Chapter 4: Appointment Scheduler
Section 8: Wait List
Lesson: Wait List

Objectives:

Upon completion of this lesson the user will be able to:
*   add clients to or remove clients from a waiting list;
*   accurately interpret the policies related to the different types of waiting lists;
*   access and interpret the reports related to wait lists; and
*   understand, use and maintain priority ineligible and appointment needed wait lists.

Oregon Policies:

◆   475 Local Agency Operations – Waiting List

Overview:

There are times in the WIC clinic when you have a new or existing client who needs an appointment but you currently have none available, when you have exceeded your maximum caseload and cannot serve any new clients, or when certain priorities are not being served. The wait lists in TWIST allows you to track these clients, keep records on their wait list activities, and more.

The Wait Lists interfaces with the rest of the Appointment Scheduler functions, so a waiting list client can be scheduled for an appointment manually or even set up with a request so the automatic scheduler will schedule the appointment.

There are two types of wait lists in the TWIST system, Appointment needed and Priority ineligible. A client can be placed on the priority ineligible wait list if, during certification, the system determines that the category and priority the client falls under are currently frozen, or when a client applies for WIC or transfers into the clinic and the clinic is at a maximum caseload. The appointment needed wait list is for clients who need an appointment as soon as possible and are willing to come in at a moment's notice. This helps use up those appointment slots that are canceled at the last minute and allows you to better serve those who are in need of an appointment.

Instruction:

Placing Clients on the Waiting List

The starting point for this section is:

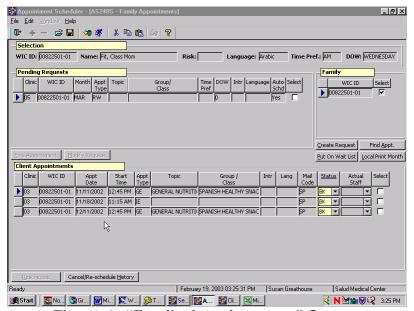Appointment Scheduler ➪ Scheduling ➪ Family Appointment Records

Figure 1: "Family Appointments" Screen

♫ NOTE: Please refer to Chapter 4, Lesson 400 *Family Appointment Record* for further information on this screen.

1. **Retrieve the client you want to place on the waiting list.**

2. **In the "Family" section, click the "Select" check box corresponding to the client you wish to place on a wait list.**

3. **Click the "Put on Wait List" button.**

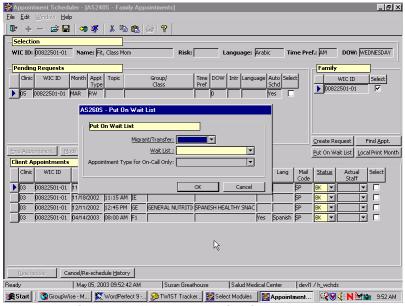   This brings up the "**Put on Wait List**" pop-up.

Figure 2: "Put on Wait List" Pop-Up

? NOTE: This pop-up is also accessible from the "WIC Intake" tabs in the screen in "Enrollment" and "Prescreen."

4. **Select the appropriate response in the "Migrant/Transfer" field.**

- "**Migrant**" designates the client is a migrant.
- "**Transfer**" indicates that the client is transferring into this clinic.
- "**None**" indicates that the client is neither a migrant nor a transfer.

5. **Tab to the "Wait List" field and select from the drop down list.**

5.1 "**Priority ineligible**" wait list is used:

- when the client is being certified, it is determined that the category and priority the client falls under is currently frozen; or
- when a client comes into or transfers into the clinic and the clinic is at a maximum caseload; and
- when the client has no current certification date.

5.2 "**Appointment needed**" (Appointment Needed) wait list is used for those who need an appointment but none are available.

6. **Tab to the "Appointment Type" field and select the appointment type needed.**

   This field is only activated if the "**Wait List**" field is populated with "**Appointment needed**."

7. **Click the "OK" button**

   This places the client on the wait list and closes the pop-up. Click "**Cancel**" to close the pop-up without saving any information or placing the client on a wait list.

8. **Exit.**

Removing Clients from the Waiting List

The starting point for this section is:
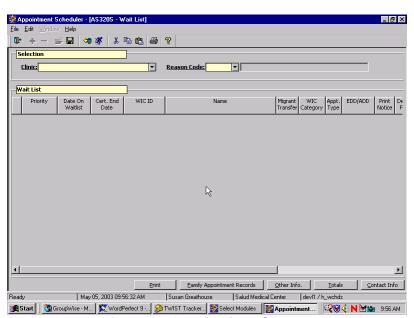Appointment Scheduler ⇨ Wait List ⇨ Wait Lists

Figure 3: "Wait List" Screen

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

2. **Tab to the "Reason Code" and select which wait list you wish to view from the drop down list.**

   Once the Reason Code has been selected, the system automatically displays the results, if any, in the Wait List section.
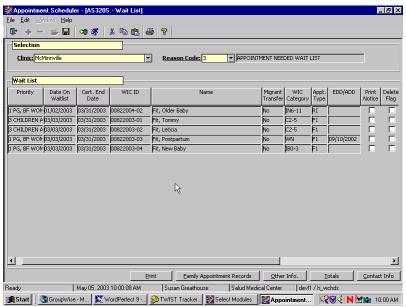
Figure 4: "Wait List" Screen with Clients

2.1   "**Priority**" displays the client's WIC priority code. Clicking on the column heading will resort the list.

2.2   The "**Date on Wait list**" field displays the date on which the client was first placed on the wait list. Clicking on the column heading will resort the list.

2.3   The "**Cert. End Date**" field displays the ending date of the client's certification period, if applicable.

2.4   "**WIC ID**" displays the client's WIC ID number.

2.5   The "**Name**" field displays the client's name.

2.6   The "**Migrant Transfer**" field displays either an "**M**" for a migrant, "**T**" for a transfer or blank for neither.

2.7   "**WIC Category**" displays the client's WIC category.

2.8   The "**Appt. Type**" field displays the appointment type needed by the client, if the client is on the Appointment needed wait list.

2.9   "**EDD/ADD**" displays the client's estimated due date or actual due date, if applicable.

2.10   The "**Print Notice**" check box is used to select clients for whom you wish to print notices.

2.11   The "**Delete Flag**" check box, when checked, removes the client from the wait list.

2.12   "**Notes**" displays any notes about this client. Double click the field to bring up the notes pop-up to add or modify notes.

2.13   Clicking on the "**Family Appointment Records**" button takes you to the "Family Appointment Record" screen to schedule an appointment or create a request for future appointments. Once an appointment has been booked, the client is removed from the wait list.

♫   NOTE: The appointment booked must match exactly the appointment type for that client indicated on the wait list for TWIST to remove the appointment from the wait list. If, for example, the Wait List shows an "RI" appointment type and the user books an "RC" appointment for that client, TWIST will not delete the "RI" appointment from the Wait List.

3.   **Click the "Delete Flag" check box for the client you wish to remove from a wait list.**

Client will be removed from the wait list once you save.

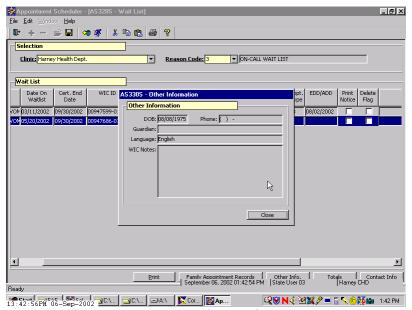4.   **Click the "Other Info" button for more information about the client.**

Figure 5: "Other Information" Pop-Up

4.1   The "**DOB**" field displays the client's date of birth.

4.2   The "**Phone**" field displays the client's phone information.

4.3   The "**Guardian**" field displays the client's guardian name, if applicable.

4.4   The "**Language**" field displays the spoken language of the client, as entered in the "Client Primary" screen.

4.5   "**WIC Notes**" displays any notes from the client's record.

5.   **Click the "Close" button.**

Managing Waiting Lists

At times it will be helpful to see how many clients are on the wait lists. You may also want to review your success at contacting clients on the wait lists. The "Totals" button and "Contact Info" button can help you.

1.   **Click the "Totals" button for information about the total number of people on the selected wait list.**
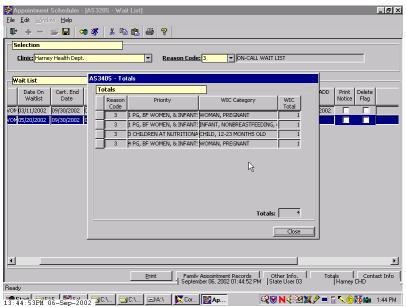
Figure 6: "Totals" Pop-Up

1.1   The "**Reason Code**" field displays the reason code of the selected wait list.

1.2   The "**Priority**" field displays how many clients in each priority are on the selected wait list.

1.3   The "**WIC Category**" field displays how many clients in each category are on the selected wait list.

1.4   The "**WIC Total**" field displays the total number of clients in the agency on the wait list broken down by priority by category.

1.5   The "**Totals**" field displays the grand total of all clients in the agency on the selected wait list.

2.   **Click the "Close" button.**

3.   **Click the "Contact Info" button to track attempts to contact the client and record their responses.**
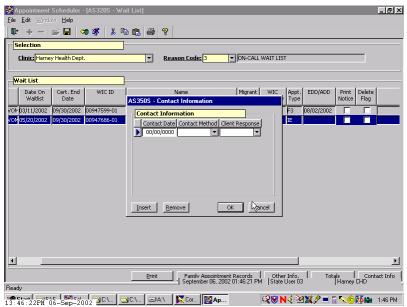
Figure 7: "Contact Information" Pop-Up

3.1   The "**Contact Date**" indicates the date contact was made with the client.

3.2   The "**Contact Method**" indicates the method used for contacting the client.

3.3   The "**Client Response**" when selected from the drop down list, indicates the client's response (positive or negative) to the contact.

3.4   Clicking the "**Insert**" button creates a new row for adding another wait list contact.

3.5   Clicking the "**Remove**" button brings up the message: "*Are you sure you wish to remove this row?*" Clicking "**Yes**" removes the row. Clicking "**No**" returns the user to the pop-up without removing the row.

3.6   Clicking the "**OK**" button saves the entered information and closes the Contact Information pop-up.

4.   **Click the "Cancel" button to close the pop-up without saving any changes.**

5.   **Save and exit.**

Viewing the "Appointment Needed Waiting List Client Register"

The "Appointment Needed Waiting List Client Register" is a listing of all clients on the appointment needed wait list, complete with phone numbers.

The starting point for this section is:
Appointment Scheduler ⇨ Output ⇨ Wait Lists⇨Wait List Client Register

1. **Select the "Clinic" from the drop down list or leave the field blank to run the report for all clinics within your agency.**

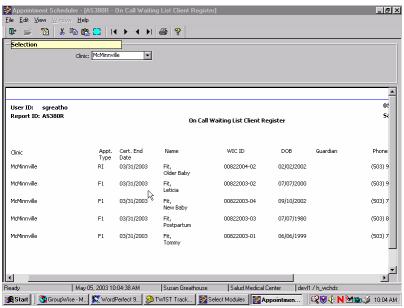2. **Click the "Run" icon on the menu bar to produce the report.**

Figure 8: "Appointment Needed Waiting List Client Register"

2.1   "**Clinic**" displays the client's clinic.

2.2   "**Appt. Type**" displays the type of appointment that the client needs.

2.3   "**Cert End Date**" displays the date the client's current certification ends.

2.4   "**Name**" displays the client's name.

2.5   "**WIC ID**" displays the client's WIC ID number.

2.6   "**DOB**" displays the client's date of birth.

2.7   "**Guardian**" displays the name of the client's guardian, if applicable.

2.8   "**Phone**" displays the client's phone number.

2.9   "**Phone Type**" displays the type of phone associated with the client's phone number.

2.10   "**Date added to WL**" displays the date the client was put on the wait list.

3.   **Exit.**

♫   NOTE: To print Reports, click the "**Print**" icon in the top tool bar.

Viewing the Priority Ineligible Waiting List Summary

The "Priority Ineligible Waiting List Summary" produces totals of all clients on the "Priority Ineligible" wait list with the totals broken down by clinic and WIC category.

The starting point for this section is:
Appointment Scheduler ⇨ Output ⇨ Wait Lists ⇨ Wait List Summary (Priority Ineligible).

1.   **Select the "Clinic" from the drop down list or leave the field blank to run the report for all clinics within your agency.**

The "Agency" field is protected and defaults to your agency based on your logon.

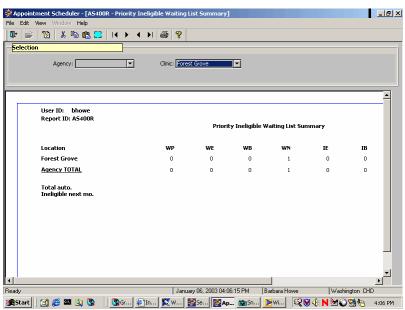2.   **Click the "Run" icon on the menu bar to produce the report.**

Figure 9: "Priority Ineligible Waiting List Summary"

2.1   "**Location**" displays the clinic locations.

2.2   "**WP:WE:WB:WN:IE:IB:IN:C**" displays the WIC Categories
          with the number of clients in each category on the wait list.

2.3   "**Total**" displays the total accumulation of all the clients in all
          the categories within the clinic.

2.4   "**Agency Total**" displays the totals for the entire agency.

2.5   "**Total auto ineligible next mo.**" displays the total number
          of clients for that agency that are due to be automatically
          terminated next month, broken down by category.

3.   **Exit.**

♫ NOTE: To print Reports, click the "**Print**" icon in the top tool bar.

Viewing the Appointment Needed Waiting List Summary Report

The "Appointment Needed Waiting List Summary" produces totals of all clients
for each clinic who are on the appointment needed wait list, with the totals broken
down by appointment type needed.

The starting point for this section is:

Appointment Scheduler ⇨ Output ⇨ Wait Lists ⇨ Wait List Summary (Priority Ineligible).

1.   **Select the "Clinic" from the drop down list or leave the field blank to run the report for all clinics within your agency.**

The "**Agency**" field is protected and defaults to your agency based on your logon.

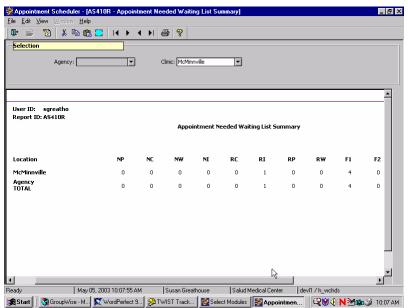2.   **Click the "Run" icon on the menu bar to produce the report.**

Figure 10: "Appointment Needed Waiting List Summary"

2.1   "**Location**" displays the clinic's location.

2.2   "**NP:NC:NW:NI:RC:RI:RP:RW:F1:F2:F3:IE**" displays the Appointment Types with the number of clients needing that specific appointment type.

2.3   "**Total**" displays the total accumulation of all the clients in all the appointment types within the clinic.

2.4   "**Agency Total**" displays the totals for the entire agency.

3.   **Exit.**

♫   NOTE: To print Reports, click the "**Print**" icon in the top tool bar.

➥ *Practice Activities:*

The starting point for this activity is:
    Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

1.   Search for, retrieve, and return to the "Family Appointment Records" screen with your client.
2.   Select your client in the "Family" section.
3.   Click the "Put on Wait List" button.
4.   Add your client to the appointment needed wait list, and select the appropriate appointment type for them.
5.   Click "OK."
6.   Exit.
7.   Now go to the next starting point: Appointment Scheduler ⇨ Wait List ⇨ Wait Lists.
8.   Select "Clinic" from the drop down list.
9.   Select "Appointment needed Wait List."
10.   Click "Contact Info" button.
11.   Enter today's date in the "Contact Date" field.
12.   Select "Phone" from the "Contact Method" field drop down list.
13.   Select "Positive" from the "Client Response" drop down list.
14.   Click "OK."
15.   Save.
16.   Exit.
17.   Go to the next starting point: Appointment Scheduler ⇨ Output ⇨ Wait Lists ⇨Wait List Client Register.
18.   Select your clinic from the drop down list.
19.   Run the report.
20.   Exit.

✔ *Skill Check:*

Now, it's your turn to show what you have learned about wait lists. Use your ☛ Activity Sheet for this practice.

The first client is a four-year-old child who comes into your clinic. Your agency is not currently serving four year olds, but the child's mother wants you to put the child on the wait list anyhow. Place the client on the appropriate wait list. Later that week, your agency is given additional caseload from the state WIC office so now you may serve all priorities. Run the report that would be needed to view how many clients are currently waiting to be enrolled. Make a screen print. Write your name on it and turn it in to the instructor.

✍ Notes:

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