

Chapter 4: Appointment Scheduler

Section 3: Automatic Scheduler

Lesson: Special User – Automatic Scheduler

Objectives:

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

- explain the basic functionality and potential use of the Automatic Scheduler and how it is linked to the client record; and
- use the automatic scheduler.

Overview:

Automatic scheduling is a feature of the TWIST appointment scheduler that allows you to give a client a “request” for an appointment for some month in the future that is then “booked” to a specific date and time when the automatic scheduler is run. This feature can be used to schedule individual appointments, including follow-up and FI pick-up appointments, group education/class appointments, and group screening appointments.

The automatic scheduler will go through a sort order as defined by the State that schedules the highest priority and most complicated appointments first. This is not an interactive process. The user must make a “request” for TWIST to run the auto scheduler, which is run as part of End of Day processes.

Instruction:

Automatically Scheduling Appointments

The starting point for this section is

Appointment Scheduler ± Scheduling ± Automatic Scheduler

This is the screen that you use to request an Auto Scheduler run.

1. **Click in the “Clinic” field.**

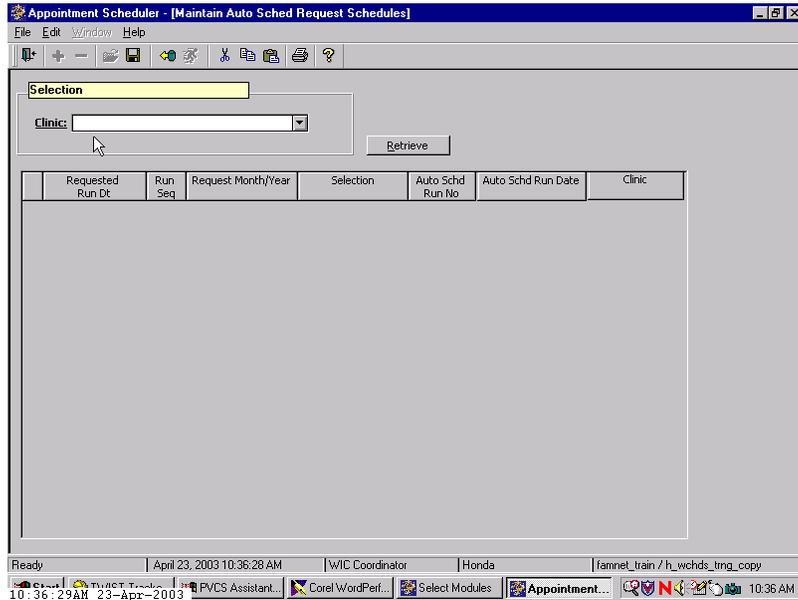


Figure 1: “Maintain Auto Scheduler” Requests

2. **Select the clinic for which you want to run the Auto Scheduler**
If you leave the “Clinic” field blank, screen will display requests for the entire agency. You cannot enter information at the agency level, only at the clinic level.
3. **Click the “Retrieve” button to view existing auto scheduler requests.**

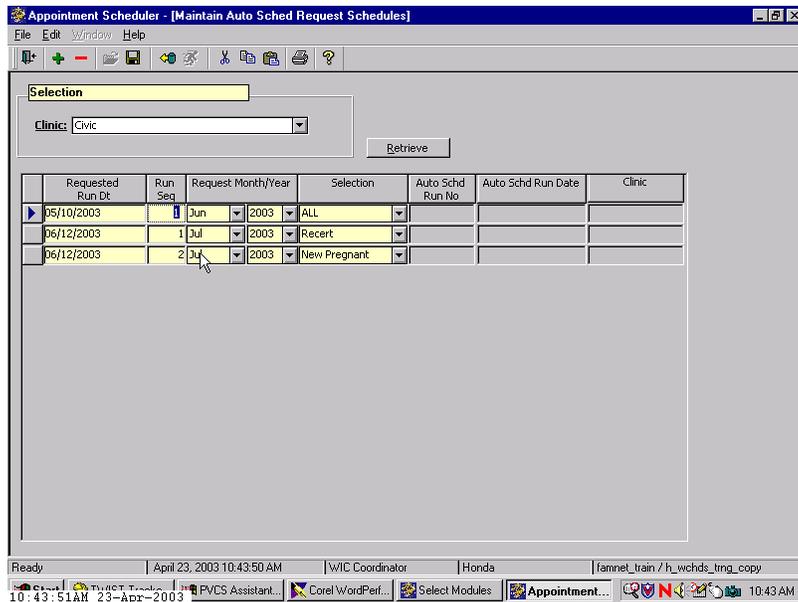


Figure 2: Existing Auto Scheduler Requests” Screen

- 3.1 **Requested Run Date** is the date when you want End of Day to run the auto scheduler.
- 3.2 **Run Sequence** is the order in which you want End of Day to run your requests when you have multiple requests for the same date. You must enter a number in this field.
- 3.3 **Request Month/Year** are drop-down windows where you select the month and year for which you are wanting to schedule appointments.
- 3.4 **Selection** allows you to select a specific type of auto scheduler run.
 - **All** runs auto scheduler for all appointment requests in state-defined sort order. This is the option that you will use most often.
 - **Recert** runs auto scheduler only for recertification appointment requests in the same sort order. This selection could be run first if you are concerned you might not have enough recertification or mid-certification health assessment appointments for the month.
 - **New Pregnant** runs auto scheduler only for new pregnant appointments requests.
 - **Pick Up** runs auto scheduler only for food instrument pick up appointment requests.
 - **Class** runs auto scheduler only for group nutrition education class requests.
 - **Group Screen** runs auto scheduler only for group screening requests.
 - **Wait List** runs auto scheduler only for clients who are on the Appointment Needed wait list.

♪ Note: The autoscheduler will group requests for the appointment types “**MI**,” “**MC**” and “**MW**” with recertification appointment types. This means that if you select “**Recert**” the autoscheduler will attempt to book all “**MI**,” “**MC**” and “**MW**” types appointment requests along with those starting with an “**R**.”

4. **Enter the information for the clinic for which you are requesting an Auto Scheduler run.**

The information on this screen can be modified at any time up until the evening that the auto scheduler is scheduled to run.

5. **Click “Save.”**

6. **To delete an auto scheduler request, select that row and click on the “Remove” icon.**
Once Auto Scheduler has run, the system will fill in the information for the “Auto Schd Run No” and “Auto Schd Run Date”. These rows can be left on screen to provide a history of the Auto Scheduler runs or can be deleted by the user at any time.
7. **To enter information for another clinic in the agency, select that clinic, click the “Retrieve” button, and enter the request information.**
8. **Click “Save” and exit.**

Auto Scheduler Sort Order and Exceptions

Sort Order

The sort order is designed to maximize the auto scheduler’s use of available appointment slots:

- High risk families of 3 with the most complex requests are scheduled first.
- Next all remaining high risk clients are scheduled.
- After this, multiple family members with multiple requests are scheduled, and so on down to individual appointments.
- Group Nutrition Education appointments are scheduled separately.
- The auto scheduler will match first to the exact appointment type if you have specified a non-generic appointment type in your template. When there are no exact matches available, it will match to the appropriate generic appointment type.

Family Size

You can set the maximum family size to either 2 or 3 in the Agency/Clinic Information screen in Operations/Management. The default is three. See this lesson for additional information on setting this field.

- If one client in a family has a request for a high-risk appointment, all family members with requests for that same month will be scheduled as high risk.

Exceptions

There are situations that are “exceptions” where the auto scheduler is unable to match the request criteria to the existing open appointment slots:

- If a family larger than three members has requests in the same month.
- If two or more family members with requests in the same month have conflicting preferences.
- If a participant has both an individual appointment request and group appointment request in the same month.
- If there is no match available for the client’s preferences.
- If the request is marked “Inactive”, the autoscheduler will skip that request and not book it. Inactive requests will not show up on the “**Autoscheduler Unable to Schedule**” report.

Additional Information

- The system has background edits to match the appointment type to the client’s category before it books the appointment, but if the client’s category changes after the appointment request is made or the appointment is booked, the system will not edit.
- The request records for those clients being auto-terminated will be made “inactive” when termination takes place during the End of Day (e.g. missing proofs) or End of Month (e.g. one month past due for cert) processes.
- When searching for an appointment for a client who needs an interpreter, as indicated in their preferences, the system will first search for a staff member whose language matches the client’s needs. If no match can be found, the appointment will be booked with an English speaking staff person and the appointment flagged as “Interpreter needed - Yes”.
- The Automatic Scheduler can be rerun an unlimited number of times.
- An “**Auto Scheduler Unable to Schedule**” report will be created for any appointments with parameters which are unable to be scheduled.

Using the Auto Scheduler Reports

In order for the automatic scheduler to be most useful to you it is important that you take advantage of the “schedule planning” reports TWIST provides. These reports include:

- The “**Projected number of individual appointment requests**” report that will allow you to determine the total number of clients needing an appointment in a given month and allow you to schedule adequate staff to cover the necessary appointments.
- The “**Projected number of group education class requests**” report provides the same information as the “projected number of individual appointment requests” about the number of clients that need a class during a given time period. Again, you will be able to schedule staff to accommodate client needs more efficiently when you know how many clients need a specific class.
- The “**Interpreter needed**” report will provide you with a list of clients due for an appointment who also will be requiring the services of an interpreter. This will allow you to more efficiently utilize your interpreters.
- “**Auto scheduler unable to schedule**” report that lists all those clients that the automatic scheduler was unable to book. This allows you to add additional appointment times that meet the needs of the clients listed on the report and then re-run the automatic scheduler. You can also simply use the report as a list of clients who were not scheduled and then schedule them manually from the list.
- The “**Register of clients to schedule manually**” report will list all those clients that have an appointment request for a given time period to allow you to schedule them all manually.

(See Job Aid “Appointment Scheduler Reports” for more information.

(See Job Aid “Scheduling Clients with Language Needs” for more information.

Using the Auto Scheduler Unable to Schedule Report

The report has several sections that can be reviewed to help with fine tuning your scheduling or re-running scheduler to assure that all participants are scheduled.

1. To view details, you must first select the “Run” you want to see and then select “Retrieve”:

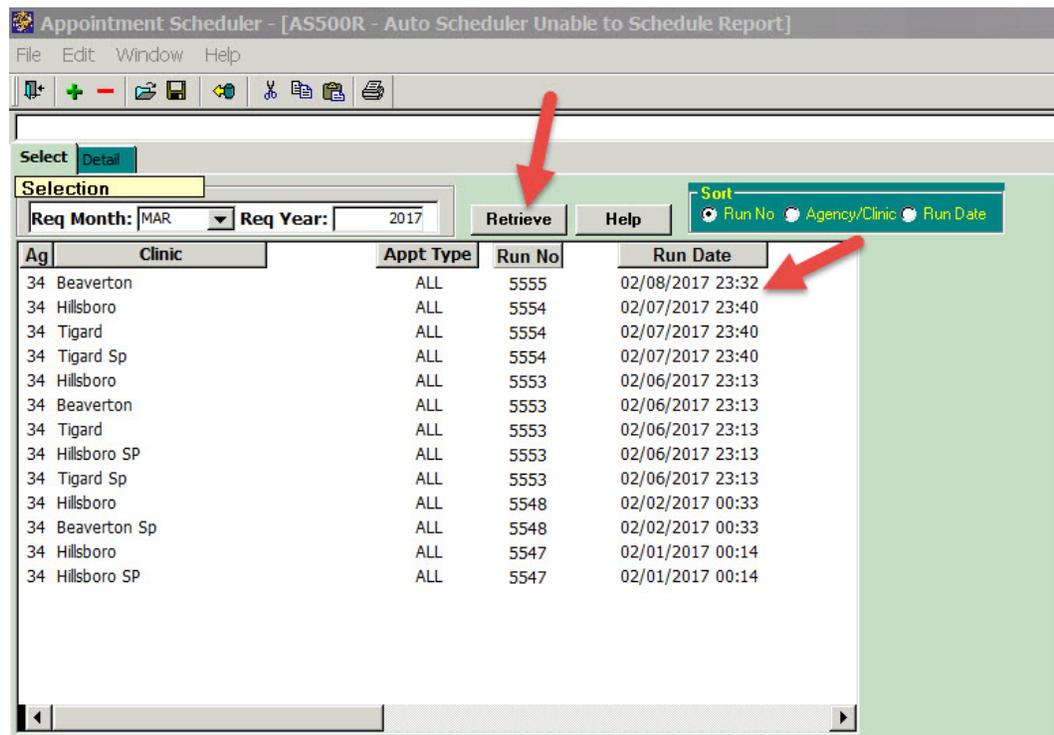


Figure 3: Auto Scheduler Unable to Schedule Report

2. In the “Details” section, you can see 3 tabs.

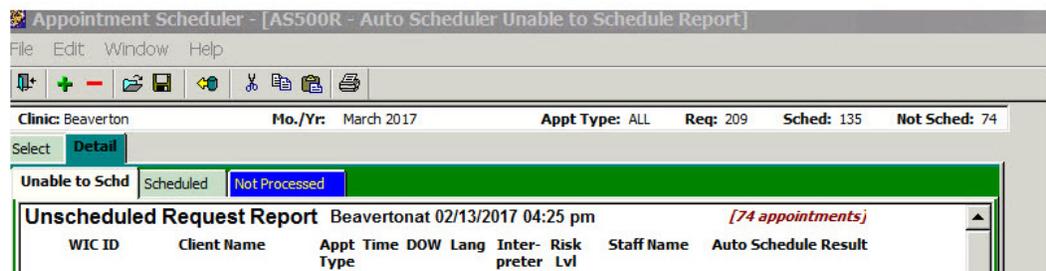


Figure 4: Auto Scheduler Unable to Schedule Report- Details

- **Unable to Schd:** Lists all participants for the run date selected that the auto scheduler could not find an appointment match and why. This is a dynamic report, so as you either manually schedule these participants, or you re-run the auto scheduler and they get scheduled, they will be removed from this tab.
- **Scheduled:** Shows a list of all appointments that were actually scheduled during that autoscheduler run.
- **Not Processed:** *It is important to always review this tab*, as the auto scheduler did not even process these participants for appointments during that run. Reasons for this include that the participant has a request but in either intake or Family Appt. Record, they are indicated as “auto schedule-No” or “Manual only”. Requests highlighted in yellow mean that the certifier made the request after the auto scheduler ran for that month, and so the request could not be made. Sometimes it is not really clear why the participant did not get processed, and you will need to look at the record to determine what needs to happen next.

Tips and Shortcuts

- When the “Appointments Auto Scheduler Unable to Book” report lists the appointments which were not scheduled, it may be faster to change the Daily Clinic Schedule by opening more generic appointments as needed and then proceed with the “Run Selection” process rather than to manually schedule each appointment.
- When making requests for multiple family members, there are some important rules to be aware of for different scenarios:
 - **Requests for different individual appointments for 2 or more family members** (e.g. F1, IE, RC) – TWIST will schedule these on same day within 90 minutes as long as there are appropriate appointment slots available in daily clinic schedule within that time frame.
 - **Requests for more than one appt. type for the same person in the same month** (e.g. request for an IE and a GE, or two RC’s, for the same person) – TWIST will not schedule these and will kick them out to the “Unable to Schedule” report.
 - **Requests for different appt. types, one for each family member, where one is an individual and one is a group, in same month** (e.g. IE and a GE) – TWIST will schedule these,

although not on the same date. (If you are trying to coordinate one family member's individual follow-up with another family member's GE class, you should schedule these manually at cert/recert appointment.)

- **Requests for two different GE classes for two different family members in same month** (e.g. a Prenatal Class for one and a Kids Club for another) – TWIST will not schedule these and will kick out on Unable to Schedule report as “conflicting preferences”. If you want to do this, these should be manually scheduled.
- There are no Fast Paths from the Automatic Scheduler function.

Notes:

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