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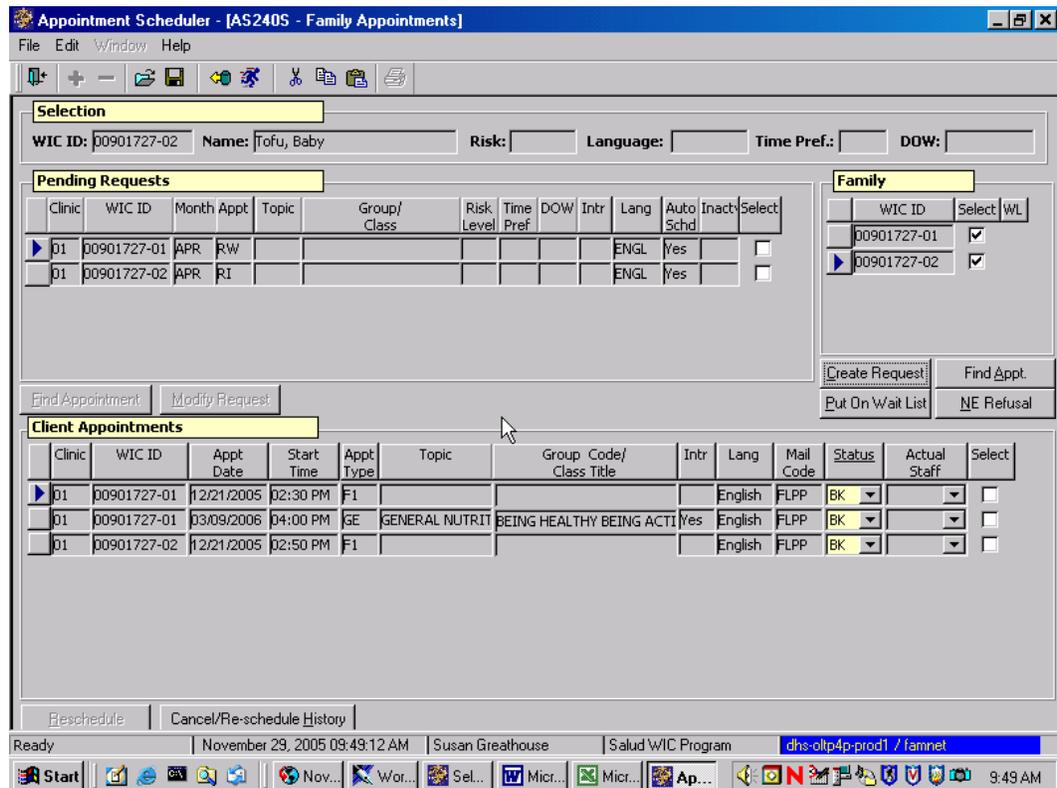
1.      **Select "Family Appointment Records."**

**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.
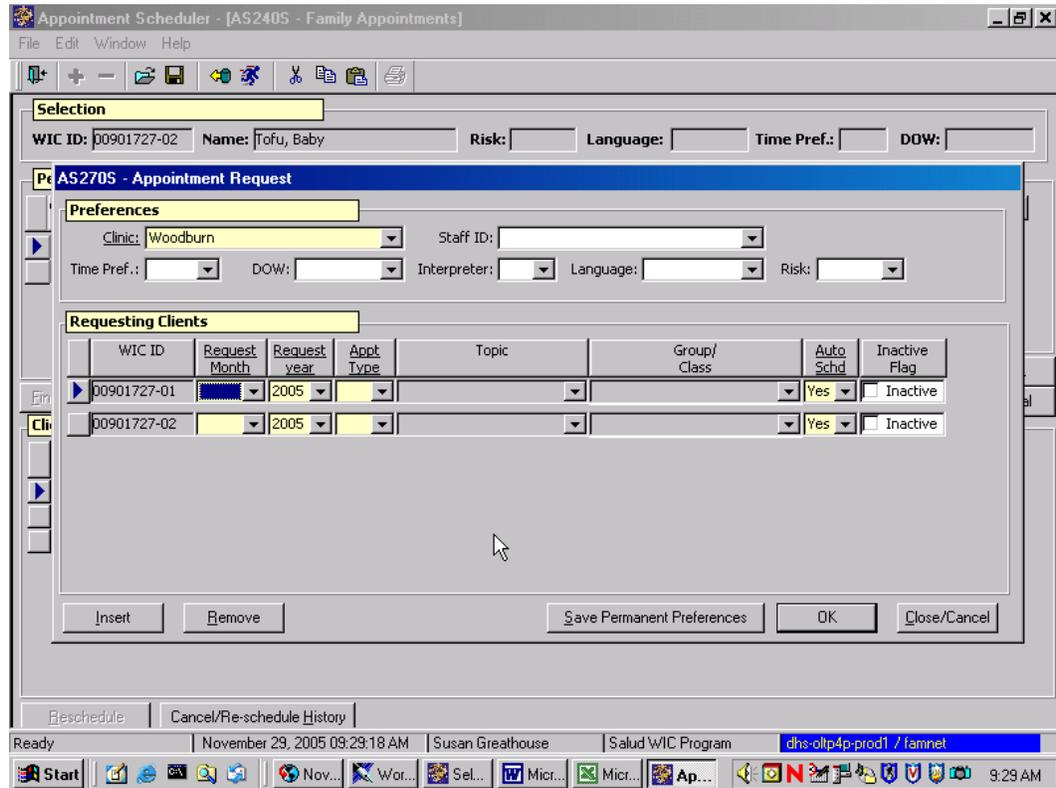
**Figure 2: "Appointment Request" Screen**

- 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.
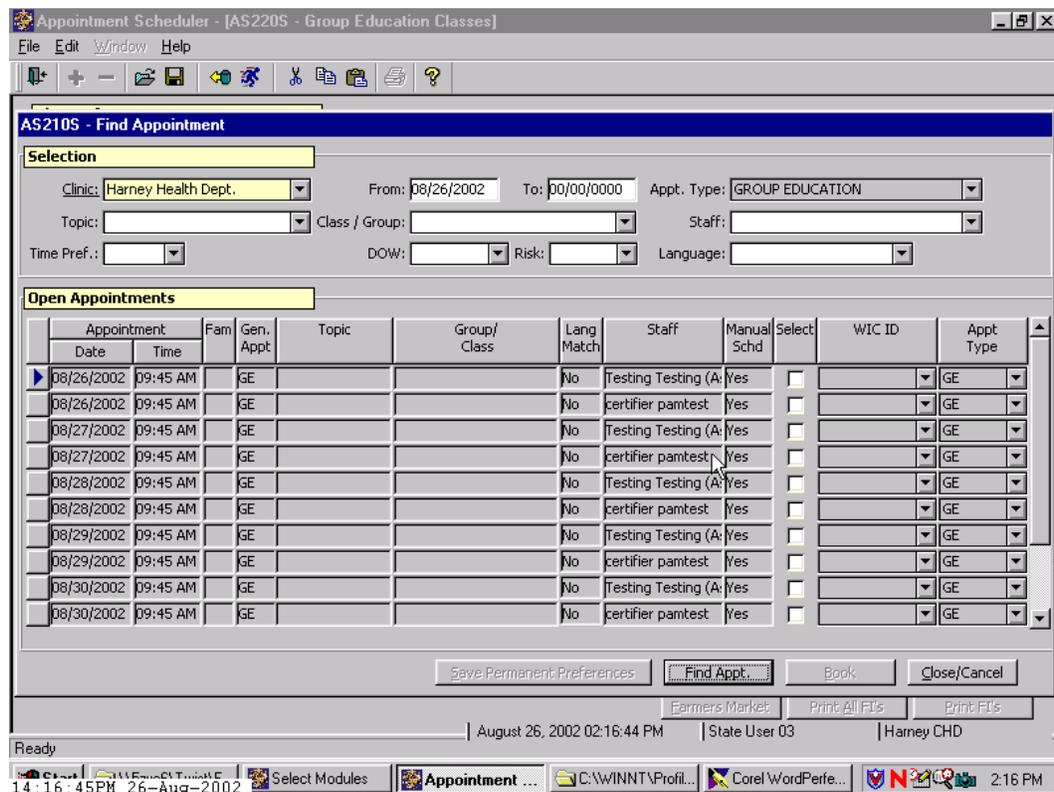
**Figure 3: "Find Appointment" screen**

- 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.