# Cascades Steps
Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types

We'll show two methods for scheduling multiple, different appointment types for the same family. Choose the method that works best for your participants and for your clinic's needs. Consider which services different staff provide, participant language needs, and clinic flow to help you decide.

- In **Method 1,** the RD doesn't do certifications. We schedule a Registered Dietitian appointment for Kelsy Penny who is high risk, and a Subsequent Certification appointment for Mel Penny with a certifier.
- In **Method 2,** the RD does certifications in addition to RD appointments. We schedule a longer Registered Dietitian appointment. The RD sees Johnnie Roberts for a high risk appointment and completes the Subsequent Certification appointment for Maggie Roberts.

Steps	Cascades Screen
METHOD 1 **Step 1. Get to the Master Calendar:** 1. Select **Scheduling** from Menu bar. 2. Select **Clinic Master Calendar**. **Note:** Calendar defaults to current month's view.	

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types

P a g e | 1
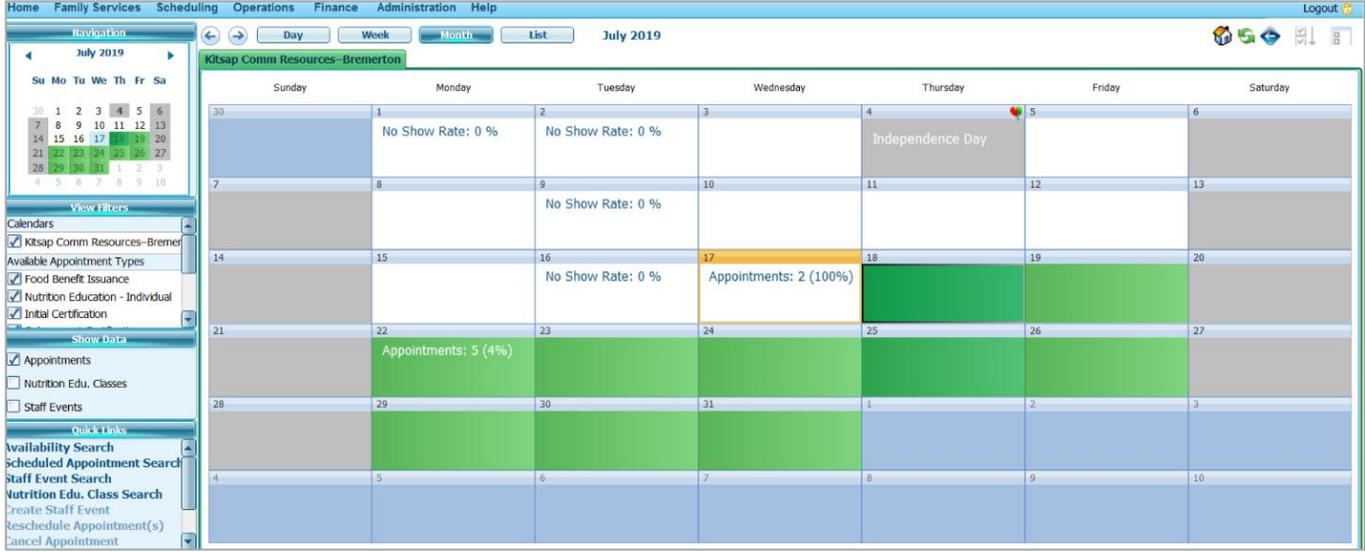
Step 2. Choose appointment types and day for your appointments:

1. If the appointments will happen in a future month, use the **Mini Calendar** to select month and date for desired appointments.

2. Check-mark the appointment types in **Available Appointment Types** box to refresh calendar with these types.

   Note: Once appointment types are selected in the **Available Appointment Types** box, the types will stay selected for other searches.

3. Double-click the green-colored date field of your choice in the big calendar to get to the Daily Schedule-view of the calendar.

   You will choose the time of appointments next.

Important
Confirm that you're into correct clinic if your agency has multiple clinics.

Calendars
☑ Kitsap Comm Resources–Bremerton

Available Appointment Types
☑ Food Benefit Issuance
☑ Nutrition Education - Individual
☑ Initial Certification
☑ Subsequent Certification
☑ PE-Complete Assessment
☑ Mid Cert HA
☐ Anthro/Lab
☑ Registered Dietitian
☐ BFPC

- Check-mark the appointment types you want to include here.
- Choices will stay selected for future searches.

Use the **Mini Calendar** to quickly move to future months.

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types

P a g e | 2

Step 3. Choose a time for your appointments:

Note the following:

➜ **Daily Schedule** is separated into appointments already made (white part on the left) and appointment slots still available (green columns on the right.)

➜ Each appointment type has its own green column, e.g. FBI, IC.

➜ Each 15 min slot shows the number of staff available for each appointment type.

1. Select the beginning time of your appointment by clicking your cursor into the column and time slot you want to choose. Repeat for all the appointment types you need.
   o In our example, we need a 30 minute RD appointment for Kelsy and a 30 minute SC appointment for Mel.

2. Double-click any one of the selected appointment slots (blue boxes) to get to the **Manage Appointments** screen.

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types
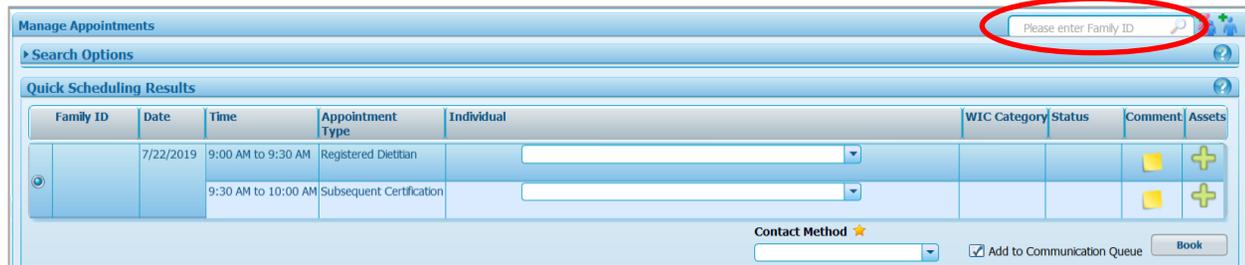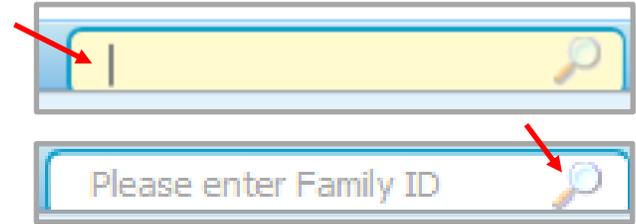
P a g e | 3

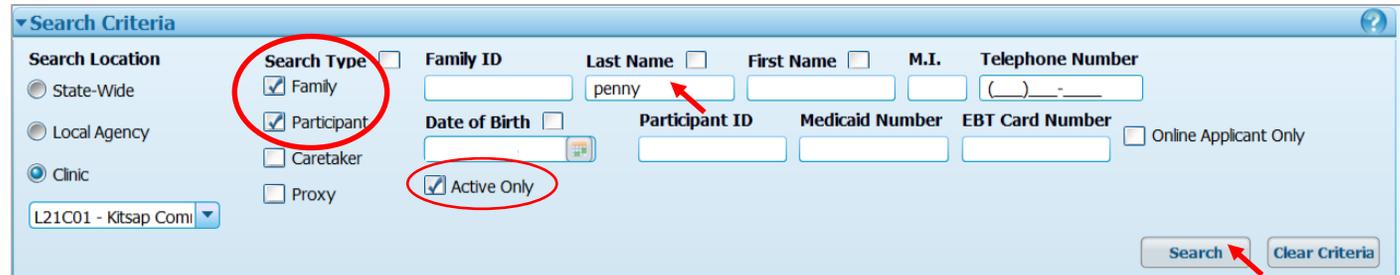|	
Step 4. Add your participants: 1. In the **Manage Appointments** screen, select the magnifying glass icon or place your cursor in the search box. 2. Select **Enter** on your keyboard to display the **Search Criteria** pop-up screen.	**TIP!** This search field says to enter Family ID, but it's not required. Instead: • Select the magnifying glass icon or • Place your cursor in the box and • Select the **Enter** button on your keyboard

Step 5. Add your participants: 1. Check-mark **Family** and **Participant** boxes. 2. Enter a few letters or all of last and, if need be, first name. 3. Check-mark **Active Only** box. 4. Select **Search** button. 5. In **Search Results** box, select one of the participants you want. 6. Press the **Select** button. **NOTE:** For applicants and expired participants we keep the **Active Only** box unchecked. However, here we know for certain that both participants are active.	

Step 6. Book the appointments:

On **Manage Appointments** screen:

1. Confirm dates, times, and appointment types.

2. Select participants for each appointment type in **Individual** drop-down.

3. Select **Contact Method** drop-down and choose answer:
   In-person – participant or caregiver in clinic
   Phone – participant or caregiver called clinic

4. Keep **Add to Communication Queue** box checked if family wants to receive a reminder email or text.
   • Uncheck box if reminder email or text isn't needed.

5. Select the **Book** button.

On the **Daily Schedule** screen:
➔ The participants who've you just made appointments for now show on the left hand side of the **Daily Schedule**.

The number of staff available for each appointment type now has reduced by 1.

NOTE

You may have noted that a third person's name shows in the pull-down. We aren't scheduling an appointment for Pat, since it's her last month of benefits.

Leaving Sticky Notes:

- You can leave a note related to an appointment by double-clicking the family name at the top of the individual appointments for a family. This will bring up the **Family Appointments List**.
- Select the yellow sticky note icon to write an appointment-specific note for a participant.
- Save the note by selecting the minimize icon [ ] at the top right corner of the sticky note.
- View notes later in the participant's record by selecting **Quick Links**, then **Scheduling System**, then **Family Appointments**.

REMEMBER

- Each time a participant cancels or reschedules the appointment, any sticky notes for that appointment will be lost.
- Use **Family Alerts** for any notes that aren't specifically appointment-related.

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types

P a g e | 6

- In **Method 2** we schedule a longer Registered Dietitian appointment. The RD sees Johnnie Roberts for a high risk appointment and completes the Subsequent Certification appointment for Maggie Roberts.

- Consider this method if the RD does certifications in addition to RD appointments.

- Choose the method that works best for your participants and for your clinic's needs. Consider which services different staff provide, participant language needs, and clinic flow to help you decide.

Steps	Cascades Screen
METHOD 2 **Step 1. Get to the Master Calendar:** 1. Select **Scheduling** from Menu bar. 2. Select **Clinic Master Calendar**. **Note:** Calendar defaults to current month's view.	
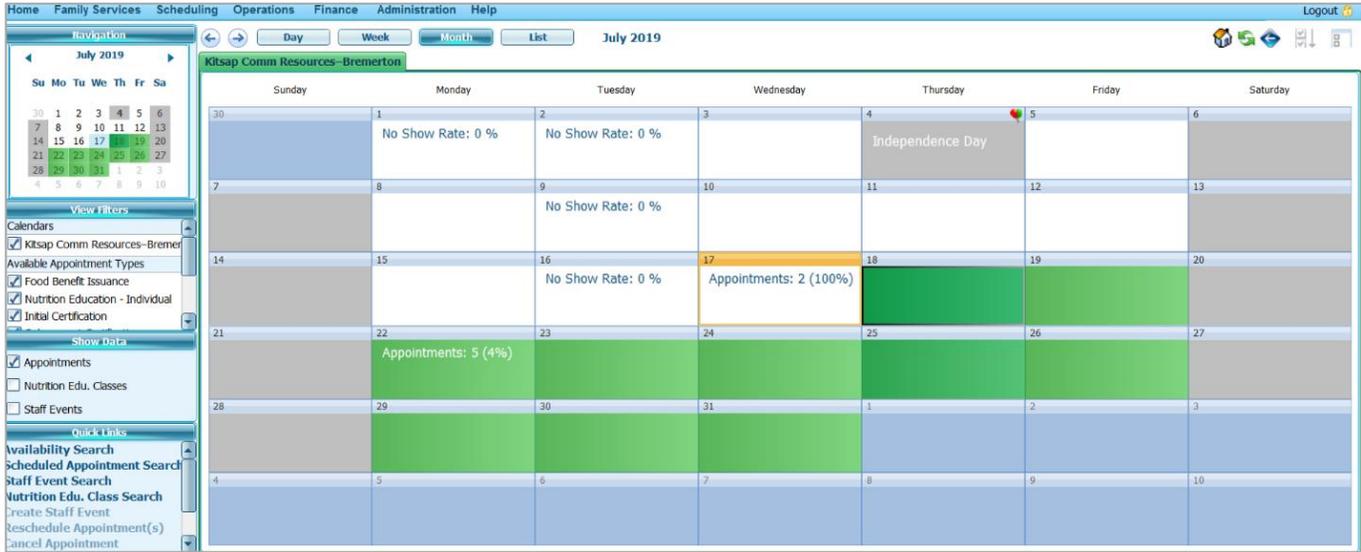
Step 2. Choose appointment type and day for your appointments:

1. If the appointments will happen in a future month, use the **Mini Calendar** to select month and date for desired appointments.

2. Check-mark the appointment types in **Available Appointment Types** box to refresh calendar with these types.

   Note: Once appointment types are selected in the **Available Appointment Types** box, the types will stay selected for other searches.

3. Double-click the green-colored date field of your choice in the big calendar to get to the Daily Schedule-view of the calendar. You will choose the time of appointments next.

Important
Confirm that you're into correct clinic if your agency has multiple clinics.

Use the **Mini Calendar** to quickly move to future months.

- Check-mark the appointment types you want to include here.
- Choices will stay selected for future searches.

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types
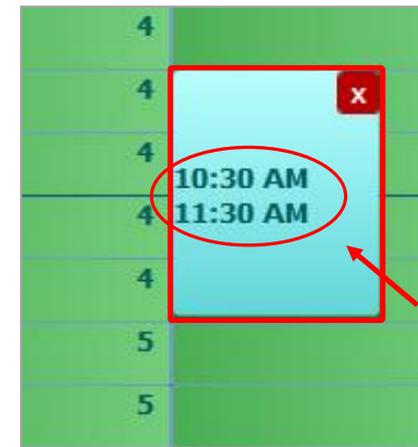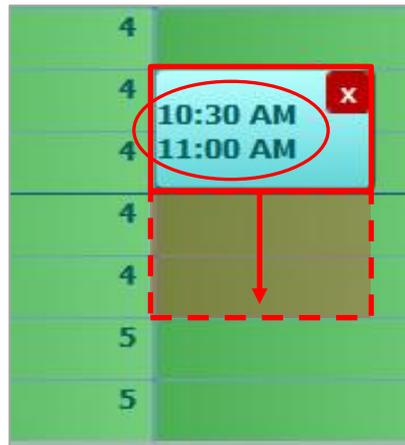
P a g e | 8

Step 3. Choose a time for your appointments:

Note the following:

➔ **Daily Schedule** is separated into appointments already made (white part on the left) and appointment slots still available (green columns on the right.)

➔ Each appointment type has its own green column, e.g. FBI, IC.

➔ Each 15 min slot shows the number of staff available for each appointment type.

1. Select the beginning time of your appointment by clicking your cursor into the column and time slot you want to choose.

2. Drag the appointment slot (blue box) with your cursor to extend appointment time.

3. Double-click any one of the selected appointment slots (blue boxes) to get to the **Manage Appointments** screen.
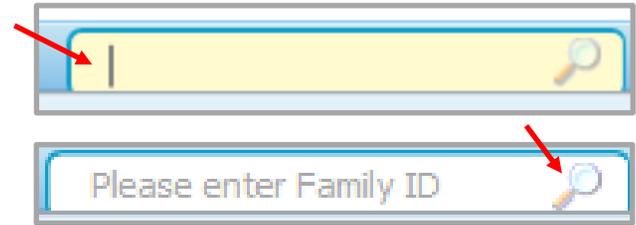
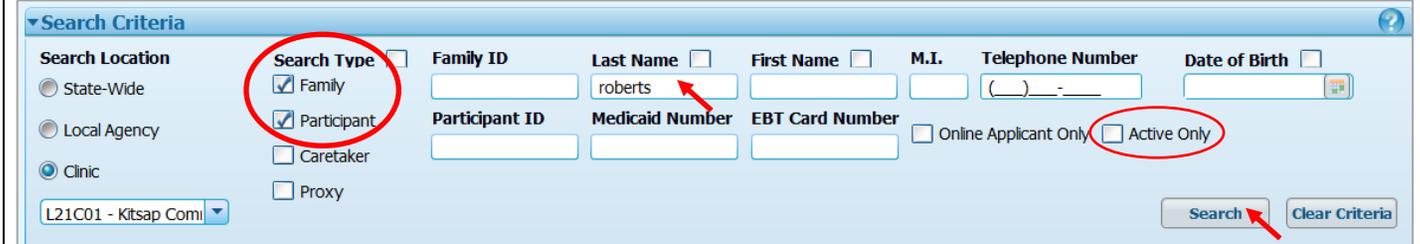|	
Step 4. Add your participants: 1. In the **Manage Appointments** screen, select the magnifying glass icon or place your cursor in the search box. 2. Select **Enter** on your keyboard to display the **Search Criteria** pop-up screen.	**TIP!** This search field says to enter Family ID, but it's not required. Instead: • Select the magnifying glass icon or • Place your cursor in the box and • Select the **Enter** button on your keyboard

Step 5. Add your participants: 1. Check-mark **Family** and **Participant** boxes. 2. Enter a few letters or all of last and, if need be, first name. 3. Uncheck **Active Only** box. 4. Select **Search** button. 5. In **Search Results** box, select one of the participants you want schedule. 6. Press the **Select** button. **NOTE:** Unchecking the **Active Only** box is best practice and especially important when you have an applicant or expired participant. In our example, Maggie is "expired."	

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types
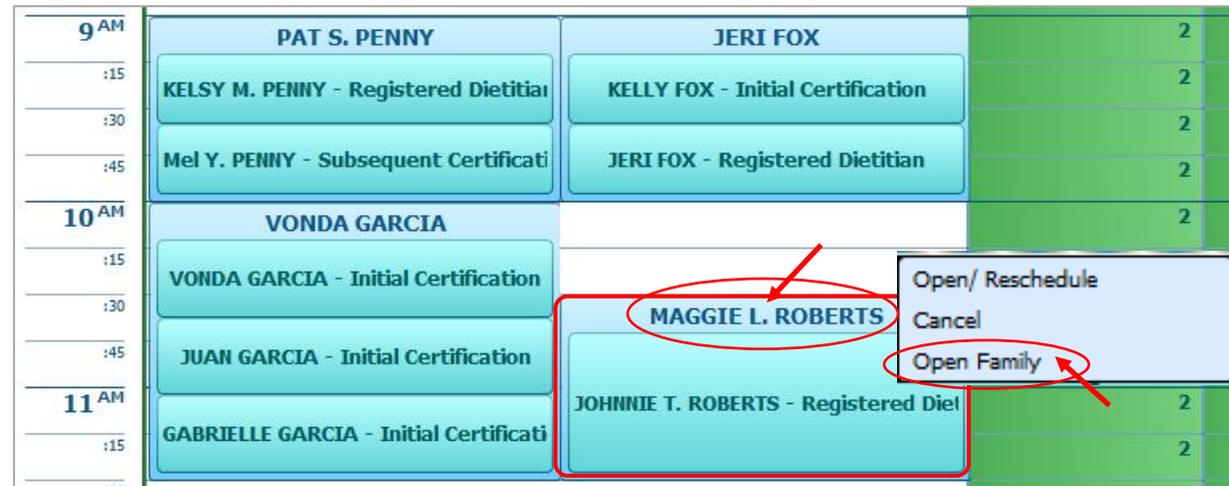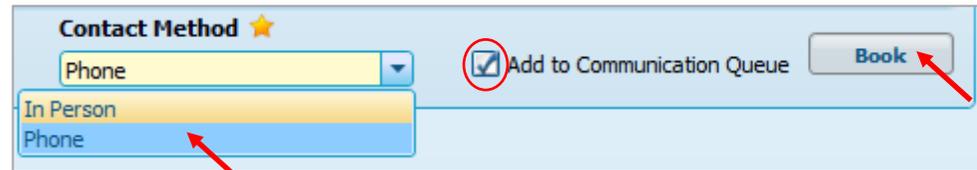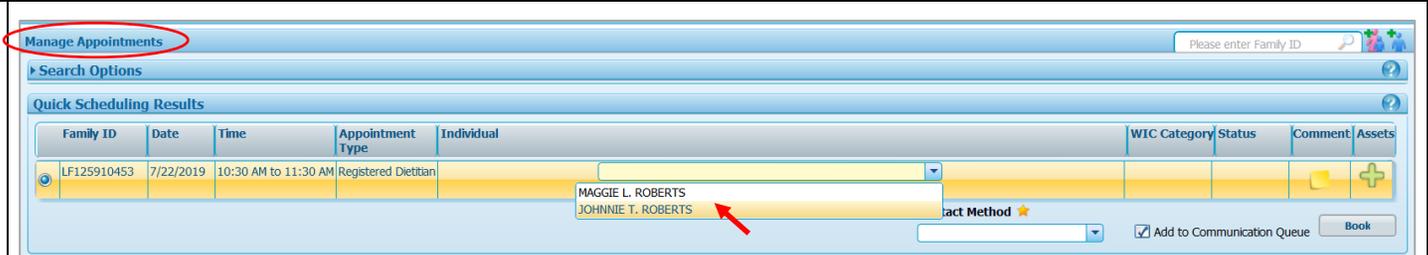
P a g e | 10

Step 6. Book the appointments:

On **Manage Appointments** screen:

1. Confirm dates, times, and appointment type.

2. Always select the high risk participant that actually needs the RD appointment in **Individual** drop-down.

3. Select **Contact Method** drop-down and choose answer:

   <u>In-person</u> – participant or caregiver in clinic
   <u>Phone</u> – participant or caregiver called clinic

4. Keep **Add to Communication Queue** box checked if family wants to receive a reminder email or text.
   - Uncheck box if reminder email or text isn't needed.

5. Select the **Book** button.

On the **Daily Schedule** screen:

➔ Find the appointment you just made.
➔ Right-click on the name at the top of the family.
➔ Select **Open Family**.

TIP!
Add a sticky note that the RD will do both appointment types. Follow steps on page 6.

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types

P a g e | 11

Step 7. Set a Family Alert to remind staff that RD will do a RD and a SC appointment:

You'll land in the **Family Demographics** screen.

1. From Menu bar, select **Family Services**, then **Certification**, then **Family Alerts**.

2. On the **Alert Information** screen, select the **Add** button at the bottom right of the screen to add a new alert.
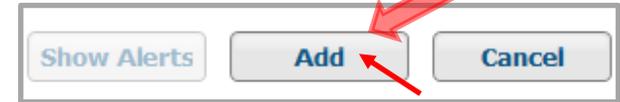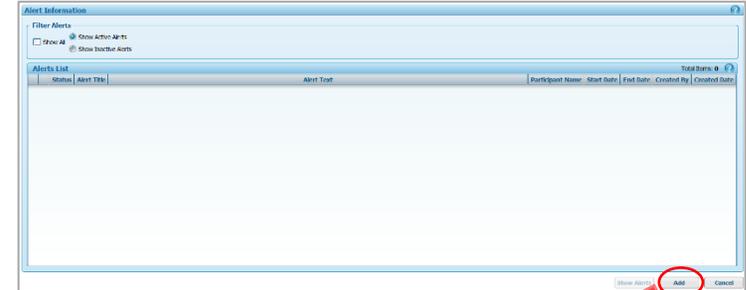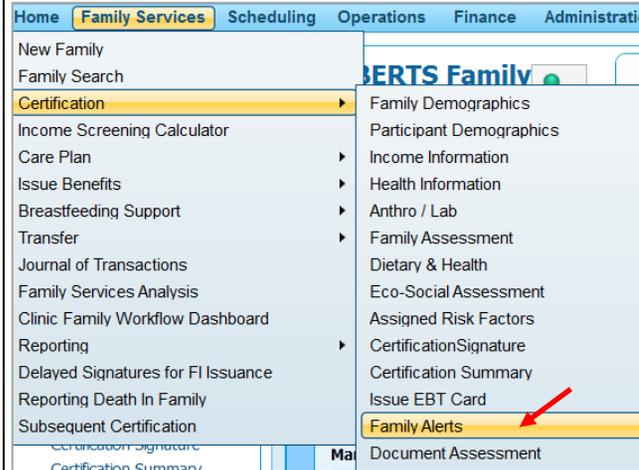

Step 8. Enter Alert information:

1. In the **Maintain Alerts** pop-up, enter information for the alert:

- Free-Form or State Defined: keep at Free-form
- Alert Type: keep Family Alert
- Status: keep at Active
- Alert Title: add a brief title
- Start Date: keep today's date
- End Date: Enter the date when the alert isn't needed anymore. E.g. a day after the appointment date
- Alert Text: add brief note of what needs to happen (see sample text in our example.)

2. Select **Save**.
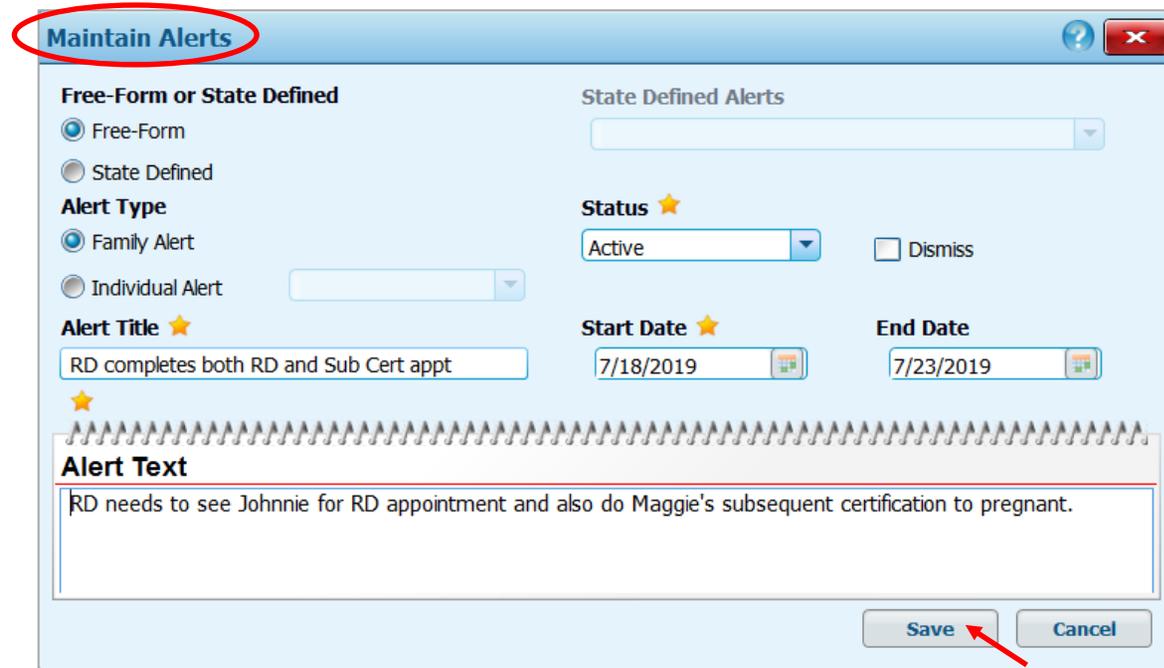
July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types

P a g e | 12

Once you've saved your Family Alert, you can find it in the **Alerts List** section.

Note:

- Use the pencil icon to edit an alert.
- To delete an alert, select the red X icon.

This institution is an equal opportunity provider.
Washington State WIC Nutrition Program does not discriminate.
For persons with disabilities, this document is available on request in other formats.
To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

DOH 961-1171 July 2019

July 2019 – Schedule Appointments using Clinic Master Calendar – Multiple Appt. Types

P a g e | 13