## © Job Aid: How to Make an Individual Appointment

Chapter 4: Appointment Scheduler Section 4: Scheduling Appointments Lesson: Schedule Appointment Now

## **INDIVIDUAL APPOINTMENT** – Four ways:

1) Thru NE Plan:	2) Thru Family Appts:	3) Thru Daily Clinic Schedule:	4) Thru Family Summary Screen:
Client Processes  Certification (retrieve client)	Appointment Scheduler  Scheduling  •	Appointment Scheduler  Scheduling	Client Processes  ↓  Lookup  ↓  Family Summary
NE Plan (top tab) ▼ Next Appt	Family Appt Record  * "Select" WIC ID	Daily Clinic Schedule	Screen (retrieve client using blue folder icon)  Select Client
(bottom tab)  ♣  "Schedule	(can select multiple family members)	Select Clinic & Date	Find Appointment Button
Appt"  ♣ Family Appt. Record	"Find Appt." (can fill-in Search criteria to define search results)	"Display Schedule" ♣ Enter WIC ID	Fill in Dates and Appointment Type
	"Find Appt."  "Select Appt"  (fill-in specific appt type if appt was generic)	or  Fast Path to Client Master "Return w/Client"   ♣  SAVE	"Select Appt" (fill-in specific appt type if appt was generic)  ■ "BOOK"  ■ Close
	♥ "BOOK"  ♥ Close		Close