☺ Appointment Scheduler Reports Overview

Chapter 4: Scheduling Appointments
Chapter 7: Reports
Lesson: Automatic Scheduler Reports — Special User

Report Name	Description	How would you use this report?	When would you use this report?
Projected Number of Individual Appointment Requests	Lists the projected number and types of individual appointments needed by clinic and by month. Data is broken down by: • appt. type • risk level and • language needs.	This report can be run to help you when setting up staff schedules and templates for a future month	Run this <u>before</u> you set up your schedules. <u>Example</u>: you may need to increase the time you schedule for high risk appts. in one clinic and decrease it in another based on projected appt. needs.
Projected Number of Group Education Requests	Lists the projected number and types of group education appointments needed by clinic and by month. It shows: ▪ location ▪ title and ▪ time preferences	Can help you decide which classes need to be scheduled in which clinic for a future month based on group education requests.	Run this before you set up your class schedules. <u>Example</u>: You find that your Spanish Breastfeeding class request is greater than usual so you will need to schedule two classes for that month because of your classroom space.
Appointments Auto Scheduler Unable to Book	This report is NOT on the reports menu since it is produced automatically once the Auto Scheduler has been run. The report lists information on clients that the Auto Scheduler was unable to book.	This report is used to manually schedule those clients for whom the Auto Scheduler was unable to find a valid appt. or an appt. matching the client's appointment preferences.	Use this right after you run your Auto Scheduler. <u>Example</u>: This report can be used to identify what type of appts. couldn't be scheduled, so you can fix your schedule and re-run the Auto Scheduler instead of scheduling all of them manually.

Report Name	Description	How would you use this report?	When would you use this report?
Report of Clients to Schedule Manually	Lists clients who have appointment requests that have been flagged to be manually scheduled, not auto scheduled	You will need to run this report to identify those clients with a pending appt. request who will not be scheduled by the Auto Scheduler	Can be run either before or after you run your Auto Scheduler. You will need to schedule these clients manually into your daily clinic schedule.
Interpreter Needed Report	This report lists client information for all appts. booked or requested where an interpreter is needed. The report is run for: ▪ clinic ▪ a specific date range ▪ for specific language needed.	This report can be used to help you plan your schedules so that your interpreters' time is used efficiently.	You can run this report before or after you run your Auto Scheduler. Example: if you have several appts booked and requested for the same language, you may want to adjust these by rescheduling or moving appt. slots so that they are all scheduled in the same morning to better use the interpreter's time.
Unfilled Appointment Report by Date and Clinic	This report lists all appts. scheduled and unfilled broken down by appt. type.	Designed to be used to manage your schedules after they have been created. Lets you see at a glance how many and what types of appts. are still available for scheduling.	Run this report after you have completed your schedules and run Auto Scheduler. ♫ NOTE: If you still have many unfilled appts. in one clinic location, you might want to cancel those and move that staff person to another site or time where you need more appts.
Daily Clinic Appointment Prep Report	This report produces a list of clients that have booked appts. for a specific clinic and date range that can be used to pull charts.	Designed to be used in those agencies with shared files who will still be maintaining a WIC paper chart.	Can be run daily or weekly as needed to help with chart pulling.

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Daily Clinic Schedule for Individual Appts.	Lists all clients with booked individual appts from the Daily Clinic schedule	This report was designed to be used: ▪ as a daily appointment "schedule" for check-in or for a particular staffperson. ▪ to make appt. reminder phone calls or ▪ as a "call back" list for clients who missed their appts.	Can be run for all clinics or one clinic and can be broken down by assigned staff. ♫ NOTE: You will use TWIST to document appt. attendance and may find that you don't need to print out this report.
Group Appointment Sign Up List	Displays all clients who have a Group Appointment for a selected clinic and date.	Designed to be used as a listing of all clients scheduled for a given class. Includes: ▪ title of class ▪ class location ▪ client name & phone #	It can also be used to document class attendance for later data entry (we recommend, however, that you document attendance directly in TWIST unless unable to access system at the time)
No Show Client Register	Shows client information for all clients who have not showed up for their scheduled appt. by clinic and by date.	This can be used as a call-back list to help you manage your caseload.	Can be run daily or as needed.
Staff Schedule Report	Displays all staff scheduled for a given time period and the clinic and time period they are scheduled for.	This is a general staff calendar for the month. You can also use this report to double-check that you correctly scheduled staff & clinics.	It can be printed out and posted or simply accessed on-line when you need to view it.
Local agency monthly group NE show rate	Shows class attendance for GE appts compared to those scheduled. Shows: ▪ topic ▪ class code ▪ # scheduled & # showed ▪ % showed	This report can be used to identify trends and class preferences related to topic and scheduled time/location	Run this report after all group NE for the month is done. ♫ NOTE: Can help in planning for and scheduling future GE classes

Report Name	Description	How would you use this report?	When would you use this report?
Local agency monthly 2nd NE show rate	Shows attendance for: ▪ group NE ▪ non-WIC NE, IE, and follow-ups compared to those scheduled Shows # scheduled and % showed for each 2nd NE appt. type.	Similar to above report but lists show rates for all types of second NE contacts in one report.	Run this report at the end of the month once all second NE for the month is done.
Local agency refusal rate for 2nd NE	Shows the number of certified clients compared to the number of clients who have refused 2nd NE.	This can be used as a quality assurance report (Broken down by category and staff ID.)	Run as needed.
Monthly individual appointment show rate	Shows # of clients who have showed up for their appointments compared to those scheduled, broken down by appt. type.	This can be used as a caseload management tool. ♫ NOTE: Does not show group or non-WIC NE appts.	Run as needed.
Local agency show rate history	This is a show-rate history that compares the number of people who showed up for appts. compared to those scheduled for appts.	This can be used to identify trends and to help with caseload management. ♫ NOTE: Shows all appointment types.	Run as needed.