

Chapter 4: Appointment Scheduler

Section 6: Attendance Documentation

Lesson: Documenting Appointment Attendance

Objectives:

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

- document appointment attendance for individuals and groups; and
- correctly define appointment scheduling terms.

Overview:

Maintaining an accurate appointment book is crucial to a well-run WIC clinic and documenting appointment attendance is a major part of maintaining your appointment book. Additionally, documenting appointment attendance will make show rate reports accurate and will allow the clinic manager to run staff productivity reports. In TWIST, documentation for individual appointment attendance is done manually as part of the certification process.

At the end of the day all individual appointments that have not been documented as “show” will be documented automatically as a “no show.”

Class attendance is documented as a group process on the “group education classes’ screen, so individual records do not need to be accessed to document class attendance. You can print clients FIs directly from the GE Class screen.

Group screening appointment attendance is documented in the same way as an individual appointment, since certification documentation must be done on each individual record. A group screening is sometimes referred to as a “group certification.” You cannot, however, print FIs directly from the Group Screening screen. You must go to the Family Summary Screen to print FIs from here.

Instruction:

Documenting Individual Appointment Attendance

The usual flow will be for the certifier to document individual appointment attendance through the “NE Plan” screen as part of each certification/recertification appointment.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ NE Plan ⇒ Next Appointment

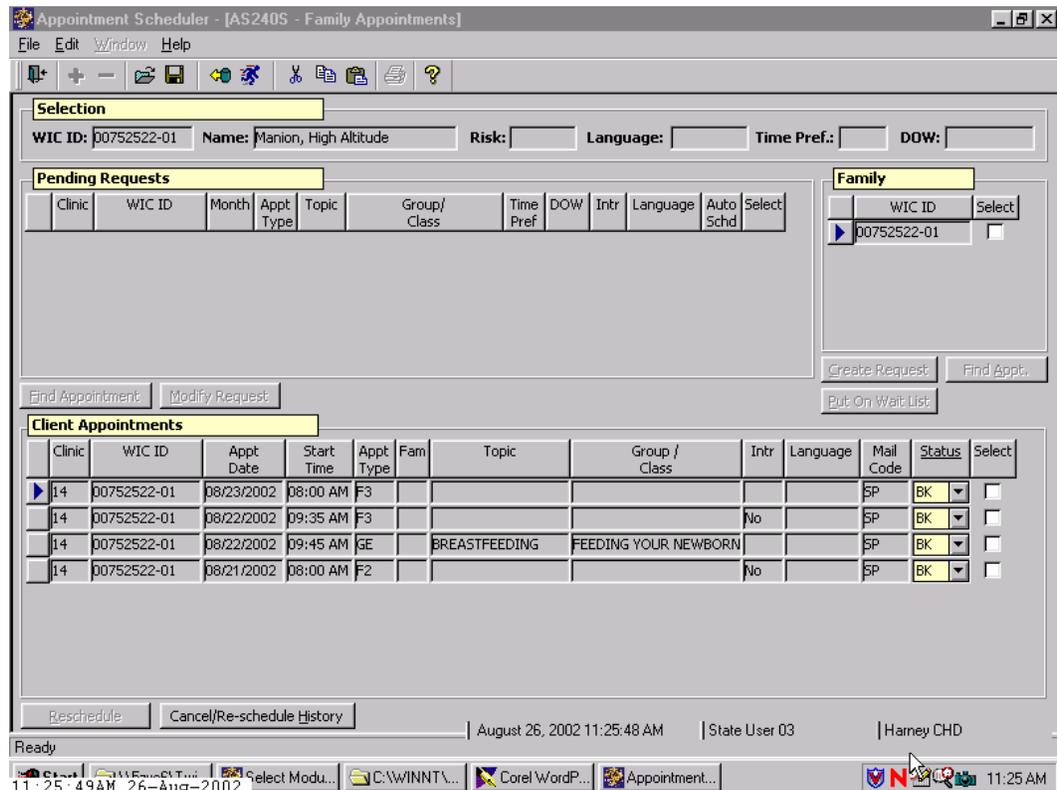


Figure 1: Family Appointment Record

1. **Using the “Open” icon, search for and return with the client for whom you wish to document attendance.**
 - Normally you would have the client record open and this would just be a continuation of the certification appointment.
2. **Click the “Schedule Appointment” button which takes you to the “Family Appointment Record.”**
3. **In the “Client Appointments” section of the screen, locate the appointment for which you wish to document attendance.**
4. **In the “Status” field for this appointment, select “Show.”**
5. **In the “Actual Staff” field select the name of the staff person who actually saw the client from the drop down list.**
6. **Save.**
7. **Exit “Family Appointment Record.”**

♪ NOTE: Individual appointment attendance can also be documented by going directly to the “Family Appointment Record” and retrieving the client. The clerk may also “show” the client through the “Daily Clinic Schedule” and by selecting the “Actual Staff” name if they know who will be seeing the client.

Documenting Attendance for a Group Education Class

The starting point for this section is

Appointment Scheduler ⇒ Scheduling ⇒ Group Education Classes

♪ NOTE: Please refer to the “Schedule a Client into a Nutrition Education Group Appointment” lesson for more detailed information about this screen.

1. **Click the “Open” icon to search for and retrieve the class for which you wish to document class attendance.**

Class Info

Clinic: Topic: Class Title:

Instructor: Language: Date Held:

Location: Room#: Start Time:

Address: Current Booked: End Time:

City: Maximum Capacity: Notes:

State: Zip: Phone:

Class List

Display FI Print Information

WIC ID	Name	Phone Number	Status
00071908-02	Lexington, Levi Ford-Bronco-Z	503 - 119 - 2992	BOOKED
00071908-01	Lexington, Lexi Ford-Bronco-Z	503 - 119 - 2992	BOOKED
00205314-01	Seaside, Samantha Ford-Bronco-Z	541 - 983 - 0933	BOOKED
00205314-02	Seaside, Sasha Ford-Bronco-Z	541 - 983 - 0933	BOOKED
00193328-01	Ashland, Amy Ford-Bronco-Z	503 - 998 - 9933	BOOKED
00193328-02	Ashland, Andrew Ford-Bronco-Z	503 - 998 - 9933	BOOKED

Save | September 19, 2005 02:29:05 PM | Susan Greathouse | Ford | famnet_train / famnet_practice

Figure 2: “Group Education Classes” Screen

2. **Change the “Status” field from “Booked” to “Show” for all clients listed in the “Class List” section who came to the appointment.**

- Use the drop down list in the “**Status**” field to change the attendance status to “**Show**.”
 - It is not necessary to change the Status to “**No Show**” for those clients who did not keep the appointment. This will be automatically changed by the system during the End of Day processes.
3. When you have finished documenting attendance for the whole class, click the “**Display FI Print Information**” check box.
- A message saying “**Calculating FI Print Information**” will display while TWIST retrieves FI information. This process may take up to a minute depending on the size of the GE Class.
 - TWIST will display the date of the last month FIs were issued and the number of printable FIs for each client in the class.
 - The “**Print FIs**” checkbox will automatically be checked by the system for each client whose status is “**Show**,” if they have printable FIs within the next 3 months.

Appointment Scheduler - [AS220S - Group Education Classes]

File Edit Window Help

Class Info

Clinic: Bronco Topic: GENERAL NUTRITION Class Title: FAMILY MEAL TIMES
 Instructor: Hallie Happy Language: English Date Held: 09/23/2005
 Location: Room#: Current Booked: 6 Start Time: 08:00 AM
 Address: Maximum Capacity: 15 End Time: 09:00 AM
 City: Notes:
 State: Zip: -
 Phone: - -

Delete Class New Class Schedule Class

Class List

Display FI Print Information

WIC ID	Name	Phone Number	Status	On FLPP?	Last Date FIs Issued	Printable FIs	Print FIs
00071908-02	Lexington, Levi Ford-Bronco-Z	503 - 119 - 2992	SHOW	Y	00/00/0000	2	<input checked="" type="checkbox"/>
00071908-01	Lexington, Lexi Ford-Bronco-Z	503 - 119 - 2992	SHOW	Y	00/00/0000	3	<input checked="" type="checkbox"/>
00205314-01	Seaside, Samantha Ford-Bronco-Z	541 - 983 - 0933	SHOW	N	09/01/2005	2	<input checked="" type="checkbox"/>
00205314-02	Seaside, Sasha Ford-Bronco-Z	541 - 983 - 0933	SHOW	N	00/00/0000	1	<input checked="" type="checkbox"/>
00193328-01	Ashland, Amy Ford-Bronco-Z	503 - 998 - 9933	BOOKED	N	11/01/2005	0	<input type="checkbox"/>
00193328-02	Ashland, Andrew Ford-Bronco-Z	503 - 998 - 9933	BOOKED	N	09/01/2005	0	<input type="checkbox"/>

Farmers Market Eligibility Farmers Market Issuance Family Summary Screen Print All FIs Print Selected FIs

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Figure 3: FI Print Information

4. **Review any client’s FI printing information by selecting the client and clicking on the “Family Summary Screen” button at the bottom of the screen.**

- This allows you to verify the number of printable FIs for each family member.
- If there is a discrepancy in the number of printable months between family members in the class, see Chapter 5, Lesson 102, *Printing FIs – Printing from a Group Education Class* and Chapter 3, Lesson 1100, *Family Summary Screen* for more information on coordinating family appointments and printing FIs.

♪ NOTE: Be sure to “Refresh” the GE Class screen if you have made any changes in the Family Summary Screen before you print FIs.

5. **Save and exit**

✓ **Skill Check:**

The “**Group Education Classes**” screen can also be accessed from the “**Daily Clinic Schedule**” by double clicking on the “**Group/Class**” field in the row the class you want is listed on.

✍ **Notes:**

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