

Chapter 4: Appointment Scheduler

Section 4: Scheduling Appointments

Lesson: Handle Walk-In & Overbook Appointments

Objectives:

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

- schedule walk-in clients in the “Daily Clinic Schedule.”

Overview:

Making a space in the clinic schedule for walk-in appointments is a common WIC occurrence. TWIST allows you to book a walk-in appointment or add a necessary space in a busy schedule, while at the same time, keeping track of and reporting the number of walk-in appointments!

Let’s go to the “Daily Clinic Schedule” and see how to handle a walk-in client.

Instruction:

How to Format a Lesson

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Daily Clinic Schedule

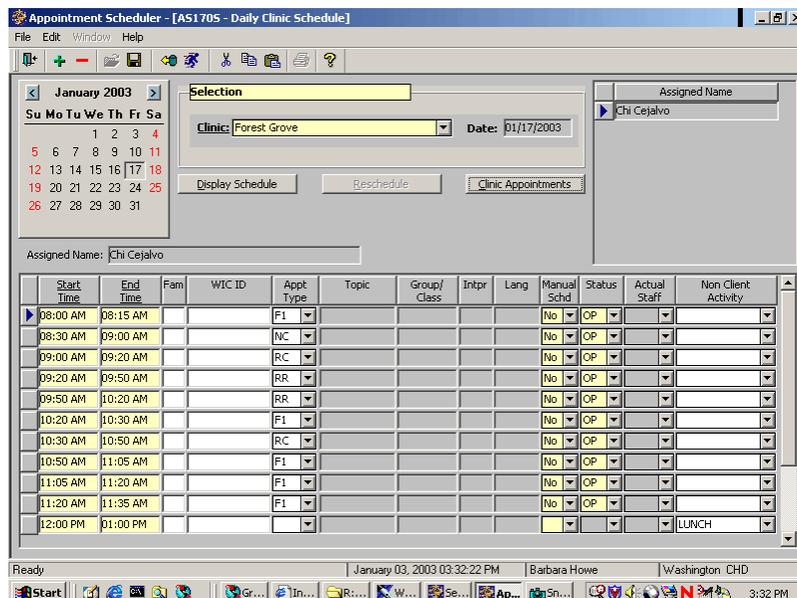


Figure 1: “Daily Clinic Schedule” Screen

NOTE: Please refer to Chapter 4, Lesson 202 *Daily Clinic Schedule* for more detailed instructions on the **“Daily Clinic Schedule”** screen.

In the “Selection” section, select the “Clinic” from the drop down list.

In the “Calendar” section, click on the number corresponding to the day on which you wish to schedule the walk-in appointment.

To move the calendar forward or backward by month, use the arrows in the left and right hand corners of the calendar.

Click the “Display Schedule” button.

The **“Assigned Name”** section displays the list of staff names assigned to the schedule for that date.

Click on the desired staff person’s name to view their schedule for the day.

Search for an open appointment slot in the lower half of the screen.

If there is a blank row on the **“Daily Clinic Schedule,”** signifying an open appointment slot, you may use this time slot to schedule the walk-in. If there are no open slots, you must create one.

Click on the “Insert Record” icon to create a new row.

You will then need to enter the **“Start Time”** field for this appointment time.

Set the “End Time” of the appointment just before the one you are creating so that it is the same as the start time of the appointment you are creating.

This is done so the new appointment does not start before the one before it ends.

Enter the client’s “WIC ID” number.

If this is a new client, you will first need to complete the client demographics and prescreening data for them in order to get a temporary WIC ID number.

Tab to the “Appt Type” field and select the appointment type from the drop down list, if needed.

- If this is a newly created schedule row, you must select an appointment type from the drop down list
- If you are using an existing slot, and it already has the correct appointment type in the field, there is no need to change it.
- If the appointment type field is populated, but the appointment type is not correct, select the correct appointment type from the drop down list
- When an appointment type is selected, the end time will auto fill based on the duration of the appointment as defined in the appointment types duration table.

Adjust the “Start Time” for the appointment that begins after the one you are creating.

- This is done so the next appointment does not start before the one you are creating ends.
- If you are adding the appointment to the end of the day, there will be no next appointment.

Tab to the “Status” field and select “WI (Walk In)” from the drop down list.

- The “**Walk In**” status means the same thing as “**Kept**.”
- Using the “**Walk In**” status instead of “**Kept**” allows the system to track and report on the number of Walk In appointments done in the clinic.

In the “Actual Staff” column, you can select the name of the staff person if you know who will be seeing this client. Otherwise, this can be left blank and the staff will document this later on the Family Appointment Record.

Save and exit.

“Refresh” to see the appointment on the “Family Appointment Record” screen.

♪ NOTE: Be sure and leave the status as “**Walk-in**” rather than “**Show**,” so that your agency can track the number of walk-ins. If you change the status to “**show**” there is no way to distinguish between clients who had a scheduled appointment and those who did not.

✓ Skill Check:

Now that you have reviewed the “Daily Clinic Schedule” screen and practiced how to add a walk-in appointment, it’s time to give it a try on your own! Go to today’s “Daily Clinic Schedule” screen and add in a walk-in appointment for an existing client. When you are done, make a screen print of the “Daily Clinic Schedule” screen showing your scheduled appointment.

 Notes: