# Chapter 4:  Appointment Scheduler
## Section 4:  Scheduling Appointments
## Lesson:  Scheduling a Client into a Group Nutrition Education Appointment

### *Objectives:*

Upon completion of this lesson the user will be able to:
•       schedule clients into group nutrition education appointments.

### *Overview:*

Scheduling and maintaining group appointments are important elements of WIC business.  Federal regulations require that WIC clients be offered nutrition education contacts.  Classes can be easily scheduled and maintained within the TWIST system using the same basic functionality that applies to scheduling individuals and families.

### *Instruction:*

### *Reviewing the "Group Education Classes" Screen*

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

**Figure 1: "Group Education Classes" Screen**

- There are two parts to this screen: "**Class Info**" at the top, which displays information about the Group Education Class, and "**Class List**," which displays information about those clients scheduled to attend the class.
- The "Class Info" section is completed by the scheduling person in your local agency and booked into specific appointment slots on the "Daily Clinic Schedule." You will know that this has been done when you see both the "Topic" and the "Group/Class" fields are filled with text.
- After the class is scheduled in the "Daily Clinic Schedule," clients can then be booked into the class.

When you are using the "Group Education Classes" screen for scheduling, you will be using the "Class List" part of the screen, but let's briefly review the "Class Info" section so you know what information is available.

- The "**Clinic**" field will display the clinic at which the group education class will be held.
- The "**Topic**" field indicates the topic of the class.
- The "**Class Title**" indicates the name of the class.
- The system displays the "**Instructor**" field with the name of the staff person assigned to this class.

- The "**Language**" field displays the language in which the class will be taught.
- The "**Date Held**," "**Start Time**," and "**End Time**" fields will display the date and times for which the class is scheduled.
- The "**Location**" field displays the location of the class. If this is blank, the location will be the same as the physical address of the clinic where the class is scheduled.
- The "**Address**," "**City**," "**State**," "**Zip**," and "**Phone**" fields display the corresponding data for the class location site.
- The "**Room #**" field displays the room number where the class will be held, if available.
- 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.
- The "**Maximum Capacity**" field displays the maximum number of clients for attending this class. When booking clients, if the number of clients in the "Current Booked" field exceeds the number entered as the maximum, the system will display a message to prevent over booking. The "Maximum Capacity" may then be increased by the person in charge of scheduling, if desired, to accommodate more clients in the class.
- The "**Notes**" field shows any notes entered relating to this class.

♫ NOTE:  The "New Class" and "Schedule Class" buttons are used by your scheduling person to book the Group Education class in your agency's "Daily Clinic Schedule" screen.

## *Scheduling a Client in a Group Education Class*

There are three different ways to book clients into group education classes by using: 1) the "Group Education Classes" screen, 2) the "Daily Clinic Schedule" screen or 3) the "Family Appointment Record" screen.

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

1.  **Click the "Open" icon to display the "Select Group Education Class" pop-up.**

- This pop-up allows you to search for any scheduled group education class.
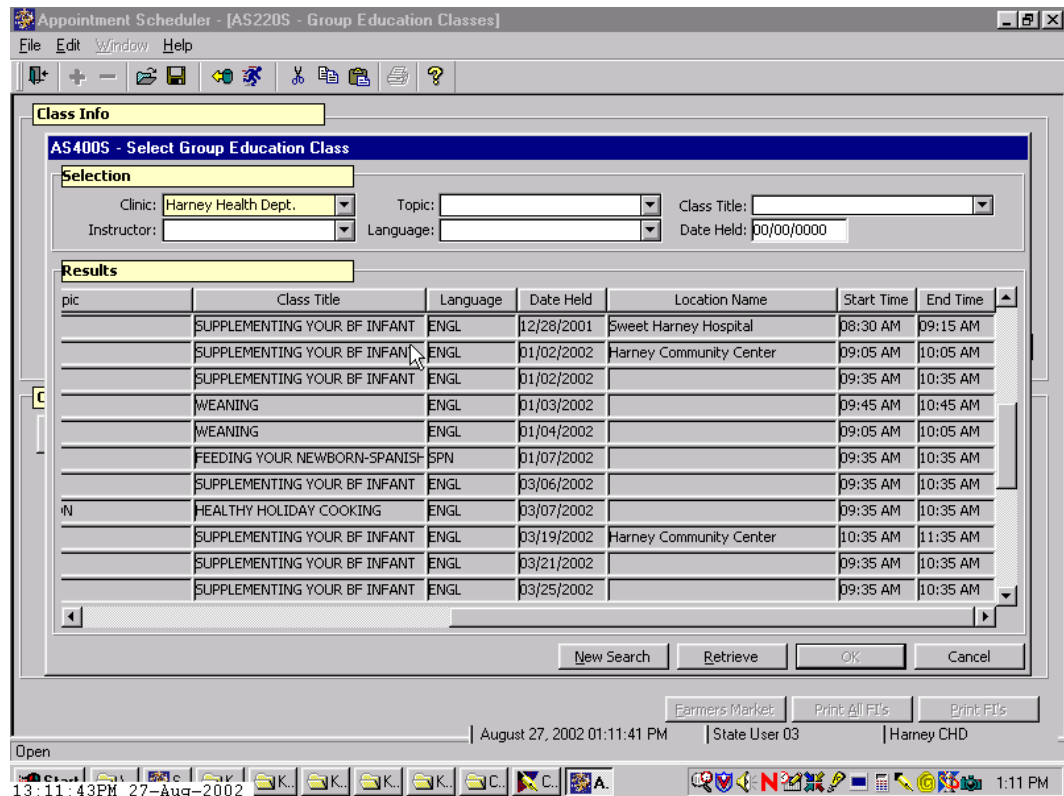- There are two sections to the pop-up: "Selection" and "Results."

**Figure 2: "Select Group Education Classes" Screen**

2.   **In the "Selection" section, enter data into the fields on which you wish to search for a group education class.**

   •   Adding more information in the "Selection" section fields will give you more limited results.
   •   You must enter at least the clinic name to search for a class.

3.   **Click the "Retrieve" button.**

4.   **Locate the desired group education class and double-click on that line.**

   •   Once you double click on the appointment line, the pop-up will close and return you to the "Group Education Classes" screen with the "Class Info" data populated.
   •   If clients have already been booked into this class, their names and corresponding information will be shown in the "Class List" section.

♫ NOTE: You may also click once on the desired appointment line and then click the "OK" button to close the pop-up and return to the "Group Education Classes" screen.

5. **Click the "Insert Record" icon to create a new row for scheduling a client to this group education class.**

There are two ways to enter the client information into the class:

5.1 **Enter the client's "WIC ID" and tab to the "Status" field.**

The system displays the client's "name" and "phone number" in the corresponding fields. The system defaults the "Status" field to "booked."

5.2 **If you do not know the client's ID number, you can fast path to client master search, search for and return with the client.**

The client will then be retrieved directly into the class.

6. **Save.**

• Notice that the "Current Booked" field in the "Class Info" section has been updated to include the client you just scheduled for the class.
• To continue booking other clients for this same group education class, tab off the "Status" field to create a new client row.

7. **Exit the "Group Education Classes" screen.**

♫ NOTE: The "**Farmers Market Eligibility**", "**Farmers Market Issuance**," and "**Family Summary Screen**" are all used when the class is held and are explained in detail in other lessons.
The "**Display FI Print Information**" checkbox, "**Print All FIs**," and "**Print Selected FIs**" buttons have been temporarily disabled.

## ➥ *Practice Activities:*

Using your ☛ Activity Sheet, follow the steps below to schedule your client to a group nutrition education class.

1. Click on "Appointment Scheduler."
2. Click on "Scheduling."
3. Click on "Group Maintenance."
4. Click on "Group Education Class."
5. Click the "Open" icon.
6. In the "Selections" section, enter the corresponding data from your activity sheet.

7.      Click the "Retrieve" button.
8.      Double click on the class designated on your activity sheet.
9.      Click the "Insert Record" icon to create a new client row in the "Class List" section.
10.     Enter the "WIC ID" number.
11.     Tab to the "Status" field and keep the "booked" status entered by the system.
12.     Save.
13.     Exit the "Group Education Classes" screen.

Congratulations!  You have scheduled your client to a Group Nutrition Education Class!

## Scheduling a Client into Group NE via the "Daily Clinic Schedule" Screen

The "Group Education Classes" screen may also be accessed from the "Daily Clinic Schedule."

The starting point for this section is:
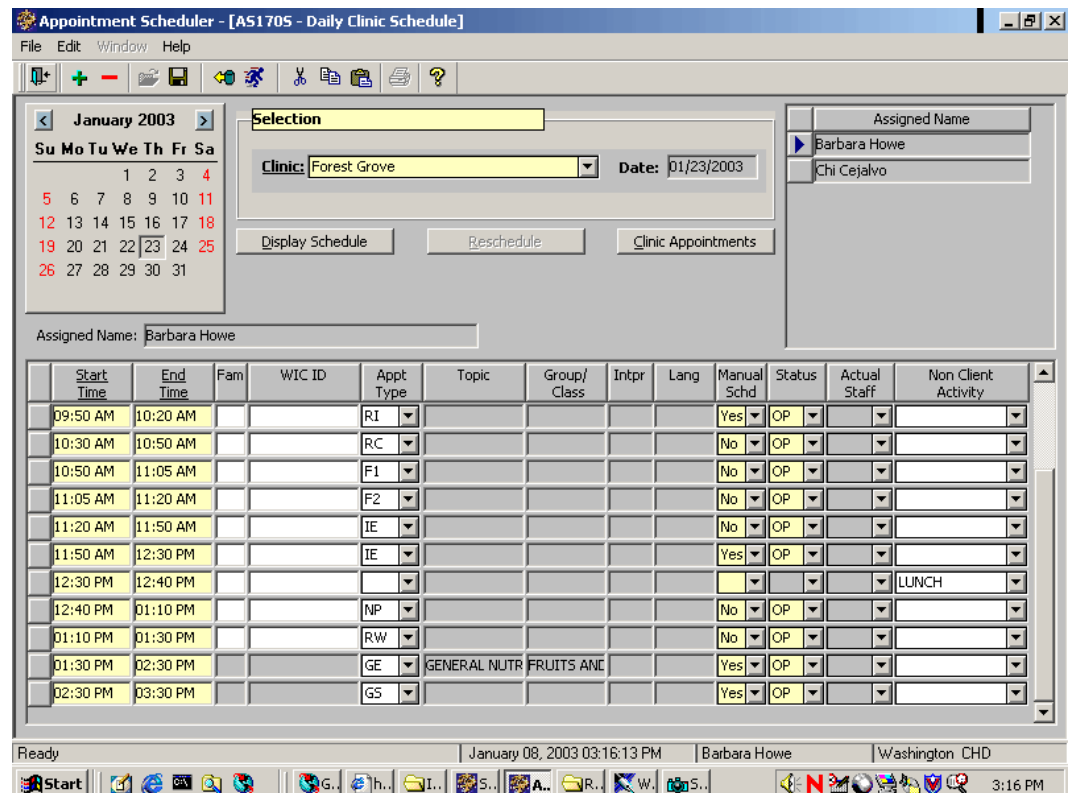           Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule



**Figure 3: "Daily Clinic Schedule" Screen**

1.      **Double click in the "Group/Class" field corresponding to the desired group education class.**

        This will take you directly to the "Group Education Classes" screen. You can then schedule the client as previously outlined.

♫ NOTE: When the "Group Education Classes" screen is accessed this way it is not necessary to search for the class you want. You are already there!

## Scheduling a Client in a Group Education Class via the "Family Appointment Record" Screen

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

1.      **Using the "Open" icon, search for and return with the client to the "Family Appointment Record" screen.**

2.      **Select the WIC ID number of your client by clicking on the select box.**

3.      **Select the "Find Appt." button which will take you to the "Find Appointment" screen.**

        Please refer to the "Schedule Appointment Now" lesson for more information on this screen.

4.      **Under the "Appointment Type" field, select "Group Education" from the drop down list.**

5.      **Click on the "Find Appt" button.**

        All group education classes with openings will be listed under the "Open Appointments" section of the screen.

6.      **Select the class by clicking on the select box.**

        The client's WIC ID number will auto-fill.

7.      **Click on the "Book" button.**

You will be taken back to the "Family Appointment Record" and the class appointment you just made will be visible under the "Client's Appointments" section.

♫ NOTE: You can only schedule one family member at a time into a group NE class from the "Family Appointment Record" screen, even if it for the same class.

### ✔ Skill Check:

Use your ☛ Activity Sheet for this practice.

The client needs to be scheduled into a group nutrition education class on the topic of "General Nutrition."

*Print out the blank "Group Education Classes" screen before you schedule the appointment and then print out the screen again after you have scheduled the appointment.*

### ✍ Notes: