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:
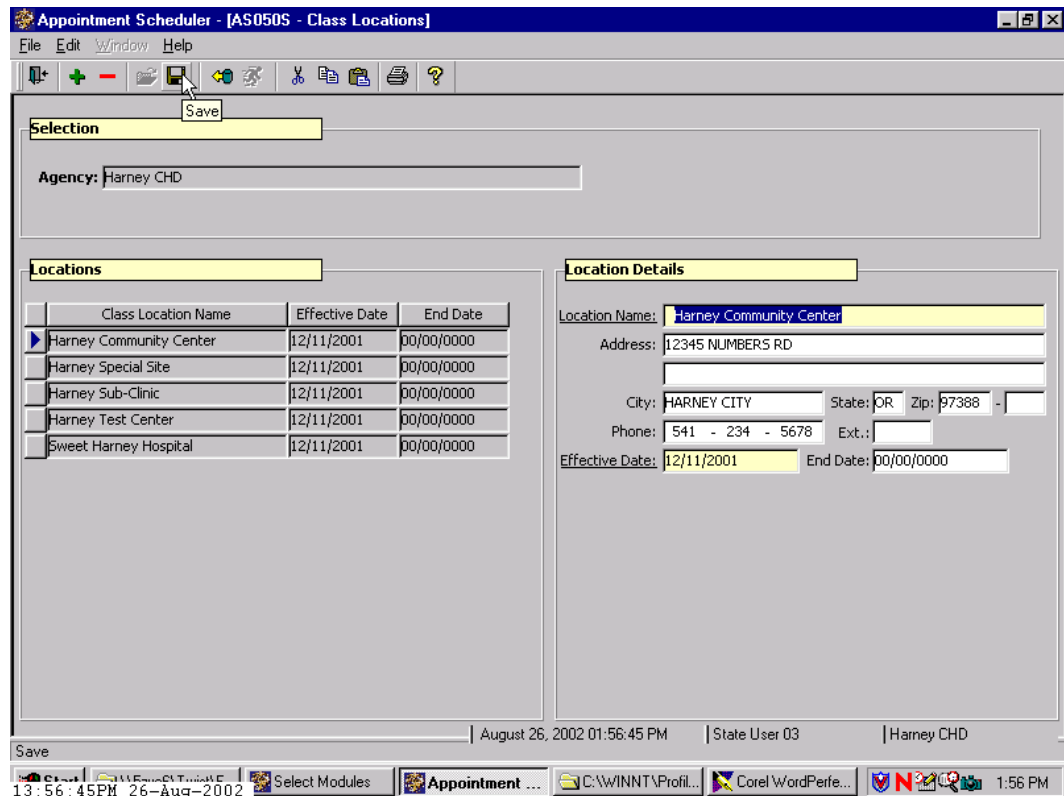   Appointment Scheduler ⇨ Tables ⇨ Class Locations

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:
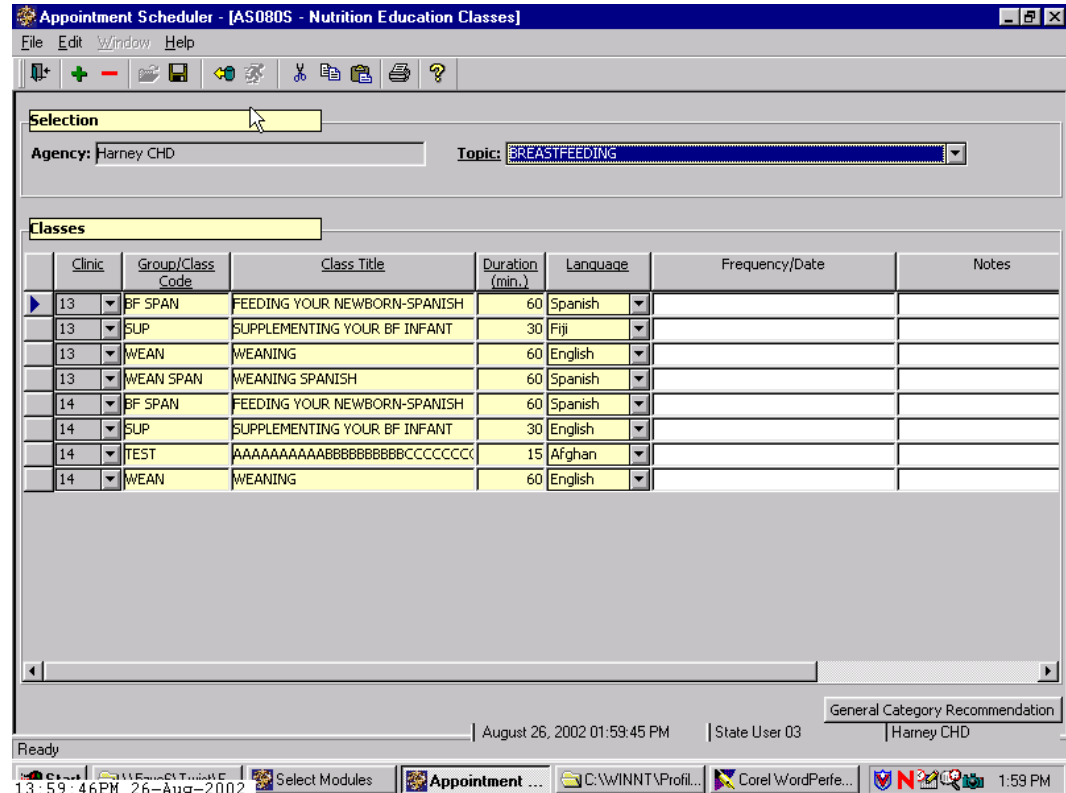Appointment Scheduler ⇨ Tables ⇨ Nutrition Education Classes

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.
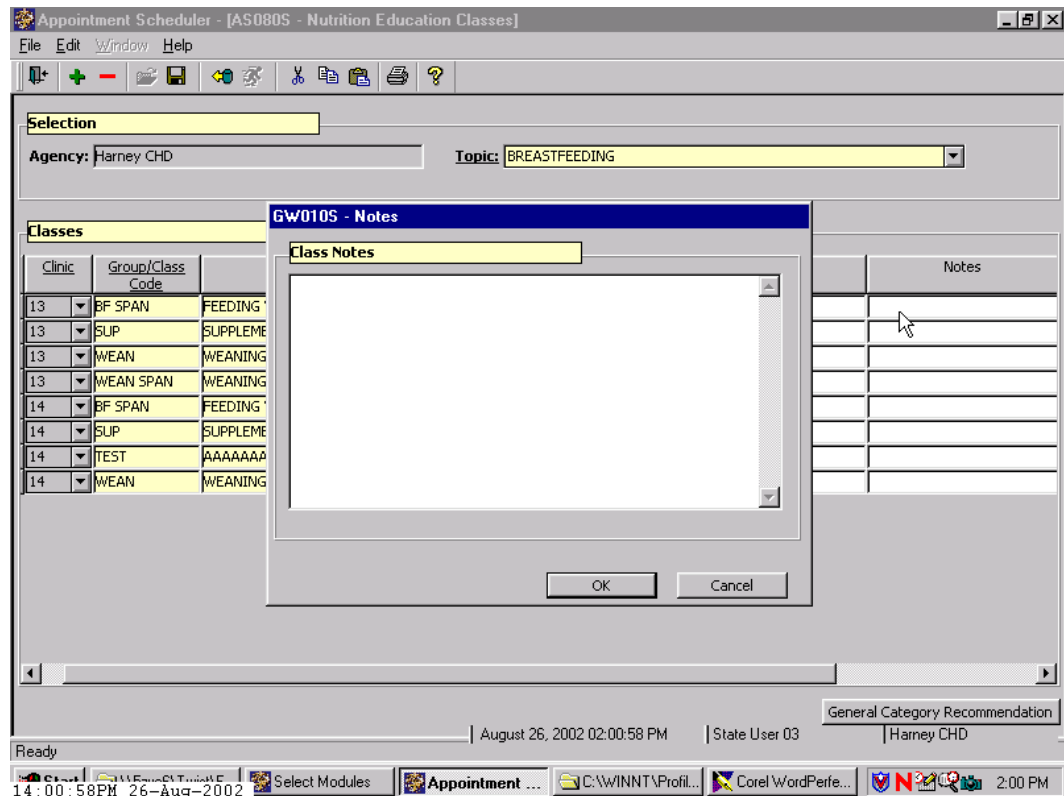•   Double clicking will open the "**Notes**" pop-up.

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**.
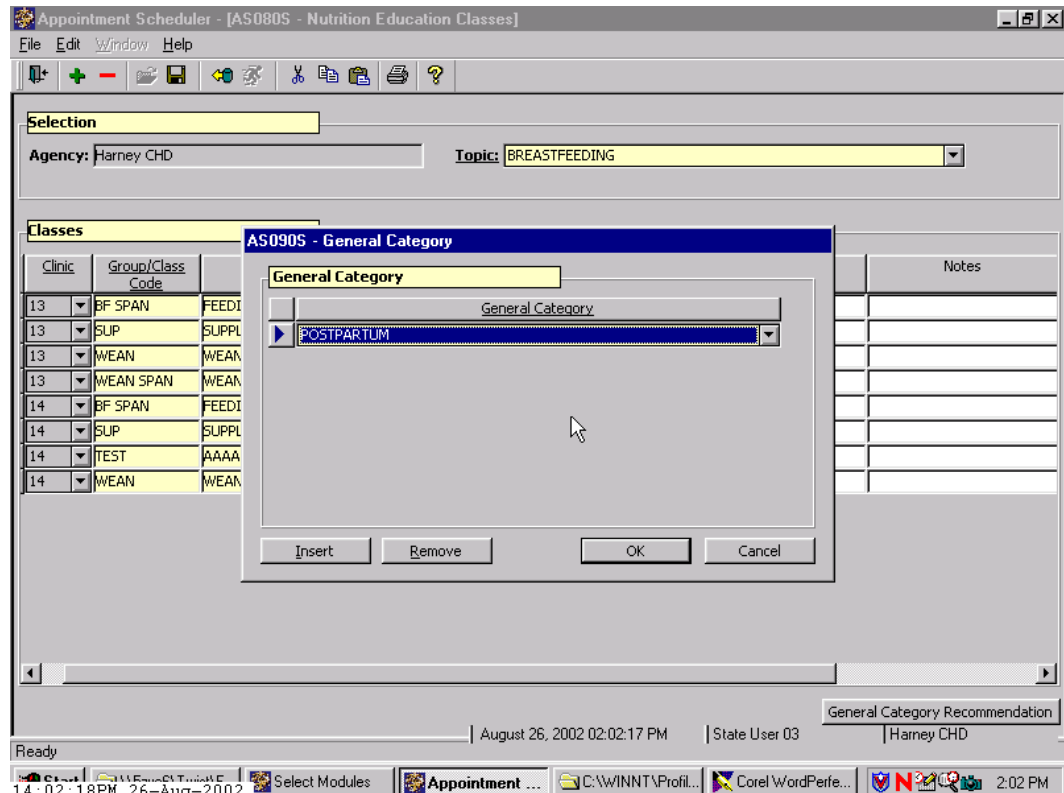

Figure 4: "General Category Recommendation" Pop-Up

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.

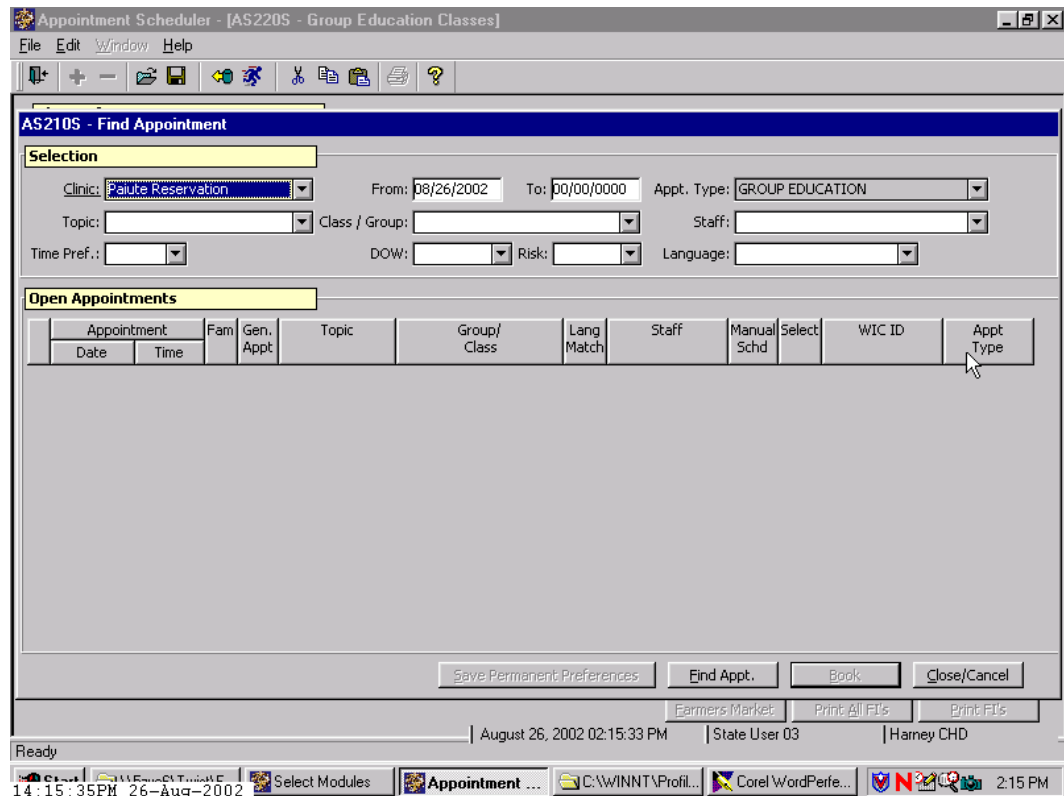3.   **Click the "Schedule Class" button to display the "Find Appointment" pop-up.**

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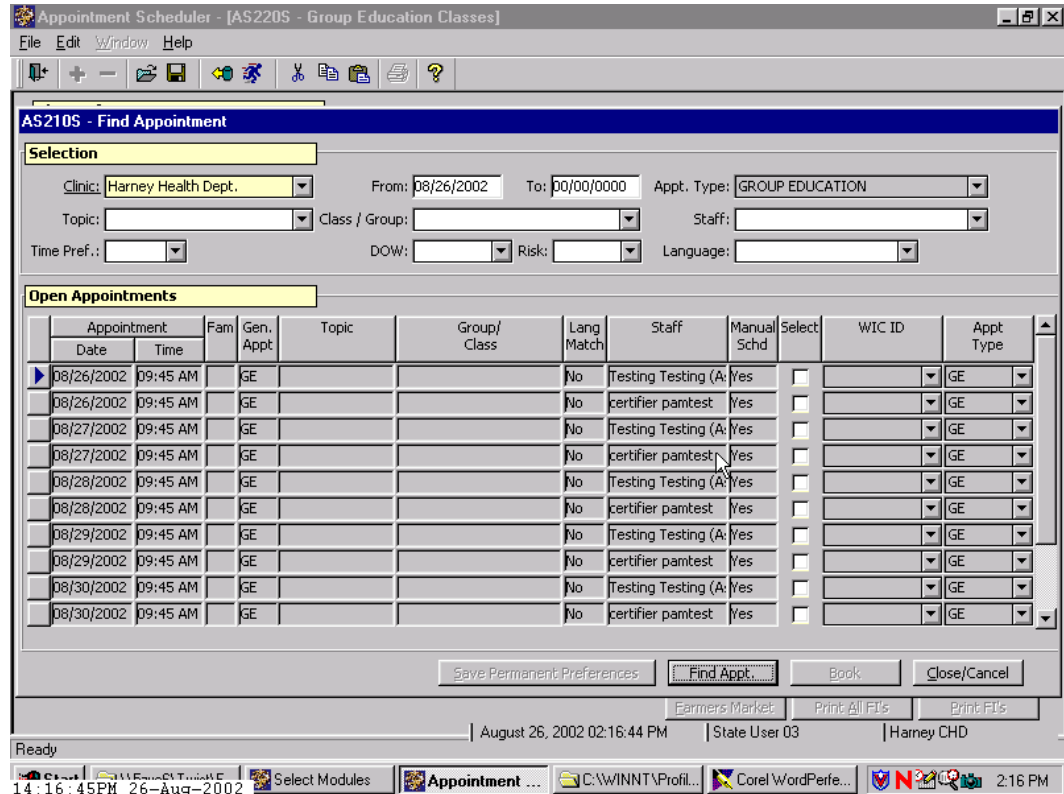
4. **Click the "Find Appt." button.**

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:
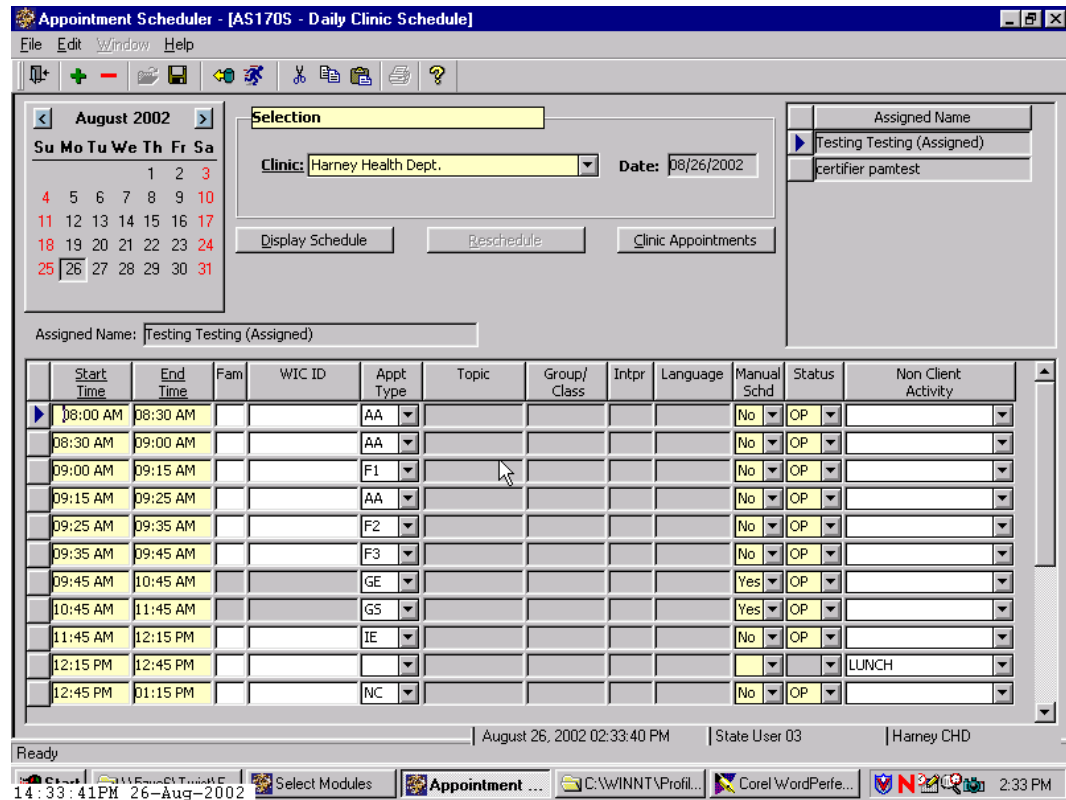Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

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
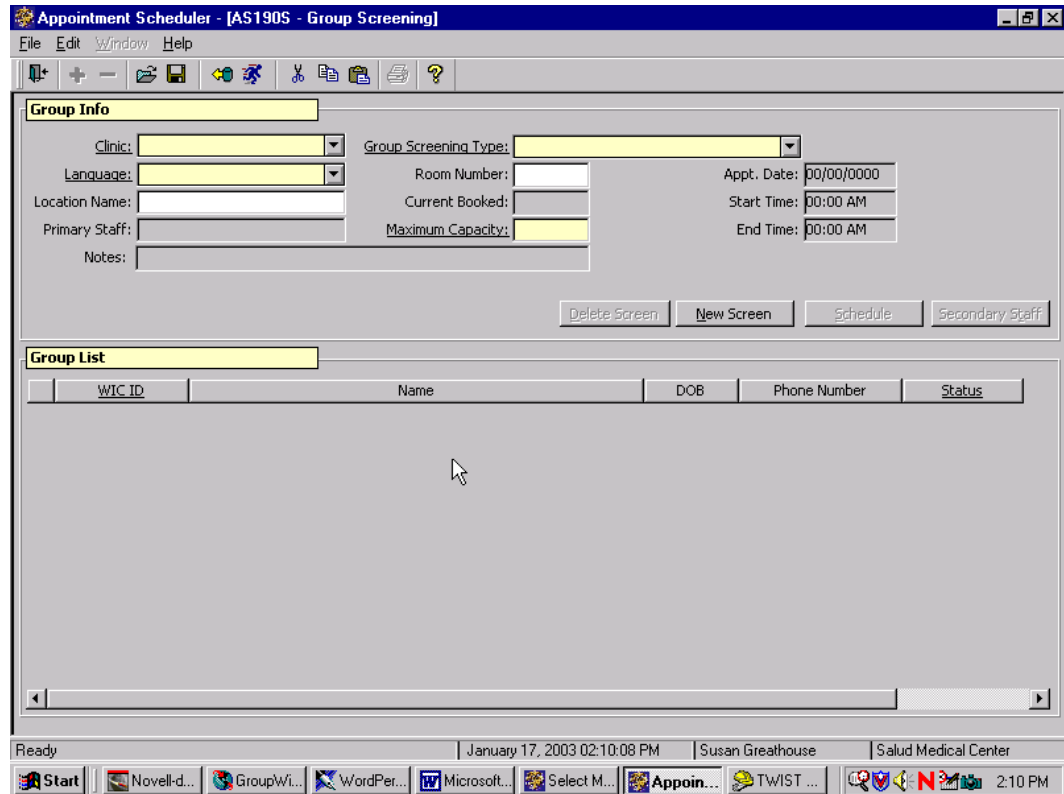

Figure 10: "Group Screening" Screen

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.

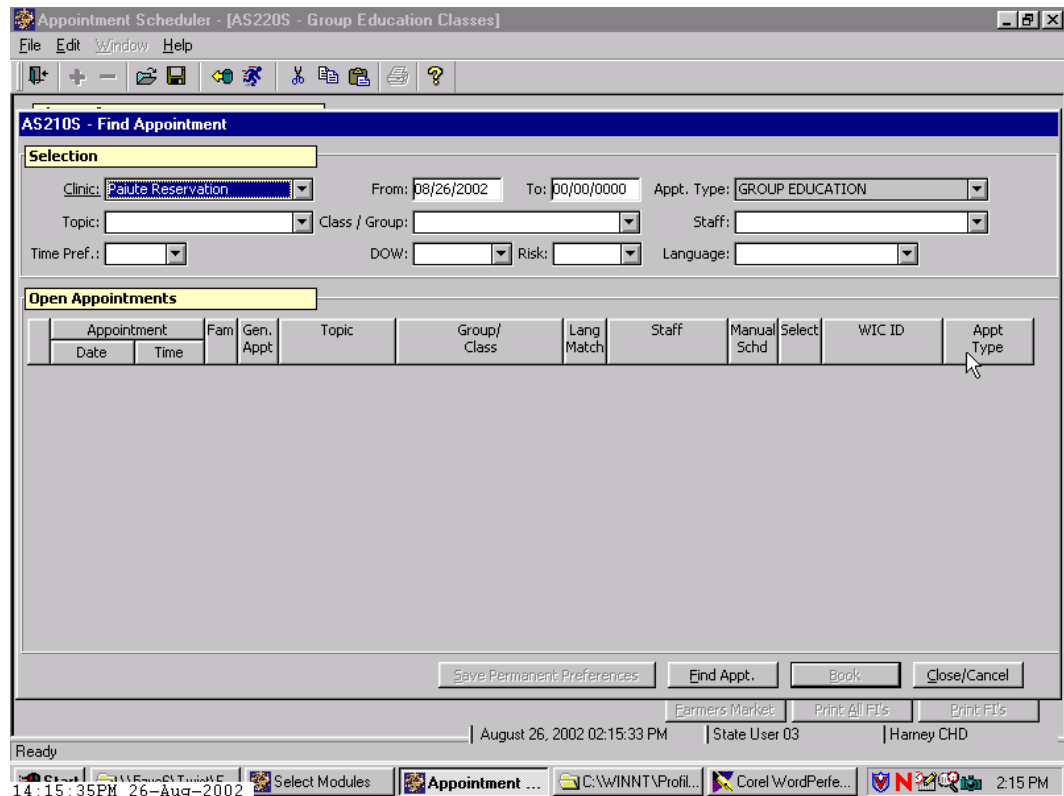3.   **Click "Schedule" button. To display the "Find Appointment" screen.**

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**.

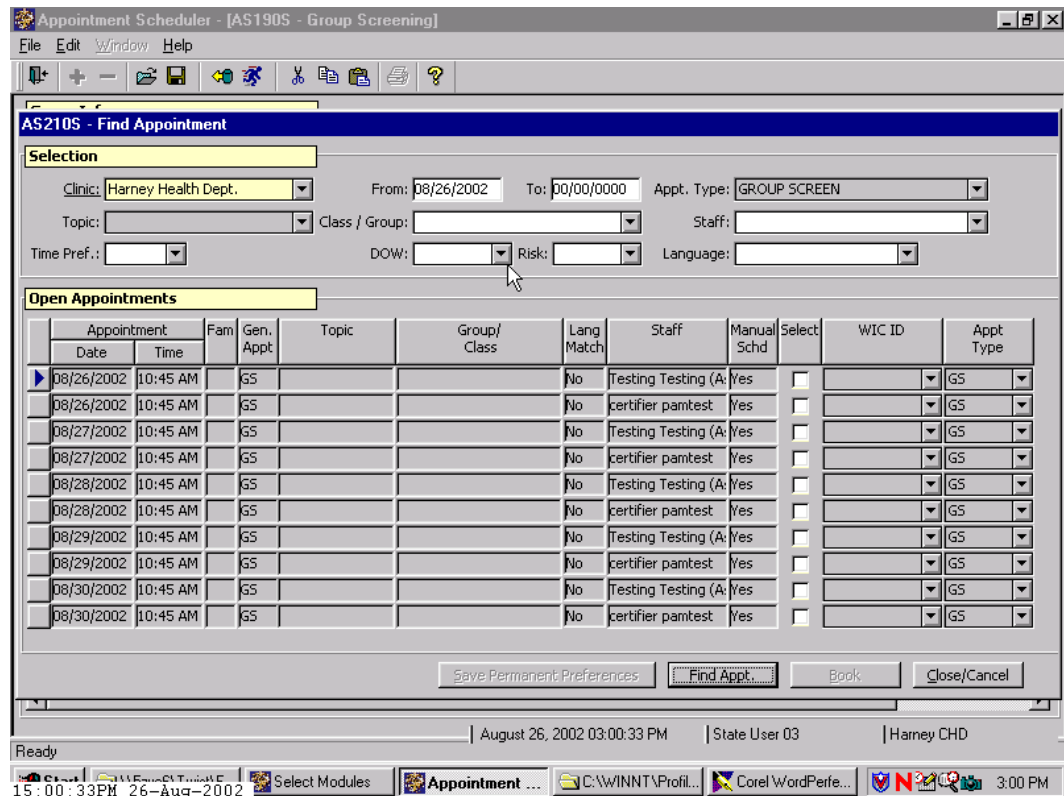4.   **Click the "Find Appt." button.**

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.
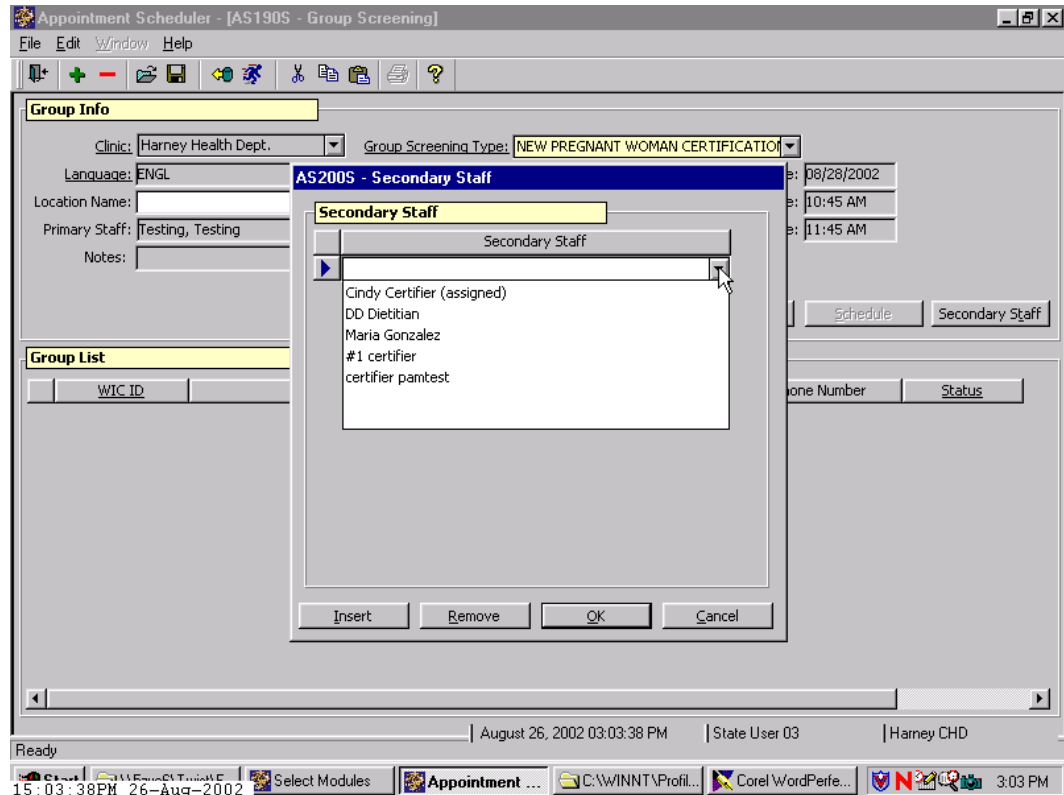

Figure 13: "Secondary Staff" Pop-Up

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: