**Evaluating your Appointment Schedule**

**Action Plan**

NOTE: If you do not use TWIST’s appointment scheduler, you can still use these ideas to evaluate your appointment schedule.

**Evaluate your Individual Appointment show rates**:

1. Run the ***Show Rate Monthly Individual*** report in Appointment Scheduling for the past month.
2. Within each clinic:
3. Highlight any appointment type with a show rate lower than 70%
4. For each appt type highlighted, choose one action to increase that show rate. Examples:
   * Make reminder phone calls or texts the day before.
   * Send reminder post cards or letters.
   * Offer alternate clinic hours.
   * Make the interpreter available more frequently.

**Evaluate your Second NE group and Online Education show rates:**

1. Run the ***Show Rate Monthly Second NE (Local Agency)*** report in Appointment Scheduling for the past month.
2. Within each clinic:
3. Highlight any group with a show rate lower than 70%
4. For each group highlighted, choose one action to increase that show rate. Examples:

* Change the topic of the group nutrition education.
* Add more interactive, participant center activities, that give adult learners an opportunity to share what they already know.
* Offer alternate locations for the group nutrition education.
  + Change the time of the group nutrition education.
* Offer child friendly group nutrition education.
* Offer groups in different languages.

1. If you offer online education:
   * Text, email, or call to remind participants to complete their online class and include the link to the website.
   * Ensure that participants know when and how to contact you to receive benefits after completing the class.

**Evaluate staff members’ schedules:**

1. Run the ***Productivity Report*** in Operations Management for each staff person at each clinic.
2. Evaluate:
   1. Is the workload evenly distributed?
   2. Can staff by cross-trained for more efficiency?
   3. Can appointments be grouped to meet the needs of special staff (e.g. dietitian or interpreter)?