Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Family Appointment Record

Objectives:

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

- maneuver between the "Family Record" screen, "Find Appointment" screen, "Appointment Request" screen and "Client Search" screen and understand how they interrelate; and
- read and understand all sections on the "Family Record" screen.

Overview:

The "Family Appointment Records" screen is the focal point of all searches, creating appointment requests and booking appointments throughout the Appointment Scheduler area. This screen allows you to view all family members' appointment records on a single screen which makes it quick and easy to find appointment details for all family members, coordinate family appointments, manually schedule appointments or create appointment requests. A history of canceled and rescheduled appointments is also available from this screen.

Instruction:

Reviewing "Family Appointment Records" screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointments

1. **Select "Family Appointment Records."**

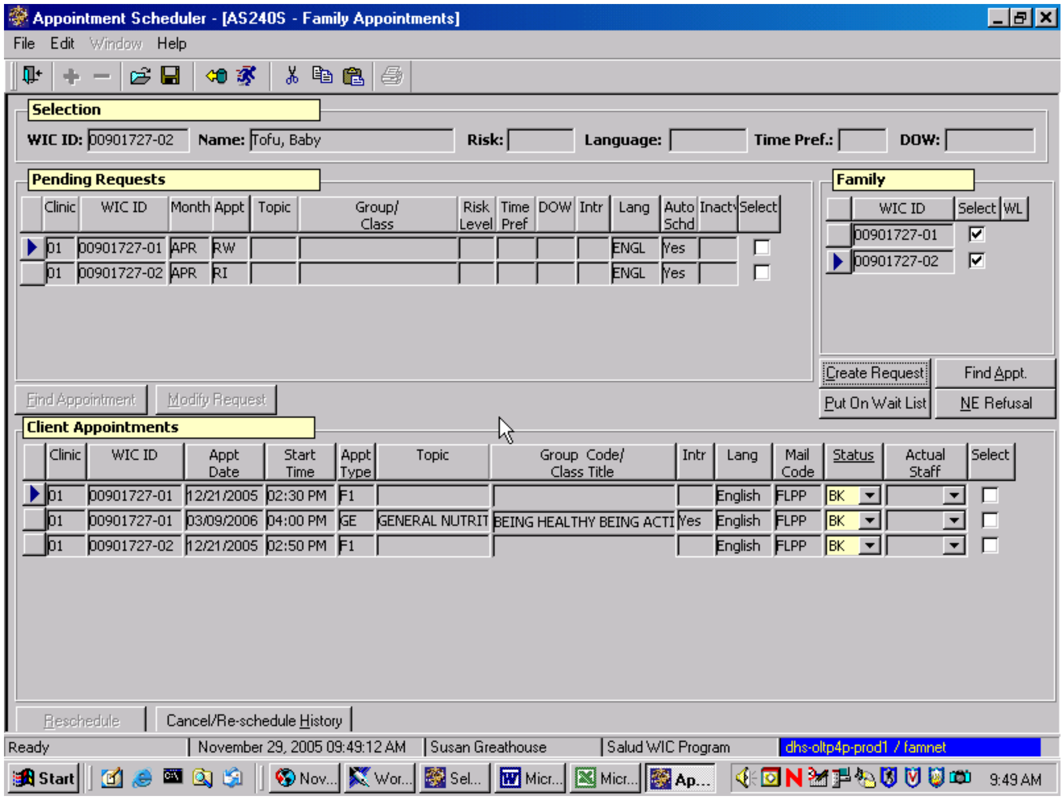

Figure 1: "Family Appointment Records" Screen

There are four sections to the "**Family Appointment records**" screen, "**Selection**," "**Pending Requests**," "**Family**" and "**Client Appointments**."

2. **Search for and return with client to "Family Appointment Records" screen.**

   2.1 The "**Selection**" section displays the "**WIC ID**," "**Name**" and, if known, "**Risk**," "**Language**" and appointment preferences for "**Time Pref**." and "**DOW**" (day of week).

   2.2 The "**Pending Requests**" section shows any appointment requests currently pending.

   - "**Clinic**" displays the clinic where the appointment request is to be scheduled.
   - "**WIC ID**" displays the WIC ID of the family member to be scheduled.
   - "**Month**" displays the month the appointment request is to be scheduled in.

- “**Appt. Type**” displays the type of appointment to be scheduled.
- “**Topic**” displays the code for the class topic if the appointment type is “**GE**.” (Group Education). If the appointment type is other than “GE” this field will be blank.
- If the appointment type is “GE”, the title of the class will display in the “**Group/Class**” field. If the appointment type is “GS” (Group Screen) the real appointment type for the group screen will display. If the appointment type is other than “GE” or “GS” this field will be blank.
- “**Time Pref**” displays time preference associated with the specific appointment request. If no time preference, the field will be blank.
- “**DOW**” displays the day of week preference associated with the specific appointment request. If no day of week preference, the field will be blank.
- If the user has indicated that an interpreter is needed for the appointment requested, the “**Intr**” field will display “yes.” If an interpreter has not been indicated, the field will be blank.
- If the user has indicated a language other than the client’s usual spoken language for a specific request, it will display in the “**Lang**” field.
- The “**Auto Sched**” field indicates whether or not the auto scheduler is intended to schedule the appointment request.
- When the user clicks the “**Select**” box beside a specific request, the “**Find Appointment**” and “**Modify Request**” buttons become enabled. The “**Find Appointment**” button takes the user to the “Find Appointment” screen to schedule an appointment for the specific request. The “**Modify Request**” button takes the user to the “Appointment Request” screen where the request the user selected is available for modification.

2.3 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. When the “**Select**” check box for a family member is chosen, the “**Create Request**,” “**Find Appointment**,” “**Put on Wait List**,” and “**NE Refusal**” buttons are activated.

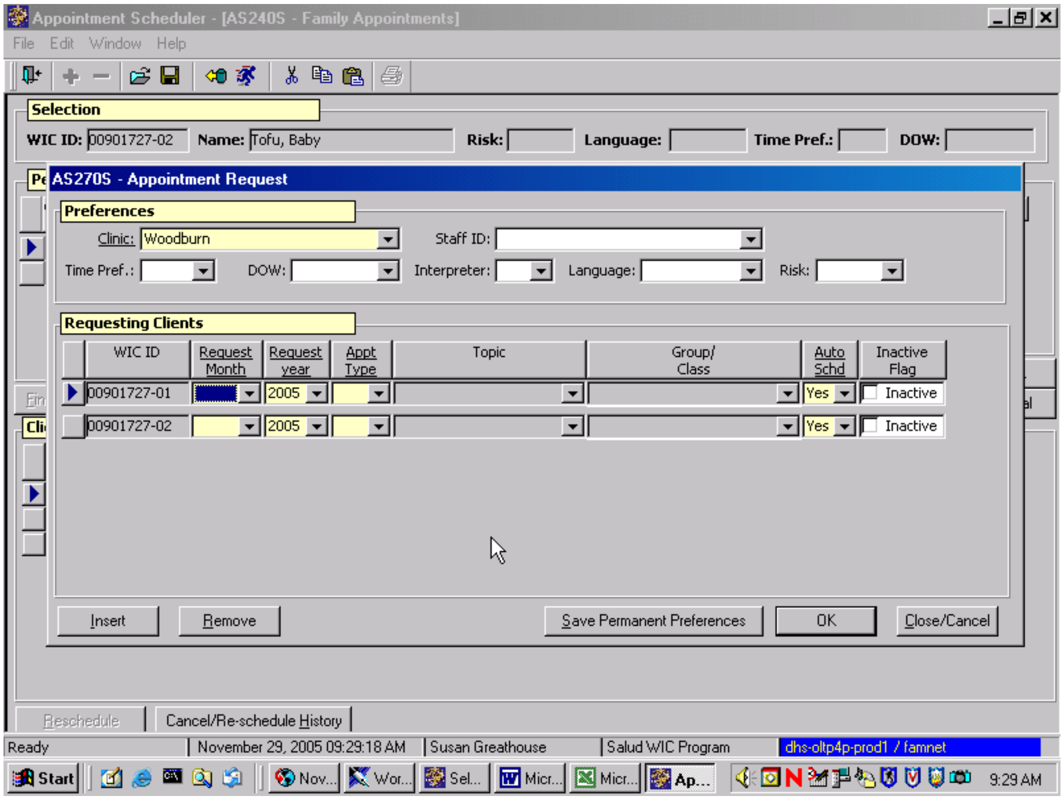

Figure 2: "Appointment Request" Screen

- The "**Create Request**" button takes the user to the "Appointment Request" screen for an appointment request to be created. Up to three family members may be selected at a time.

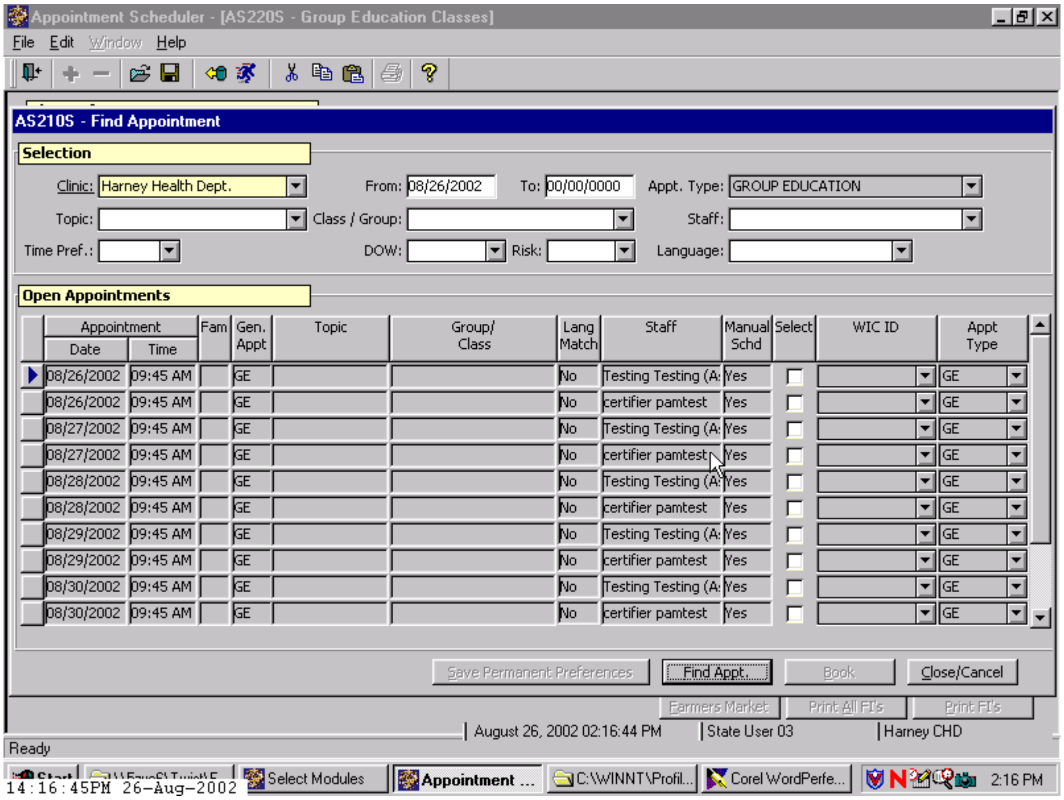

Figure 3: "Find Appointment" screen

- The "**Find Appointment**" button takes the user to the "Find Appointment" screen to schedule an appointment. Up to three family members may be selected at a time to schedule appointments for.
- The "**Put on Wait List**" button will take the user to a pop -up screen to choose which wait list to place client on. Only one family member at a time may be placed on the wait list.
- The "**NE Refusal**" button brings up a pop-up screen for user to document participant refusal to attend a second NE contact.

2.4 The "**Client Appointments**" section displays scheduled appointments for all the family members on WIC. From this area an existing appointment can be rescheduled, and the user can view the family's appointment cancel/reschedule history. Past appointments are archived off of this area 11 months after the appointment was last modified.

- "**Clinic**" displays the clinic the appointment is scheduled in

- "**WIC ID**" displays the ID number of the family member scheduled. Data in this column can be resorted by clicking on the column heading.
- "**Appt. Date**" displays the date of the scheduled appointment. Data in this column can also be resorted by clicking on the column heading.
- "**Start Time**" displays the start time of the appointment.
- If the local agency is using family precoding, the "**Fam**" field will display an "F" in the appointment was scheduled into a slot that was open for family coordination.
- "**Topic**" displays the class topic if the appointment type is "GE." (Group Education). If the appointment type is other than "GE" this field will be blank.
- If the appointment type is "GE", the title of the class will display in the "**Group/Class**" field. If the appointment type is "GS" (Group Screen) the real appointment type for the group screen will display. If the appointment type is other than "GE" or "GS" this field will be blank.
- If the user has indicated that an interpreter is needed for the scheduled appointment the "**Intr**" field will display "yes." If an interpreter has not been indicated, the field will be blank.
- If an interpreter is required for the scheduled appointment, the client's spoken language will display in the "**Lang**" field. If an interpreter is not required the field will be blank.
- "**Mail Code**" displays the client's mail code for the month the appointment is scheduled for.
- The "**Status**" field lists the current status of the appointment.
- "**Actual Staff**" is a drop down field that allows the user to document appointment attendance by choosing the name of the staff person who actually saw the client.
- When the "**Select**" box beside a specific appointment is checked, the "**Reschedule**" button is activated. The "**Reschedule**" button takes the user to the find appointment screen to reschedule the appointment selected. When an appointment is rescheduled the old appointment information is captured in the "**Cancel/Reschedule History**" and the appointment is re-opened for use.

♫ NOTE: Only current and future dates can be selected for rescheduling.

The "**Cancel/Reschedule History**" button takes the user to the "Cancel/Reschedule History" screen which displays a six month history of canceled and rescheduled appointments.

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Special User – Group Scheduling

Objectives:

Upon completion of this lesson the user will be able to:
- set up and maintain group nutrition education classes; and
- create and maintain Group Screening appointments.

Overview:

Before you can use the Appointment Scheduler to make appointments for Group Nutrition Education Classes and Group Screenings, you need to complete a few 'background' screens. Classes are set up under specific topics that come from the topics table, which is maintained by the state. Classes are maintained through base tables set up at the local level. You will also need to complete the "Class Locations" table in order to identify where the classes will be held within your agency.

The **"**Group Education Classes**"** screen allows the user to create or display information pertinent to a class. Once this screen is completed and booked into the Daily Clinic Schedule, clients can then be booked into the class either automatically or manually.

"Group Screening" is a way to schedule a group of clients into one appointment type and time frame. The **"**Group Screening**"** screen allows multiple clients to be scheduled as a group appointment. This screen works very much like the "Group Education Classes" screen.

Instruction:

Entering Class Locations

Class locations are entered here so when you are setting up your classes you are able to select a location for the class from a drop down menu. The address you choose when setting up your class is the address that will print on the client's appointment notice. We recommend that you put in an address for each site where you teach classes, including your main clinic sites. If you choose not to do this, however, the location for class will default to the address for the clinic the class was set up in.

The starting point for this section is:

Appointment Scheduler ⇨ Tables ⇨ Class Locations

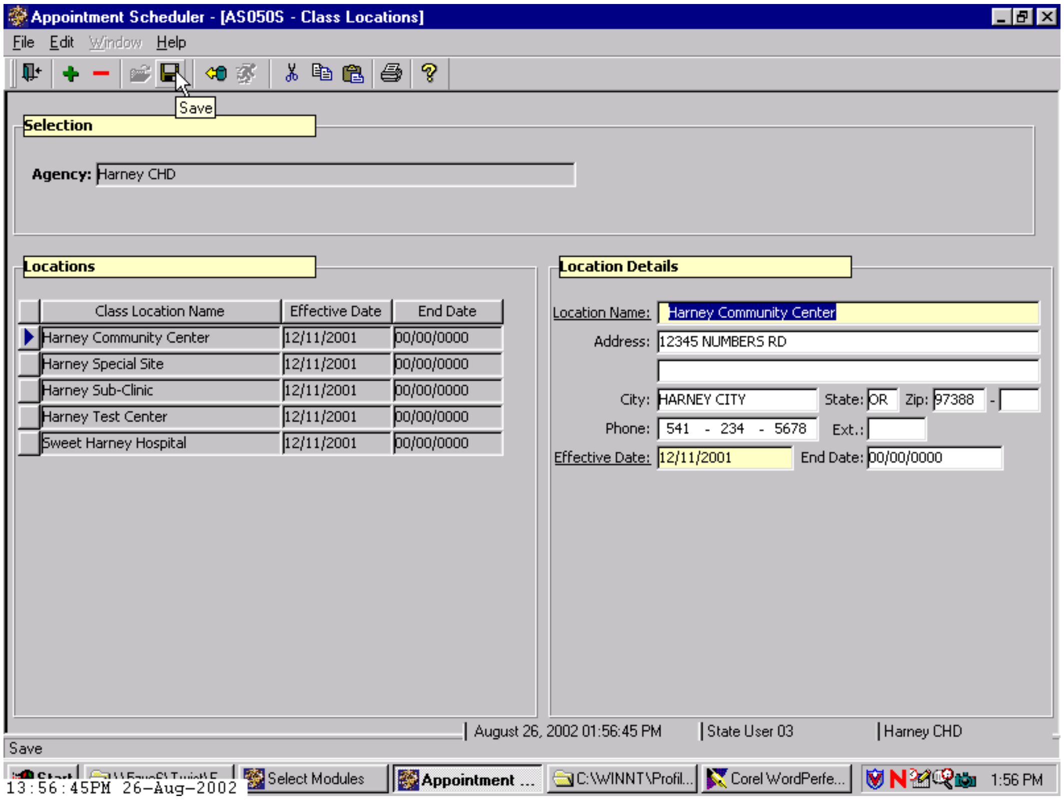

Figure 1: "Class Locations" Screen

- The screen is agency specific.
- The top part of the screen is labeled "**Selection**." The "**Agency**" field displays your local agency based on your log on.
- The bottom left side of the screen is labeled "**Locations**" and displays information input from the "**Location Details**" section.
- The bottom right side of the screen is "**Location Details**." This is where you input information about the class locations.

1. **Enter the "Location Name" for this class location in the "Location Details" section.**

    - When you enter this screen, the cursor will already be located in the "Location Name" field.
    - Click on the "Insert Record" icon to create a blank row for the new Class Location, if necessary.
    - When you tab off the "Location Name" field, the system displays this information in the "Locations" section.

♫ NOTE: To modify an existing location, you must first select that location on the left side of the screen in the "Locations" sections by placing your cursor on the location and clicking.

2. **Tab to the "Address" field and enter the address for this class location.**

   - This address will be printed for the class address on the appointment notices.
   - Complete the address for the class location by entering the "City," "State," and "Zip" fields.
   - If left blank, the physical address for the clinic will print on class appointment notices.

3. **Tab to the "Phone" field and enter the phone number for this location, if desired.**

   - If left blank, the client phone number for the clinic will print on the appointment notices.

4. **Tab to the "Effective Date" field and enter the date this location is effective as a class location.**

   The system displays this information in the **"**Locations**"** section.

5. **Tab to the "End Date" field, and enter the last date this location is to be used as a class location.**

   Leave as 00/00/0000 if unknown. The system displays this information in the "Locations" section.

6. **Save.**

7. **Exit.**

➥ *Practice Activity #1:*

Use the information from your Data Entry Document for this practice. You will be entering information about Class Locations for your agency.

The starting point for this activity is:
Appointment Scheduler ⇨ Tables ⇨ Class Locations

1. Click the "Insert Record" icon to create a new blank row.
2. Enter the "Location Name."
3. Tab to the "Address" field and enter the appropriate information.
4. Tab and enter the "City" and "Zip" fields data.
5. Tab and enter the "Phone" number.
6. Tab to the "Effective Date" field and complete.

7. Save and exit.

Entering Nutrition Education Classes

The starting point for this section is:

Appointment Scheduler ⇨ Tables ⇨ Nutrition Education Classes

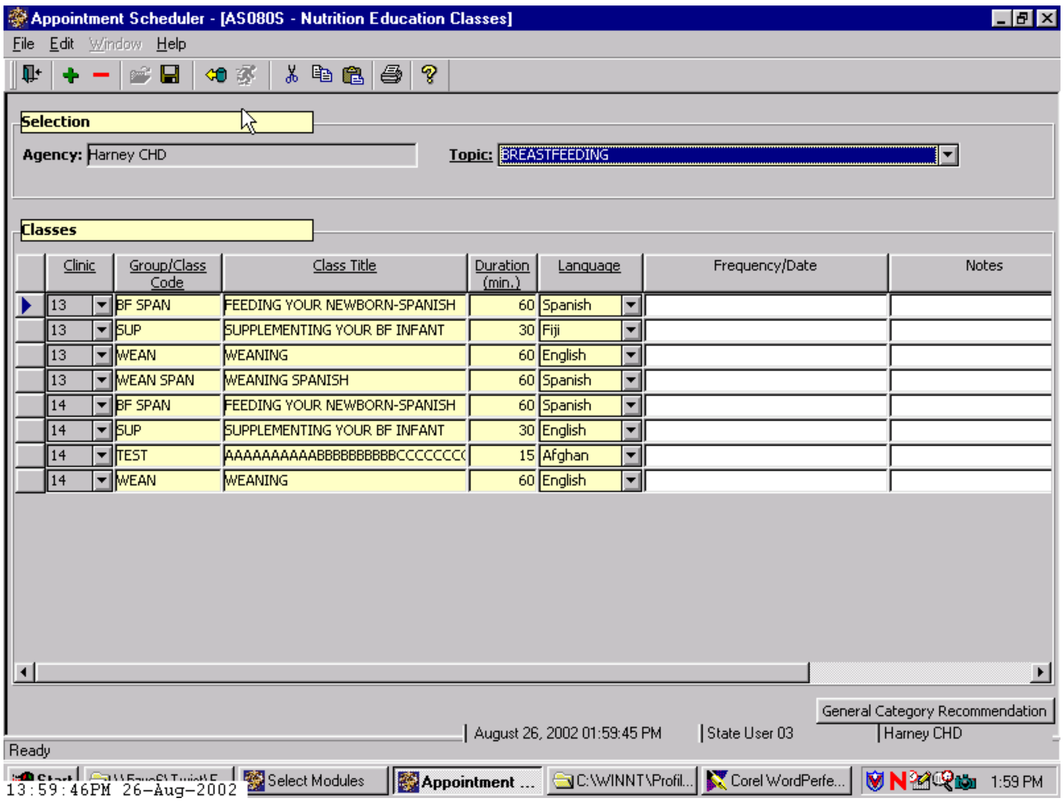

Figure 2: "Nutrition Education Classes" Table

- The top part of the screen is labeled "Selection."
- The "Agency" field displays your local agency based on your log on.

1. **Select the "Topic" for the nutrition education class from the drop down list.**

    - The system will display any nutrition education classes previously entered for this specific topic in the "Classes" section.
    - If there are no education classes displayed in this section, the system will provide a blank line for adding a new nutrition education class.
    - If necessary, click on the "Insert Record" icon to create a new line for entering the new nutrition education class.

2. **Complete the fields in the "Classes" section.**

   2.1 "**Clinic**" designates in which clinic this class is being taught. Select the clinic from the drop down list.

   2.2 "**Group/Class Code**" is the unique code for this class. The user enters the code which may be up to ten alphanumeric characters in length.

   2.3 The user must enter the "**Class Title**," which is the descriptive title for this class.

   - You will want to use the appropriate language in this table when setting up your classes since the class title prints exactly as written on the class appointment notices.

   2.4 "**Duration (min.)**" is the length (in minutes) of the class. This field is used for informational purposes only. The actual duration for the Group Education appointment type is assigned on the Appointment Type Duration Table.

   2.5 Select the "**Language**" in which the class is taught from the drop down list.

   2.6 "**Frequency/Date**" designates how often this class is taught at the selected clinic. For example, "Two times per month" or "The first and third Monday of the month." This field is informational only for staff scheduling the class.

3. **Double click on the "Notes" field.**

   - This field is in an inactive/display mode until you double click.
   - Double clicking will open the "**Notes**" pop-up.

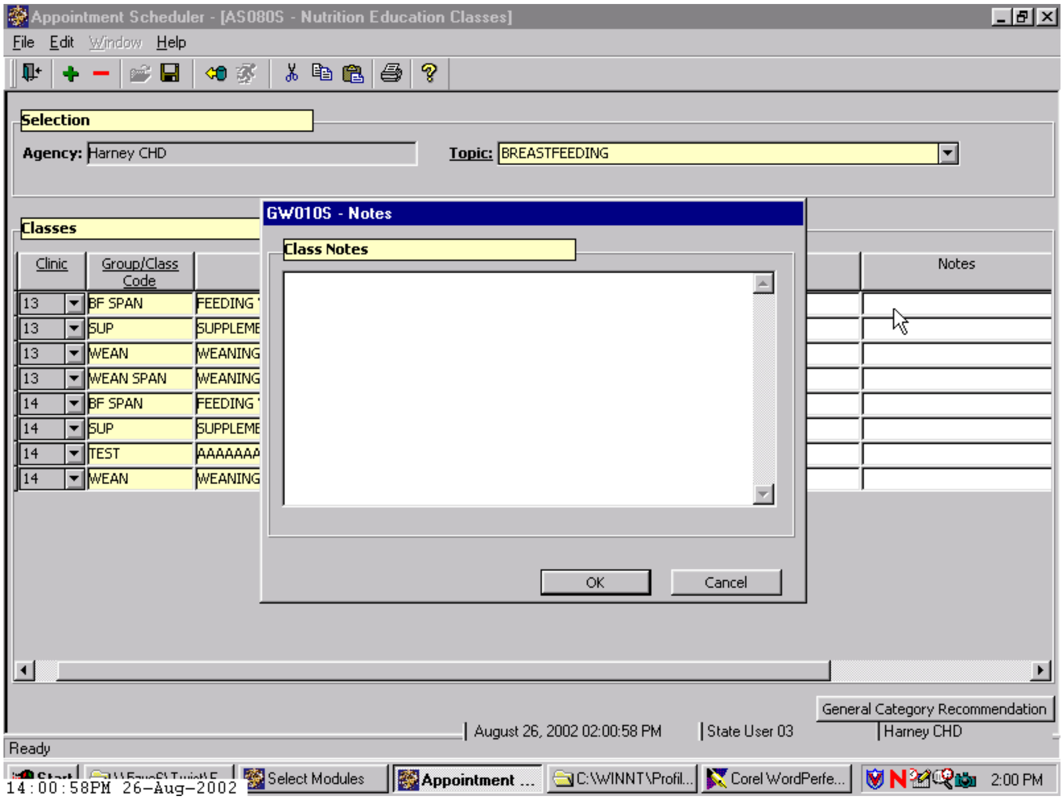

Figure 3: "Notes" Pop-Up

- You may enter free form notes about the class here.
- Click "OK" to save the notes and return to the "Nutrition Education Classes" screen.
- Click "Cancel" to close the pop-up without saving any data.

4. Scroll to right to see the "**Effective Date**" field, which is used to designate the first day the class is available for use on the Appointment Scheduler. This field must be filled in.

5. Complete the "**End Date**" field only when the class is no longer going to be used on the Appointment Scheduler, as it will prevent the class from being able to be scheduled.

♫ NOTE: If a class has been de-activated by putting in an end date, but you now want to start using the class again, you may change the effective date and delete the end date. This will allow the class to once again be scheduled.

6. **Save.**

Once the "Nutrition Education Classes" data is saved, the "General Category Recommendation" button in the lower right hand corner of the screen is activated.

7. **Click the "General Category Recommendation" button to bring up the "General Category Recommendation" pop-up**.

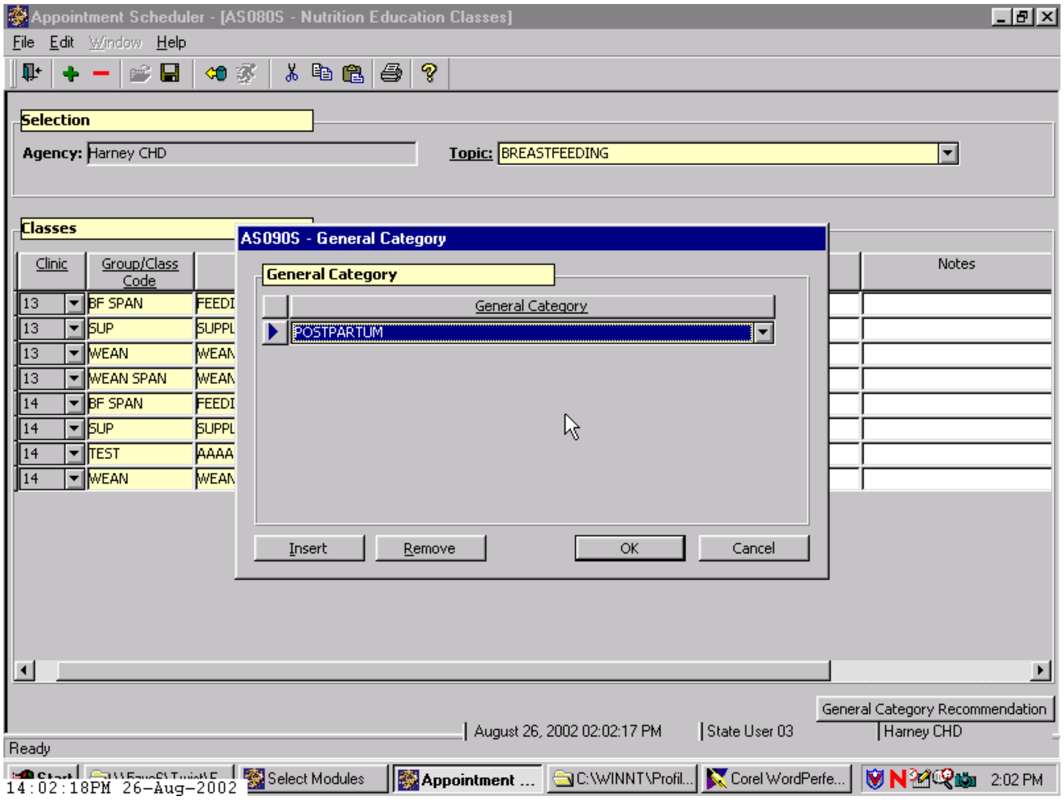

Figure 4: "General Category Recommendation" Pop-Up

This pop-up allows you to select which categories are recommended for each class.

♫ NOTE: Assigning recommended categories to a class here will cause those classes most pertinent to a client's category to list first when scheduling a client into a class.

8. **Select a category from the drop down list.**

- The "Insert" and "Remove" buttons allow you to add more categories or delete categories not recommended for this class.
- The "OK" button will save the information and close the pop-up.
- The "Cancel" button will close the pop-up without saving the information.

9. **Save.**

10. **Exit.**

➥ *Practice Activity #2:*

Use the information from your Data Entry Document for this practice. You will be entering information about Nutrition Education Classes for your agency.

The starting point for this activity is:

Appointment Scheduler ⇨ Tables ⇨ Nutrition Education Classes

1. Select the “Topic” for the nutrition education class from the drop down list.
2. Click the “Insert Record” icon, if needed, to create a new line for your class.
3. Select the “Clinic” for this class from the drop down list.
4. Tab to the “Group/Class Code” field and enter the code.
5. Tab to the “Class Title” field and enter the descriptive title for the class.
6. Tab to the “Duration (min)” field and enter the descriptive title for the class.
7. Tab to the “Language” field and select the language from the drop down list.
8. Tab to the “Frequency/Date” field and enter this data, if appropriate.
9. Tab to the “Notes” field and double click on this field to display the “Notes” pop-up window.
10. Enter any applicable notes for this class.
11. Click “OK” to close the pop-up.
12. Tab to the “Effective Date” field and enter the effective date for this class.
13. Save.
14. Click the “General Category Recommendation” button to bring up the “General Category” pop-up.
15. Select a “Category” from the drop down list.
16. Select any additional categories recommended for this class.
17. Click the “OK” button to close the pop-up.
18. Save and exit.

Next, we are going to work on setting up the classes and booking them into the “Daily Clinic Schedule.” There are two ways to add a class into the daily clinic schedule. One way is through the “Group Education Classes” screen, and the other is from the “Daily Clinic Schedule” itself.

Booking a Group Education Class into the Daily Clinic Schedule via “Group Education Classes” Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

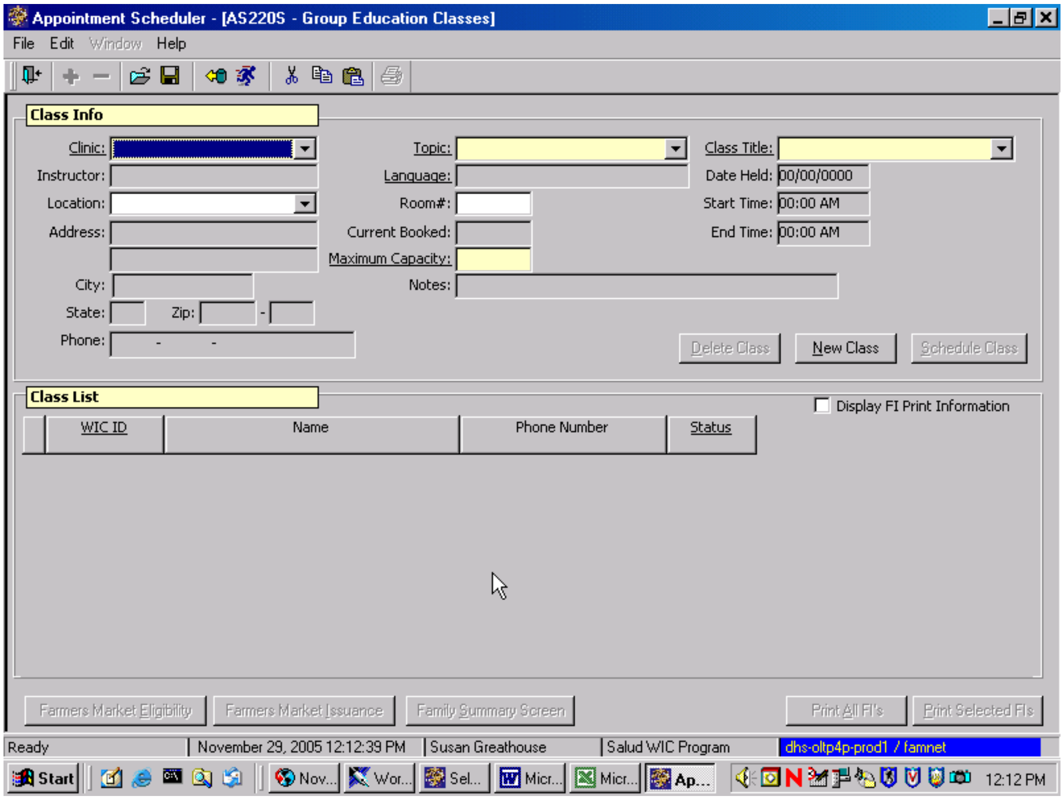

Figure 5: "Group Education Classes" screen

The top part of the screen is "Class Info" and is used to set up the classes at a clinic location and to book the class into the "Daily Clinic Schedule."

1. **Complete the mandatory and optional fields in the "Class Info" section.**

   1.1 Select the "**Clinic**" where the class is to be held from the drop down list.

   1.2 Tab to the "**Topic**" field and choose the topic for the class from the drop down list.

   1.3 Tab to the "**Class Title**" field and select from the drop down list.

   1.4 Tab to the "**Location**" field. Once you have selected the location from the drop down list, the address and phone number fields will be filled in with the information you entered on the "Class Locations" table.

   - The "**Location**" field will default to the clinic location if you don't select a location here.

1.5 Tab to the "**Room #**" field, and enter the room number where the class will be held, if appropriate.

- The "**Current Booked**" field displays the number of clients currently scheduled for this class. This is filled in by the system as clients are scheduled.

1.6 Tab to the "**Maximum Capacity**" field and enter the maximum number of clients for attending this class.

♫ NOTE: Setting maximum capacity will indicate the total number of clients who can attend the class. This number will need to be set approximately two times higher than the number you really want to attend the class to take into account the fact that all family members may have a class scheduled, and all will get class credit, only the parent/guardian may actually attend.

♫ NOTE: When maximum capacity is reached you will receive an error message when you attempt to schedule someone into the class. If you want to increase the maximum capacity, you will need to go back into the "**Group Education Classes**" screen and change it.

1.7 Tab to the "**Notes**" field and enter any free form notes for this class. The field works the same way at the other "Notes" field previously described.

2. **Save.**

♫ NOTE: If you are not ready to actually schedule the class to a specific date, time and staff, you can stop here. In order to find a class that has been set up, but not yet scheduled, a search screen can be accessed from this screen by clicking on the "Open" icon.

3. **Click the "Schedule Class" button to display the "Find Appointment" pop-up.**

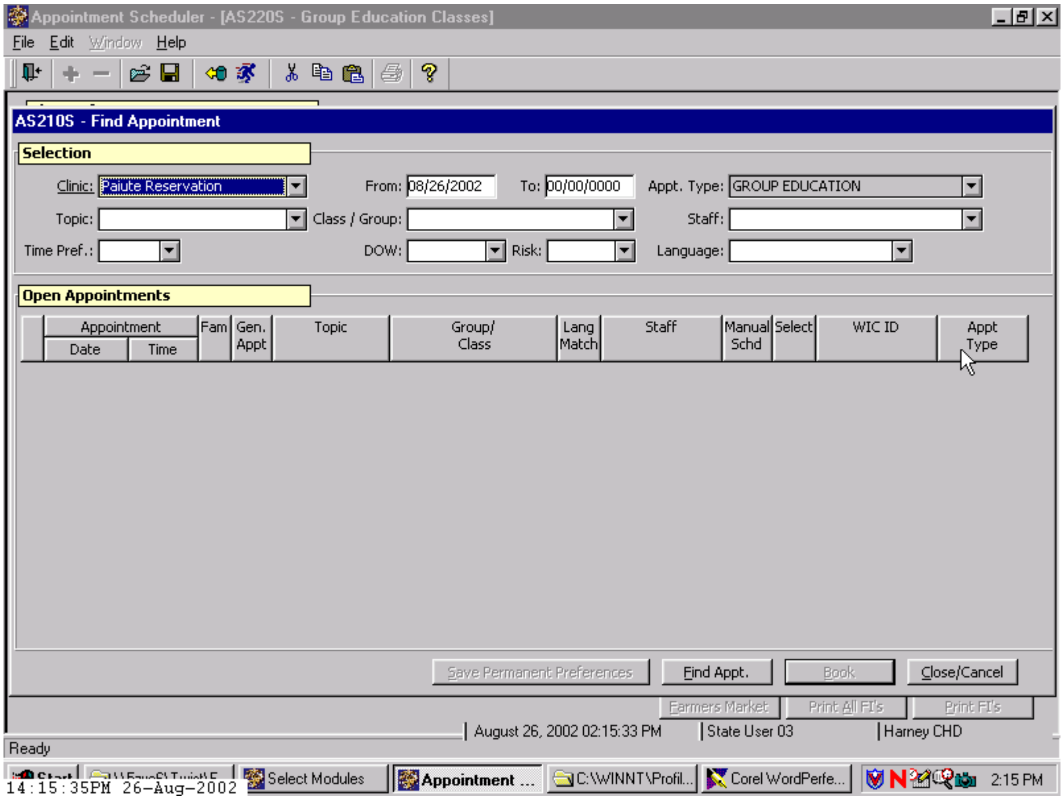

Figure 6: "Find Appointment" Pop-Up

The "Find Appointment" pop-up is used to search for available times to book the class into the "Daily Clinic Schedule."

3.1 In the "**Selection**" section, the system displays the Clinic from the "Group Education Classes" screen.

3.2 The "**From**" field defaults to today's date, but you may change this date to another date in the future.

3.3 The "**To**" field defaults to 00/00/0000, but you may enter a specific end date on which the system should search the Daily Clinic Schedule for available times.

3.4 The system displays the "**Appt. Type**" field as "group education" this cannot be changed.

3.5 To restrict the available appointments search further, you may complete these fields: **Staff**, **Time Pref** (select AM or PM), **DOW (Day of Week)**, **Risk**, **Language**.

3.6 Do not use **Topic** or **Class/Group** as selection criteria.

4. **Click the "Find Appt." button.**

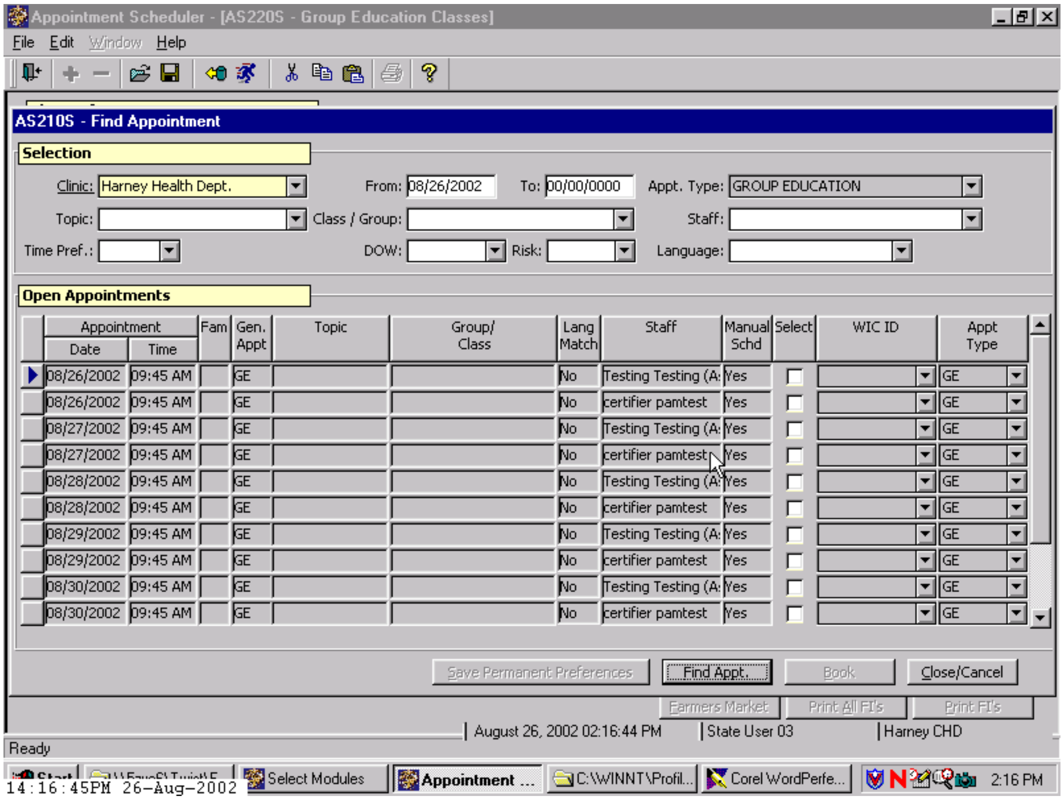

Figure 7: "Find Appointment – Open Appointments" Pop-Up

- This allows you to find a time in which to book the class. The system displays any available times for the class, based on the selection criteria, in the "**Open Appointments**" section.
- Clicking the "**Cancel**" button closes the pop-up without scheduling the class.

5. **Click the "Select" checkbox corresponding to the desired date and time slot for the class.**

6. **Click the "Book" button to book the selected time.**

- If you do not want to continue with booking the class, click the "**Cancel**" button to close the pop-up.
- When you click the "**Book**" button, the pop-up closes and the following fields in the Class Info section of the "**Nutrition Education Classes**" screen are now filled in: Instructor, Date Held, Start Time, and End Time.

7. **Save.**

♫ NOTE: To schedule another class, click the “New Class” button. The screen will clear allowing you to book the next class as previously described.

8. **Exit.**

➥ *Practice Activity #3:*

Use the information from your agency calendar for this practice. You will be entering information about Group Education Classes for your agency.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Groups Maintenance ⇨ Group Education Classes

1. Select the “Clinic” from the drop down list.
2. Tab to the “Topic” field and select the topic from the drop down list.
3. Tab to the “Class Title” field and select from the drop down list.
4. Tab to the “Location” field and select from the drop down list.
5. Tab to the “Room #” field and enter the room number, if appropriate.
6. Tab to the “Maximum Capacity” field and enter the maximum number for this class.
7. Tab to the “Notes” field and enter any applicable notes.
8. Save.
9. Click the “Schedule Class” button.
10. On the “Find Appointment” pop up, edit the “From” and “To” dates if needed.
11. Click the “Find Appt.” button.
12. Click the “Select” checkbox corresponding to the desired date and time for this class.
13. Click the “Book” button.
14. Save.
15. Exit the “Group Education Classes” screen.

Booking a Group Education Class into the Daily Clinic Schedule via the “Daily Clinic Schedule” screen

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

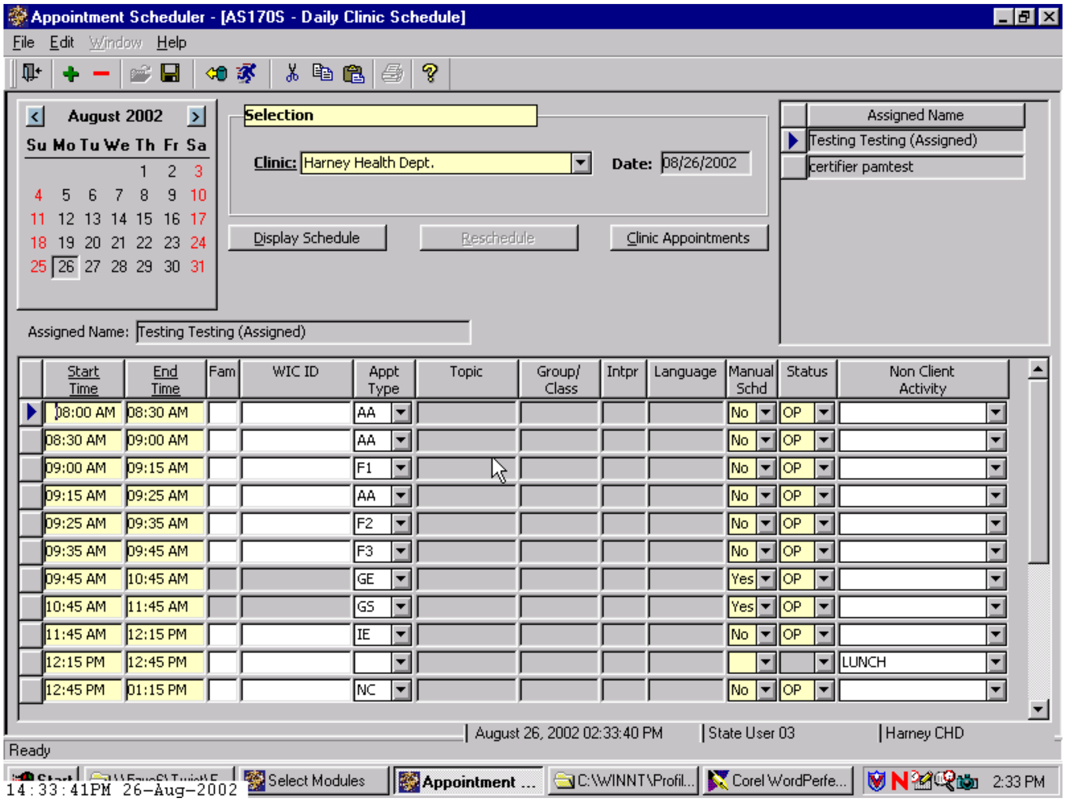

Figure 8: "Daily Clinic Schedule" Screen

1. **Locate the GE appointment slot you wish to set up and book.**

2. **Double click the "Group/Class" field on the row in which the GE appointment is located.**

   This brings up the "Group Education Classes" screen.

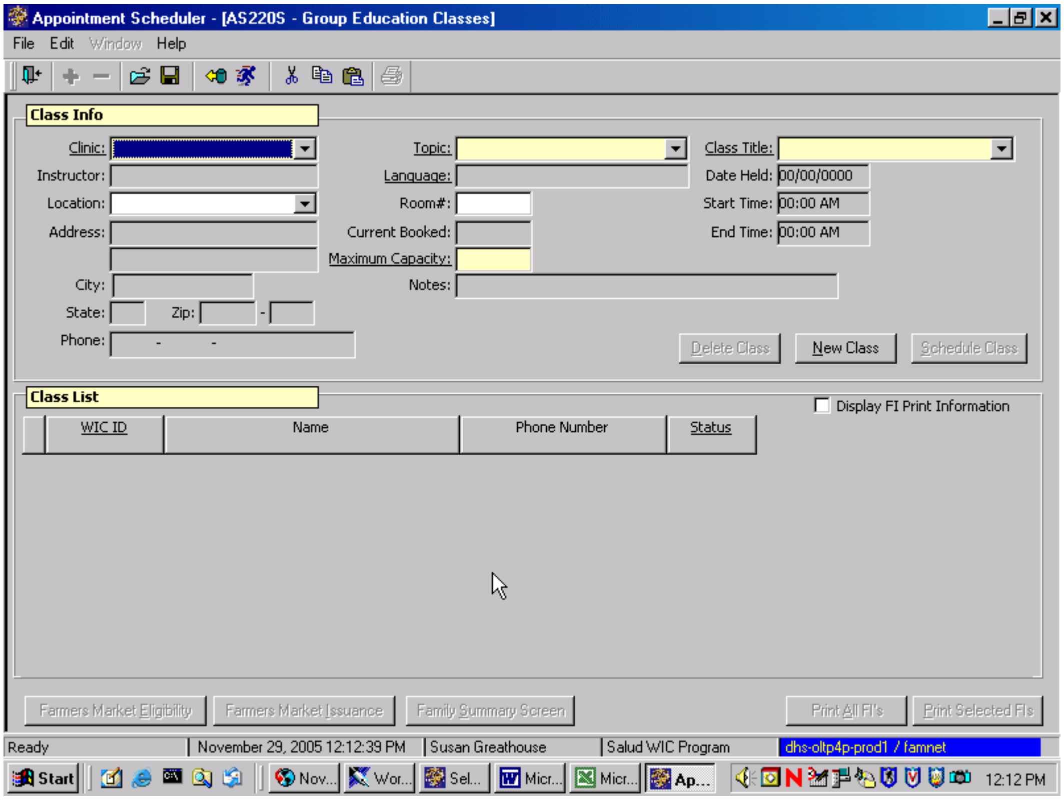

Figure 9: "Group Education Classes" Screen

3. **Complete the mandatory and optional fields in the "Class Info" section.**

4. **Save.**

5. **Exit the screen by clicking the "Exit" icon, which returns you to the "Daily Clinic Schedule" screen.**

6. **Click "Yes" on the pop-up to update the schedule with the class that you have just set up.**

   Clicking "**No**" means the class will not be scheduled.

☺ See Job Aid "Making a Group Education Appointment."

Booking a Group Screening

This function is similar to booking "Group Education Classes," only you are booking appointments for Group Screenings (sometimes called "group certifications") rather than group classes. We are going to work on setting up group screenings and booking them into the "Daily Clinic Schedule."

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

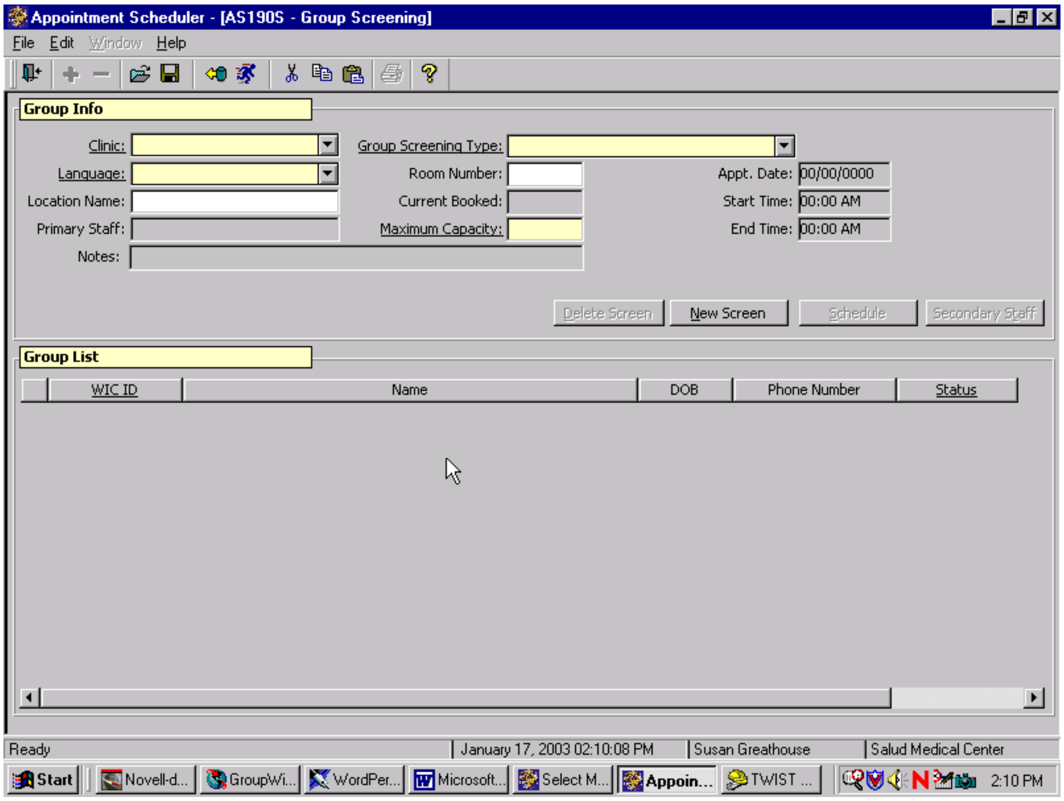

Figure 10: "Group Screening" Screen

The top part of the screen is "Group Info" and is used to set up the screening at a clinic location and to book the class into the "Daily Clinic Schedule."

1. **Complete the "Group Info" section.**

   1.1 Select the "**Clinic**" where the screening is to be held from the drop down list.

   1.2 Tab to "**Group Screening Type**" and enter appointment type from the drop down list.

   1.3 The "**Language**" field is a drop-down window that allows you to select the language in which the appointment will be conducted once the appointment has been booked using the "**Schedule**" button, which is discussed later.

   1.4 Tab to "**Room Number**" and enter if desired

1.5 The "**Appt. Date**," "**Start Time**," and "**End Time**" fields display the date and times for which the appointment is scheduled. These fields are filled in by the system once the class is booked.

1.6 Tab to "**Location Name**" and select location from the drop down list.

1.7 The "**Current Booked**" field displays the number of clients currently scheduled for this appointment. This is filled in by the system as clients are booked.

1.8 The "**Primary Staff**" field displays the name of the primary staff person assigned to this appointment once the appointment is booked.

1.9 Tab to "**Maximum Capacity**" and enter the maximum number of clients that can attend this screening.

♫ NOTE: Setting maximum capacity will indicate the total number of clients who can attend the screening.

♫ NOTE: When maximum capacity is reached you will receive an error message when you attempt to schedule someone into the screening. To increase the maximum capacity, you will need to go back into the "**Group Screening**" screen and change it.

1.10 Tab to "**Notes**" and enter any notes applicable to this screening.

2. **Save.**

♫ NOTE: If you are not ready to actually schedule the group screening to a specific date, time and staff, you can stop here.

♫ NOTE: In order to find group screenings that have been set up, but not yet scheduled, a search screen can be invoked from this screen by clicking on the open folder icon in the top tool bar.

3. **Click "Schedule" button. To display the "Find Appointment" screen.**

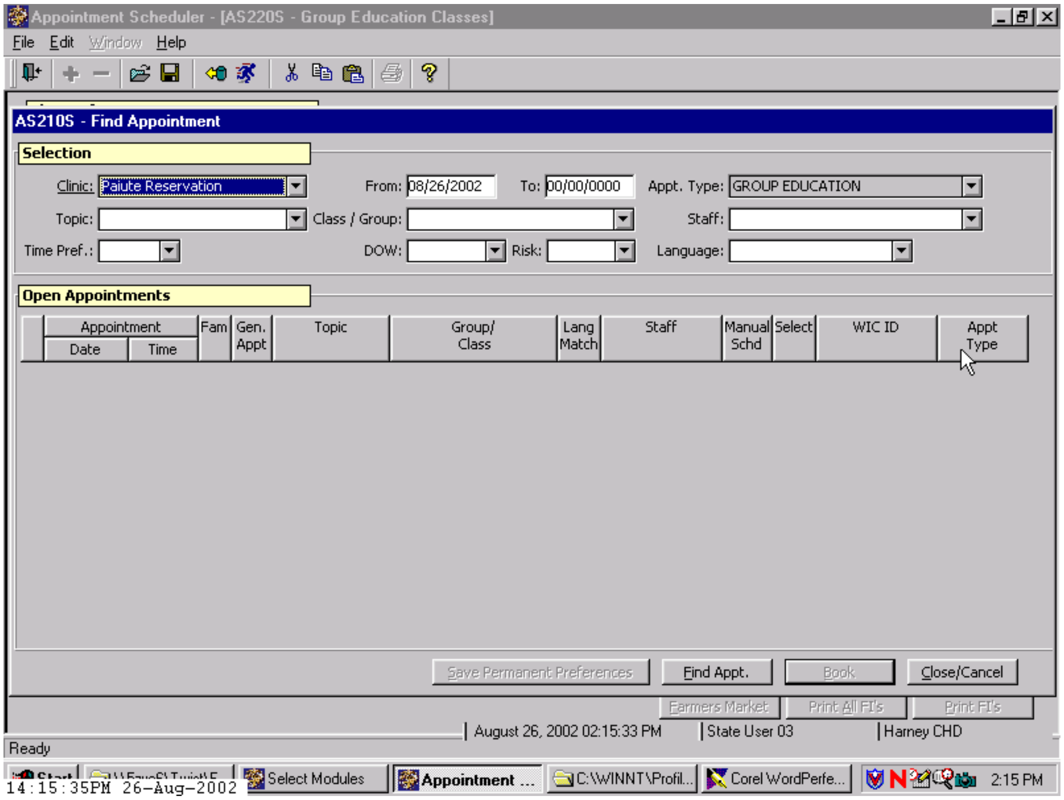

Figure 11: "Find Appointment" Pop-Up

3.1 In the "**Selection**" section, the system displays the Clinic from the "Group Screenings" screen.

3.2 The "**From**" field defaults to today's date, but you may change this date to another date in the future.

3.3 The "**To**" field defaults to 00/00/0000, but you may enter a specific end date on which the system should search the Daily Clinic Schedule for available times.

3.4 The system displays the "**Appointment Type**" field as "group screen" this cannot be changed.

3.5 To restrict the available appointments search further, you may complete the remaining fields: **Class/Group, Staff, Time Pref** (select AM or PM), **DOW (Day of Week)**, **Risk**, **Language**.

4. **Click the "Find Appt." button.**

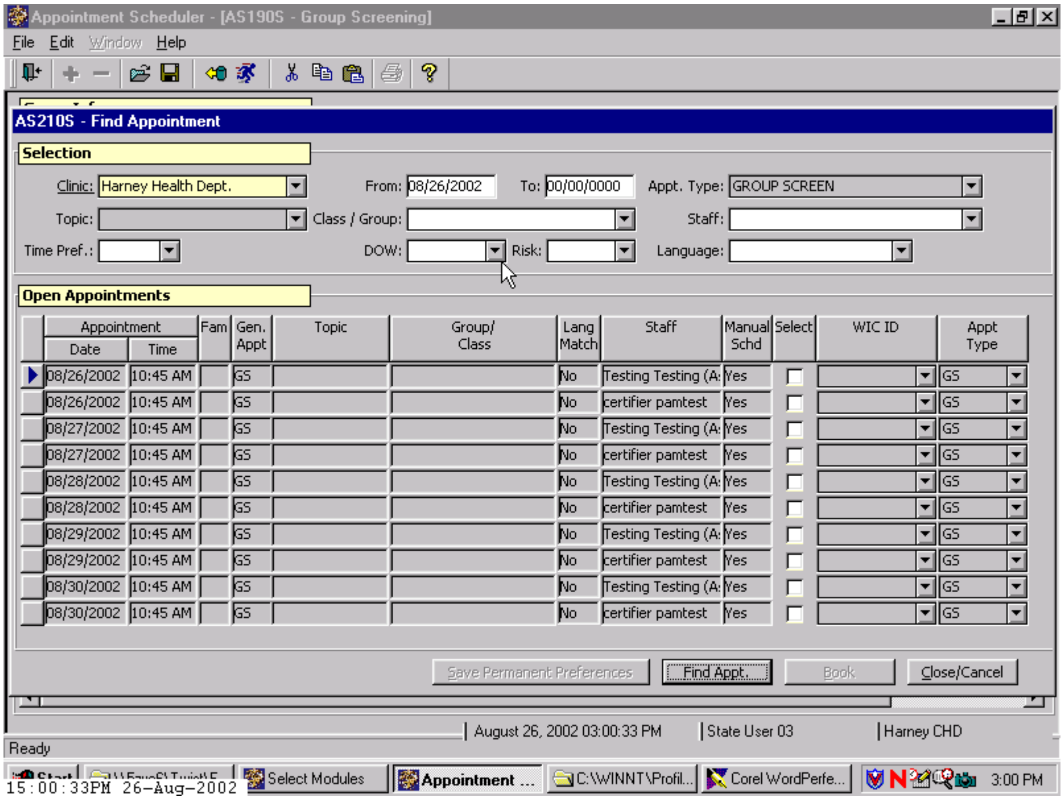

Figure 12: "Find Appointment-Open Appointments" Pop-Up

- This pop-up allows you to find a time in which to schedule the screening.
- The system displays any available times for the screening, based on the selection criteria, in the "Open Appointments" section.
- Clicking the "Cancel" button closes the pop-up without scheduling the screening.

5. **Click the "Select" checkbox corresponding to the desired date and time slot for the screening.**

6. **Click the "Book" button to book the selected time.**

- When you click the "Book" button, the pop-up closes and the following fields in the Class Info section are now filled in: Primary Staff, Appointment Time, Start Time, and End Time.
- The "Secondary Staff" button is also now activated.
- If you do not want to continue with booking the screening, click the "Cancel" button to close the pop-up.

7. **Click the "Secondary Staff" button.**

This pop-up allows you to select other staff members to be assigned to the screening appointment.

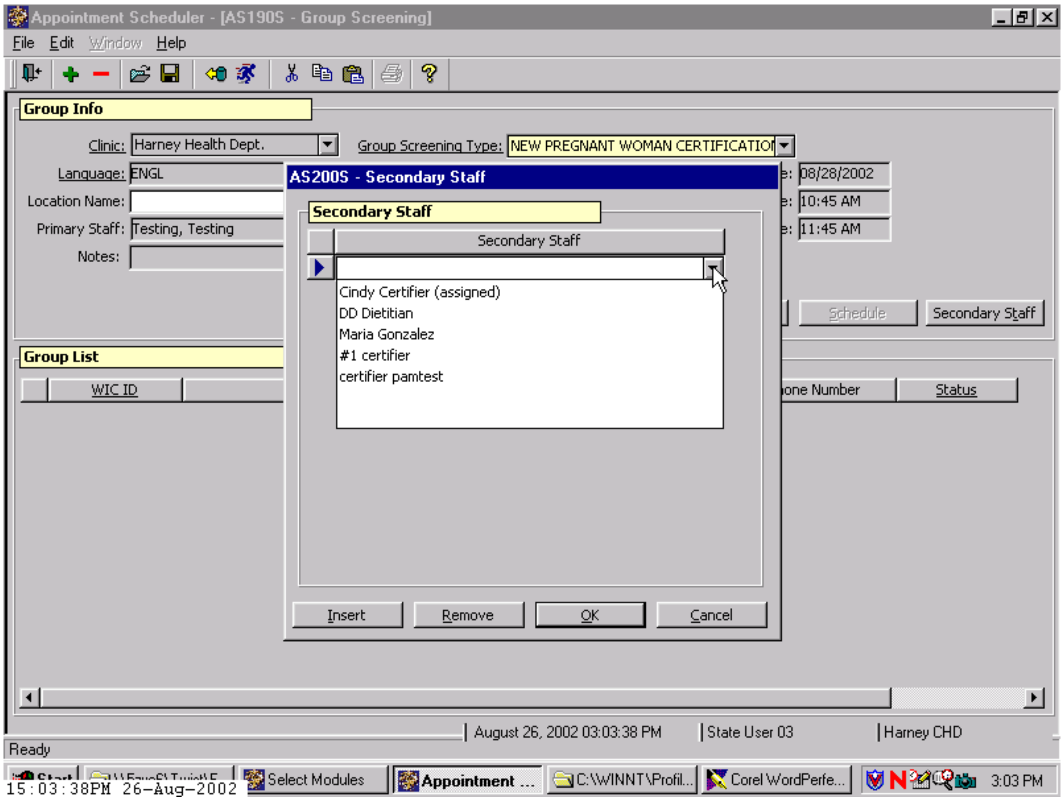

Figure 13: "Secondary Staff" Pop-Up

8. **Select a staff member from the drop down list.**

- The "Insert" and "Remove" buttons allow you to add more staff members, if available, or delete staff members not needed for this screening.
- The "OK" button will save the information and close the pop-up.
- The "Cancel" button will close the pop-up without saving the information.

9. **Save and Exit.**

♫ NOTE: To schedule another screening, click the "New Screen" button. The screen will clear allowing you to schedule the next screening as previously described.

♫ NOTE: To delete a screening that has not yet been booked, use the "**Delete Screen**" button. Once a screening has been booked, however, the "**Delete**

Screen” button is no longer enabled. To delete a booked screening, you must go to the Daily Clinic Schedule and change the GS appointment type to clear the scheduled screening.

♫ NOTE: Group screening appointments will not show up in reports, such as the Productivity or Show Rate reports.

♫ NOTE: You will not be able to print vouchers from the “**Group Screening**” screen.

➥ *Practice Activity #4:*

Use the information from your ☛ Activity Sheet for this practice.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Groups Maintenance ⇨ Group Screenings.

1. Select the “Clinic” from the drop down list.
2. Tab to the “Group Screening Type” field and select the appointment type from the drop down list.
3. Tab to the “Room #” field and enter the room number, if appropriate.
4. Tab to the “Location” field and enter the location, if desired.
5. Tab to the “Maximum Capacity” field and enter the maximum number for this screening.
6. Tab to the “Notes” field and enter any applicable notes.
7. Save.
8. Click the “Schedule” button.
9. On the “Find Appointment” pop up, edit the “From” and “To” dates if needed.
10. Click the “Find Appt.” button.
11. Click the “Select” checkbox corresponding to the desired date and time for this screening.
12. Click the “Book” button.
13. Click the “Secondary Staff” button.
14. On the “Secondary Staff” pop-up, select any secondary staff to be assigned to this screening.
15. Click “OK.”
16. Save.
17. Exit the “Group Screenings” screen.

✓ *Skill Check:*

Using your Data Entry Document, complete the nutrition Education Classes table and set up your Group Nutrition Education classes as completely as you can.

✍ *Notes:*

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Schedule Appointment Now

Objectives:

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

- navigate to the Appointment Scheduler from the Intake functional area and schedule a client two different ways.
- use the "Family Appointment Record" to schedule an appointment.
- schedule an appointment from the Daily Clinic Schedule
- recognize the different appointment types available in TWIST; and
- distinguish between generic and specific appointments.

Overview:

You are in the middle of completing a certification, and you need to make an appointment, or on the phone prescreening a potential client and also want to book an appointment for them at the same time. What do you do? Well, with the help of fast paths or a push button on your screen, the TWIST Appointment Scheduler is just a click away! Let's review a few possible situations when you might need to quickly schedule an appointment and see how easily you can do it.

The Job Aid at the end of the chapter outlines the many ways that you can schedule an appointment in TWIST.

☺ See Job Aid "How to Make an Individual Appointment" for more information.

Instruction:

Scheduling an Appointment from Enrollment & Intake

There are two different ways to schedule an appointment from Enrollment & Intake. One is through "Applicant Prescreening" and other is through "Enrollment".

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Applicant Prescreening

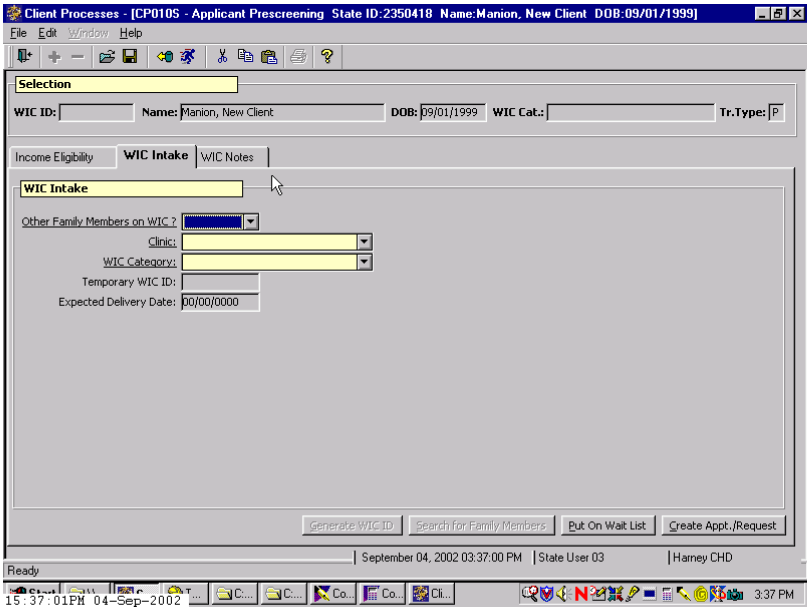

Figure 1: "Applicant Prescreening - WIC Intake" Screen

1. **Retrieve the client for whom you wish to make an appointment.**

2. **Click "Create Appt./Request" button.**

This will take you to the "**Family Appointment Record**" screen. The Family Appointment Record allows you to see all the appointments for the entire family. It is the most important screen for appointment scheduling.

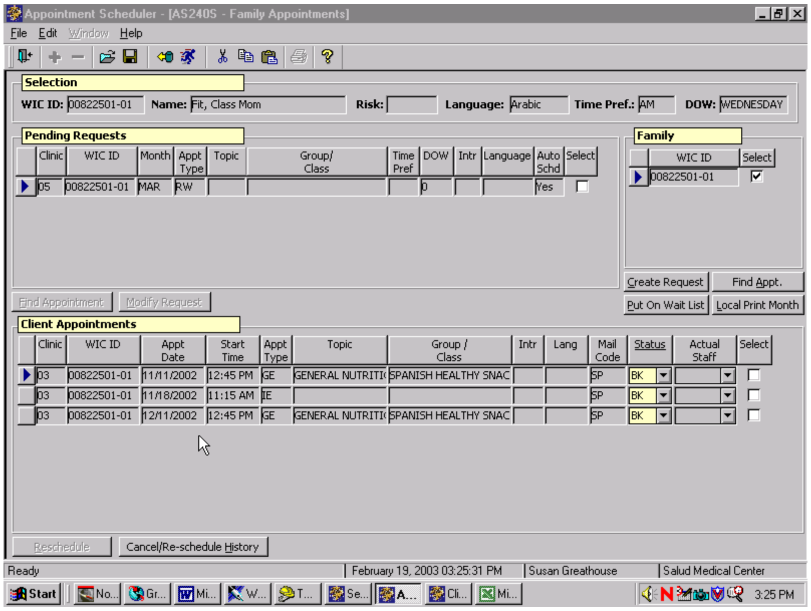

Figure 2: "Family Appointments" Screen

3. **In the "Family" section, click the "Select" checkbox corresponding to the client for whom you want to make an appointment.**

- When you click the "**Select**" checkbox, the "**Create Request**," "**Find Appt.**," "**Local Print Month**" and "**Put on Wait List**" buttons are activated.
- If you need to see more information on the client, double click on the WIC ID.

4. **Click the "Find Appt." button to view the "Find Appointment" pop-up.**

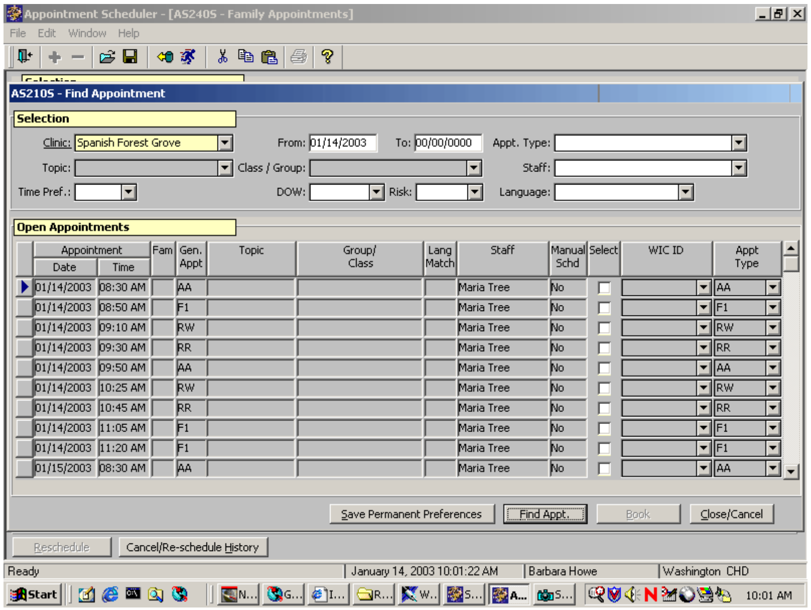

Figure 3: "Find Appointment" Pop-Up

- In the "**Selection**" section, "**Clinic**" will default to the clinic you are currently in. You can change this by selecting a different clinic from the drop down list.
- The system defaults the "**From**" date to today's date, but you may change this to any date in the future.
- The "**To**" date should be entered if there is an end date for which you need to limit the search. This may be left at the default "**00/00/0000**" if no end date is needed. If you have a large number of appointment templates already scheduled, it is better to put in an end date, so the system can respond more quickly to your query.
- You may enter any other selection criteria, if desired, for "**Appt Type**," "**Staff**," "**Time Pref.**," "**DOW**," or "**Interpreter**".

☺ See Job Aid "Appointment Types" for more information.

- "**Language**" refers to client language preference. This field does not need to be filled in unless you want the client to have an appointment in a different language from their spoken language indicated in the Client Primary. In other words, this field works as a language "override" of the language listed in the Client Primary.
- If you have selected the appointment type of group education (GE), you may select the "**Topic**". You may select the "**Class/Group**" if you have selected an appointment type of either group education (GE) or group screening (GS).
- The system will display the client's risk level in the "**Risk**" field if the client is already enrolled in WIC. If you are coming from prescreening, this field will be blank. The risk level is modifiable and is used to match the client to the appropriate staff person based on risk level.
- If you want to save "**Time Pref.**," "**DOW**" or "**Staff**" preferences in the client's record for future appointments, click the "**Permanent Preference Change**" button.
- Click the "**Cancel**" button to close the pop-up without making an appointment.

5. **Click the "Find Appt." button at the bottom of the pop-up screen.**

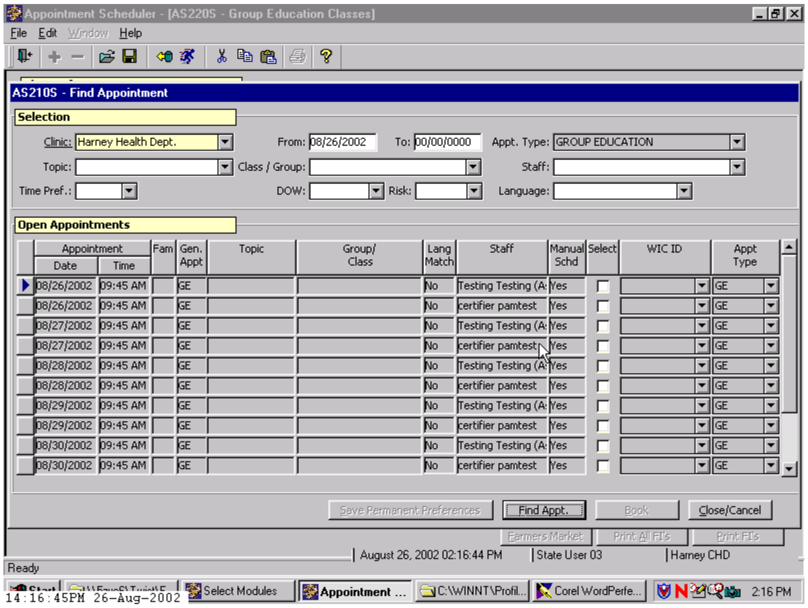

Figure 4: "Find Appointment" Pop-Up

- This displays the open appointments that meet the selection criteria.
- The "**Appointment Date**" displays the date of the available appointment.
- The "**Appointment Time**" displays the start time of the appointment.
- The "**Fam**" field will display an "**F**" if this appointment is restricted to coordinated family appointments times. Most agencies will not be using this feature.
- The "**Generic Appt Type**" field displays the generic appointment type if the appointment found is included in a generic type.
- The "**Topic**" field will be populated with the topic only when this appointment is for a GE (group education) class. (See Notes)
- The "**Group/Class**" field will be populated with the corresponding class or group code if this appointment is for a GS (group screening) or GE appointment.
- The "**Lang Match**" field displays a "**Yes**" if the language needs of the client match the language skills of the staff member. A "**No**" indicates that there is not a match between the client and the staff member's language. You can still, however, book the appointment with that staff and the appointment will display in the Family Appointment record with a "**Yes**" in "**Interpreter**" and the language needed.
- The "**Staff**" field displays the staff member's name.
- The "**Manual Schd**" field displays a "**Yes**" if the appointment must be scheduled manually. A "**No**" means that the appointment may be scheduled using the automatic scheduler. The default is "**No**".
- The "**Select**" checkbox is used to select the appointment for booking. You can un-select an appointment by clicking this box again before you book the appointment.
- The "**WIC ID**" field will display the client's WIC ID number once the "Select" checkbox has been marked for the appointment.
- The "**Appointment Type**" field displays the appointment type that will go in the client's record.

6. **Check the "Select" checkbox next to the desired appointment.**

- The system fills in the "**WIC ID**" field with the client's ID number.
- The "**Book**" button becomes activated.
- If a generic appointment type (AA, RR or NN) is selected, you must choose a real appointment type to fill the slot.

7. **Click the "Book" button to schedule the appointment and close the pop-up.**

- The client appointments section of the family appointments screen is now populated with the scheduled appointment information. The information is automatically saved.

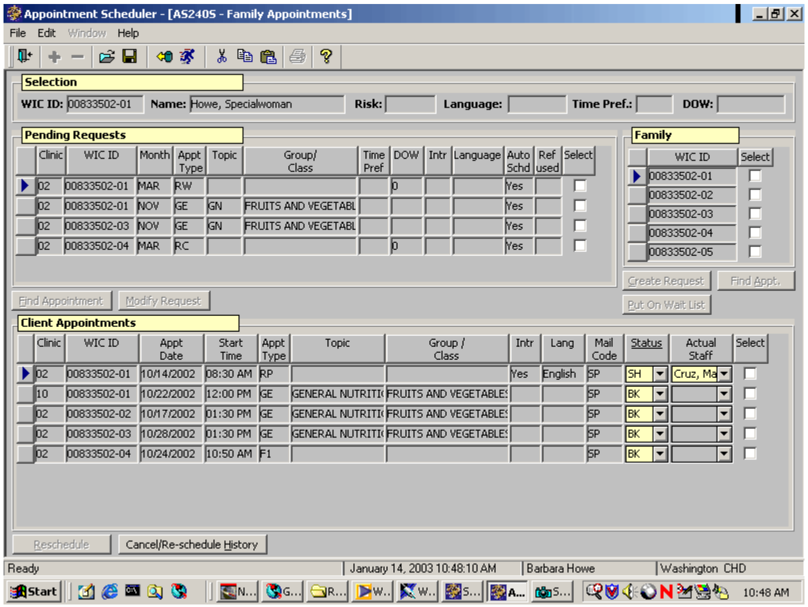

Figure 5: "Family Appointments" Screen

"Client Appointments" Section

- The "**Clinic**" field lists the clinic where the appointment is to be held.
- The "**WIC ID**" field displays the ID number for the scheduled client.
- The "**Appt Date**" field lists the date of the appointment.
- The "**Start Time**" field lists the scheduled start time for the appointment.
- The "**Appt Type**" field lists the specific appointment.
- The "**Topic**" field will display a topic if this is for a group education class.
- The "**Group/Class**" field will display the group or class title if this appointment is either a group education class or group screening appointment.
- The "**Intr**" field will display "**Yes**" if an interpreter is needed or "**No**" if one is not needed. See Figure 5: "Family Appointments" Screen for an example.

- The "**Language**" field will display the language for which an interpreter is needed, if "**Yes**" is displayed in the "**Intr**" field.
- The "**Mail Code**" indicates where the client's FIs will be printed. This field is display-only and based on what was entered in the client's intake record.
- The "**Status**" field lists the current status of the appointment.
- The "**Actual Staff**" field is used when documenting appointment attendance so the staff person who actually saw the client can be captured.
- The "**Select**" checkbox is used for rescheduling appointments. This is discussed in another lesson.

8. **Exit.**

Now that we know the first way to schedule a client through Enrollment and Intake, let's take a brief look at the other way.

The starting point for this section is:
Client Processes ⇨ Enrollment and Intake ⇨ Enrollment

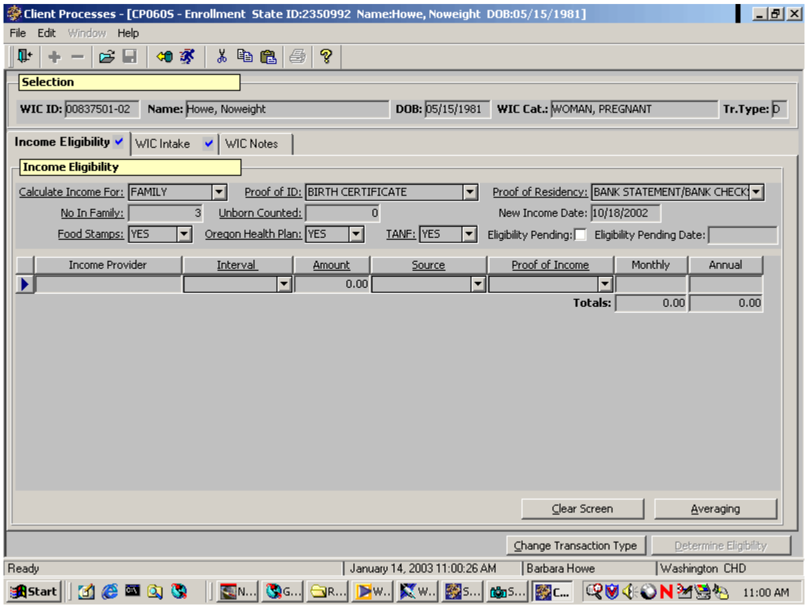

Figure 6: "Enrollment" Screen

1. **Click on the "open" icon to retrieve your client.**

2. **Fast Path to "Family Appointments".**

3. **Schedule the appointment as outlined earlier in the lesson.**

➥ *Practice Activity #1:*

Use the information from your ☛ Activity Sheet for this practice.

The starting point for this activity is:
Client Processes ⇨ Enrollment and Intake ⇨ Prescreening

1. Click on the "Open" icon to open the "Client Search" pop-up and return to the "WIC Intake" screen with your client.
2. Click on the "Create Appt./Request" button to go to the "Family Appointments" screen.
3. Click the "Select" checkbox corresponding to your client's WIC ID number.
4. Click the "Find Appt." button to bring up the "Find Appointment" pop-up.
5. Enter the desired "Selection" criteria.
6. Click the "Find Appt." button to display the open appointments.
7. Locate the desired appointment and click the corresponding "Select" checkbox.
8. Click the "Book" button.
9. Exit.

Scheduling an Appointment from Daily Clinic Schedule

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

1. **In the Daily Clinic Schedule, select the clinic and date where you want to schedule the client.**

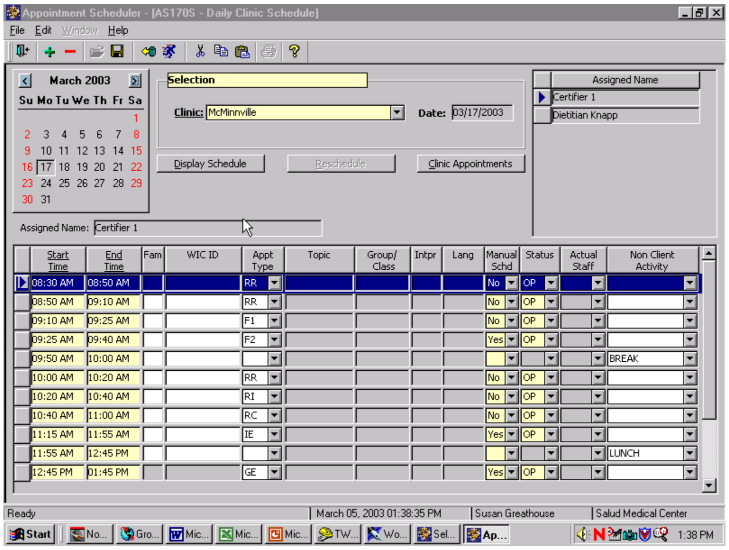

Figure 7: "Daily Clinic Schedule" Screen

2. **Select an open appointment time.**

3. **If you know the client's WIC ID number, enter that number in the WIC ID field for that appointment time.**

♫ NOTE: Remember you can double-click on the WIC ID number in the Daily Clinic Schedule to display the name, category and date of birth of the client.

4. **Tab to the Appointment Type field and select the correct appointment type for that client's appointment. You may need to adjust the start or end times for the appointments before and after if the appointment type you select doesn't match the appointment length in the schedule.**

♫ NOTE: If you do not know the client's WIC ID number, you can click on the open appointment slot and then use the Fast Path to go to the Client Primary and retrieve the client you are trying to schedule. As in Step 4 above, you may need to change the Appointment Type and adjust the appointment start and end time so that times do not overlap.

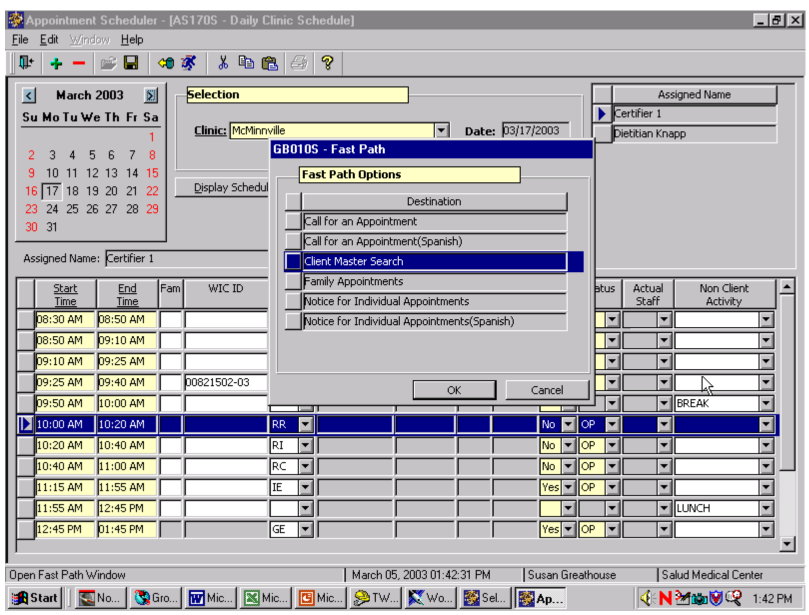

Figure 8: Fast Path from "Daily Clinic Schedule" Screen

5. **Click "Save" to save the scheduled appointment.**

✂ *Tips and Shortcuts:*

You can also schedule a client directly by starting in the Family Appointment record and retrieving the client for whom you are scheduling an appointment. The process for scheduling an appointment is exactly the same once you reach the "Family Appointment Record" screen, no matter how you get there.

You can reach the "Family Appointment Record" to schedule a client from:

- the "Applicant Prescreening" screen using the "Create Appt./Request" button,
- the "Enrollment" screen using the fast path,
- the "Nutrition Education Plan" screen using the "Schedule Appointment" tab, and
- the Appointment Scheduler module under "Scheduling"

➥ *Practice Activities:*

The starting point for this activity is:
Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select the date and clinic where you want to schedule your client's appointment.
2. Click on the WIC ID field on the time of the appointment.
3. Click on the Fast Path icon and select "Client Master Search".
4. Find yourself in the Client Master and click "Return with Client".
5. Adjust the appointment type to "F1".
6. Save and exit.

✓ *Skill Check:*

Now you are going to get a chance to put this new scheduling knowledge to the test!

Use the information from your ☛ Activity Sheet for this practice.

1. Prescreen a client that does not yet exist, and make an appointment for their certification appointment from the "Applicant Prescreening" screen. Make up the client information.
2. Print out the "Family Appointments" screen for this client after you have booked the appointment.

✍ *Notes:*

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Scheduling a Client into a Group Nutrition Education Appointment

Objectives:

Upon completion of this lesson the user will be able to:
- schedule clients into group nutrition education appointments.

Overview:

Scheduling and maintaining group appointments are important elements of WIC business. Federal regulations require that WIC clients be offered nutrition education contacts. Classes can be easily scheduled and maintained within the TWIST system using the same basic functionality that applies to scheduling individuals and families.

Instruction:

Reviewing the "Group Education Classes" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

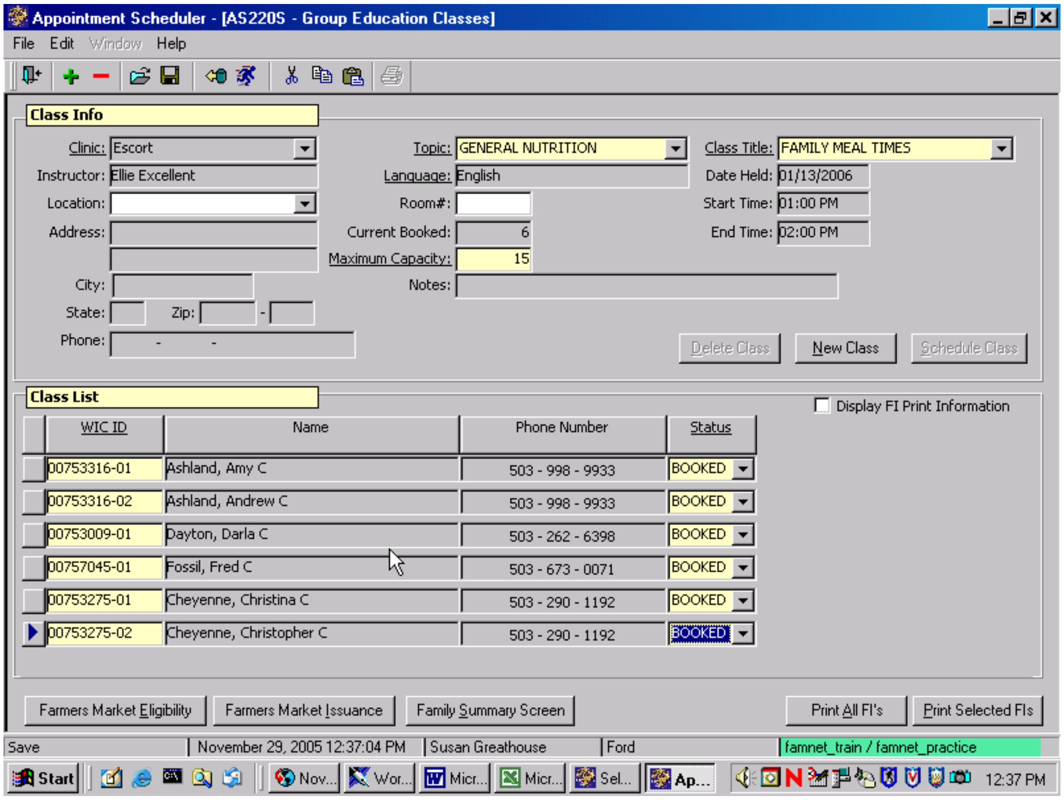

Figure 1: "Group Education Classes" Screen

- There are two parts to this screen: "**Class Info**" at the top, which displays information about the Group Education Class, and "**Class List**," which displays information about those clients scheduled to attend the class.
- The "Class Info" section is completed by the scheduling person in your local agency and booked into specific appointment slots on the "Daily Clinic Schedule." You will know that this has been done when you see both the "Topic" and the "Group/Class" fields are filled with text.
- After the class is scheduled in the "Daily Clinic Schedule," clients can then be booked into the class.

When you are using the "Group Education Classes" screen for scheduling, you will be using the "Class List" part of the screen, but let's briefly review the "Class Info" section so you know what information is available.

- The "**Clinic**" field will display the clinic at which the group education class will be held.
- The "**Topic**" field indicates the topic of the class.
- The "**Class Title**" indicates the name of the class.
- The system displays the "**Instructor**" field with the name of the staff person assigned to this class.

- The “**Language**” field displays the language in which the class will be taught.
- The “**Date Held**,” “**Start Time**,” and “**End Time**” fields will display the date and times for which the class is scheduled.
- The “**Location**” field displays the location of the class. If this is blank, the location will be the same as the physical address of the clinic where the class is scheduled.
- The “**Address**,” “**City**,” “**State**,” “**Zip**,” and “**Phone**” fields display the corresponding data for the class location site.
- The “**Room #**” field displays the room number where the class will be held, if available.
- The “**Current Booked**” field displays the number of clients currently scheduled for this class. This is filled in by the system as clients are scheduled.
- The “**Maximum Capacity**” field displays the maximum number of clients for attending this class. When booking clients, if the number of clients in the “Current Booked” field exceeds the number entered as the maximum, the system will display a message to prevent over booking. The “Maximum Capacity” may then be increased by the person in charge of scheduling, if desired, to accommodate more clients in the class.
- The “**Notes**” field shows any notes entered relating to this class.

♫ NOTE: The “New Class” and “Schedule Class” buttons are used by your scheduling person to book the Group Education class in your agency’s “Daily Clinic Schedule” screen.

Scheduling a Client in a Group Education Class

There are three different ways to book clients into group education classes by using: 1) the “Group Education Classes” screen, 2) the “Daily Clinic Schedule” screen or 3) the “Family Appointment Record” screen.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

1. **Click the “Open” icon to display the “Select Group Education Class” pop-up.**

    - This pop-up allows you to search for any scheduled group education class.
    - There are two sections to the pop-up: “Selection” and “Results.”

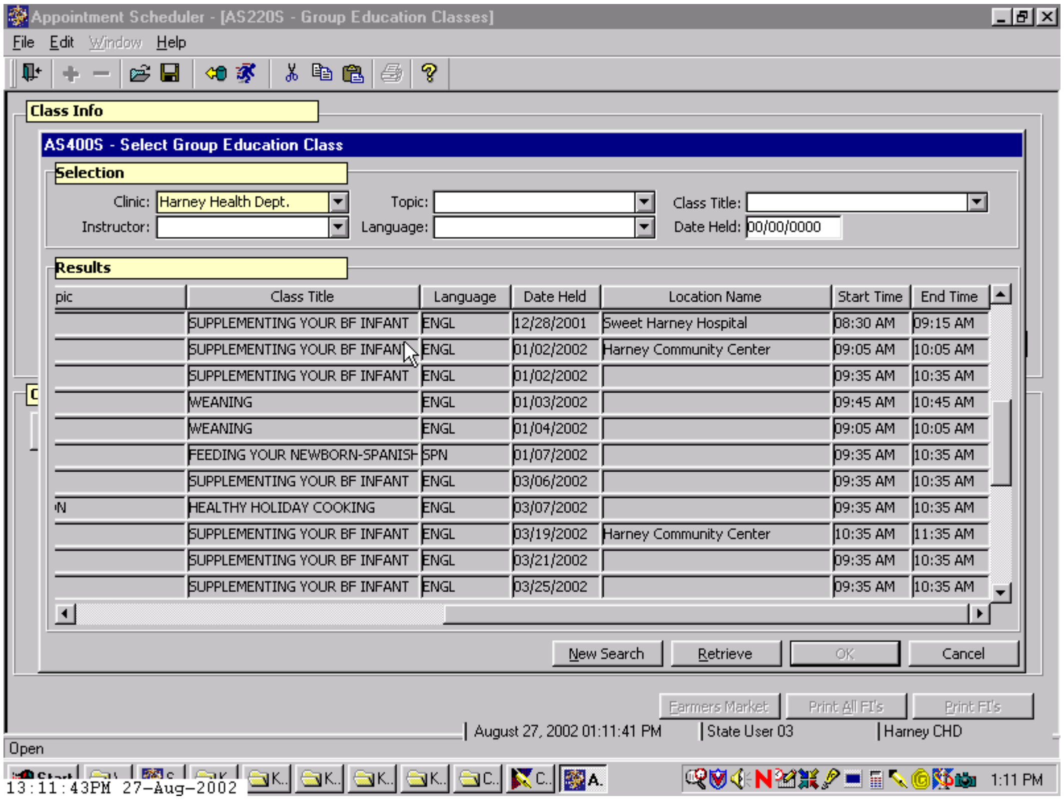

Figure 2: “Select Group Education Classes” Screen

2. **In the “Selection” section, enter data into the fields on which you wish to search for a group education class.**

   - Adding more information in the “Selection” section fields will give you more limited results.
   - You must enter at least the clinic name to search for a class.

3. **Click the “Retrieve” button.**

4. **Locate the desired group education class and double-click on that line.**

   - Once you double click on the appointment line, the pop-up will close and return you to the “Group Education Classes” screen with the “Class Info” data populated.
   - If clients have already been booked into this class, their names and corresponding information will be shown in the “Class List” section.

♫ NOTE: You may also click once on the desired appointment line and then click the “OK” button to close the pop-up and return to the “Group Education Classes” screen.

5. **Click the "Insert Record" icon to create a new row for scheduling a client to this group education class.**

   There are two ways to enter the client information into the class:

   5.1 **Enter the client's "WIC ID" and tab to the "Status" field.**

   The system displays the client's "name" and "phone number" in the corresponding fields. The system defaults the "Status" field to "booked."

   5.2 **If you do not know the client's ID number, you can fast path to client master search, search for and return with the client.**

   The client will then be retrieved directly into the class.

6. **Save.**

   - Notice that the "Current Booked" field in the "Class Info" section has been updated to include the client you just scheduled for the class.
   - To continue booking other clients for this same group education class, tab off the "Status" field to create a new client row.

7. **Exit the "Group Education Classes" screen.**

♫ NOTE: The "**Display FI Print Information**" checkbox, and the "**Farmers Market Eligibility**", "**Farmers Market Issuance**," "**Family Summary Screen**", "**Print All FIs**," and "**Print Selected FIs**" buttons are all used when the class is held and are explained in detail in other lessons.

➥ *Practice Activities:*

Using your ☛ Activity Sheet, follow the steps below to schedule your client to a group nutrition education class.

1. Click on "Appointment Scheduler."
2. Click on "Scheduling."
3. Click on "Group Maintenance."
4. Click on "Group Education Class."
5. Click the "Open" icon.
6. In the "Selections" section, enter the corresponding data from your activity sheet.
7. Click the "Retrieve" button.

8. Double click on the class designated on your activity sheet.
9. Click the “Insert Record” icon to create a new client row in the “Class List” section.
10. Enter the “WIC ID” number.
11. Tab to the “Status” field and keep the “booked” status entered by the system.
12. Save.
13. Exit the “Group Education Classes” screen.

Congratulations! You have scheduled your client to a Group Nutrition Education Class!

Scheduling a Client into Group NE via the “Daily Clinic Schedule” Screen

The “Group Education Classes” screen may also be accessed from the “Daily Clinic Schedule.”

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

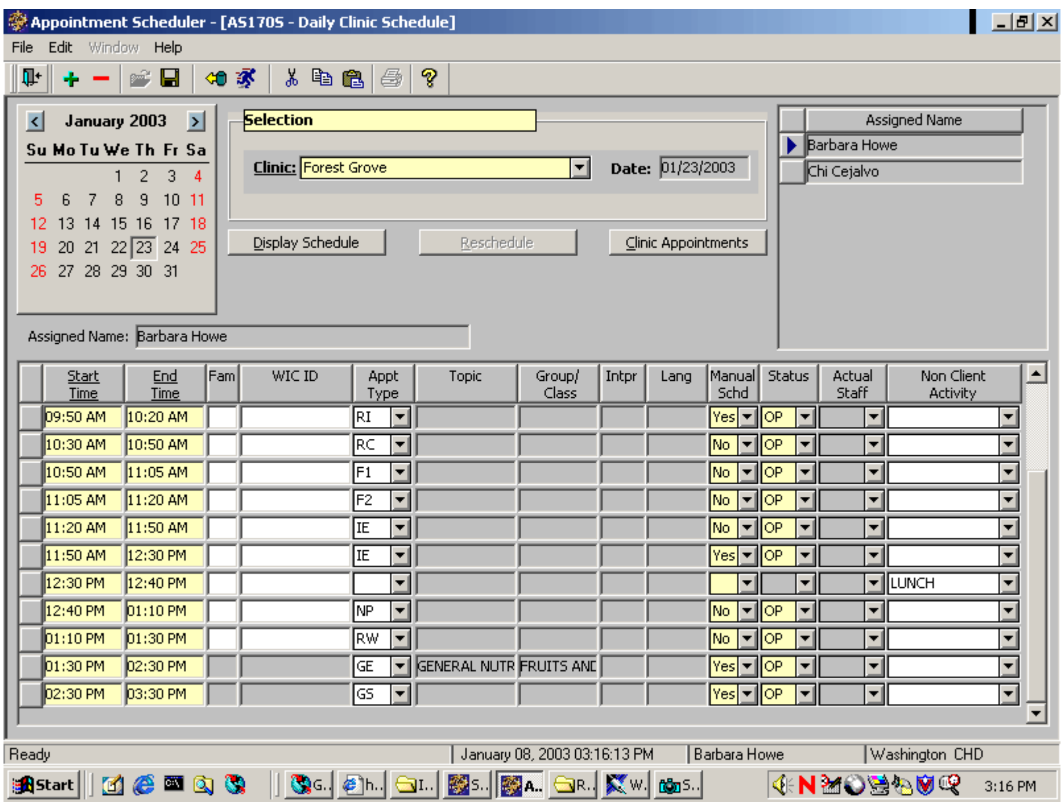

Figure 3: “Daily Clinic Schedule” Screen

1. **Double click in the "Group/Class" field corresponding to the desired group education class.**

   This will take you directly to the "Group Education Classes" screen. You can then schedule the client as previously outlined.

♫ NOTE: When the "Group Education Classes" screen is accessed this way it is not necessary to search for the class you want. You are already there!

Scheduling a Client in a Group Education Class via the "Family Appointment Record" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling Family Appointments ⇨ Family Appointment Record

1. **Using the "Open" icon, search for and return with the client to the "Family Appointment Record" screen.**

2. **Select the WIC ID number of your client by clicking on the select box.**

3. **Select the "Find Appt." button which will take you to the "Find Appointment" screen.**

   Please refer to the "Schedule Appointment Now" lesson for more information on this screen.

4. **Under the "Appointment Type" field, select "Group Education" from the drop down list.**

5. **Click on the "Find Appt" button.**

   All group education classes with openings will be listed under the "Open Appointments" section of the screen.

6. **Select the class by clicking on the select box.**

   The client's WIC ID number will auto-fill.

7. **Click on the "Book" button.**

You will be taken back to the “Family Appointment Record” and the class appointment you just made will be visible under the “Client’s Appointments” section.

♫ NOTE: You can only schedule one family member at a time into a group NE class from the “Family Appointment Record” screen, even if it for the same class.

✓ *Skill Check:*

Use your ☛ Activity Sheet for this practice.

The client needs to be scheduled into a group nutrition education class on the topic of “General Nutrition.”

Print out the blank “Group Education Classes” screen before you schedule the appointment and then print out the screen again after you have scheduled the appointment.

✍ *Notes:*

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Handle Walk-In & Overbook Appointments

Objectives:

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

- schedule walk-in clients in the "Daily Clinic Schedule."

Overview:

Making a space in the clinic schedule for walk-in appointments is a common WIC occurrence. TWIST allows you to book a walk-in appointment or add a necessary space in a busy schedule, while at the same time, keeping track of and reporting the number of walk-in appointments!

Let's go to the "Daily Clinic Schedule" and see how to handle a walk-in client.

Instruction:

How to Format a Lesson

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

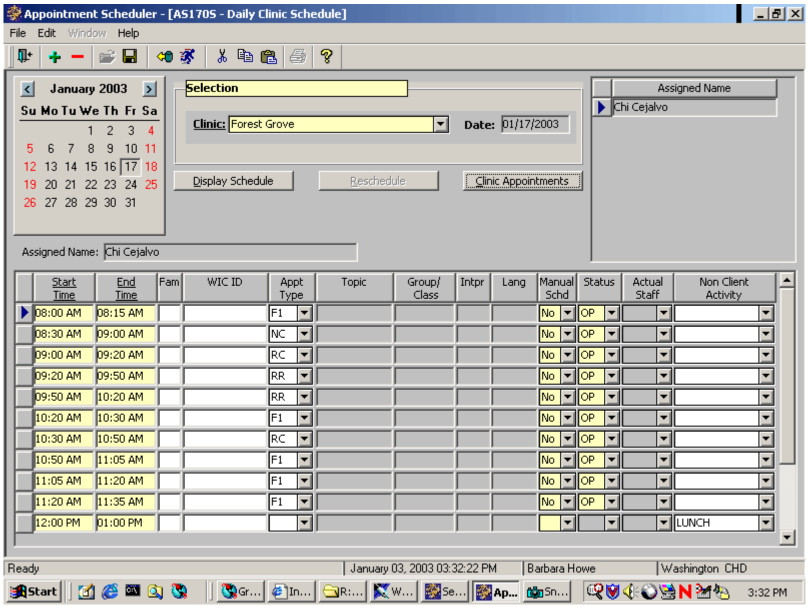

Figure 1: "Daily Clinic Schedule" Screen

NOTE: Please refer to Chapter 4, Lesson 202 *Daily Clinic Schedule* for more detailed instructions on the "**Daily Clinic Schedule**" screen.

In the "Selection" section, select the "Clinic" from the drop down list.

In the "Calendar" section, click on the number corresponding to the day on which you wish to schedule the walk-in appointment.

To move the calendar forward or backward by month, use the arrows in the left and right hand corners of the calendar.

Click the "Display Schedule" button.

The "**Assigned Name**" section displays the list of staff names assigned to the schedule for that date.

Click on the desired staff person's name to view their schedule for the day.

Search for an open appointment slot in the lower half of the screen.

If there is a blank row on the "**Daily Clinic Schedule**," signifying an open appointment slot, you may use this time slot to schedule the walk-in. If there are no open slots, you must create one.

Click on the "Insert Record" icon to create a new row.

You will then need to enter the "**Start Time**" field for this appointment time.

Set the "End Time" of the appointment just before the one you are creating so that it is the same as the start time of the appointment you are creating.

This is done so the new appointment does not start before the one before it ends.

Enter the client's "WIC ID" number.

If this is a new client, you will first need to complete the client demographics and prescreening data for them in order to get a temporary WIC ID number.

Tab to the "Appt Type" field and select the appointment type from the drop down list, if needed.

- If this is a newly created schedule row, you must select an appointment type from the drop down list
- If you are using an existing slot, and it already has the correct appointment type in the field, there is no need to change it.
- If the appointment type field is populated, but the appointment type is not correct, select the correct appointment type from the drop down list
- When an appointment type is selected, the end time will auto fill based on the duration of the appointment as defined in the appointment types duration table.

Adjust the "Start Time" for the appointment that begins after the one you are creating.

- This is done so the next appointment does not start before the one you are creating ends.
- If you are adding the appointment to the end of the day, there will be no next appointment.

Tab to the "Status" field and select "WI (Walk In)" from the drop down list.

- The "**Walk In**" status means the same thing as "**Kept**."
- Using the "**Walk In**" status instead of "**Kept**" allows the system to track and report on the number of Walk In appointments done in the clinic.

In the "Actual Staff" column, you can select the name of the staff person if you know who will be seeing this client. Otherwise, this can be left blank and the staff will document this later on the Family Appointment Record.

Save and exit.

"Refresh" to see the appointment on the "Family Appointment Record" screen.

♫ NOTE: Be sure and leave the status as "**Walk-in**" rather than "**Show**," so that your agency can track the number of walk-ins. If you change the status to "**show**" there is no way to distinguish between clients who had a scheduled appointment and those who did not.

✔ Skill Check:

Now that you have reviewed the “Daily Clinic Schedule” screen and practiced how to add a walk-in appointment, it’s time to give it a try on your own! Go to today’s “Daily Clinic Schedule” screen and add in a walk-in appointment for an existing client. When you are done, make a screen print of the “Daily Clinic Schedule” screen showing your scheduled appointment.

✍ Notes:

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Scheduling Group Screening Appointments

Objectives:

Upon completion of this lesson the user will be able to:
- schedule clients into group screening appointments.

Overview:

Group screening appointments, sometimes called “group certifications”, are often used to screen and certify a group of WIC eligible clients who all belong to the same category. This group process often allows for the processing of more clients than could be done by scheduling individual appointments for them. This is especially true for clients new to WIC who need an orientation to the program.

Group screening appointments can easily be scheduled with the TWIST system using the same process as for other appointment types. Let’s look at the “Group Screening” screen and see how easy it is!

Instruction:

Reviewing the “Group Scheduling” Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

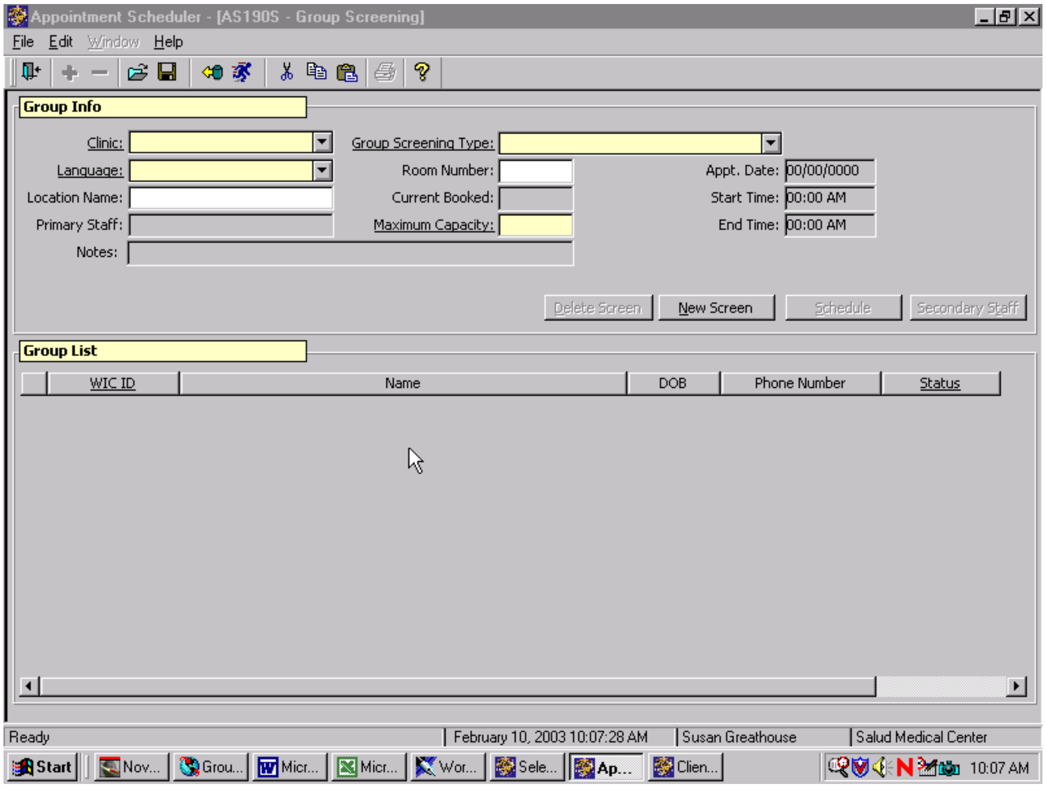

Figure 1: "Group Screening" Screen

- There are two parts to this screen, "**Group Info**" at the top, which displays information about the Group Screening appointment, and "**Group List**," which displays information about those clients scheduled to attend the appointment.
- The "**Group Info**" section is completed by the scheduling person in your local agency and booked into specific appointment slots on the "**Daily Clinic Schedule**."

When you are using the "**Group Screening**" screen for scheduling, you will be using the "**Group List**" part of the screen, but let's briefly review the "**Group Info**" section so you know what information is available.

1. **Review the "Group Info" section.**

   1.1 The "**Clinic**" field indicates the clinic at which the screening appointment will be held.

   1.2 The "**Group Screening Type**" field displays the type of group screening appointment (e.g., new child certification, new pregnant woman certification, etc.)

1.3 The “**Language**” field is a drop-down window that allows you to select the language in which the group screening will be conducted.

1.4 If applicable, “**Room Number**” shows the room in which the appointment will be held.

1.5 The “**Appt. Date**” field displays the date on which the appointment is booked.

1.6 “**Location Name**” lists the location for this appointment.

1.7 The “**Current Booked**” field displays the number count of clients already scheduled for this appointment. As you schedule clients for this appointment, you will notice the number changes accordingly.

1.8 The “**Start Time**” field displays the time this appointment starts. This comes from the “**Daily Clinic Schedule**” screen.

1.9 The “**Primary Staff**” field displays the name of the staff person who is scheduled as the primary staff person for this appointment.

1.10 The “**Maximum Capacity**” field lists the maximum number of clients who should be booked for this group appointment.

1.11 The “**End Time**” field displays the time this appointment is scheduled to end.

1.12 The “**Notes**” field shows any notes entered relating to this screening appointment.

1.13 The buttons to the bottom right of the “**Group Info**” section, “**New Screen**,” “**Schedule**,” and “**Secondary Staff**” are all used by the person setting up and scheduling the screening appointments.

Scheduling a Client in a Group Screening Appointment

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

1. **Click the “Open” icon.**

This displays the "**Select Group Screening**" pop-up.

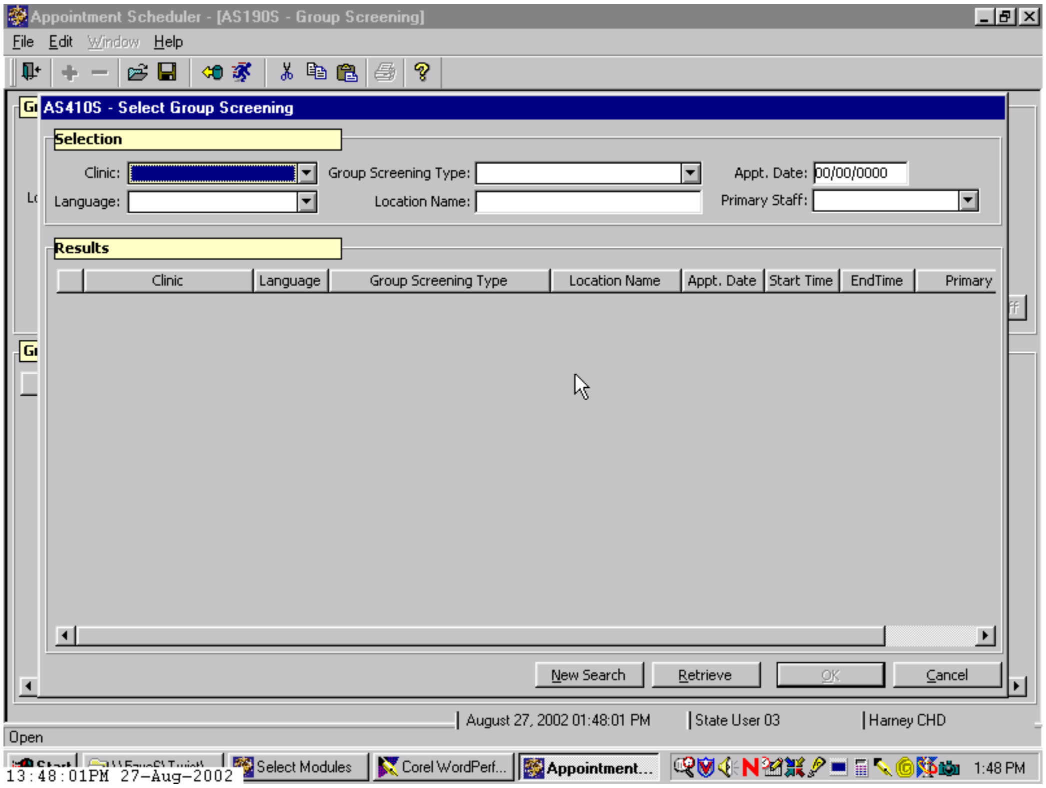

Figure 2: "Select Group Screening" Pop-Up

- This pop-up allows you to search for any scheduled group screening appointments.
- There are two sections to the pop-up: "**Selection**" and "**Results**."

2. **In the "Selection" section, enter data into the fields on which you wish to search for a group screening appointment.**

   - The more information you enter in the "**Selection**" section fields, will give you more limited results.
   - You must use at least one field from the "**Selection**" section on which to search.

3. **Click the "Retrieve" button**

4. **Double click on the appropriate screening appointment.**

   - Once you double click on the appointment line, the pop-up will close and return you to the "**Group Screening**" screen with the "**Group Info**" data populated.

- If clients have already been booked into this screening appointment, their names and corresponding information will be shown in the "**Group List**" section.

♫ NOTE: You may also click once on the desired appointment line and then click the "**OK**" button to close the pop-up and return to the "**Group Screening**" screen.

5. **Click "Insert"**

   This creates a new row for scheduling a client to this screening appointment.

6. **Enter the client's "WIC ID"**

   If you do not know the client's WIC ID, you can fast path to client master search, find and return with your client.

7. **Tab to the "Status" field.**

   - The system displays the client's "**Name**," "**DOB**," and "**Phone Number**" in the corresponding fields.
   - The system defaults the "**Status**" field to "**booked**."

8. **Save.**

   - Notice that the "**Current Booked**" field in the "**Group Info**" section has been updated to include the client you just scheduled for the appointment.
   - To continue booking other clients for this same screening appointment, tab off the "**Status**" field to create a new client row, or click the insert icon.

♫ NOTE: You cannot print vouchers from this screen. In addition, data from this screen does not appear on productivity or show rate reports.

9. **Exit.**

✂ *Tips and Shortcuts:*

The "Group Screening" screen may also be accessed from the "Daily Clinic Schedule" screen by double clicking in the "Group/Class" field corresponding to the desired group screening. When the "Group Screening" screen is entered this way it is not necessary to search for the screening you want. You are already there!

➥ *Practice Activities:*

Using the information on your ☛ Activity Sheet, follow the steps below to schedule your client to a group screening appointment.

The starting point for this activity is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

1. Click the “Open” icon.
2. In the “Selections” section, enter the corresponding data from your Activity Sheet.
3. Click “Retrieve.”
4. Double click on the screening appointment designated on your Activity Sheet.
5. Click “Insert.”
6. Enter your “WIC ID” number.
7. Tab to the “Status” field and select the status from the drop down list.
8. Save.
9. Exit the “Group Screenings” screen.

Great job! You have scheduled your client to their Group Screening appointment!

✓ *Skill Check:*

You are now going to schedule a client into a group screening. For the purposes of this activity, you are a WIC clerk. The person to your right will be your client. She is trying to make an appointment to put herself back on WIC. She is pregnant and will be scheduled into a group screening for pregnant women. Do a screen print of the screen that shows your client has been scheduled successfully. Good Luck!