

## **Chapter 4: Appointment Scheduler**

### **Section 4: Scheduling Appointments**

#### **Lesson: Schedule Appointment Now**

##### **Objectives:**

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

- navigate to the Appointment Scheduler from the Intake functional area and schedule a client two different ways.
- use the “Family Appointment Record” to schedule an appointment.
- schedule an appointment from the Daily Clinic Schedule
- recognize the different appointment types available in TWIST; and
- distinguish between generic and specific appointments.

##### **Overview:**

You are in the middle of completing a certification, and you need to make an appointment, or on the phone prescreening a potential client and also want to book an appointment for them at the same time. What do you do? Well, with the help of fast paths or a push button on your screen, the TWIST Appointment Scheduler is just a click away! Let’s review a few possible situations when you might need to quickly schedule an appointment and see how easily you can do it.

The Job Aid at the end of the chapter outlines the many ways that you can schedule an appointment in TWIST.

☺ See Job Aid “How to Make an Individual Appointment”  
for more information.

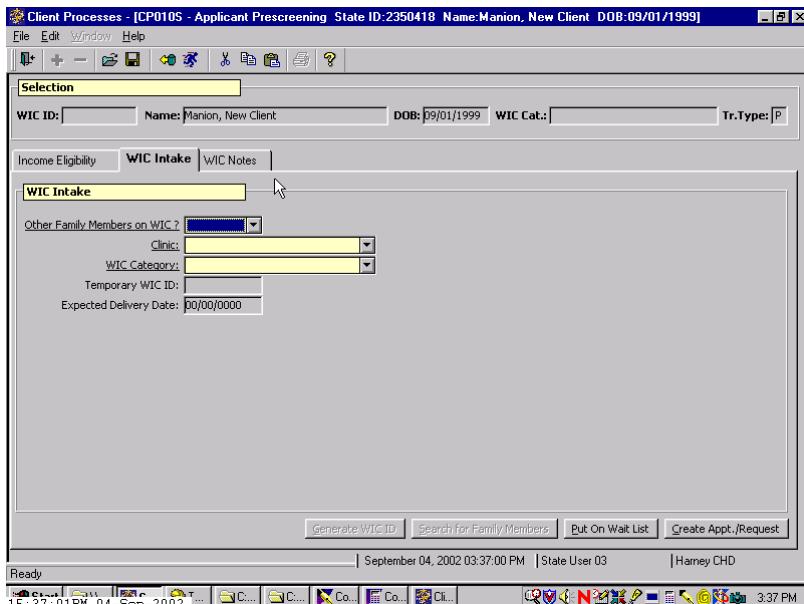
##### **Instruction:**

##### **Scheduling an Appointment from Enrollment & Intake**

There are two different ways to schedule an appointment from Enrollment & Intake. One is through “Applicant Prescreening” and other is through “Enrollment”.

The starting point for this section is:

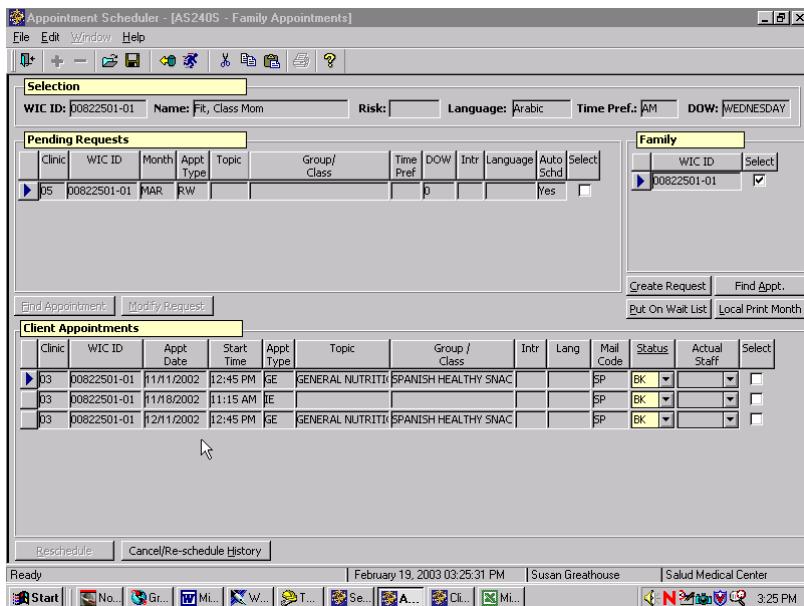
Client Processes ⇒ Enrollment and Intake ⇒ Applicant Prescreening



**Figure 1: “Applicant Prescreening - WIC Intake” Screen**

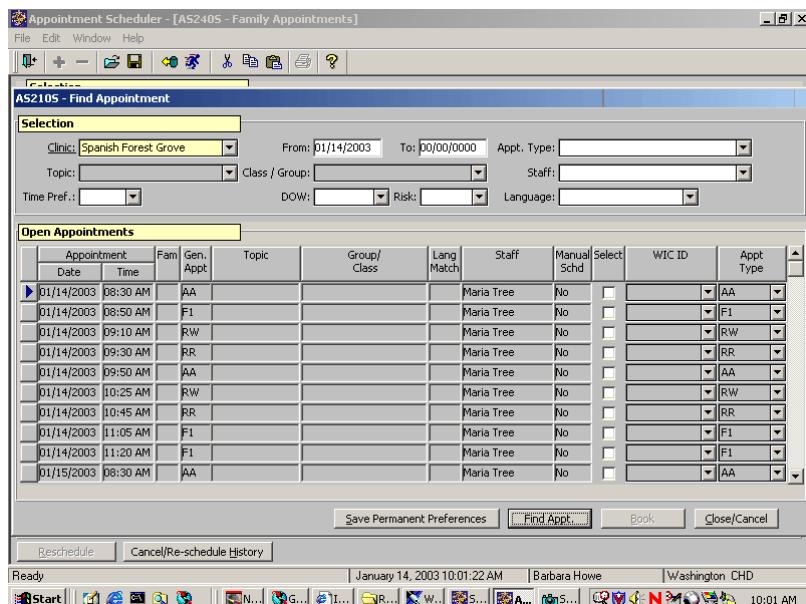
1. **Retrieve the client for whom you wish to make an appointment.**
2. **Click “Create Appt./Request” button.**

This will take you to the **“Family Appointment Record”** screen. The Family Appointment Record allows you to see all the appointments for the entire family. It is the most important screen for appointment scheduling.



**Figure 2: “Family Appointments” Screen**

3. In the “Family” section, click the “Select” checkbox corresponding to the client for whom you want to make an appointment.
- When you click the “Select” checkbox, the “Create Request,” “Find Appt.”, “Local Print Month” and “Put on Wait List” buttons are activated.
  - If you need to see more information on the client, double click on the WIC ID.
4. Click the “Find Appt.” button to view the “Find Appointment” pop-up.



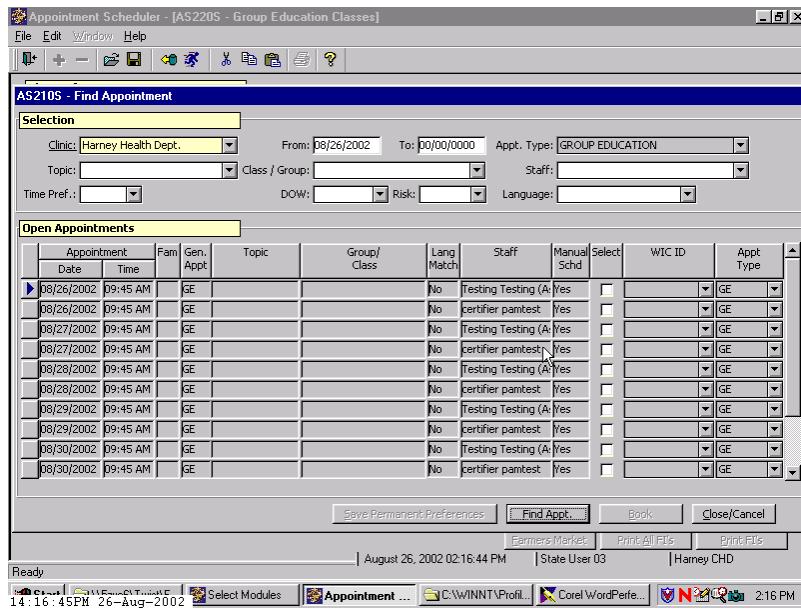
**Figure 3: “Find Appointment” Pop-Up**

- In the “Selection” section, “Clinic” will default to the clinic you are currently in. You can change this by selecting a different clinic from the drop down list.
- The system defaults the “From” date to today’s date, but you may change this to any date in the future.
- The “To” date should be entered if there is an end date for which you need to limit the search. This may be left at the default “00/00/0000” if no end date is needed. If you have a large number of appointment templates already scheduled, it is better to put in an end date, so the system can respond more quickly to your query.
- You may enter any other selection criteria, if desired, for “Appt Type,” “Staff,” “Time Pref.,” “DOW,” or “Interpreter”.

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

- “**Language**” refers to client language preference. This field does not need to be filled in unless you want the client to have an appointment in a different language from their spoken language indicated in the Client Primary. In other words, this field works as a language “override” of the language listed in the Client Primary.
- If you have selected the appointment type of group education (GE), you may select the “**Topic**”. You may select the “**Class/Group**” if you have selected an appointment type of either group education (GE) or group screening (GS).
- The system will display the client’s risk level in the “**Risk**” field if the client is already enrolled in WIC. If you are coming from prescreening, this field will be blank. The risk level is modifiable and is used to match the client to the appropriate staff person based on risk level.
- If you want to save “**Time Pref.**,” “**DOW**” or “**Staff**” preferences in the client’s record for future appointments, click the “**Permanent Preference Change**” button.
- Click the “**Cancel**” button to close the pop-up without making an appointment.

**5. Click the “Find Appt.” button at the bottom of the pop-up screen.**



**Figure 4: “Find Appointment” Pop-Up**

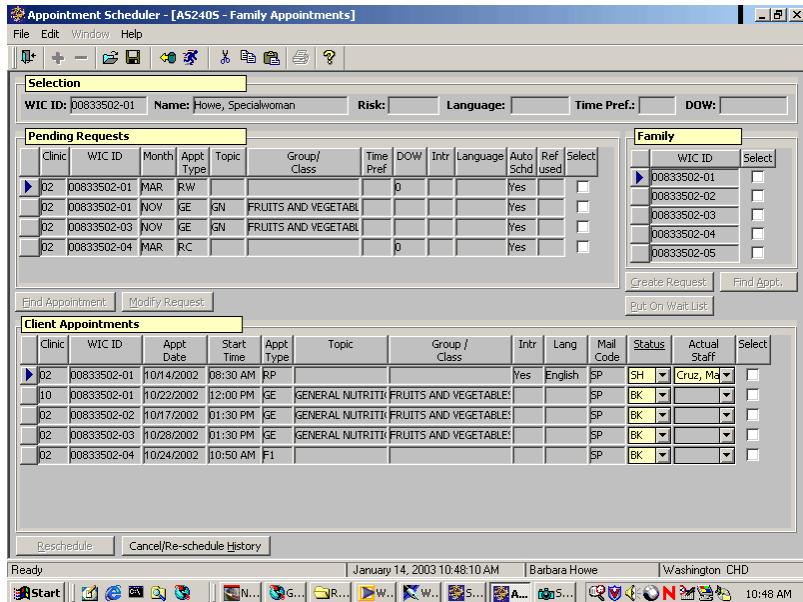
- This displays the open appointments that meet the selection criteria.
- The “**Appointment Date**” displays the date of the available appointment.
- The “**Appointment Time**” displays the start time of the appointment.
- The “**Fam**” field will display an “**F**” if this appointment is restricted to coordinated family appointments times. Most agencies will not be using this feature.
- The “**Generic Appt Type**” field displays the generic appointment type if the appointment found is included in a generic type.
- The “**Topic**” field will be populated with the topic only when this appointment is for a GE (group education) class. (See Notes)
- The “**Group/Class**” field will be populated with the corresponding class or group code if this appointment is for a GS (group screening) or GE appointment.
- The “**Lang Match**” field displays a “**Yes**” if the language needs of the client match the language skills of the staff member. A “**No**” indicates that there is not a match between the client and the staff member’s language. You can still, however, book the appointment with that staff and the appointment will display in the Family Appointment record with a “**Yes**” in “**Interpreter**” and the language needed.
- The “**Staff**” field displays the staff member’s name.
- The “**Manual Schd**” field displays a “**Yes**” if the appointment must be scheduled manually. A “**No**” means that the appointment may be scheduled using the automatic scheduler. The default is “**No**”.
- The “**Select**” checkbox is used to select the appointment for booking. You can un-select an appointment by clicking this box again before you book the appointment.
- The “**WIC ID**” field will display the client’s WIC ID number once the “Select” checkbox has been marked for the appointment.
- The “**Appointment Type**” field displays the appointment type that will go in the client’s record.

6. **Check the “Select” checkbox next to the desired appointment.**

- The system fills in the “**WIC ID**” field with the client’s ID number.
- The “**Book**” button becomes activated.
- If a generic appointment type (AA, RR or NN) is selected, you must choose a real appointment type to fill the slot.

**7. Click the “Book” button to schedule the appointment and close the pop-up.**

- The client appointments section of the family appointments screen is now populated with the scheduled appointment information. The information is automatically saved.



**Figure 5: “Family Appointments” Screen**

### “Client Appointments” Section

- The “**Clinic**” field lists the clinic where the appointment is to be held.
- The “**WIC ID**” field displays the ID number for the scheduled client.
- The “**Appt Date**” field lists the date of the appointment.
- The “**Start Time**” field lists the scheduled start time for the appointment.
- The “**Appt Type**” field lists the specific appointment.
- The “**Topic**” field will display a topic if this is for a group education class.
- The “**Group/Class**” field will display the group or class title if this appointment is either a group education class or group screening appointment.
- The “**Intr**” field will display “**Yes**” if an interpreter is needed or “**No**” if one is not needed. See Figure 5: “Family Appointments” Screen for an example.

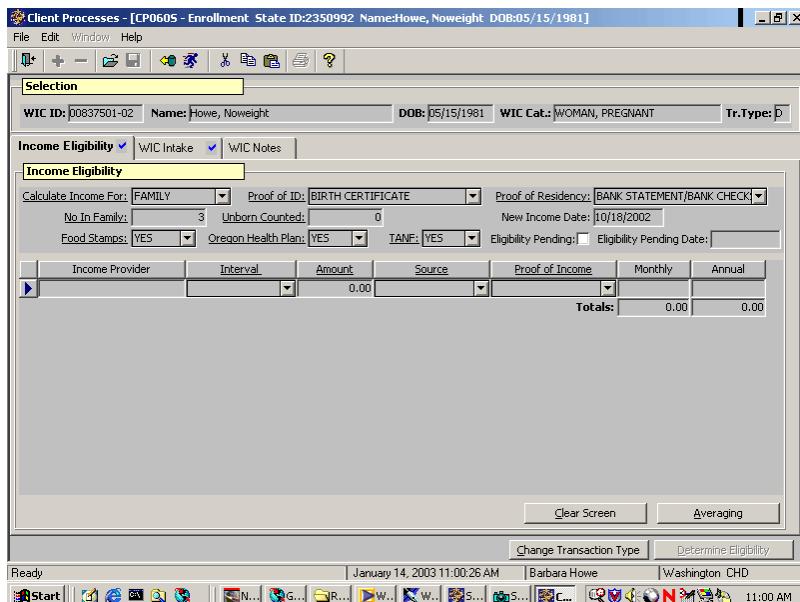
- The “**Language**” field will display the language for which an interpreter is needed, if “**Yes**” is displayed in the “**Intr**” field.
- The “**Mail Code**” indicates where the client’s FIs will be printed. This field is display-only and based on what was entered in the client’s intake record.
- The “**Status**” field lists the current status of the appointment.
- The “**Actual Staff**” field is used when documenting appointment attendance so the staff person who actually saw the client can be captured.
- The “**Select**” checkbox is used for rescheduling appointments. This is discussed in another lesson.

#### 8. **Exit.**

Now that we know the first way to schedule a client through Enrollment and Intake, let’s take a brief look at the other way.

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment



**Figure 6: “Enrollment” Screen**

1. **Click on the “open” icon to retrieve your client.**
2. **Fast Path to “Family Appointments”.**
3. **Schedule the appointment as outlined earlier in the lesson.**

### → Practice Activity #1:

Use the information from your → Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇒ Enrollment and Intake ⇒ Prescreening

1. Click on the “Open” icon to open the “Client Search” pop-up and return to the “WIC Intake” screen with your client.
2. Click on the “Create Appt./Request” button to go to the “Family Appointments” screen.
3. Click the “Select” checkbox corresponding to your client’s WIC ID number.
4. Click the “Find Appt.” button to bring up the “Find Appointment” pop-up.
5. Enter the desired “Selection” criteria.
6. Click the “Find Appt.” button to display the open appointments.
7. Locate the desired appointment and click the corresponding “Select” checkbox.
8. Click the “Book” button.
9. Exit.

### Scheduling an Appointment from Daily Clinic Schedule

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. In the Daily Clinic Schedule, select the clinic and date where you want to schedule the client.

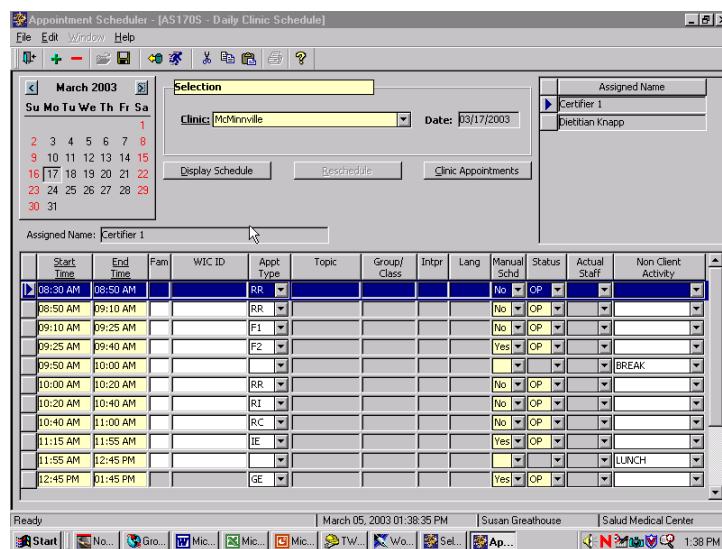
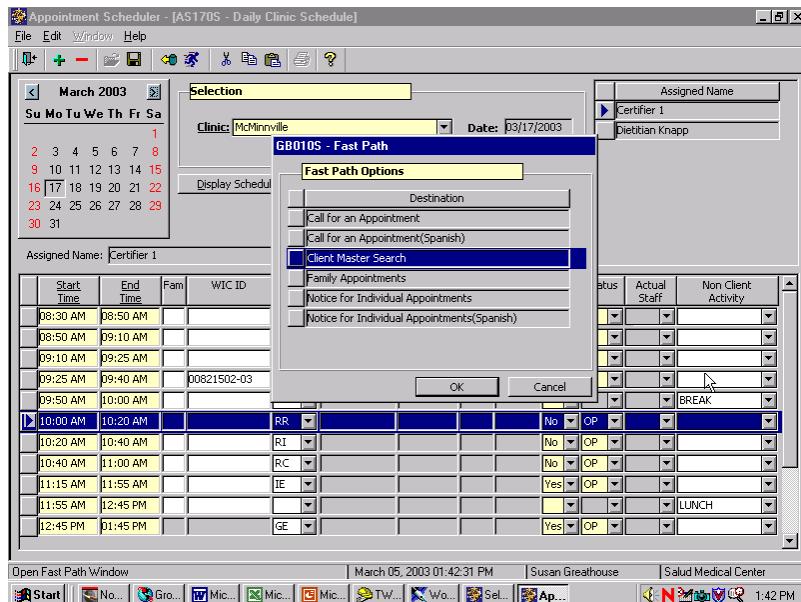


Figure 7: “Daily Clinic Schedule” Screen

2. **Select an open appointment time.**
3. **If you know the client's WIC ID number, enter that number in the WIC ID field for that appointment time.**
  - ♪ NOTE: Remember you can double-click on the WIC ID number in the Daily Clinic Schedule to display the name, category and date of birth of the client.
4. **Tab to the Appointment Type field and select the correct appointment type for that client's appointment. You may need to adjust the start or end times for the appointments before and after if the appointment type you select doesn't match the appointment length in the schedule.**
  - ♪ NOTE: If you do not know the client's WIC ID number, you can click on the open appointment slot and then use the Fast Path to go to the Client Primary and retrieve the client you are trying to schedule. As in Step 4 above, you may need to change the Appointment Type and adjust the appointment start and end time so that times do not overlap.



**Figure 8: Fast Path from “Daily Clinic Schedule” Screen**

5. **Click “Save” to save the scheduled appointment.**

### ✖ **Tips and Shortcuts:**

You can also schedule a client directly by starting in the Family Appointment record and retrieving the client for whom you are scheduling an appointment. The

process for scheduling an appointment is exactly the same once you reach the “Family Appointment Record” screen, no matter how you get there.

You can reach the “Family Appointment Record” to schedule a client from:

- the “Applicant Prescreening” screen using the “Create Appt./Request” button,
- the “Enrollment” screen using the fast path,
- the “Nutrition Education Plan” screen using the “Schedule Appointment” tab, and
- the Appointment Scheduler module under “Scheduling”

### → **Practice Activities:**

The starting point for this activity is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

1. Select the date and clinic where you want to schedule your client’s appointment.
2. Click on the WIC ID field on the time of the appointment.
3. Click on the Fast Path icon and select “Client Master Search”.
4. Find yourself in the Client Master and click “Return with Client”.
5. Adjust the appointment type to “F1”.
6. Save and exit.

### ✓ **Skill Check:**

Now you are going to get a chance to put this new scheduling knowledge to the test!

Use the information from your → Activity Sheet for this practice.

1. Prescreen a client that does not yet exist, and make an appointment for their certification appointment from the “Applicant Prescreening” screen. Make up the client information.
2. Print out the “Family Appointments” screen for this client after you have booked the appointment.

### ✍ **Notes:**

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