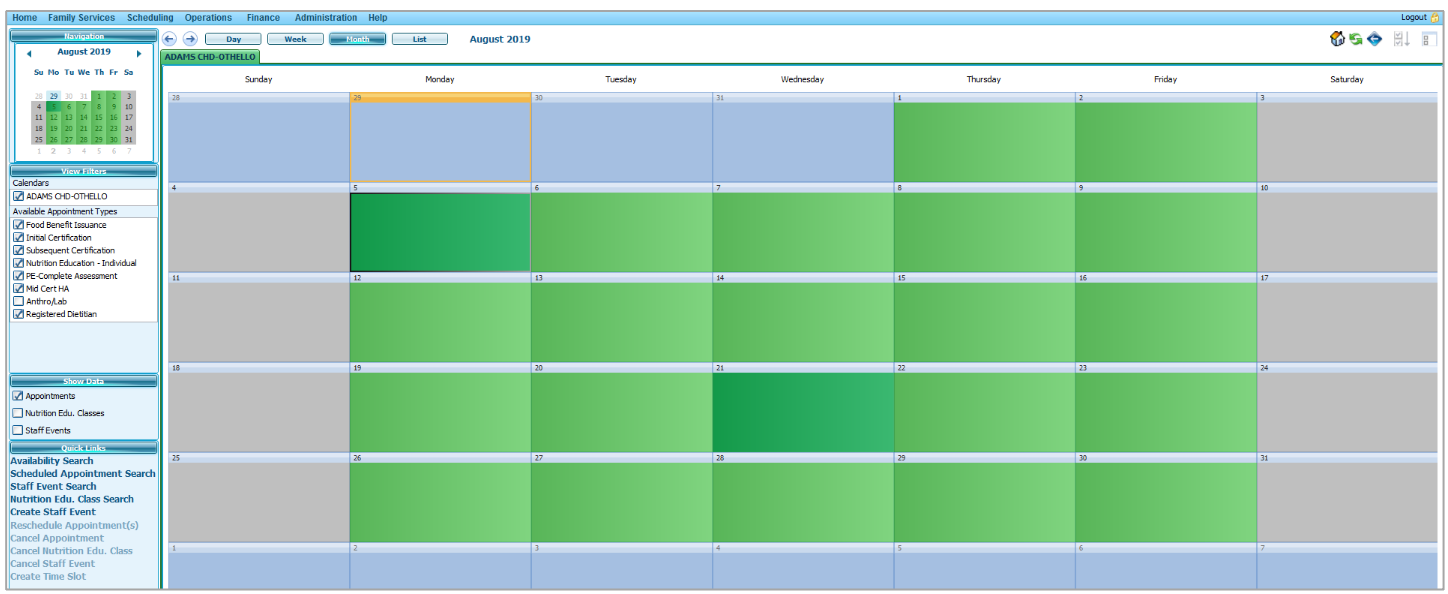
Cascades Steps

Schedule an Appointment to Transfer into the Cascades System

Follow these steps to schedule an appointment for a participant who needs to transfer in from out-of-state.

- In CIMS, we had a Transfer In (TI) Appointment type. Cascades doesn't have this appointment type. Front desk staff will choose either **NE-I** or **NE-2C**, depending on which **NE** appointment type your clinic's front desk staff use. Most clinics' front desk staff use **NE-I**.
- If the participant needs an appointment to transfer between two Cascades clinics, use Cascades Steps: [Schedule an Appointment to Transfer Between Cascades Clinics].

Steps	Cascades Screen
Step 1. Go to the Master Calendar to schedule the appointment to transfer in: 1. In the menu bar, select **Scheduling**, then **Clinic Master Calendar**. **Note:** Calendar defaults to the current month's view.	 

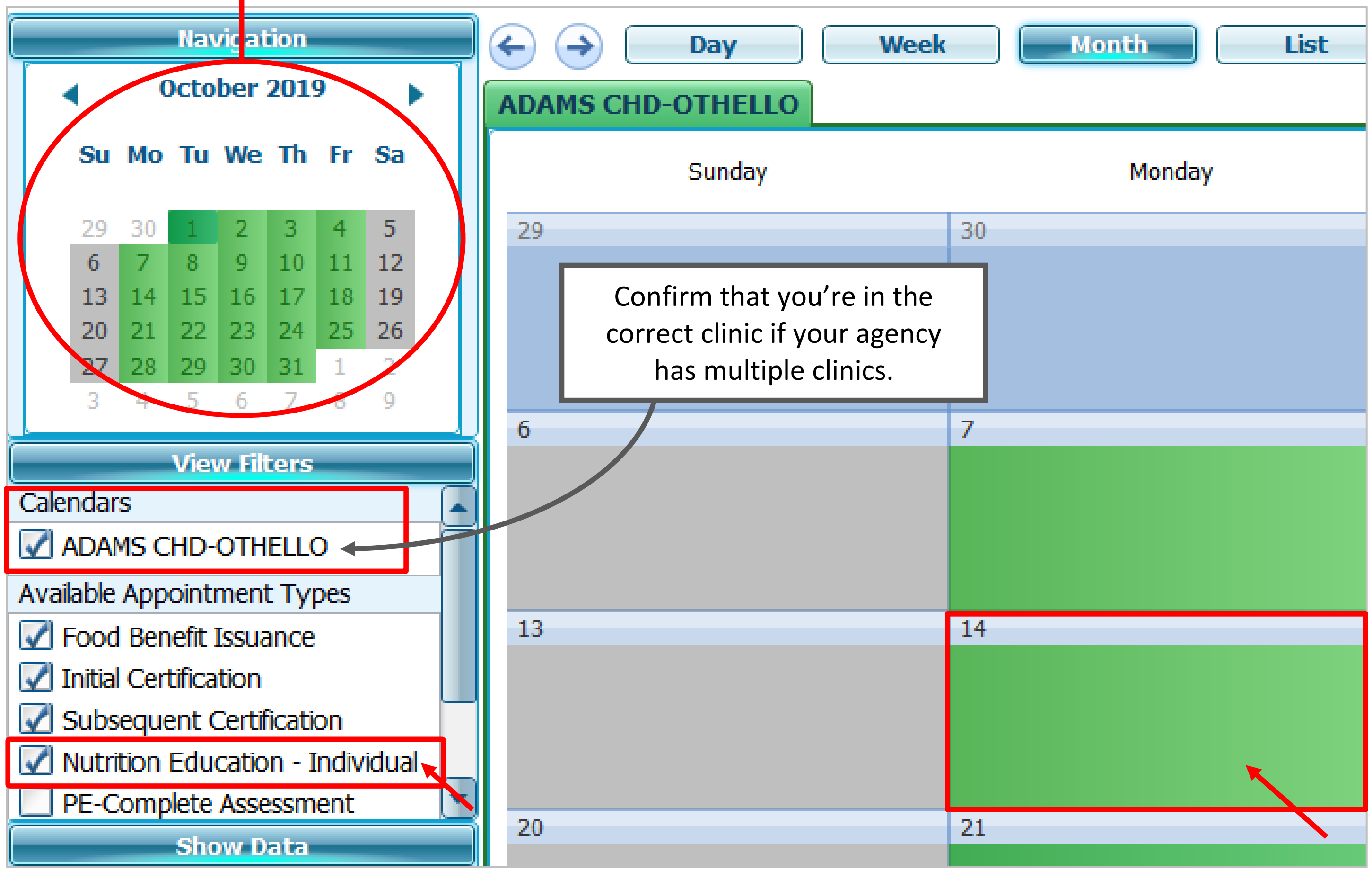
Step 2. Choose day for the appointment to transfer in:

1. Check that the appointment type **Nutrition Education – Individual** (or **Nutrition Education – 2C**) is check-marked in the **Available Appointment Types** box. In our example, we are using **NE-I**.
2. If the appointment will happen in a future month, use the **Mini Calendar** to select month and date for desired appointment.

> **Important**
>
> Cascades doesn't have the appointment type Transfer In (TI), like CIMS did.
>
> Later we'll write a Family Alert to tell staff what appointment type we're actually scheduling.

3. Double-click the green-colored date field of your choice in the Month calendar view to get to the **Daily Schedule**-view of the calendar.
4. You'll choose the appointment time and type next.

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

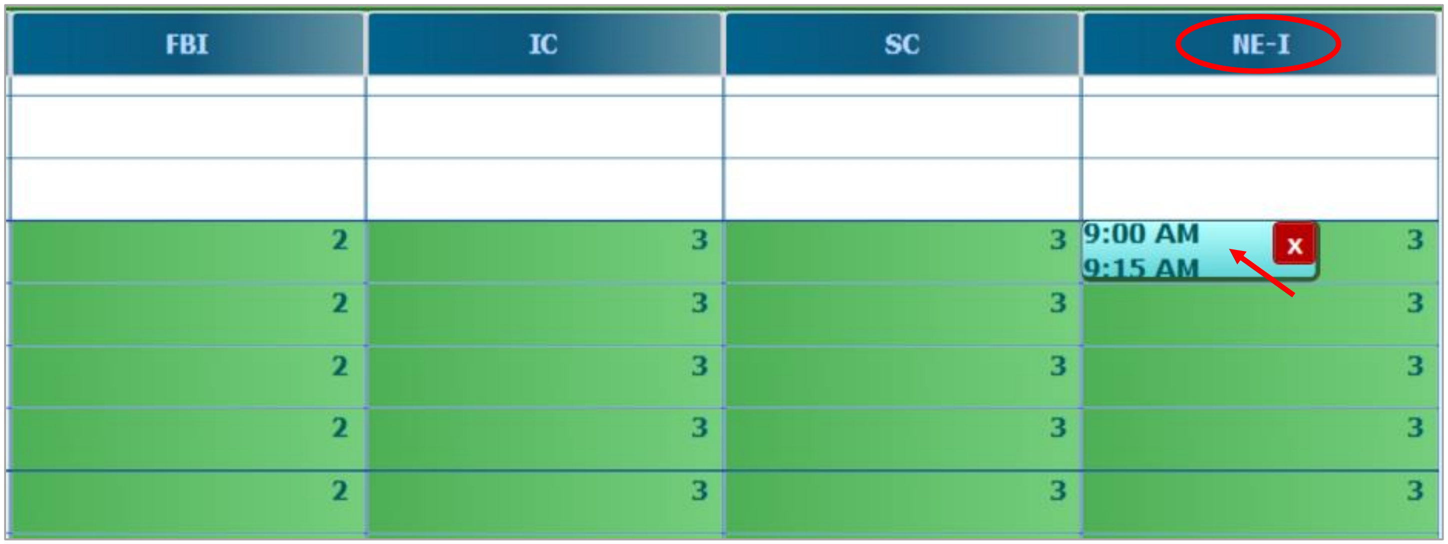


Step 3. Choose an appointment type and time for the appointment to transfer in:

Click your cursor into the **NE-I** (or **NE-2C**) **column** and time slot you want to choose.

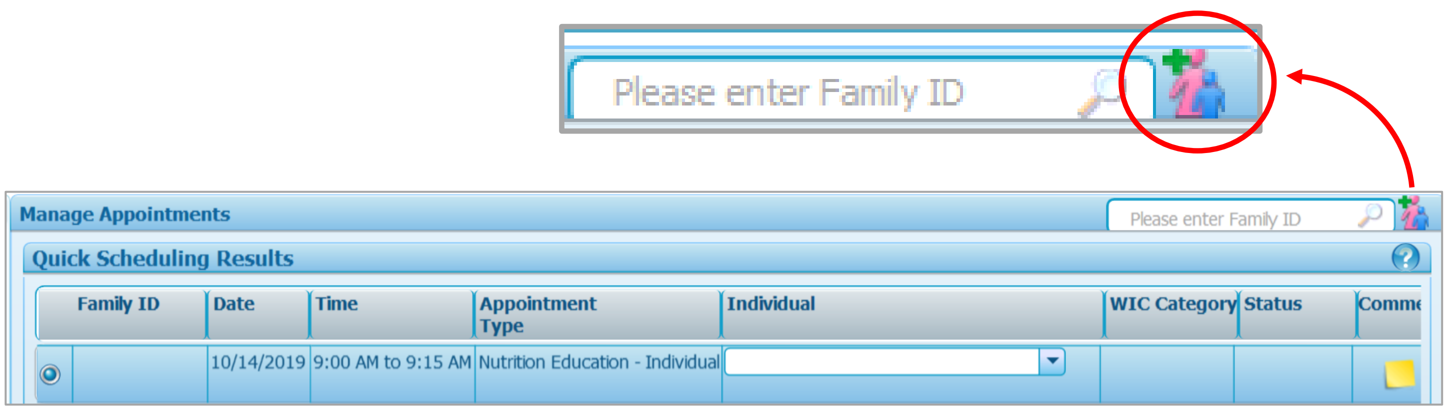
- Keep it at the default 15 minute timespan or follow your clinic's policy for appointment time to transfer in. To extend appointment time, drag the appointment slot (blue box) with your cursor.

2. Double-click the selected appointment slot (blue box) to get to the **Manage Appointments** screen.



Step 4. Add the participant:

1. In the **Manage Appointments** screen, select the persons icon with the green plus symbol.



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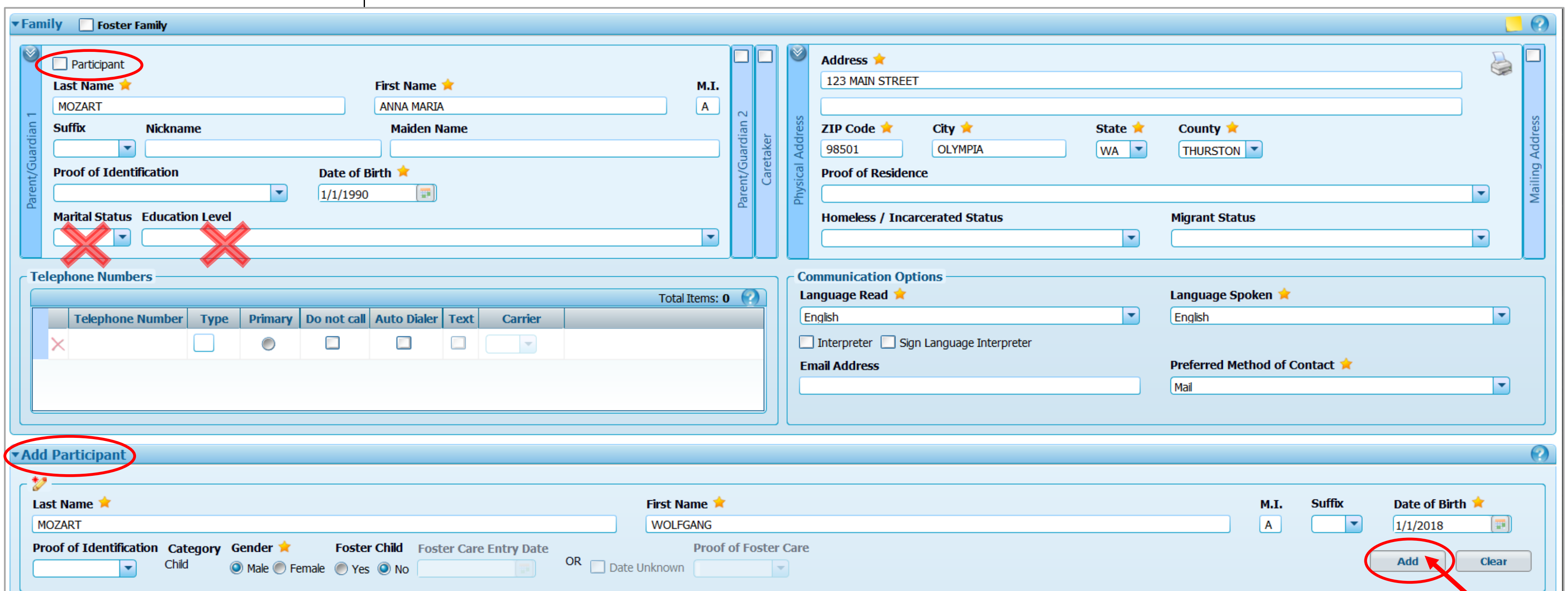
Step 5. Create new applicant record:

1. In the **New Family** screen, fill out all information necessary to schedule the appointment for this "applicant".
   - In our example, we're scheduling an appointment to transfer in a 1-year old child.

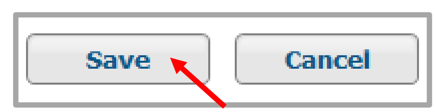
When filling out the New Family screen, take care to:

- Fill out all fields marked with stars.
- **<u>Don't</u>** ask for **Marital Status** or **Education Level**.
- Assess for all other fields.
- If the parent/guardian is also a participant, check-mark the **Participant** checkbox.



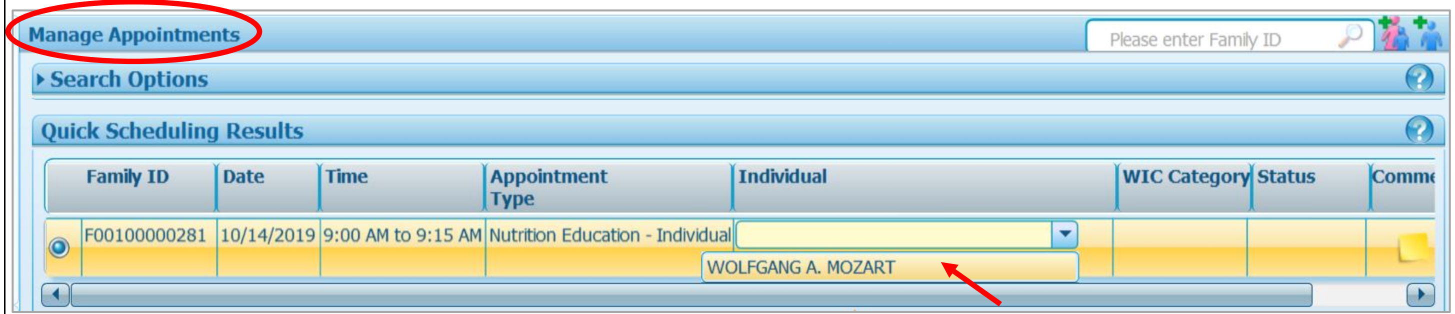
In the Add Participant section:

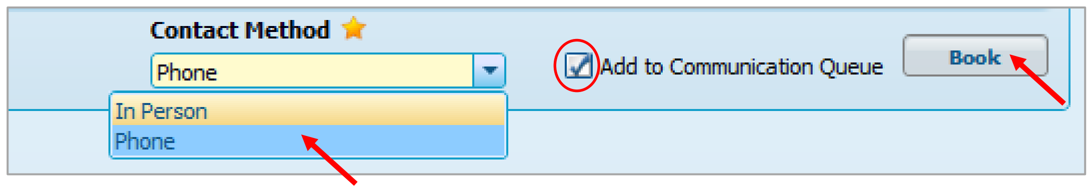
2. Add participant information. Then, select **Add** to add the participant.
3. If you have multiple participants, continue adding participants in the **Add Participant** container.
4. Once you have added all participants, select **Save**.



Step 6. Book the appointment to transfer in:

1. Confirm date and time.
2. Select participant 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.
5. Select the **Book** button.

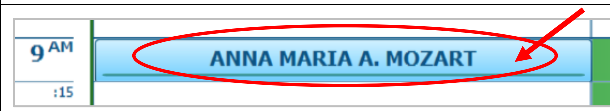


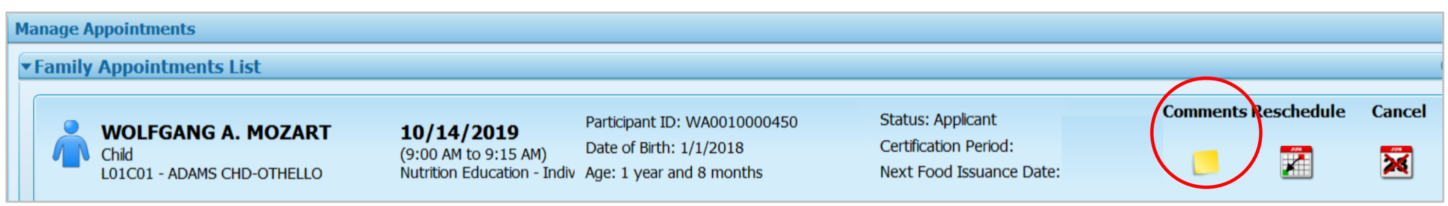


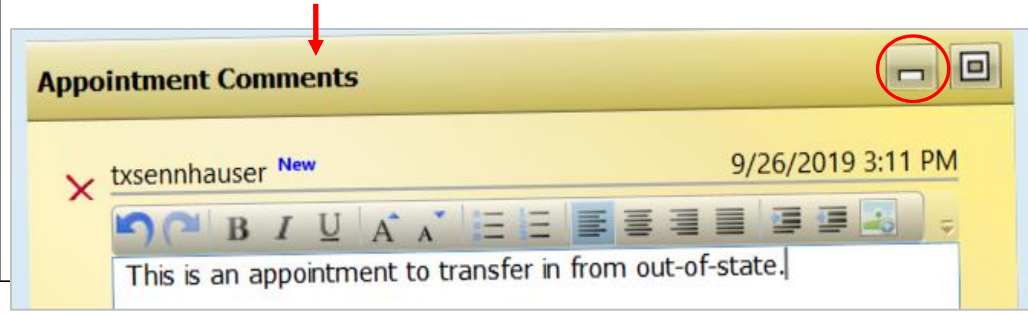
Step 7. Leave a Sticky Note and a Family Alert:

<u>Sticky Note:</u>

1. Double-click on the family name at the top of the individual appointment box to get to the **Family Appointments List**.
2. Select the **yellow sticky note** icon.
3. Write a note to let other clinic staff know this appointment is actually an appointment to transfer in.
4. **Save** by selecting the minimize icon on the sticky note.







If a participant **cancels** the appointment, any sticky notes for that appointment will be lost.

Family Alert:

1. In the menu bar, select **Family Services**, then **Family Search**.

2. Follow **Step 6** to find the family.

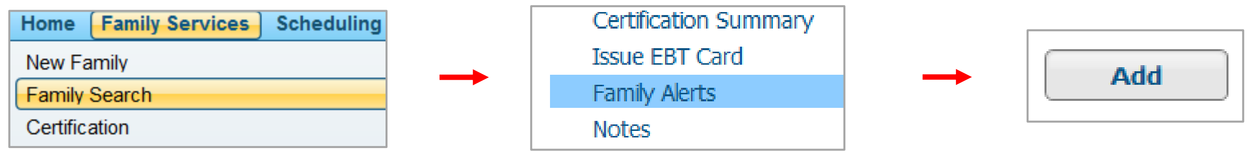
3. In the family record's Quick Links, select **Family Alerts**.

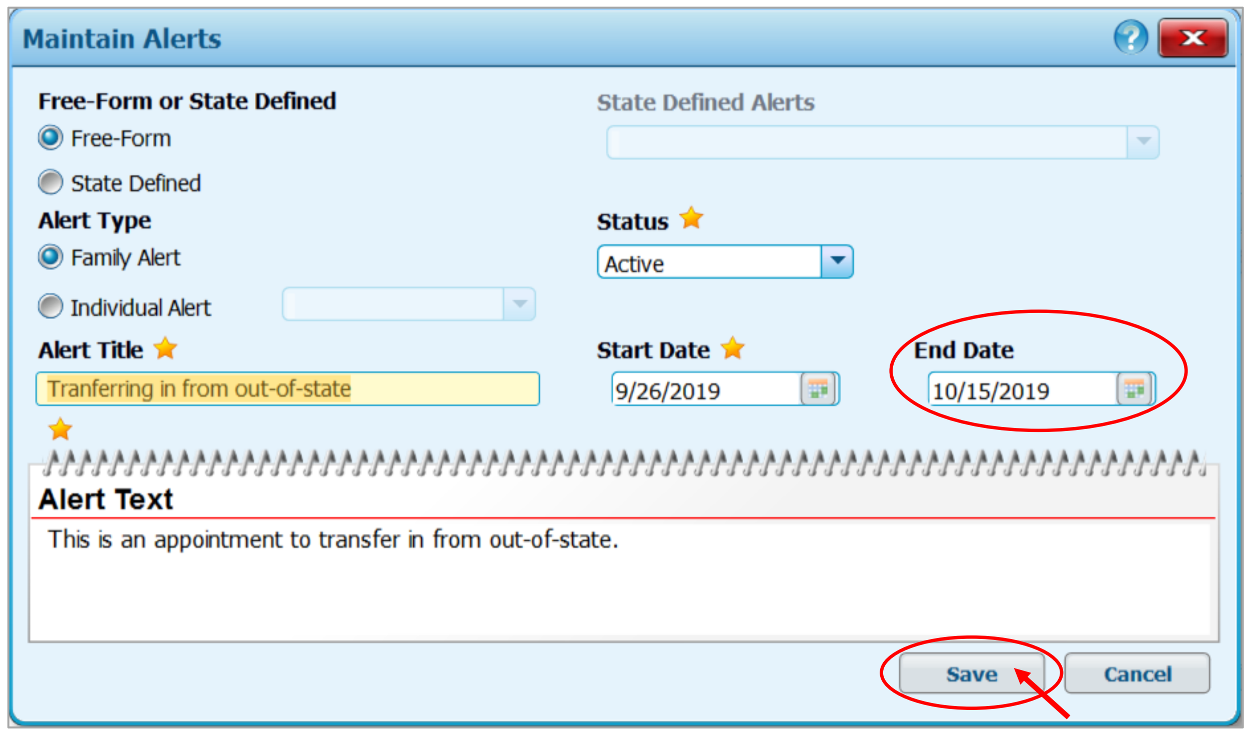
4. Select the **Add** button in the right bottom corner to add the new family alert.

5. Write the family alert to let other clinic staff know this appointment is actually an appointment to transfer in.

   Leave all default settings in the **Maintain Alerts** screen.
   - As the **End Date**, enter the day after the scheduled appointment to transfer in.

6. Select **Save**.





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