Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Scheduling Group Screening Appointments

Objectives:

Upon completion of this lesson the user will be able to:
- schedule clients into group screening appointments.

Overview:

Group screening appointments, sometimes called "group certifications", are often used to screen and certify a group of WIC eligible clients who all belong to the same category. This group process often allows for the processing of more clients than could be done by scheduling individual appointments for them. This is especially true for clients new to WIC who need an orientation to the program.

Group screening appointments can easily be scheduled with the TWIST system using the same process as for other appointment types. Let's look at the "Group Screening" screen and see how easy it is!

Instruction:

Reviewing the "Group Scheduling" Screen

The starting point for this section is:

> Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening
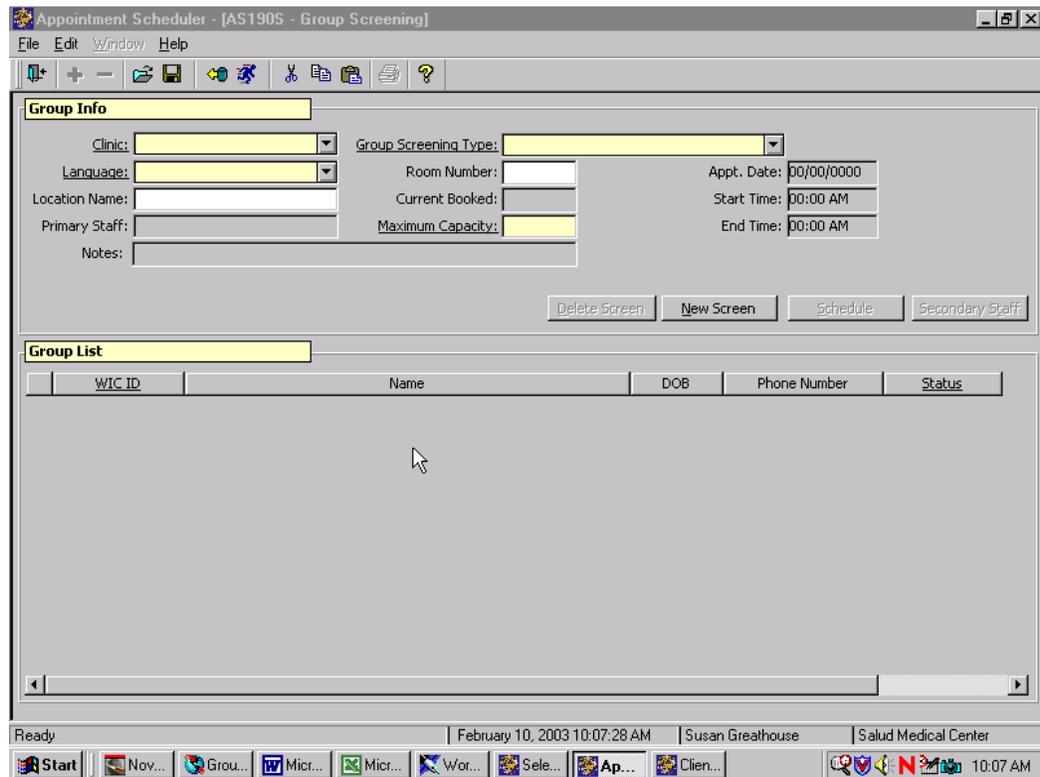
Figure 1: "Group Screening" Screen

- There are two parts to this screen, "**Group Info**" at the top, which displays information about the Group Screening appointment, and "**Group List**," which displays information about those clients scheduled to attend the appointment.
- The "**Group Info**" section is completed by the scheduling person in your local agency and booked into specific appointment slots on the "**Daily Clinic Schedule**."

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

1.   **Review the "Group Info" section.**

1.1   The "**Clinic**" field indicates the clinic at which the screening appointment will be held.

1.2   The "**Group Screening Type**" field displays the type of group screening appointment (e.g., new child certification, new pregnant woman certification, etc.)

1.3   The "**Language**" field is a drop-down window that allows you to select the language in which the group screening will be conducted.

1.4   If applicable, "**Room Number**" shows the room in which the appointment will be held.

1.5   The "**Appt. Date**" field displays the date on which the appointment is booked.

1.6   "**Location Name**" lists the location for this appointment.

1.7   The "**Current Booked**" field displays the number count of clients already scheduled for this appointment. As you schedule clients for this appointment, you will notice the number changes accordingly.

1.8   The "**Start Time**" field displays the time this appointment starts. This comes from the "**Daily Clinic Schedule**" screen.

1.9   The "**Primary Staff**" field displays the name of the staff person who is scheduled as the primary staff person for this appointment.

1.10   The "**Maximum Capacity**" field lists the maximum number of clients who should be booked for this group appointment.

1.11   The "**End Time**" field displays the time this appointment is scheduled to end.

1.12   The "**Notes**" field shows any notes entered relating to this screening appointment.

1.13   The buttons to the bottom right of the "**Group Info**" section, "**New Screen**," "**Schedule**," and "**Secondary Staff**" are all used by the person setting up and scheduling the screening appointments.

Scheduling a Client in a Group Screening Appointment

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

1.   **Click the "Open" icon.**

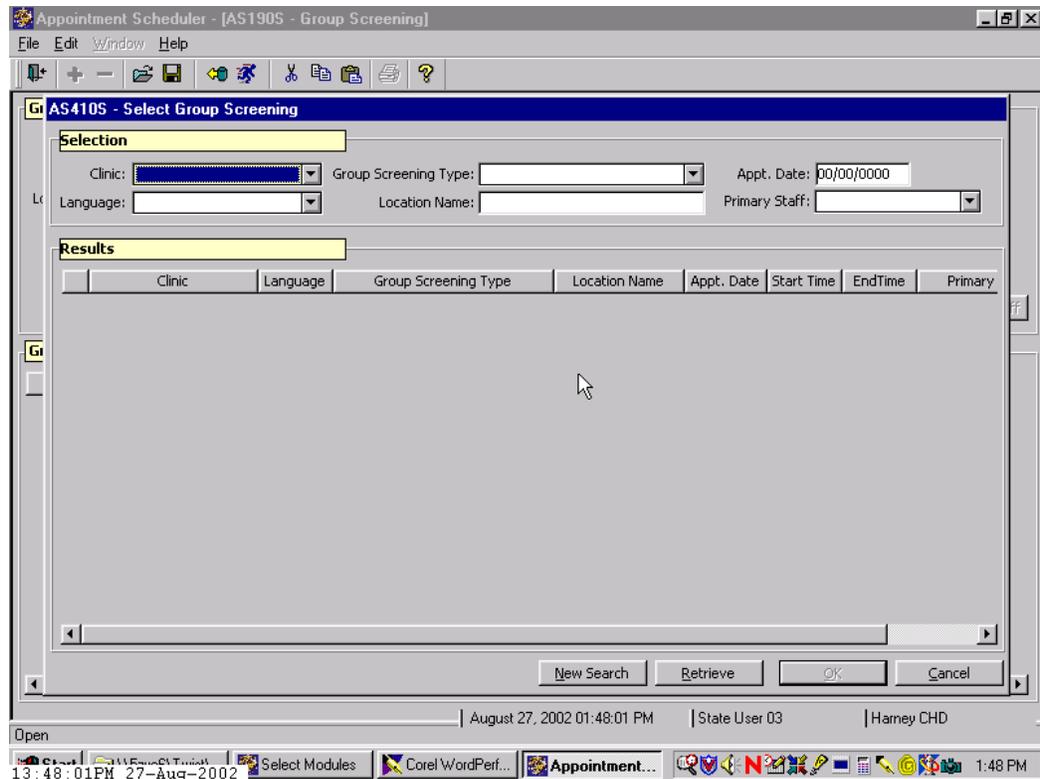This displays the "**Select Group Screening**" pop-up.

Figure 2: "Select Group Screening" Pop-Up

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

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

   - The more information you enter in the "**Selection**" section fields, will give you more limited results.
   - You must use at least one field from the "**Selection**" section on which to search.

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

4. **Double click on the appropriate screening appointment.**

   - Once you double click on the appointment line, the pop-up will close and return you to the "**Group Screening**" screen with the "**Group Info**" data populated.

- If clients have already been booked into this screening appointment, their names and corresponding information will be shown in the "**Group 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 Screening**" screen.

5.   **Click "Insert"**

This creates a new row for scheduling a client to this screening appointment.

6.   **Enter the client's "WIC ID"**

If you do not know the client's WIC ID, you can fast path to client master search, find and return with your client.

7.   **Tab to the "Status" field.**

- The system displays the client's "**Name**," "**DOB**," and "**Phone Number**" in the corresponding fields.
- The system defaults the "**Status**" field to "**booked**."

8.   **Save.**

- Notice that the "**Current Booked**" field in the "**Group Info**" section has been updated to include the client you just scheduled for the appointment.
- To continue booking other clients for this same screening appointment, tab off the "**Status**" field to create a new client row, or click the insert icon.

♫   NOTE: You cannot print vouchers from this screen. In addition, data from this screen does not appear on productivity or show rate reports.

9.   **Exit.**

✂ *Tips and Shortcuts:*

The "Group Screening" screen may also be accessed from the "Daily Clinic Schedule" screen by double clicking in the "Group/Class" field corresponding to the desired group screening. When the "Group Screening" screen is entered this way it is not necessary to search for the screening you want. You are already there!

↪ *Practice Activities:*

Using the information on your ☛ Activity Sheet, follow the steps below to schedule your client to a group screening appointment.

The starting point for this activity is:
> Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

1.   Click the "Open" icon.
2.   In the "Selections" section, enter the corresponding data from your Activity Sheet.
3.   Click "Retrieve."
4.   Double click on the screening appointment designated on your Activity Sheet.
5.   Click "Insert."
6.   Enter your "WIC ID" number.
7.   Tab to the "Status" field and select the status from the drop down list.
8.   Save.
9.   Exit the "Group Screenings" screen.

Great job! You have scheduled your client to their Group Screening appointment!

✓ *Skill Check:*

You are now going to schedule a client into a group screening. For the purposes of this activity, you are a WIC clerk. The person to your right will be your client. She is trying to make an appointment to put herself back on WIC. She is pregnant and will be scheduled into a group screening for pregnant women. Do a screen print of the screen that shows your client has been scheduled successfully. Good Luck!