



Section 3: Appointment Schedule and Caseload Management

Overview

Assessing your agency's appointment scheduling needs during eWIC conversion and implementing any necessary modifications before conversion occurs will help to assure a smooth transition to eWIC for staff and participants. Anticipating and planning for these appointment scheduling changes will also assist with caseload management to assure that the number of participants served does not decrease.

This section of the toolkit provides you with information about adjusting your appointment schedule before and during conversion to help minimize the impact on caseload and clinic flow. Remember you will be working with dual systems in TWIST during the months of eWIC conversion. Part of your caseload will be on vouchers, part will be using the eWIC card.



Have you viewed the “*Appointment Scheduling and Caseload Management*” webinar?

Appointment schedule adjustments before conversion

In the months before your agency converts to eWIC you will want make adjustments to your Appointment Schedule so that staff have time to:

- View the eWIC Webinars (See the eWIC [Webinar Overview](#) for suggested audiences)
 - At a minimum, each agency WIC Coordinator or their designee must view all the webinars.
 - All staff are required to view the following four webinars prior to attending face-to-face training: *eWIC Basics*; *eWIC in TWIST*; *Conversion Plan and Participant Notification*; and, *Vendor Perspective and Shopper Education*.

- Discuss Clinic Readiness and make Clinic Flow decisions (See Section 4) – All staff
- Review eWIC policy changes (See Section 9) – All staff
- Attend the one day face-to-face eWIC training– Required for all staff
- Attend eWIC Vendor training and shopping demonstration– One or two staff
- Access the TWIST Practice Database via Citrix – All staff

If your agency currently schedules regular staff meetings, you may want to consider dedicating a specific amount of time at each meeting for eWIC planning and preparation. If your agency does not currently schedule regular staff meetings, you may want to consider doing so. The amount of time needed for staff meetings will be dependent on which planning and preparation activities will be done independently or as a group.

Activity: Review of appointment scheduling

- Review the recommended [eWIC Readiness Timeline](#).
- Review your current Appointment Schedule between now and the date your agency converts to eWIC.

Questions for Consideration

- What time is already built in to the Appointment Schedule for staff meetings?
- What adjustments need to be made for the eWIC planning and preparation time staff will need?
- Which planning and preparation activities will be done in a group vs individually?
- How will these adjustments be made so they minimize the impact on caseload?

Coordination of family appointments and voucher issuance for conversion

As illustrated in the Conversion Section of the CeRT, existing WIC participants will be able to convert to eWIC when they don't have vouchers printed for future months. WIC participants in a family have to be converted together at the same

time, they cannot be converted independently. There may be special situations that will require careful planning, such as formula warehouse orders, breastfeeding multiples, or high risk participants. Therefore, it will be crucial to coordinate existing family appointments as much as possible.

Example: The Seaside Family

Your agency is scheduled to convert to eWIC in June. In the family below, Samantha has vouchers printed for June and July, and Sasha has vouchers printed just for June. The Seaside’s will need to wait to begin using eWIC until August because Samantha already has vouchers printer for July. When Sasha is recertified in June, she should be issued only one month of vouchers so the family can convert together. At Samantha’s appointment in July, they will be issued an eWIC card and eWIC benefits for August and beyond.

Family Information

Family ID: 00753245

ID	Name	DOB	Clinic	Cat	Status	Start Date	End Date	Risk	Wait	Last FI	Print Month Reason
01	Samantha A Seaside	12/01/1986	01	WP	EN	11/02/2012	07/31/2013	M	N	07/01/2013	
02	Sasha A Seaside	07/01/2009	01	C2-5	EN	01/06/2013	06/30/2013	L	N	06/01/2013	

Appointment/FI Schedule

ID	Name	Jun-2013			Jul-2013			Aug-2013			Sep-2013			Oct-2013	
		Appt	Fd Pkg	Fi	Appt	Fd Pkg	Fi	Appt	Fd Pkg	Fi	Appt	Fd Pkg	Fi	Appt	Fd Pkg
01	Samantha		101-19 WPB	P	RW-r	101-19 WPB	P								
02	Sasha	RC-r	101-13 C	P											

Questions for Consideration

- How are staff currently coordinating family appointments to make sure all members of the family are in the same sequence of voucher issuance?
- How will you assure all family members will be able to convert to eWIC together?

Appointment schedule during conversion for existing participants

Most likely, existing participants will be converted to eWIC during a recertification or second nutrition education appointment. Review the information below as your agency decides how existing participants will convert. These decisions will determine what adjustments need to be made to the Appointment Schedule.

Recertification and Individual Second Nutrition Education Appointments

The amount of time for existing participants to convert to eWIC during a recertification or individual second nutrition education appointment will probably take about 10 minutes longer per family. Refer to CeRT Section 2 – *Conversion and Participant Notification* for what must happen when you convert an existing family to eWIC. More information about staffing patterns is in CeRT Section 4: Clinic Flow.) Longer appointment times can impact the number of appointments available during a typical clinic day. This affects the ability to maintain assigned caseload. See Policy 325 Caseload Management for ideas on increasing the number of available appointments per day. Click [here](#) for Appointment Template Modification suggestions for eWIC.

Questions for Consideration

1. What adjustments need to be made to your scheduling template to accommodate longer recertification and individual education?
2. How will you maintain the number of appointments needed per day in order to maintain caseload?

Second Nutrition Education – Groups

Your agency may want to use a group setting when converting existing participants to eWIC during their second nutrition education appointment. A group session guide titled “eWIC – It’s EASY!” will be developed to provide eWIC education in a group setting. If using groups for second NE during conversion, staff will still need to access each participant’s record in TWIST to



complete all required conversion tasks, including entering cardholder data and verifying or modifying the participant’s food package.

The “eWIC – It’s EASY” group session guide, PowerPoint slides, and sample materials will be posted on the Oregon WIC website.

Questions for Consideration

- What adjustments need to be made for recertification and individual appointments for existing participants during the months of conversion?
- For low and medium risk participants coming in for Second Nutrition Education during conversion, will you offer individual appointments, group appointments or both?
- If using groups, how will participant records be accessed in TWIST?

Appointment Schedule During Conversion for New Participants

Appointment times for new participants will probably remain the same as they are now for your current certification appointments. The amount of time spent explaining eWIC to new participants should be about the same as the amount of time currently spent explaining how to use WIC vouchers. However, during the first month few months of conversion, your agency may want to allow an extra 5 to 10

minutes with new participant certifications as staff become familiar with eWIC and adjusting to potential changes in clinic flow.

Questions for Consideration

- What adjustments need to be made to certification appointments for new participants?



✓ Task Checklist:

- ✓ Make adjustments to your agency's Appointment Schedule for staff planning and preparation, viewing required webinars, and attending required face-to-face training prior to eWIC conversion.
- ✓ Make adjustments to your agency's Appointment Schedule which allow time for the required tasks that need to be done during the month(s) of eWIC conversion.