

Chapter 4: Appointment Scheduler

Section 1: Scheduler Basics

Lesson: Special User – Introduction to Appointment Scheduler

Objectives:

Upon completion of this lesson the user will be able to:

- identify and explain various appointment scheduler terminology and codes;
- choose appropriate appointment codes for a given local agency situation;
- assign time durations to all appointment types, and
- define agency time preferences for AM, PM and Eve appointments

Oregon Policies:

- ◆ 606 TWIST Minimum Scheduler Usage

Overview:

Efficient appointment scheduling is the backbone of a well-run WIC clinic. The appointment scheduler is flexible, efficient and user friendly. The scheduler provides for all of the scheduling needs of any WIC clinic, including individual and group scheduling, re-scheduling, documentation of appointment attendance, automatic scheduling, appointment notification, and a wait list.

The focus of this lesson will be appointment types and appointment type durations (how long a specific appointment will be).

Instruction:

Understanding Basic Appointment Types

There are seven basic two character appointment types:

- **New appointments** start with an “**N**” and include the category in the type. For example, “**NC**” means “new child” appointment.
- **Recertification appointments** start with an “**R**” and include the category in the type. For example, “**RI**” means “recertify infant” appointment.
- **Follow-up appointments** start with an “**F**.” There are 3 follow up appointments, type 1, 2, and 3. The meaning of these appointments is defined by each local agency.

- **Mid-certification health assessment appointments** start with an “**M**” and include mid-cert appointments for infants, breastfeeding women and children with year certifications.
- **Group appointments** start with a “**G**.” There are 2 group appointment types “group screen” (GS) and “group education” (GE).
- **Individual education appointments** start with “**I**.” “IE” means “individual education.” The “IE” appointment type replaces the old use of a “follow-up” appointment to provide nutrition education to individuals rather than groups.
- **Food instrument pick-up appointments** start with “**P**” for pick-up.

☺ **See Job Aid “Appointment Types” for more information.**

The starting point for this section is:
Appointment Scheduler ⇒ Tables

The duration defines the length of time your agency will set aside for each appointment type. All appointment types, except generic appointment types, must have a duration assigned to them. The appointment type duration table is set up and maintained by each local agency, since the duration for each appointment type is not consistent statewide.

1. **Select “Appointment Type Duration.”**

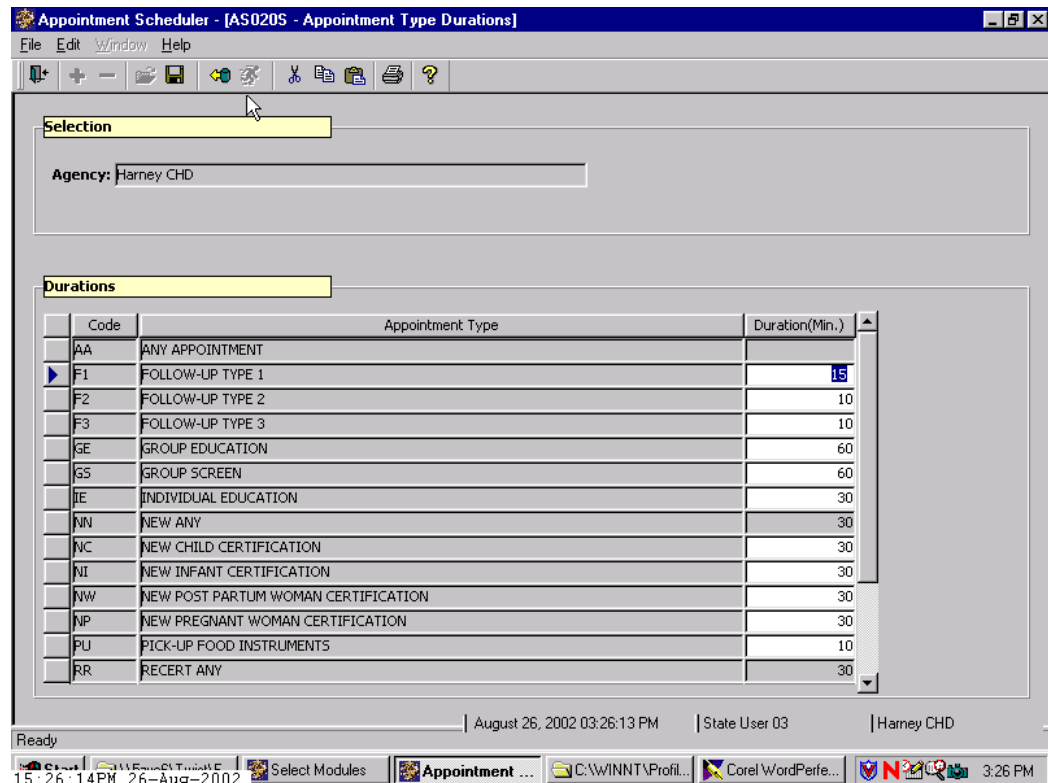


Figure 1: “Appointment Type Duration” Table

2. **Enter the duration for each appointment type in minutes using numerals only.**
3. **Exit.**

🎵 **NOTE:** There will be three appointment types for which you will not be able to enter a duration: AA, RR and NN. These are generic appointment types and will be explained in the next section.

Understanding Generic Appointment Types

The starting point for this section is:

Appointment Scheduler ⇒ Tables ⇒ Generic Appointment Types

When setting up templates to create daily clinic schedules it is necessary to indicate which appointment type can be scheduled in each time slot. Using only specific appointment types (anything except AA, NN, RR) in a time slot would mean that in order for a client’s appointment to be able to be scheduled into that slot it would have to be an exact match to the one the client needs.

In order for the system to be flexible there are “generic” appointment types. These are indicated by the “**is generic**” check box located in the appointment types base table. Generic appointment types remove the category requirement from the regular appointment types for recertification and new to create two generic types RR (any recert) and NN (any new) that will work for any category. The third generic type, AA (any appointment) removes the type and category requirement to create a generic slot that will work for any new or recert appointment for any category.

♪ NOTE: Generic appointment types are used for creating time slots for schedule templates only and are never seen in a client’s appointment record.

Each local agency will determine which regular appointment types can be slotted into times containing generic appointment types. For example,

- RR (any recert) could mean any combination or all of the recertification appointment types regardless of category.
- NN (any new) could mean any combination or all of the new appointment types regardless of category.
- AA (any appointment) could mean any combination or all of both recertification and new appointment types regardless of type or category.

See the scheduling examples below.

Example A limits what category of new or recertification appointment can be scheduled any a given time. This means when the system looks for an appointment for a client it will ignore any open appointments that do not exactly match the client’s appointment type and category.

Example A

8:00 NW
8:30 RI
9:00 NC
9:30 RW
10:00 NI

Example B limits only when new appointments and recertification appointments can be scheduled and does not care about category. When the system looks for an appointment for a client it will ignore any open appointments that do not match the type of appointment the client needs (recert or new), but will disregard the category.

Example B

8:00 NN
8:30 RR
9:00 NN
9:30 RR
10:00 NN

Example C does not limit by type or category. When the system looks for an appointment for a client it will find all of these appointments to be available for any new or recertification appointment regardless of category.

Example C

8:00 AA
8:30 AA
9:00 AA
9:30 AA
10:00 AA

♪ NOTE: It is up to each individual agency to determine which (if any) generic appointment types will be used and what regular appointment types will be included in each generic type. Once set, generic appointment types apply to the whole agency and cannot be customized for each clinic within that agency

You will now be associating regular appointment types with generic types.

- All regular appointment types you associate with a particular generic type must have the same duration. For example, if you want to associate RC and RI with generic type RR, both RC and RI must have the same duration.
- Before beginning this exercise check the appointment type duration table to ensure that appropriate times are entered.

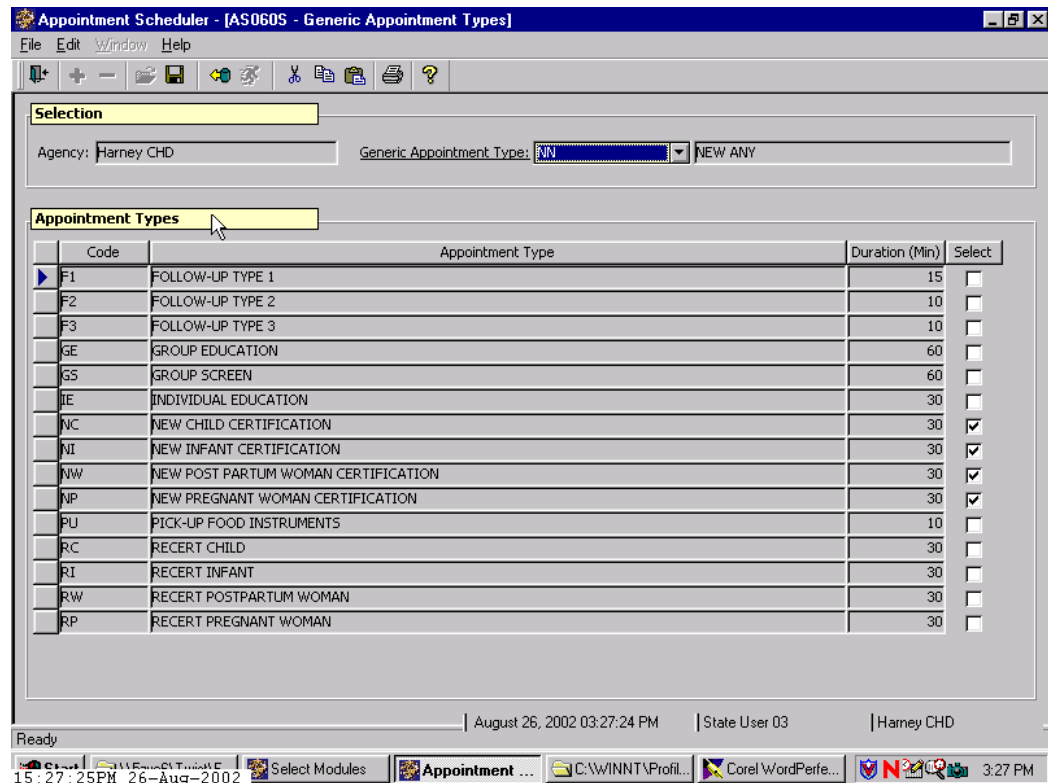


Figure 2: “Generic Appointment Type” Table

1. In the selection area, click the drop down list on “Generic Appointment Type.”
2. Select “AA (any appointment).”
3. In the appointment types area, click the select box beside each appointment type you want to include in the AA type.
4. Save.

Set Time Preferences

The starting point for this section is:
Appointment Scheduler ⇒ Tables

The Time Preferences Table is used to specify how your agency chooses to define the “AM”, “PM” and “EVE”. For example, one agency might call any appointment after 4:00 p.m. and “evening” appointment, while another agency might prefer to start “evening” appointments at 5:00 p.m. The Appointment Scheduler uses this table when it matches appointment requests with time preferences indicated.

♪ NOTE: Time preferences can only be set for the whole agency, not for each individual clinic.

1. **Select “Time Preferences” from the drop-down list of tables.**
2. **Enter the start time and end time for each time preference.**
3. **Click “OK” and exit.**

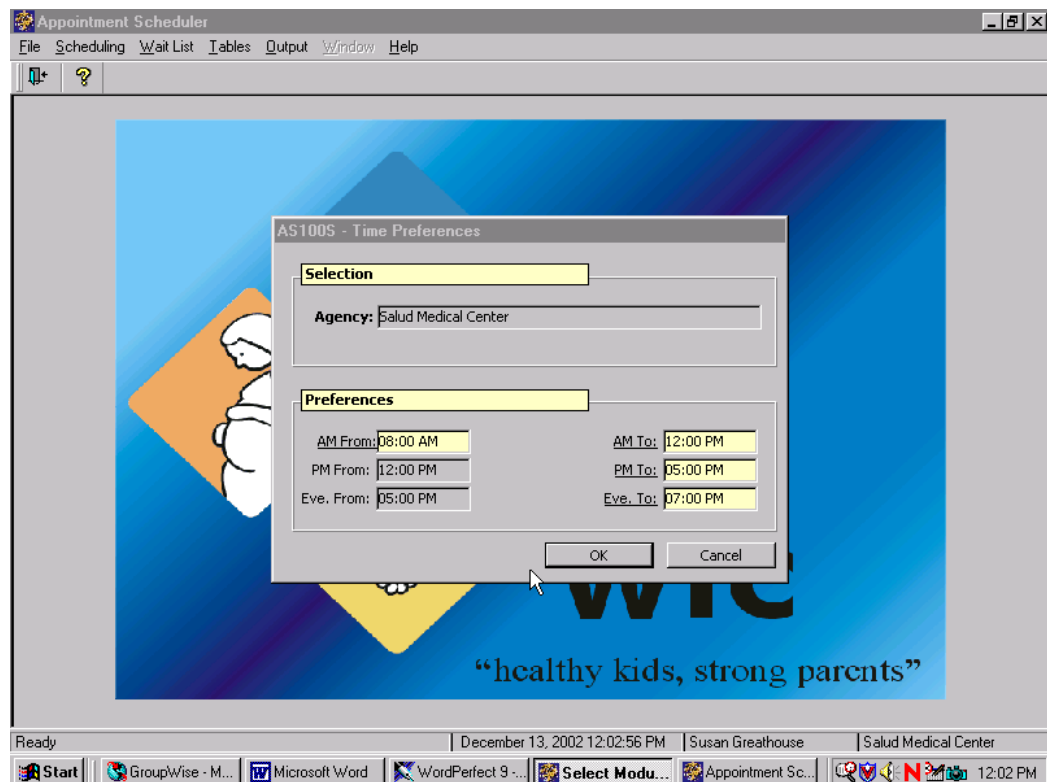


Figure 3: “Time Preferences” Table

Notes:

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