	Clinic	WIC ID	Request Month	Request Year	Appt Type	Topic	Group/Class	Auto Sched	Inactive Flag
	Baker	00946123-01	1	2008	1	1	1	Yes	No

**Figure 2: “Appointment Request” Pop-Up**

In the “**Preferences**” section, you may enter any preferences you want associated with this request, and they will be used to book this request only. These are called “one time only preferences.” If you want to save these preferences in the client’s record for future appointments, click the “Save Permanent Preferences” button.

- 3.1 **Tab to the “Staff ID” field and select the appropriate staff person from the drop down list.**

This field is only used if a particular staff person must see this client.

- 3.2 **Tab to the “Time Pref.” field and select AM, PM or EVE from the drop down list.**

- 3.3 **Tab to the “DOW” field and select the preferred day of the week for this family’s appointments.**

- 3.4 **Tab to the “Interpreter” field and indicate if an interpreter is required for this family.**

Use this field if the spoken language in client primary is not one the client wants to speak during their appointment and an interpreter will be needed, or if there is no staff person who speaks the client’s language.

- 3.5 **Tab to the “Language” field and select the correct language from the drop down list.**

Use this field when the spoken language in the client primary is not one the client wants to speak during their appointment.

3.6 **Tab to the “Risk” field and select the appropriate risk from the drop down list.**

The system will not assign risk for the appointment. The WIC Staff member making the appointment will need to be aware of the risk level of the client when making the appointment.

3.7 **Click the “Save Permanent Preferences” button at the bottom of the pop-up to save the preferences.** This will save the preferences you have selected for this appointment to apply to all future requests. Otherwise the preferences you have selected will apply only to this appointment request.

- Using the “Save Permanent Preferences” button establishes these preferences for all family members.

4. **In the “Requesting Clients” section, the client’s assigned “Clinic” and “WIC ID” is displayed.**

- The “Clinic” field can be changed if the client needs to have an appointment in a clinic other than the one to which they are assigned.

5. **In the “Request Month” field, select the month for the appointment from the drop down list.**

6. **In the “Request Year” field, select the year the appointment is to be scheduled in from the drop down list.**

7. **In the “Appt Type” field, select the type of appointment from the drop down list.**

- If the appointment type entered is “GE,” the “**Topic**” and “**Title**” fields becomes activated and a topic and title must be selected from the drop down list.
- If the appointment type selected is “GS,” the “**Group/Class**” field becomes activated and an appointment type must be selected from the drop down list.

♪ NOTE: The “**Auto Schd**” field defaults to “Yes” to indicate that the appointment is to be booked using the Automatic Scheduler function, but the user

may use the drop down list to select “No.” The “**Inactive Flag**” checkbox is automatically checked by the system when a client is termed mid-cert and the check mark is automatically removed when the client is reactivated.

8. **Click “OK” to close pop-up and save the request.**

After clicking “OK” and returning to the “Family Appointments” screen, the appointment request data is now displayed in the “Pending Requests” section of the screen.

The “Cancel” button will allow you to close the pop-up without saving the appointment request.

♪ NOTE: Saving a permanent appointment preference for any family member affects every family member, as it is a family appointment preference. You do not need to select all family WIC IDs to have changes occur, any one member will suffice.

### ↪ **Practice Activity #1:**

Using the information on your 📄 Activity Sheet, follow the steps below to schedule your client to a nutrition education appointment.

1. Click on “Appointment Scheduler.”
2. Click on “Scheduling.”
3. Click on “Family Appointment Records.”
4. Click on the “Open” icon and enter your client’s information in the “Client Search” pop-up and execute the search.
5. Select your client and click “Return W/Client.”
6. Click the “Select” check box next to your client’s WIC ID.
7. Click the “Create Request” button.
8. In the “Appointment Request” pop-up, select the “Clinic” from the drop down list.
9. Select **next month** as the “Request Month” and **current year** as the “Request Year.”
10. Select “Group Education” for the “Appt Type.”
11. Select the “Topic” and “Group Class” title from the drop-down windows.
12. Click “OK” to save the request.

## ***Modifying an Appointment Request***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Records

1. **In the “Pending Requests” section of the “Family Appointments” screen, click the “Select” check box corresponding to the appointment to be modified.**

The “Find Appointment” and “Modify Request” buttons are now activated.

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

The “Appointment Request” pop-up is displayed.

3. **Change the appointment request as needed and click the “OK” button.**

The entire appointment can be deleted by clicking on the “Remove” button.

4. **Exit the “Family Appointments” screen.**

♪ NOTE: You can also manually schedule a request from this screen by selecting the appointment request you wish to schedule and clicking the “Find Appointment” button. Once the request is scheduled, the request is deleted from the “Pending Requests” section and is displayed as a booked appointment in the “Client Appointments” section.

### **↪ Practice Activity #2:**

Using the information on your ☛ Activity Sheet, modify your client’s appointment request.

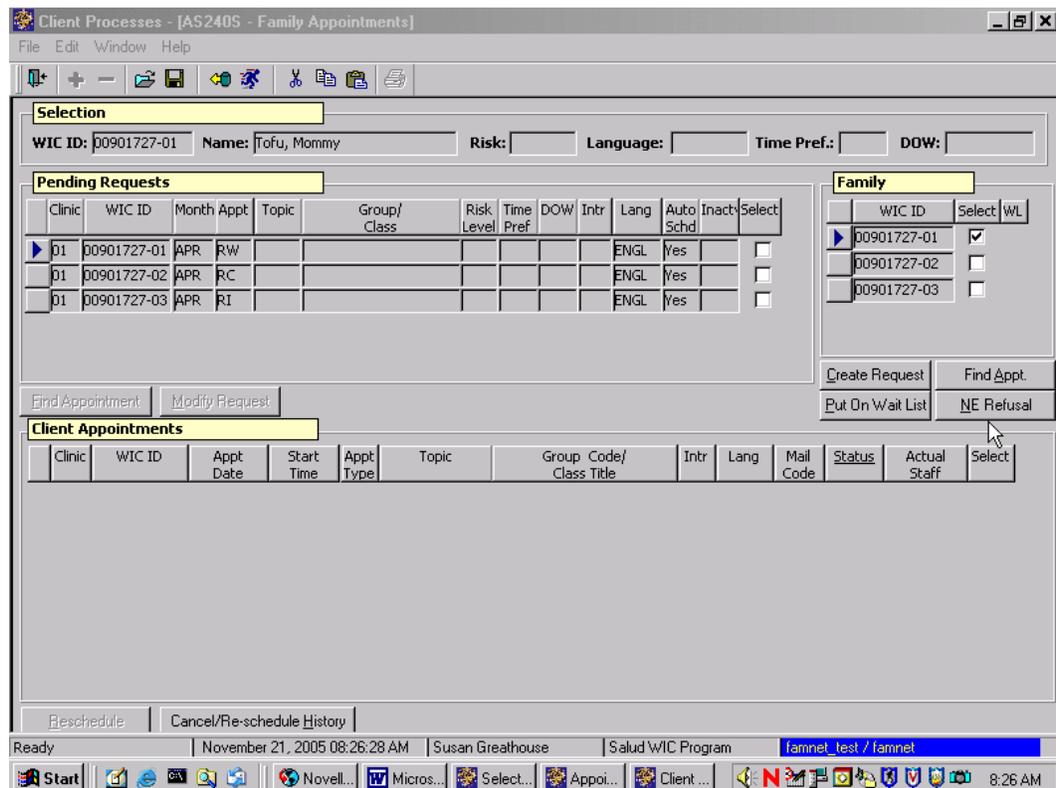
1. Click on “Appointment Scheduler.”
2. Click on “Scheduling.”
3. Click on “Family Appointment Records.”
4. Click on the “Open” icon and enter your client’s information in the “Client Search” pop-up and execute the search.
5. Select your client and click “Return W/Client.”
6. Modify the appointment request by locating the appointment in the “Pending Requests” section of the “Family Appointments” screen and checking the corresponding “Select” check box.
7. Click the “Modify Request” button.
8. In the “Appointment Request” pop-up, make the necessary changes to the appointment request.

9. Click “OK.”
10. Exit the “Family Appointments” screen.

### **Documenting Nutrition Education Refusal**

If the client refuses to attend a secondary nutrition education appointment, you can document that here.

If the client refuses to attend a secondary nutrition education appointment, you can document this using the “**NE Refusal**” button on the Family Appointment Record screen. Refusal for nutrition education can also be documented on the “Non-WIC NE” screen in the certification area.



**Fig. 3 “NE Refusal” button**

This is discussed in more detail in Chapter 3, Lesson 902, *Nutrition Education Refusal*.

### **✂ Tips and Shortcuts:**

Family preferences are used by the Auto Scheduler when coordinating family appointments. If a family has conflicting preferences (e.g. one as AM only and one as EVE only) the Auto Scheduler will not schedule and they will need to be

manually scheduled. The Auto Scheduler will begin scheduling appointments for those families who have the highest number of preferences first, i.e. the most restrictive preferences are booked first. If one member of a family has a high risk appointment request, then all family members scheduled for that same month will be scheduled with a high risk staff person. If you do not want this to be the case, then the appointments for that particular family should be manually scheduled.

**✓ Skill Check:**

Use the information on your  Activity Sheet for this practice.

You are a WIC clerk who has been asked by a certifier to schedule a request for a follow-up appointment for a WIC participant.

The request month will be for next month and the appointment type will be a follow-up type 2. *Print the request screen prior to setting up the request and then again after the request has been entered.*

One week has passed since you set up the follow-up request for the client. The client calls and tells you she has started work and will only be able to keep the appointment if it can be scheduled in the AM. Modify the appointment request to meet this need. *Print the screen after you modify the request.*

** Notes:**

*This page intentionally left blank.*