Chapter 4: Appointment Scheduler
Section 3: Automatic Scheduler
Lesson: Coordinating Family Appointments

Objectives:

Upon completion of this lesson the user will be able to:
•   coordinate family appointments using either the automatic or the manual scheduling options in TWIST.

Overview:

Scheduling and coordinating family appointments in the WIC Clinic allows us to provide better service for our clients as well as helping to streamline and avoid duplicate work for the clinic. TWIST allows us to quickly and easily coordinate family appointments by using the automatic scheduler or to search for consecutive appointment times for family members when using the manual scheduling functions. See also Lesson 3-1100, *Family Summary Screen* for more information on coordinating family appointments and FI issuance.

Instruction:

Automatically Coordinating Family Appointments

The Automatic Scheduler will automatically coordinate appointments for families of three or -fewer. In order for the Automatic Scheduler to be able to coordinate family members' appointments, a request for an appointment must be entered for each family member in the "Create Request" screen. In addition, all family members need an appointment request for the same appointment types (either all group or all individual) in the same month in order for the automatic scheduler to coordinate family appointments.

The starting point for this section is:
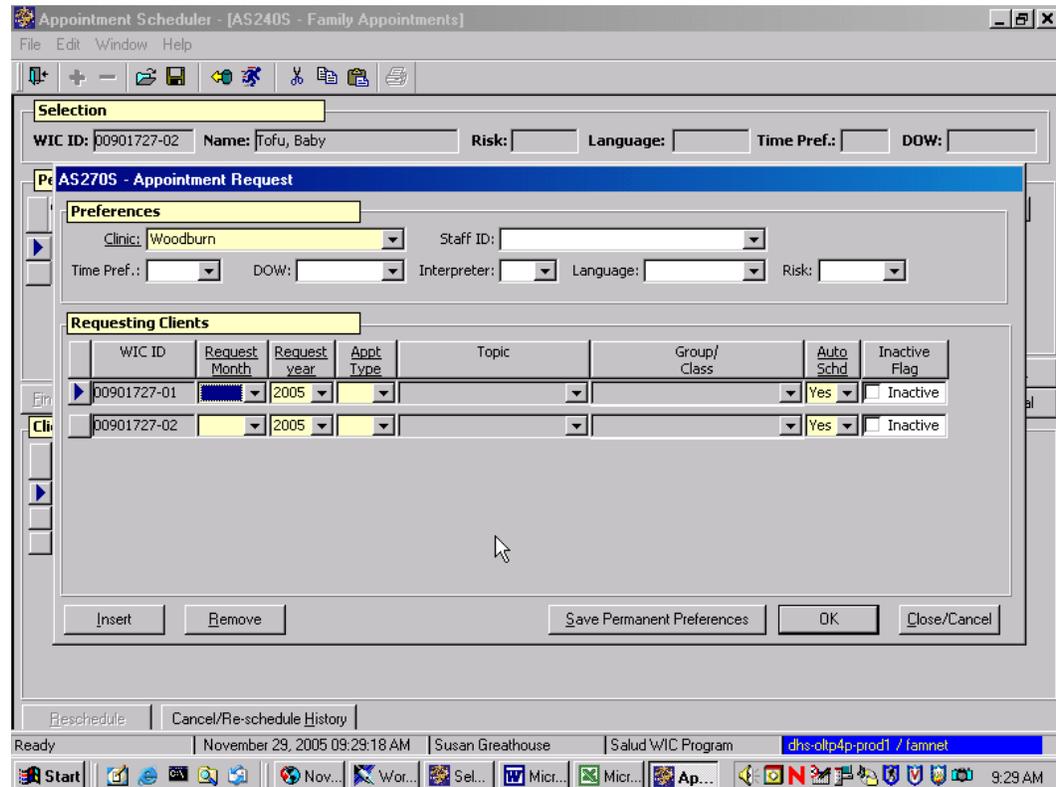   Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

Figure 1: "Family Appointments" Screen

♫ NOTE: Please refer to Chapter 4, Lesson 301, *Appointment Requests* for more detailed information about creating an appointment request and refer to the "WIC Intake" section in Chapter 3, Lesson 100 *Applicant Prescreening* for information on modifying certification dates in order to coordinate family appointments.

1.   **Retrieve a client from the family for whom you wish to coordinate appointments.**

2.   **In the "Family" section, click the "Select" checkbox corresponding to the clients for whom you want to make coordinated family appointment requests.**

- You must select all family members for whom you wish to coordinate appointments. Family members must have appointment requests for the same appointment types (group or individual) and for the same month.
- The system will automatically coordinate families so appointments are with the same staff within 90 minutes or less of one another.

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

Figure 2: "Appointment Request" Pop-Up

4. **In the "Preferences" section, select the "Clinic" from the drop down list.**

5. **Select any other desired selection criteria.**

    If one family member you are trying to schedule is high risk, this will be the default preference used to book all family members.

6. **In the "Requesting Clients" section, complete the "Request Month," and "Appt Type" fields for each family member.**

    The "Inactive Flag" check box is auto-filled by the system when a participant is termed mid-certification. It is not used when coordinating family appointments.

7. **Click the "OK" button to close the pop-up and save this appointment request.**

    The appointment request data is now displayed in the "Pending Requests" section of the screen.

8. **Exit.**

Manually Coordinating Family Appointments

The starting point for this section is:
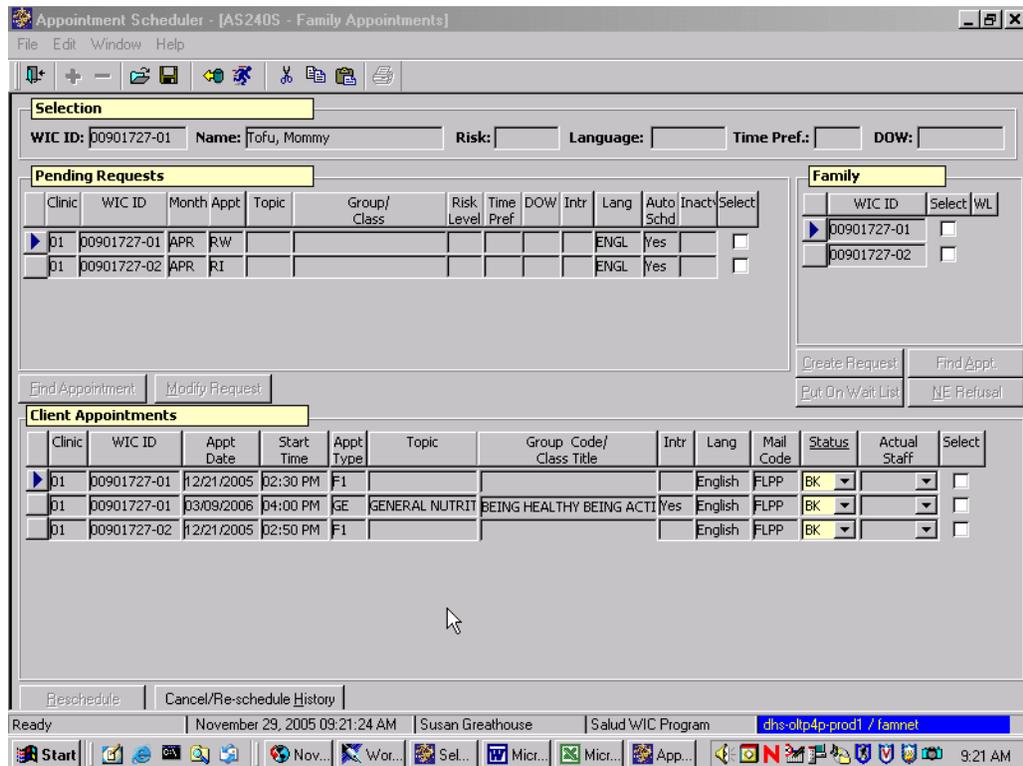 Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

Figure 3: "Family Appointments" Screen

♫ NOTE: Please refer to Chapter 4, Lesson 402 *Schedule Appointment Now* for more detailed instructions on booking manual appointments and refer to the "WIC Intake" section in Chapter 3, Lesson 100 *Applicant Prescreening* for information on modifying certification dates in order to coordinate family appointments.

1.   **Retrieve a client from the family for whom you wish to coordinate appointments.**

2.   **In the "Family" section, click the "Select" checkbox corresponding to the clients for whom you want to make a coordinated family appointment.**

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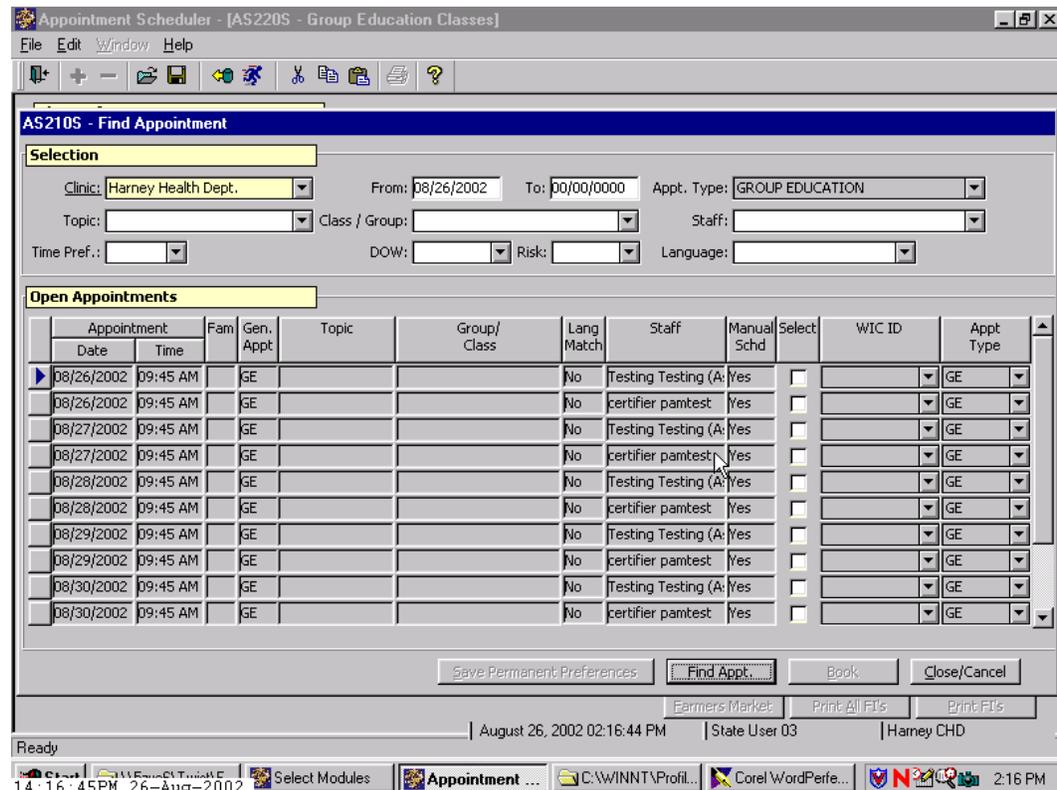

Figure 4: "Find Appointment" Pop-Up

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

5. **Leave "Appointment Type" blank so you can be sure to bring back appointments that match the multiple types needed by the clients.**

6. **Select any other desired selection criteria.**

7. **Click the "Find Appt." button to display the open appointments that meet the selection criteria.**

8. **Search the open appointments for the number of consecutive appointments needed for the family appointments.**

   Make certain to select appointments for all family members with the same staff person.

9.   **Check the "Select" checkbox next to the desired appointment for the first family member.**

- Client with the lowest participant number appears in the WIC ID drop down box.
- Use the drop down to indicate correct participant for appointment type.
- If the appointment type chosen is a generic appointment type, you will have to enter the real appointment type in the "Appt. Type" field.

10.   **Continue by checking the "Select" checkbox for the next desired appointment time.**

- Click on the WIC ID field and select the correct client as necessary.
- Indicate real appointment type as necessary if generic appointment type slots are chosen.

11.   **Click the "Book" button to schedule the appointments and close the pop-up.**

The "**Client Appointments**" section of the "**Family Appointments**" screen is now populated with the scheduled appointment information.

12.   **Exit.**

♫ NOTE: These same functions can also be done in the Family Summary Screen section. See Chapter 3, Lesson 1100, *Family Summary Screen* for more information.

✎ *Notes:*

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