

😊 Job Aid: Scheduling Clients with Language Needs

Chapter 4: Appointment Scheduler Section 3: Automatic Scheduler — Special User

General Rules	Manual Schedule	Auto Scheduler
<ul style="list-style-type: none"> ➤ <i>If an individual appt:</i> System compares client’s spoken language from Client Primary and matches to staff language as defined in Ops/Mgmt., Staff Information section ➤ <i>If a group appt.:</i> Matches client spoken language to language of group class or screening. ➤ <i>Language preference:</i> You can “override” the spoken language in Client Master by selecting a language as an appt. “preference” when making an appt. request or finding an appt. (e.g. Client usually prefers Spanish but could attend a cooking class taught in English). 	<ol style="list-style-type: none"> 1. For Individual and Group Appts: <ul style="list-style-type: none"> ➤ <i>If there is a language match</i> the system will indicate the by putting “yes” in “Lang. Match” field on “Find Appt.” screen. ➤ <i>If no language match</i>, system will put a “no” in the “Lang. Match” field, but allow you to book appt. When you return to Family Appt Record, appt. line will display a “yes” in “Intr” column and the language needed in the “Lang” column. 2. When setting up Group Appts.: <ul style="list-style-type: none"> ➤ <i>If no language match</i>, you will get an error message if you try to schedule a class with a staff person who doesn’t speak the language that the class will be taught in, but system will still allow you to schedule it. 	<ol style="list-style-type: none"> 1. For Individual Appts: <ul style="list-style-type: none"> ➤ <i>Auto Scheduler try to match language</i> of client to language of staff person – it will look first to match language preference; if none, it will schedule according to client’s spoken language from Client Primary. ➤ <i>If no language match available</i> and interpreter field does not say “yes”, auto scheduler will not schedule appt. and will put client on “unable to schedule” report. ➤ <i>If two family members have conflicting spoken languages</i>, auto scheduler will not schedule appt. and will put client on the “unable to schedule” report. 2. For Group Appts: <ul style="list-style-type: none"> ➤ <i>If language match</i> between client’s spoken language and language of class requested, auto scheduler will schedule client into class. ➤ <i>If no language match</i>, conflicting language preferences for family members or client is marked as “interpreter needed,” auto scheduler won’t schedule into group appt. and will put client(s) on “unable to schedule” report.

Scheduling Options when an Interpreter is Needed:

Manual Schedule	Auto Scheduler	Pseudo Staff person
<p>You can make all “interpreter needed” appts. manual schedule only and run the “Interpreter Needed” report to see which clients need appts. for that month.</p> <ul style="list-style-type: none"> ➤ You will need to train users to always change “auto schedule” in appt. request to “no” when making appt. requests for clients needing interpreters. ➤ You can then manually schedule clients into appts. for times when you have interpreters available. (Be sure, however, that you have coded enough “manual schedule only” appt. slots into your schedule templates.) 	<p>When you run the auto scheduler, it looks for appts that have “interpreter – yes” and auto schedule “yes” indicated and schedules those clients with English-speaking certifiers.</p> <ul style="list-style-type: none"> ➤ You can then print out a report which shows all the appointment dates and times for clients for that month with interpreter needed marked “yes”. ➤ Then you can either schedule interpreters for each appt. or reschedule and group those clients to make better use of interpreter time. 	<p>When setting up staff in Ops./Mgmt., you have the option of creating a “pseudo staff person” that can be used to group interpreter needed appts.</p> <ul style="list-style-type: none"> ➤ For example, you could create a pseudo staff person who only “speaks” Vietnamese. When you set up your template, only schedule your Pseudo Vietnamese staff person for times when you have a Vietnamese interpreter available. The auto scheduler will put clients whose spoken language is Vietnamese in the appt. slots you open for this “staff”. ➤ You will also need to have an actual certifier scheduled for the same times as the pseudo staff person (set daily clinic schedule for actual staff person for non-clinic activities for those times so you don’t double-book).