Chapter 4: Appointment Scheduler
Section 7: Correspondence
Lesson: Printing Appointment Notices (Special User and Local Agency Training)

Objectives:

Upon completion of this lesson the user will be able to:
- $ understand all types of appointment scheduler correspondence;
- $ use the correspondence print definition screens
- $ modify the content of appointment scheduler correspondence; and
- $ print appropriate appointment notices.

Overview:

There are nine different appointment notices in TWIST. Some are letters, some are postcards, and some are both. All are available in English and Spanish. Below is a list of the different notices:

Letters
Notice for Individual Appointments
Notice for Group (GS) Code Appointments
Notice of Clinic Choice to Reschedule
Notice for Group (GE) Class Appointments

Postcards
Call for an Appointment
Postcard for Group (GE) Class Appointments
Postcard for Individual Appointment
Postcard for Group (GS) Code Appointments
Wait List Notification

- Each notice contains "text lines" which allow the local agency to customize their appointment notices and send agency specific information to their clients. This information is entered in the **"Appointment Notices"** base table, which provides blank lines for each line of text that is available for each specific appointment notice. The user will enter their agency specific text onto the blank lines in the table, which will then display on the specific notice.
- There are separate notices with Spanish text for each of the nine correspondence types. Standard information is hard-coded in Spanish. The user can then enter text information in Spanish as described above.

- The appointment information (date and time) will pull from the system automatically, as will the client information and the agency information.
- Bulk notices will print for up to four family members. If more than four family members have an appointment an additional notice will be printed.
- If the appointment notice is for multiple family members, only the earliest appointment time will print on the notice.
- Individual notices will only print for the individual client selected.

In this lesson you will learn how create the text for your appointment notices and how to print appointment notices for both specific groups of clients and for individual clients.

Instruction:

Understanding Appointment Correspondence Types

The starting point for this section is:
  Appointment Scheduler ± Outputs

1.   **Click on "Correspondence."**

Figure 1: "Correspondence" Drop Down Menu

- There are three options, Letters, Mail Merge and Postcards. You will learn about Mail Merge in another lesson.
- There are two basic appointment notices: Letters and Postcards.
- Some types of notices may be both a letter or a postcard.

> • You may select the type of notice that best meets your agency's needs.
> • Specific text for each of these notices can be created by the local agency.

2. **Select "Letters" from the drop down list.**

> • There are four types of letters available: Individual Appointment, Group Screening, Clinic Reschedule and Group Nutrition Education Class.
> • The letters are also available in Spanish.

3. **Select "Postcards" from the drop down list.**

> • There are five types of postcards available: Call for an Appointment, Group Nutrition Education Class, Individual Appointment, Group Screening and Wait List Notification.
> • The postcards are also available in Spanish.
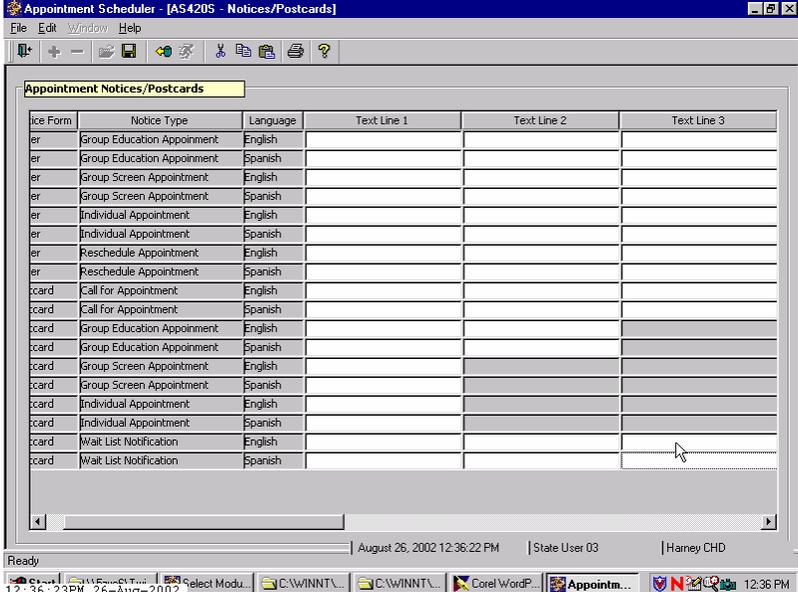
4. **Exit the menu.**

Creating Text Messages for the Notices

Before appointment notices can be printed each local agency must create their own unique message information for the notices. This in done in the "Appointment Notices" base table. Both the English and Spanish text must be entered for each type of notice.

The starting point for this section is:
> Appointment Scheduler ± Tables

1. **Click on "Appointment Notices."**

Figure 2: "Appointment Notices" Base Table

- Each row represents a separate notice, either postcard or letter, in either English or Spanish.
- Each notice displays a different number of open lines for text.
- Use the scroll bar at the bottom of the screen to move through the lines.
- Use the down arrow key on the key board to move down the list.

2.   **Click in the appropriate "Text Line" field and enter your text.**

- Each line on a letter may contain up to 50 characters.
- Each line on a postcard may contain up to 38 characters.
- Lines may contain both numbers and letters.
- Use the tab key to move to the next line.
- Be sure to enter text for the Spanish correspondence in Spanish.

3.   **Save and exit.**

Printing Bulk Appointment Letters

Once the text messages have been created, you will be able to print notices.

The starting point for this section is:
    Appointment Scheduler ± Outputs

1.   **Select "Correspondence" from the drop down list.**

There are three options, Letters, Mail Merge and Postcards. You will learn about Mail Merge in another lesson.

2.   **Select "Letters."**

3.   **Select the notice you want to print.**

3.1   The **"Correspondence Print Definition"** pop-up is displayed. This pop-up is the same for both Letters and Postcards.
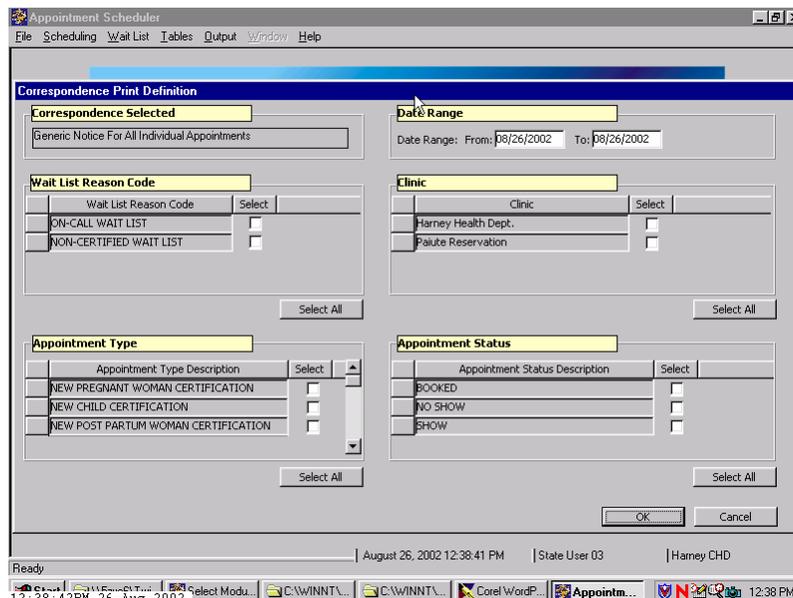

Figure 3: "Correspondence Print Definition" pop-up

3.2   The "From" and "To" dates in the **"Date Range"** section are used to indicate which range of dates of appointments you want to print notices. The "From" and "To" date may be the same date when printing only one day.

3.3   The **"Wait List Reason Code"** section is for the user to select a wait list for which to print a "Wait List Notification" postcard. Check "Noncertified" or "On Call" to indicate which wait list you want to print notices for.

3.4   The **"Appointment Type"** section is for the user to indicate what type of appointment(s) you want to print notices for. You

may check multiple types of appointments or click the **"Select All"** button to check all appointment types.

3.5   The clinic for which you want to print appointment notices is selected in the **"Clinic"** section. You may select multiple clinics or use the **"Select All"** button to select all clinics.

3.6   The status of appointments you want to print notices for is entered in the **"Appointment Status"** section. You may select multiple statuses or use the "Select All" button to select all statuses.

4.   **Click "OK" to process print parameters or "Cancel" to close the pop-up.**

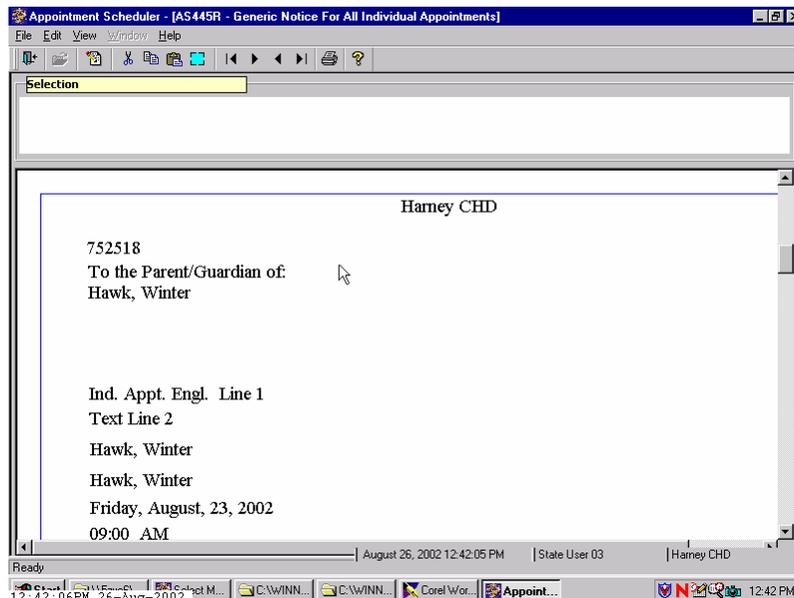The "Notice" window is shown, with the client, clinic and appointment information displayed.

Figure 4: "Appointment Notice Letter"

- Use the scroll bar on the right to view all the clients.
- The "First," "Next," "Prior" and "Last" icons in the top tool bar may also be used to scroll through the clients.

+NOTE: If there are no clients who match the criteria entered a message will be displayed stating no data was found.

5.   **Click the "Print" icon to print the notices.**

+NOTE: Letters will print on the laser printer selected as the default printer for the workstation.

+NOTE: The client's written language will be used as part of the selection criteria for appointment notices. If you select a Spanish notice only clients whose primary language is Spanish and who match the other criteria will be displayed and printed.

6.   **Exit.**

Setting Up The Postcard Printer Table

Before printing appointment postcards in a FLPP environment, you must set up your Lexmark printer in the Postcard Printer table.

The starting point for this is:
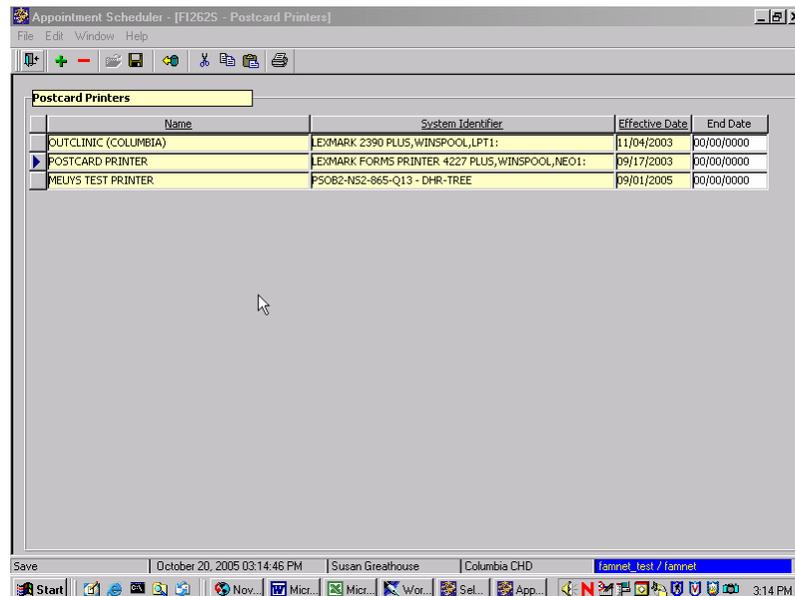   Appointment Scheduler ± Tables ± Postcard Printers

Figure 5: Postcard Printer Table

1.   **Type in a name for your Lexmark postcard printer in the first column under "Name". It can be something as easy as "Postcard Printer."**

2.   **In the column under "System Identifier", copy <u>exactly</u> the name for the Lexmark that appears in the printer settings on**

> **the desktop. Check with your technical support staff person if you need further assistance in setting up this printer.**

3.   **Click "Save" and Exit.**

+ Note: Do <u>not</u> set the Lexmark printer as your default printer on your workstation.

Printing Bulk Appointment Postcards

The starting point for this section is:
        Appointment Scheduler ± Outputs

1.   **Select "Correspondence" from the drop down list.**

2.   **Select "Postcards."**

3.   **Select the notice you want to print.**

   3.1   The **"Correspondence Print Definition"** pop-up is displayed. This pop-up is the same for both Letters and Postcards.
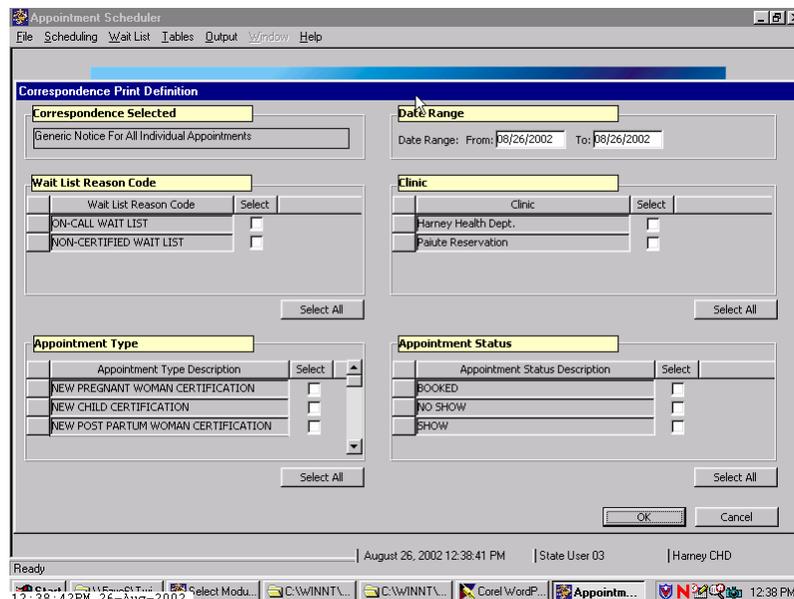

Figure 6: "Correspondence Print Definition" pop-up

   3.2   The "From" and "To" dates in the **"Date Range"** section are used to indicate which range of dates you want to print notices. The "From" and "To" date may be the same date when printing only one day.

3.3   The **"Wait List Reason Code"** section is for the user to select a wait list for which to print a "Wait List Notification" postcard. Check "Noncertified" or "On Call" to indicate which wait list you want to print notices for.

3.4   The **"Appointment Type"** section is for the user to indicate what type of appointment(s) you want to print notices for. You may check multiple types of appointments or click the **"Select All"** button to check all appointment types.

3.5   The clinic for which you want to print appointment notices is selected in the **"Clinic"** section. You may select multiple clinics or use the **"Select All"** button to select all clinics.

3.6   The status of appointments you want to print notices for is entered in the **"Appointment Status"** section. You may select multiple statuses or use the "Select All" button to select all statuses.

4.   **Click "OK" to process print parameters or "Cancel" to close the pop-up.**

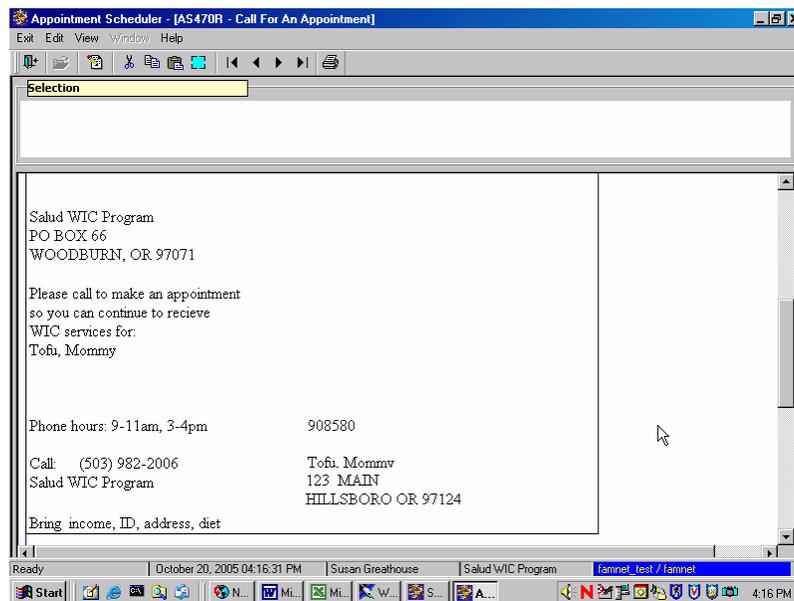The "Notice" window is shown, with the client, clinic and appointment information displayed.

Figure 7: "Appointment Notice Postcard"

+NOTE: If there are no clients who match the criteria entered a message will be displayed stating no data was found.

5.   **Click the "Print" icon to print the notices.**

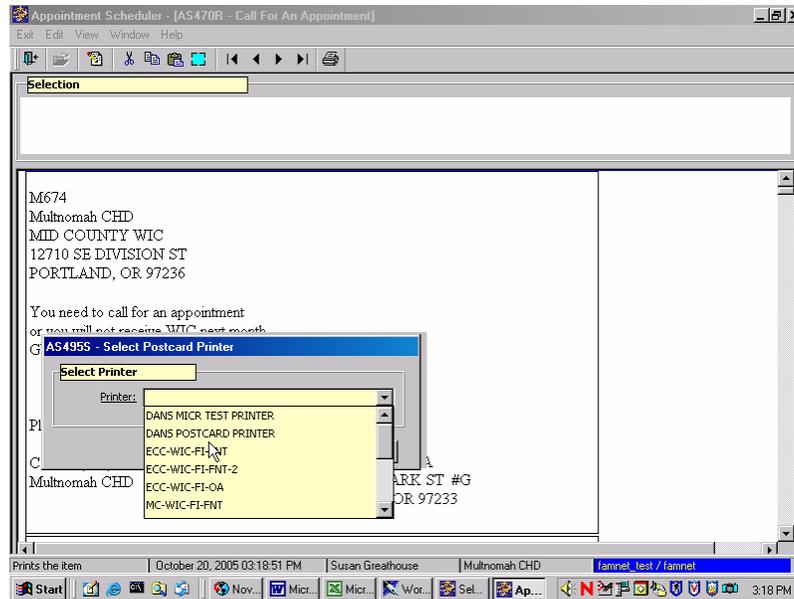6.   **Select your Postcard Printer from the drop down window.**

Figure 8: "Select Postcard Printer"

7.   **Click "OK" to close pop-up and you will get another pop-up asking if you have loaded postcard stock. Click "OK" and appointment postcards will print**.
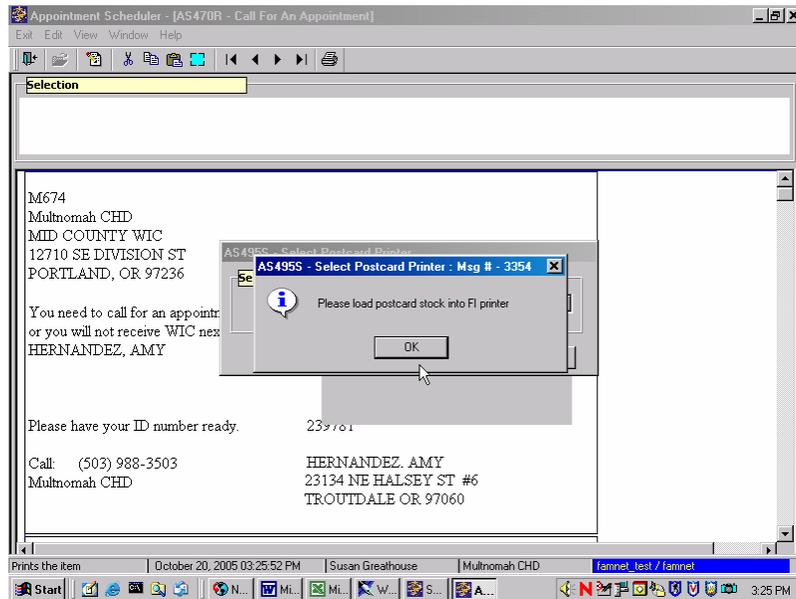
Figure 9: "Postcard Stock"

(*Practice Activity #1:*

The starting point for this section is:
> Appointment Scheduler ÷ Outputs

1.   Select "Correspondence" from the drop down list.
2.   Select "Letters" and then select "Notice for Individual Appointments."
3.   Select "Pick-up Food Instrument" and "Follow-up Type 2."
4.   Enter the first and last day of the current month as the "From" and "To" dates.
5.   Select all clinics by clicking the "Select All" button.
6.   Select "Booked" as the status.
7.   Click the "OK" button.
8.   Use the scroll bar to view all clients displayed.
9.   To help save trees – Do not print the notices.
10.   Exit the window.

Υ *Skill Check:*

Now that you have learned how to print notices, let's practice one more time. You want to send a reminder notice to all pregnant women who have a new appointment in the next ten days for all clinics in the agency. Do a screen print of the "Correspondence Print Definition" screen after you have completed it and only view the "Notice" screen. Be sure to write your name on the screen print before you turn them in to the instructor.

Printing Individual Appointment Notices

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

1.   **Click on the "open file" icon and retrieve a client from the Client Primary.**

2.   **Click in the "select" box next to the appointment to select the individual appointment for which you want to print an appointment notice.**
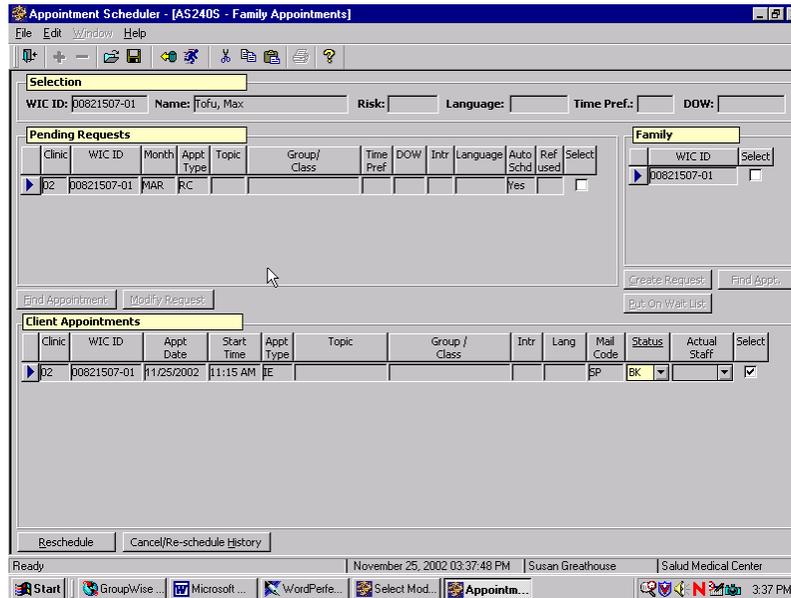
Figure 10: " Family Appointment Record"

3. **Click on the Fast Path icon and select the type of individual correspondence you want to send.**

   • You can select an individual appointment, a group education or a group screening, **but you can only put one participant name per letter using this procedure.**
   • You cannot print individual postcards from this function. Postcards can only be batch printed.
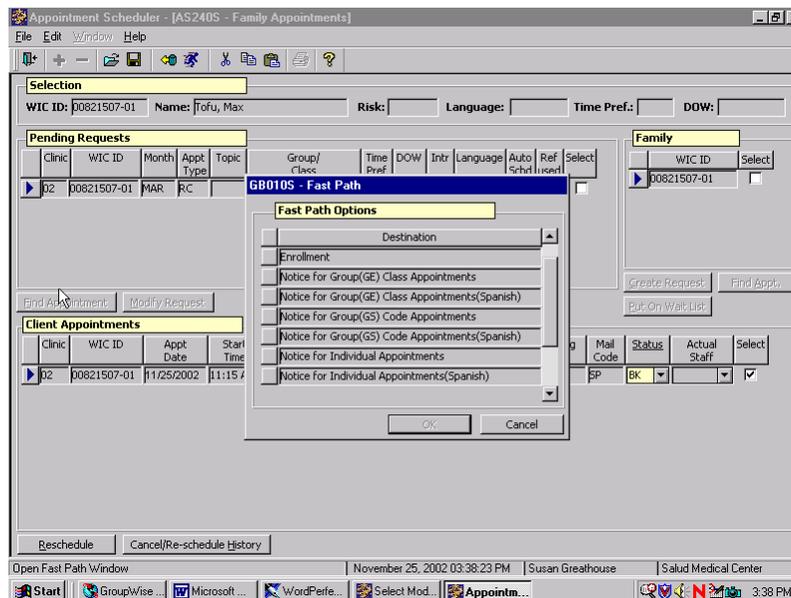

Figure 11: "Fast Path" for Appointment Notices

4.   **Click on correspondence type** and the system will retrieve the information and display the selected appointment correspondence.

5.   If the information is correct, press the print icon and print the notice. This will return you to the **Family Appointment Record.**

Practice Activity #2

The starting point for this section is:
        Appointment Scheduler ÷ Family Appointment Record

1.   Select the Client from your K Activity Sheet.
2.   Select the booked appointment from the "Client Appointments" section of the screen.
3.   Click on "Fast Path" icon.
4.   Click on "Notice for Individual Appointment".
5.   View the appointment notice.
6.   To help save trees – Do not print the notice.
7.   Exit the window.

ℵ Notes:

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