

## **Chapter 4: Appointment Scheduler**

### **Section 2: Staff Schedules**

#### **Lesson: Daily Clinic Schedule**

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

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

- have a general understanding of how Daily Clinic schedules are created;
- view appointments for a specific clinic day;
- understand and interpret all fields in the “Daily Clinic Schedule” screen; and find and interpret the appointments assigned to a staff person.

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

The scheduling person in your agency creates daily clinic schedules by applying an appointment pattern (called a template) to specific days and staff.

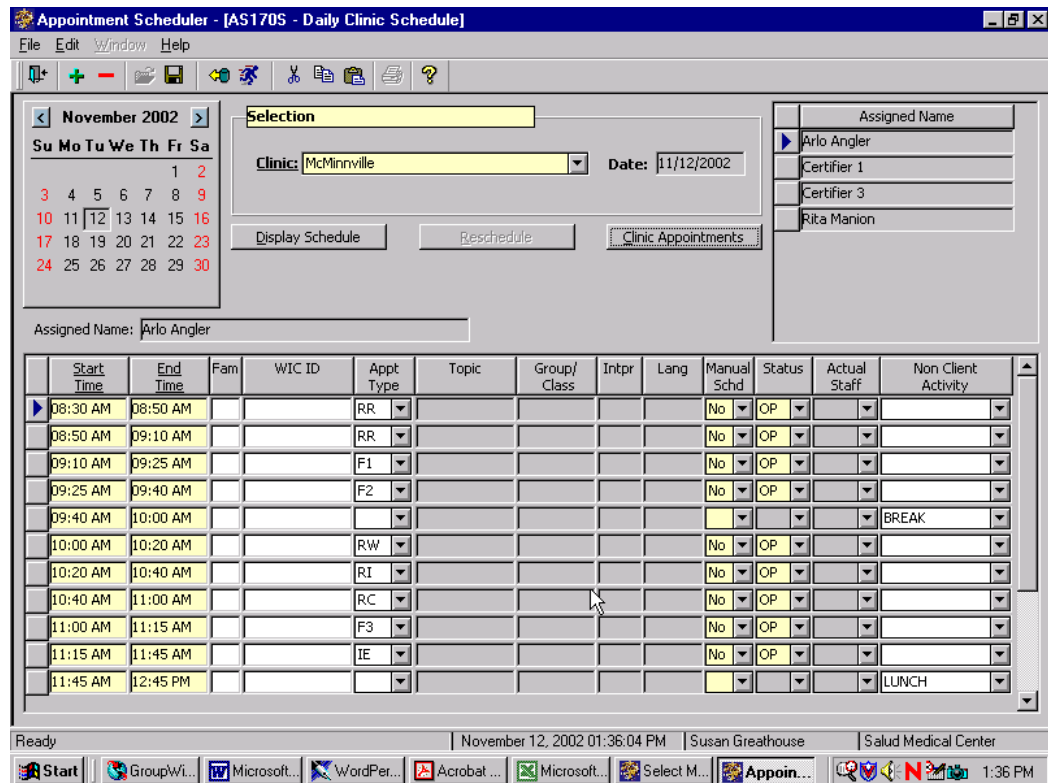
Once a basic schedule has been created, your scheduling person will use the “Daily Clinic Schedule” screen to “complete” the schedule. This includes adding classes and group screenings, and finessing individual staff schedules to include things like doctors’ appointments and meetings. Once schedules are complete, the “Daily Clinic Schedule” can be thought of as an appointment book from which appointments can be displayed, booked, rescheduled, deleted or canceled.

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

##### ***Reviewing the “Daily Clinic Schedule” Screen***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule



**Figure 1: “Daily Clinic Schedule” Screen**

The screen consists of four main sections:

- In the upper left there is a graphical calendar display which displays the days of the month and year.
- In the upper middle, the “**Selection**” section allows you to select the clinic for viewing the daily clinic schedule.
- In the upper right, the “**Assigned Name**” displays the staff names of those assigned to the schedule.
- The lower half of the screen is where the daily clinic schedule of appointments are viewed.

🎵 **NOTE:** There are two “assigned name” fields on this screen. The one in the top right of the screen lists all staff that is scheduled for the day selected. The other one, found just below the calendar, lists only the single staff person whose schedule is displayed.

### ***Viewing a Staff Member’s Daily Clinic Schedule***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. **In the “Selection” section, select the “Clinic” from the drop down list.**
2. **In the “Calendar” section, click on the number corresponding to the day on which you wish to view appointments.**
  - When you first enter the screen, the current month will be displayed.
  - Click on the “< >” buttons to move forward or backward by month through the calendar.
3. **Click the “Display Schedule” button.**
  - The system displays the date selected in the “Date” field.
  - The “Reschedule” button is activated when you click on a filled appointment slot. This function will be discussed further in another lesson.
  - The “Assigned Name” section displays the list of staff names that have a schedule for the date selected. The person whose schedule is displayed will have the indicator arrow on their name.
4. **Click on any staff person listed under “Assigned Names.”**
  - The schedule below the “Assigned Name” area will change depending on which staff you select.
  - The “Assigned Name” field just above the schedule will show the single staff person’s name that you have selected.
  - Double-clicking on the assigned name of a staff person will show the staff name, risk level of client they are allowed to serve and the languages that they speak
5. **Click on an appointment slot in the schedule.**
  - 5.1 The “Assigned Name” field displays the staff member’s name corresponding to the daily schedule you are viewing.
  - 5.2 The “Start Time” field is the scheduled start time of the appointment.
  - 5.3 The “End Time” field is the scheduled end time for the appointment.
  - 5.4 The “Fam” field indicates whether or not this time slot was set up for booking more restricted family coordinated appointments.

- If the “**Family Precoding**” field was set up as “**Yes**” in the “**Agency/Clinic**” screen, then family appointments booked by the automatic scheduler can only be booked into time slots that have an “**F**” in this field.
- If the schedule was set up with the “**Family Precoding**” as “**No**,” then family coordinated appointments may be booked anywhere and the “**Fam**” field will be blank.

5.5 The “**WIC ID**” field displays a client’s WIC ID number.

- Double-clicking a “**WIC ID**” field populated with a client’s WIC ID number causes the “**Client Information**” pop-up to be displayed. This pop-up lists client’s name, DOB and WIC category.
- If a GE (Group Education) or GS (Group Screening) appointment has been scheduled in this slot, the “**WIC ID**” field will be grayed out.

5.6 The “**Appt Type**” field lists the type of appointment that has either been scheduled or is designated for this time slot. Clicking on this field displays the list of appointment types and their corresponding codes.

5.7 The “**Topic**” field displays the topic of a scheduled GE appointment.

5.8 The “**Group/Class**” field displays the Group or Class code if the scheduled appointment is either a GE or GS appointment.

Double-clicking in the “**Group/Class**” field will take you to the “**Group Education Classes**” screen, where you can schedule and reschedule GE classes.

5.9 The “**Intpr**” field indicates whether or not an interpreter is needed for this appointment. The system automatically assigns “**Yes**” if, when scheduling, the staff’s language(s) do not match the client’s needs.

5.10 The “**Language**” field displays the language spoken by the client as indicated in their client record in the “**Client Primary**” screen. This field is only active if the “**Intpr**” field is “**Yes**.”

5.11 “**Manual Schd**” displays “**Yes**” or “**No**” to indicate if this appointment can be scheduled manually. If yes, then when the

Automatic Scheduler is run it will not schedule anyone into the appointment slot. It will be reserved for manual scheduling and will show up as an available appointment.

5.12 The “**Status**” field displays the current status of the appointment. Clicking on this field displays the list of statuses and their corresponding codes. The appointment statuses are as follows:

- BK Booked appointment
- SH Showed for appointment
- NS No-show appointment
- OP Open appointment
- WI Walk-in appointment

When a status of “**Show**” is selected, the “**Actual Staff**” field becomes active but is not mandatory in Daily Clinic Schedule.

5.13 The “**Actual Staff**” field is used to capture the ID of the staff person who actually saw the client. This ensures that the correct staff person is given credit for seeing the client. This field can be entered on this screen but will usually be filled in by the certifier on the “**Family Appointment Record**” screen during an appointment.

5.14 The “**Non-Client Activity**” field is used to show the description of a non-client activity for this time slot, if one is scheduled. Clicking on this field displays the list of non-client activities. A non-client activity is any activity that does not include working directly with a client. It could be paperwork, meetings, vacation, etc.

### ↳ **Practice Activity #1:**

Now that you have learned how to view and move around the “Daily Clinic Schedule” screen, let’s practice.

You are a WIC certifier and would like to see what your schedule looks like for an upcoming day. Take the appropriate actions to do this. Use the information from your ☛ Activity Sheet. Do a screen print of your schedule.

### **Viewing the Clinic Appointments List**

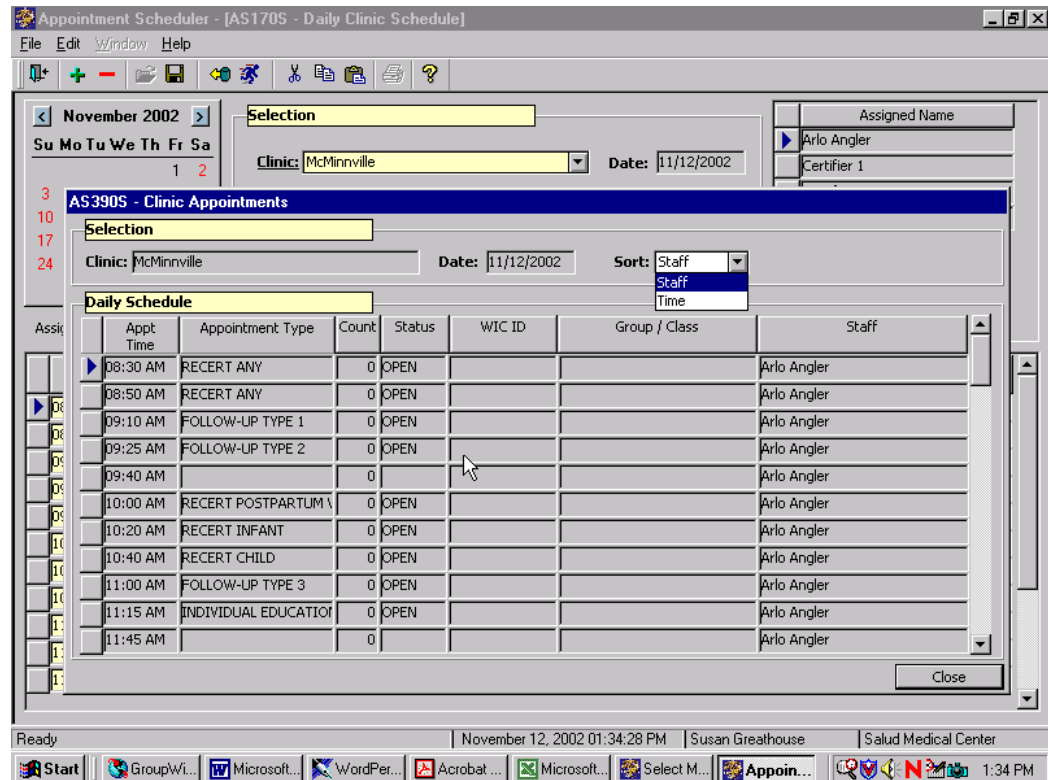
This section is very similar to your appointment book or current schedule. Just like your appointment book, this screen lists all staff members’ schedules; clients

scheduled, and open appointment times. This screen can be sorted either by staff or time.

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. **Click the “Clinic Appointments” button.**



**Figure 2: “Clinic Appointments” Pop-Up**

- The system displays the “**Clinic**” and “**Date**” based on your selection on the “**Daily Clinic Schedule**” screen.
- Appointments can be sorted by staff or time

2. **Select “Staff” from the “Sort” field drop down list.**

2.1 The daily appointment listings for the date and clinic selected will be displayed in chronological order, but grouped for each staff member in alphabetical order.

2.2 The “**Appt Time**” field displays the scheduled start time of the appointment.

- 2.3 The “**Appointment Type**” field displays the description of the appointment type.
- 2.4 The “**Count**” field displays the count of clients scheduled for the appointment.
- 2.5 The “**Status**” field displays the status of the appointment.
- 2.6 The “**WIC ID**” field displays a client’s WIC ID number. If a GE (Group Education) or GS (Group Screening) appointment has been scheduled in this slot the field will be grayed out.
- 2.7 The “**Group/Class**” field displays the Group or Class code if the scheduled appointment is either a GE or GS appointment.
- 2.8 The “**Staff**” field displays the name of the staff person assigned to this appointment slot.

### 3. Click the “Close” button

#### ↳ **Practice Activity #2:**

Using the information on your 📄 Activity Sheet, follow the steps below to view the Daily Clinic Schedule.

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. Select the “Clinic” from the drop down list.
2. Click on the desired calendar date.
3. Click the “Display Schedule” button.
4. Click the “Clinic Appointments” button.
5. On the “Clinic Appointments” pop-up screen, select “Time” from the “Sort” field drop down list to view the appointments by time listing.
6. Select “Staff” from the “Sort” field drop down list to view the appointments by staff listing.
7. Click “Close.”
8. Exit the “Daily Clinic Schedule” screen.

#### **Updating a Staff Member’s Daily Schedule**

Schedules are never static, so there will always be times when changes to existing schedules must be made. The modification of an existing schedule is easily done on the “**Daily Clinic Schedule**” screen.

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. **In the “Selection” section, select the “Clinic” from the drop down list.**
2. **In the “Calendar” section, click on the number corresponding to the day on which you wish to view appointments.**
  - When you first enter the screen, the current month will be displayed.
  - Click on the “< >” buttons to move forward or backward by month through the calendar.
3. **Click the “Display Schedule” button.**
  - The system displays the date selected in the “Date” field.
  - The “Reschedule” button is activated if there are any appointments currently scheduled on this date for this staff member. This function will be discussed further in another lesson.
  - The “Assigned Name” section displays the list of staff names that have a schedule for the date selected. The person whose schedule is displayed will have the indicator arrow on their name.
4. **Click on any staff person listed under “Assigned Names.”**
  - The schedule below the “Assigned Name” area will change depending on which staff you select.
  - The “Assigned Name” field just above the schedule will show the single staff person’s name that you have selected.
  - Double-clicking on the assigned name of a staff person will show the staff name, risk level of client they are allowed to serve and the languages that they speak.
5. **Find an open appointment slot and delete it.**

Use the “Remove” icon in the top tool bar to do this.
6. **Find an open appointment slot and add a non-client activity.**

Use the drop down list in the “Non-Client Activity” field to do this. The appointment type will disappear once the non-client activity is selected.



7. **In another open appointment slot change the appointment type to “GE.”**

The appointment end time will change based on the duration of the “GE” appointment type.

8. **Manipulate or delete some of the appointment times after the “GE” appointment so there are no overlapping appointments.**

9. **Save and exit.**

♪ NOTE: If there are booked appointments in an appointment slot they must be rescheduled before the slot can be manipulated.

### **Tips and Shortcuts:**

- If you want to delete more than one row of a daily clinic schedule, you can click on the rows you want to delete while holding down the “Shift” key. The rows selected will be highlighted. Then click on the “-” icon to remove the rows.
- To delete an entire schedule, click on the bottom left edge of the schedule while holding down the shift key. This will highlight the entire schedule. Then click on the “-” icon to remove the rows.

### **Practice Activity #3:**

Using the information on your  Activity Sheet, follow the steps below to modify an existing schedule.

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. Select “Clinic” from the drop down list.
2. Click on desired schedule date.
3. Click the “Display Schedule” button.
4. Select an open appointment slot and delete it using the “Remove” icon.
5. Select an open appointment slot and change the appointment type to “GE.”
6. Modify (or delete) some of the appointment times after the “GE” appointment so there are no overlapping appointments.
7. Using the “Insert” icon, insert a row and add an appointment.
8. Save and exit.

**✓ Skill Check:**

Being able to modify a staff person's schedule is an important task for a person doing the scheduling. Let's see what you can do.

You are the person who creates and maintains schedules for your clinic. A certifier comes to you and tells you she has a doctor's appointment next month and will be out for the entire afternoon. She also has an hour-long meeting at 9:00 that same morning. Manipulate her schedule to accommodate her requests. Your instructor will give you the staff person's name to use.

*Do a screen print of the schedule after it is modified.*

**✍ Notes:**

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