



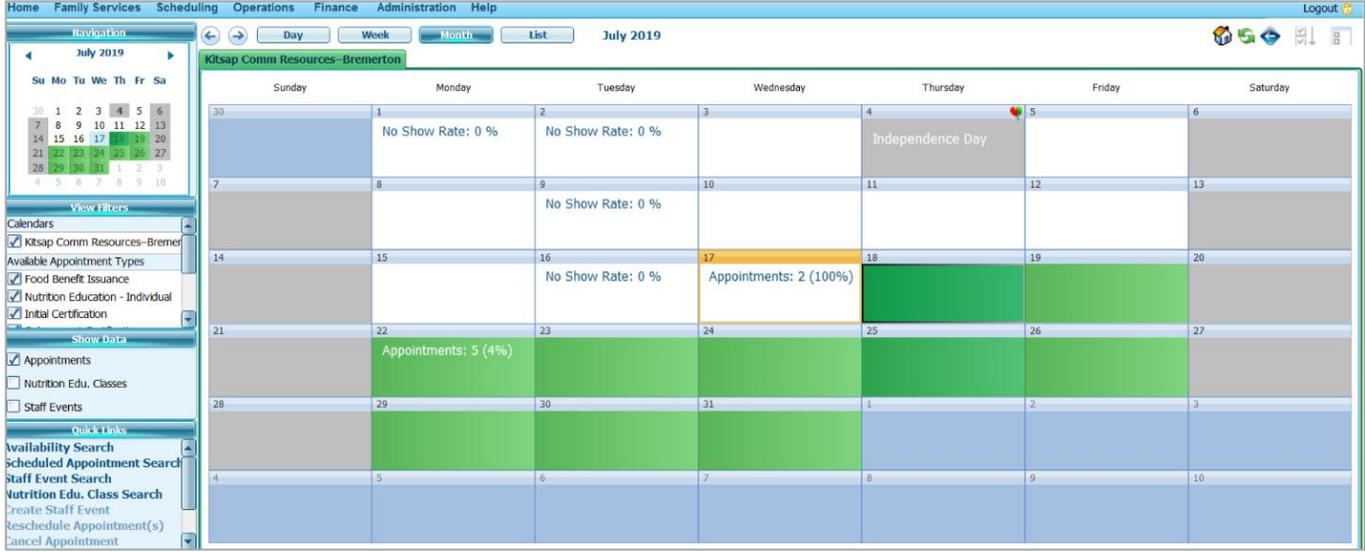
Cascades Steps

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
<p><u>METHOD 1</u></p> <p>Step 1. Get to the Master Calendar:</p> <ol style="list-style-type: none"> 1. Select Scheduling from Menu bar. 2. Select Clinic Master Calendar. <p>Note: Calendar defaults to current month's view.</p>	 

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.

The screenshot shows the 'Management Information System' interface. At the top, there are navigation tabs: Home, Family Services, Scheduling, Operations, Finance, Administration, and Help. Below this is a navigation bar with buttons for 'Day', 'Week', 'Month', and 'List', and the current date 'July 2019'. The main content area is titled 'Kitsap Comm Resources–Bremerton' and shows a calendar grid. A 'Mini Calendar' is visible in the top left of the main content area, showing a grid for July 2019 with dates 1 through 31. A red circle highlights the 'Mini Calendar' and the 'Calendars' dropdown menu. The 'Available Appointment Types' dropdown menu is also highlighted with a red box. The main calendar grid shows dates from Sunday to Monday, with a 'No Show Rate: 0 %' displayed. A red box highlights a green-colored date field in the main calendar grid, with a red arrow pointing to it.



Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types



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.
 - 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.

Time	FBI	IIE-I	IC	SC	PE-Complete Assess	Mid Cert HA	Registered Dietitian
8 AM	2	7	5	5	5	5	2
8:15	2	7	5	5	5	5	2
8:30	2	7	5	5	5	5	2
8:45	2	7	5	5	5	5	2
9 AM	2	6	4	4	4	4	2
9:15	2	6	4	4	4	4	2
9:30	2	7	5	5	5	5	2
9:45	2	7	5	5	5	5	2
10 AM	2	6	4	4	4	4	2
10:15	2	6	4	4	4	4	2
10:30	2	6	4	4	4	4	2
10:45	2	6	4	4	4	4	2
11 AM	2	6	4	4	4	4	2
11:15	2	6	4	4	4	4	2
11:30	2	7	5	5	5	5	2
11:45	2	7	5	5	5	5	2

Time	IC	SC	PE-Complete Assess	Mid Cert HA	Registered Dietitian
8 AM	5	5	5	5	2
8:15	5	5	5	5	2
8:30	5	5	5	5	2
8:45	5	5	5	5	2
9 AM	4	4	4	4	2
9:15	4	4	4	4	2
9:30	5	5	5	5	2
9:45	5	5	5	5	2
10 AM	4	4	4	4	2
10:15	4	4	4	4	2
10:30	4	4	4	4	2



Cascades Steps

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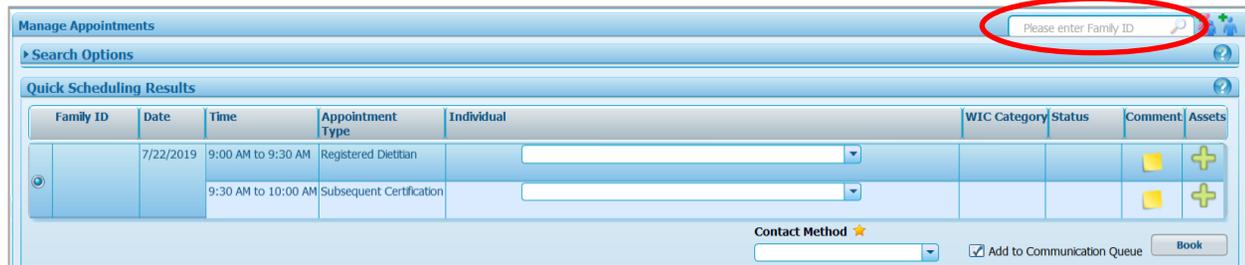
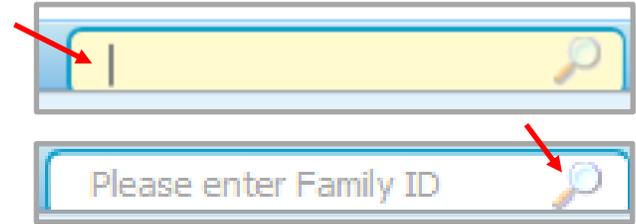


Step 4. Add your participants:

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:

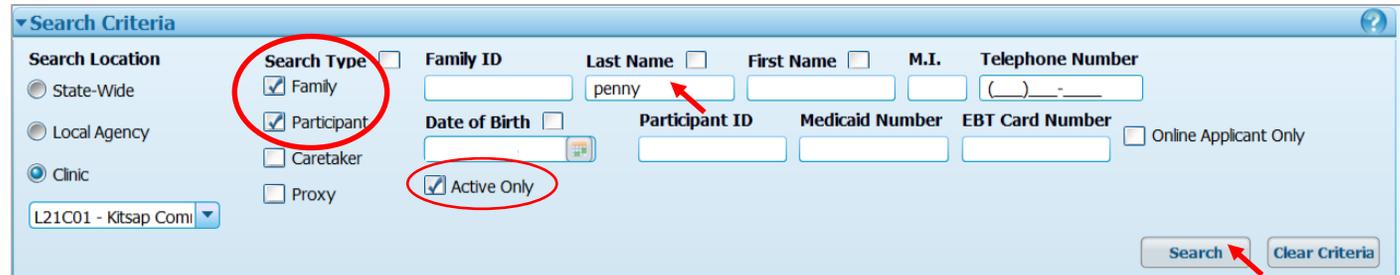
- Select the magnifying glass icon or
- Place your cursor in the box and
- Select the **Enter** button on your keyboard



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.



Search Results Total Items: 16

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
LF125910690		PENNY	PAT	S	9/19/1984					
LF125910690	LWA13416286	PENNY	KELSY	M	8/4/2015	C		Active/Certified	9/30/2019	PAT PENNY
LF125910690	LWA13419804	PENNY	Mel	Y	7/26/2018	I		Active/Certified	7/31/2019	PAT PENNY
LF125910279		Pen	Mar	C	5/3/1985					
LF125910279	LWA13418498	Pen	Ang	J	4/14/2017	C		Active/Certified	4/30/2019	Mar Pen





Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types



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.

Manage Appointments (Title bar)

Search Options: Please enter Family ID

Quick Scheduling Results

Family ID	Date	Time	Appointment Type	Individual	WIC Category	Status	Comment	Assets
LF125910690	7/22/2019	9:00 AM to 9:30 AM	Registered Dietitian	KELSY M. PENNY	Child	Active/Certified		+ Add
		9:30 AM to 10:00 AM	Subsequent Certification	PAT S. PENNY Mel Y. PENNY KELSY M. PENNY				+ Add

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.

Contact Method *

Phone (Selected)
In Person
Phone

Add to Communication Queue **Book**

Monday, July 22, 2019

Kitsap Comm Resources–Bremerton

Time	FBI	IE-1	IC	SC	PE-Complete Asses	Mid Cert HA	Registered Dietitian
8 AM	2	7	5	5	5	5	2
9 AM	2	6	4	4	4	4	2
9:15 AM	2	6	4	4	4	4	2
9:30 AM	2	6	4	4	4	4	2
9:45 AM	2	6	4	4	4	4	2
10 AM	2	6	4	4	4	4	2
10:15 AM	2	6	4	4	4	4	2
10:30 AM	2	6	4	4	4	4	2
10:45 AM	2	6	4	4	4	4	2
11 AM	2	6	4	4	4	4	2
11:15 AM	2	6	4	4	4	4	2
11:30 AM	2	7	5	5	5	5	2
11:45 AM	2	7	5	5	5	5	2

Participants on the left side of the Daily Schedule:

- PAT S. PENNY
- KELSY M. PENNY - Registered Die
- Mel Y. PENNY - Subsequent Certi
- VONDA GARCIA
- VONDA GARCIA - Initial Certical
- JUAN GARCIA - Initial Certificatio
- GABRIELLE GARCIA - Initial Certil
- JERI FOX
- KELLY FOX - Initial Certification
- JERI FOX - Registered Dietitian



Cascades Steps

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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.

The screenshot shows the 'Family Appointments List' interface. It lists two appointments for the family 'KELSY M. PENNY' and 'Mel Y. PENNY' on 7/22/2019. The interface includes fields for Participant ID, Status, Date of Birth, Age, Certification Period, and Next Food Issuance Date. Action buttons for 'Comments', 'Reschedule', and 'Cancel' are visible for each appointment. A yellow 'Appointment Comments' window is open over the list, showing a note from 'jxbeard' dated 7/18/2019 11:46 PM: 'Mom needs Sat appointments after this Monday's appointment, because she begins a new job in August!'. A red arrow points to the minimize icon in the top right corner of the sticky note window.

Participant Name	Appointment Date	Participant ID	Status	Comments	Reschedule	Cancel
KELSY M. PENNY Child L21C01 - Kitsap Comm Resources-Bren	7/22/2019 (9:00 AM to 9:30 AM) Registered Dietitian	LWA13416286	Active/Certified Certification Period: 10/16/2018 - 9/30/2019 Next Food Issuance Date: 11/17/2018			
Mel Y. PENNY Infant L21C01 - Kitsap Comm Resources-Bren	7/22/2019 (9:30 AM to 10:00 AM) Subsequent Certification	LWA13419804	Active/Certified Certification Period: 7/30/2018 - 7/31/2019 Next Food Issuance Date: 11/17/2018			

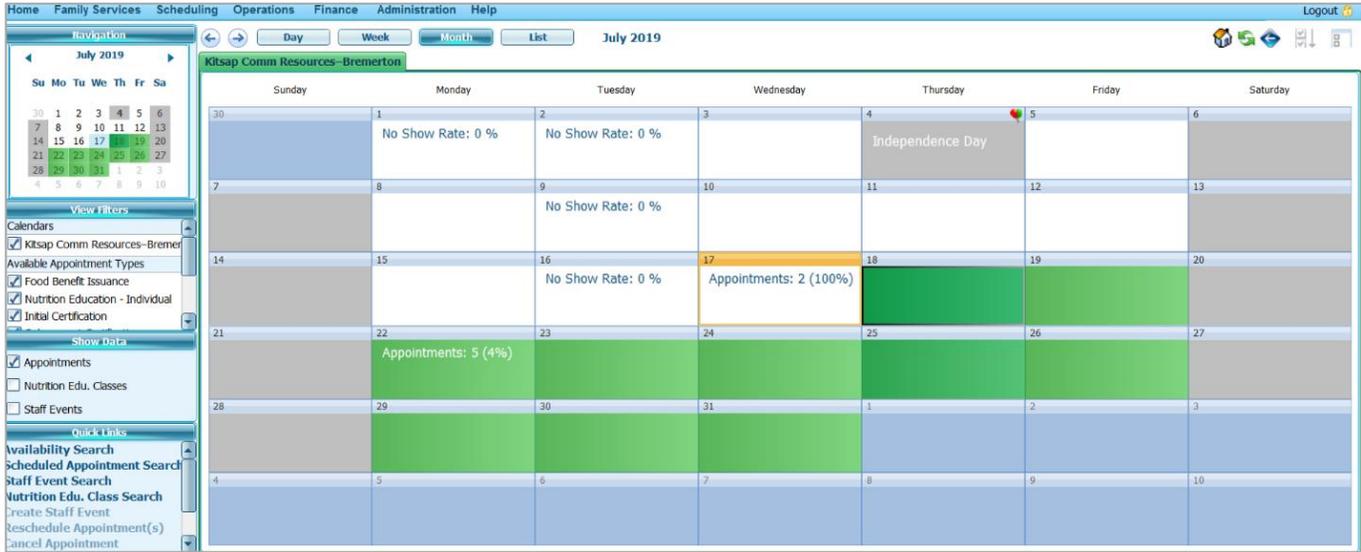


Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types



- 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
<p><u>METHOD 2</u></p> <p>Step 1. Get to the Master Calendar:</p> <ol style="list-style-type: none"> 1. Select Scheduling from Menu bar. 2. Select Clinic Master Calendar. <p>Note: Calendar defaults to current month’s view.</p>	 

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.

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

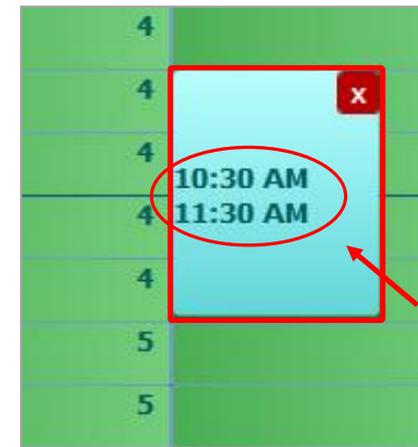
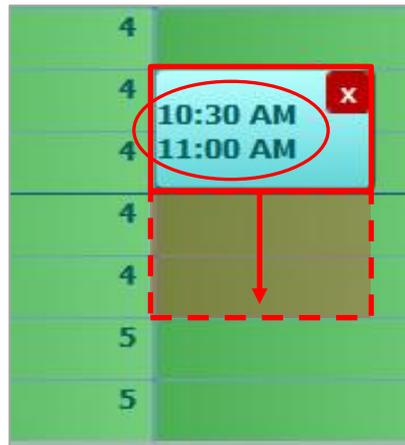
Step 3. Choose a time for your appointments:

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.

Time Slot	FBI	HE-I	IC	SC	PE-Complete Assessm	Mid Cert HA	Registered Dietitian
8 AM	2	7	5	5	5	5	2
9 AM	2	6	4	4	4	4	2
10 AM	2	6	4	4	4	4	2
11 AM	2	6	4	4	4	4	2

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.





Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types



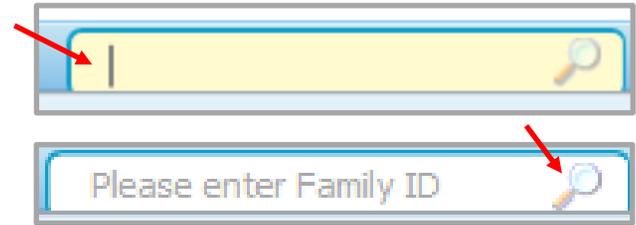
Step 4. Add your participants:

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:

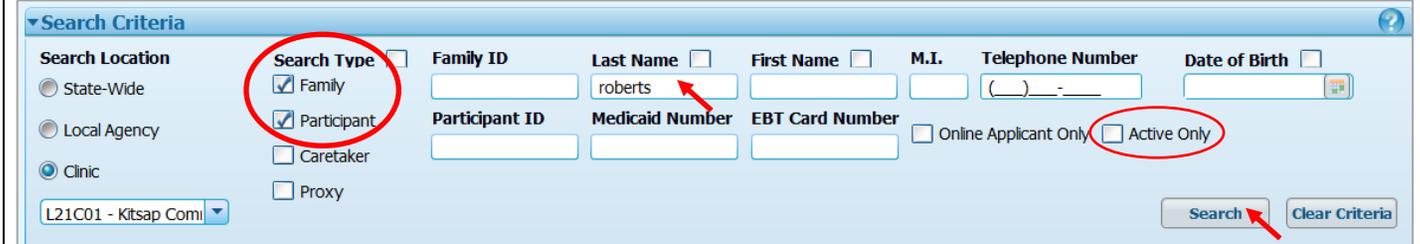
- Select the magnifying glass icon or
- Place your cursor in the box and
- Select the **Enter** button on your keyboard



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.”



Total Items: 3

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
LF125910453		ROBERTS	MAGGIE	L	2/25/1986					
LF125910453	LWA125919726	ROBERTS	MAGGIE	L	2/25/1986	N		Certification Expired	3/31/2018	MAGGIE ROBERTS
LF125910453	LWA13418938	ROBERTS	JOHNNIE	T	9/15/2017	C		Active/Certified	9/30/2019	MAGGIE ROBERTS





Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types

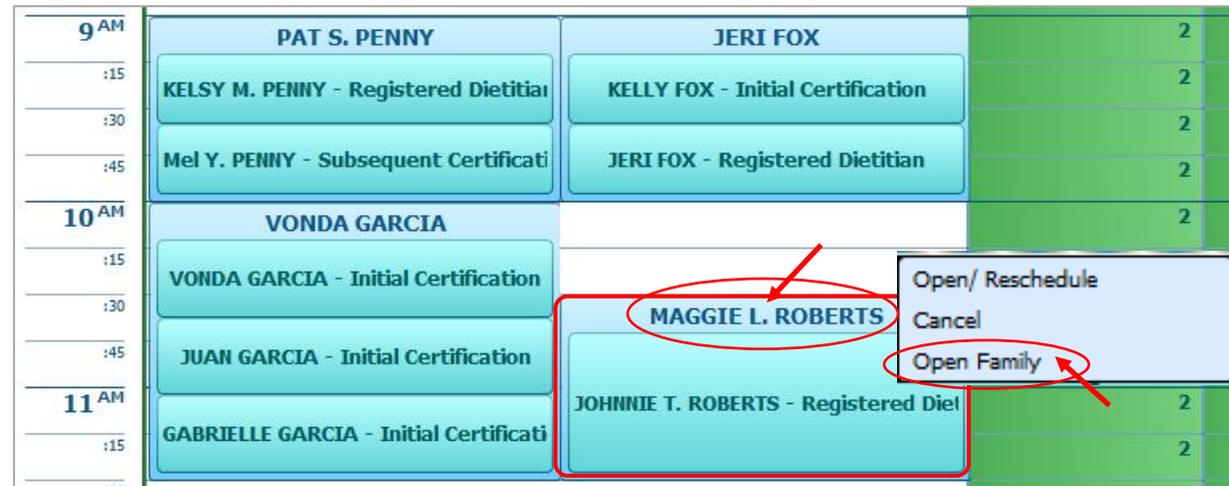
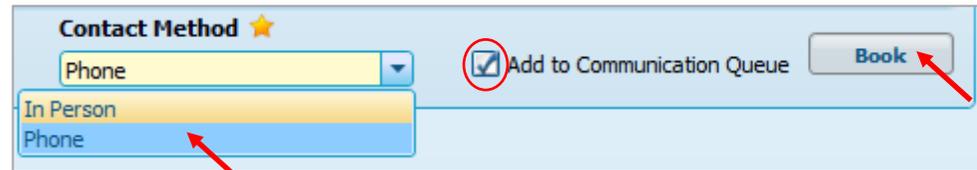
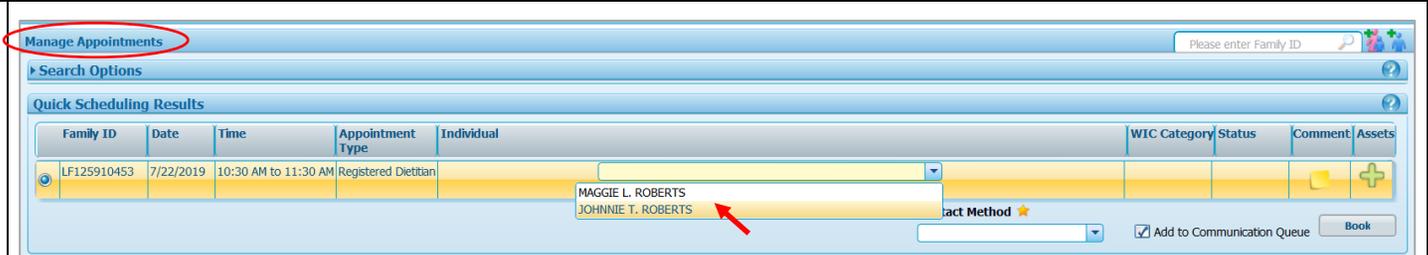


Step 6. Book the appointments:

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

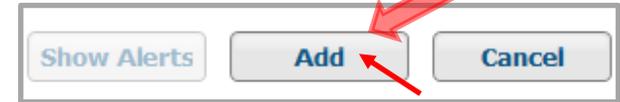
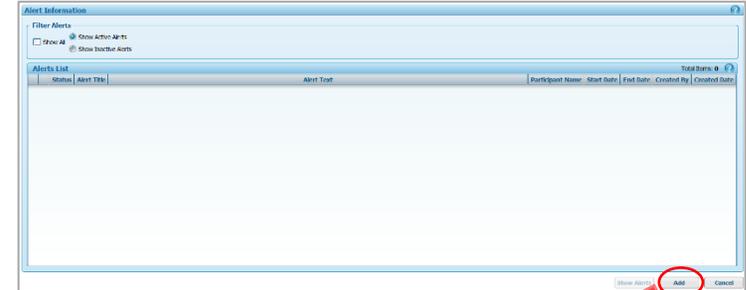
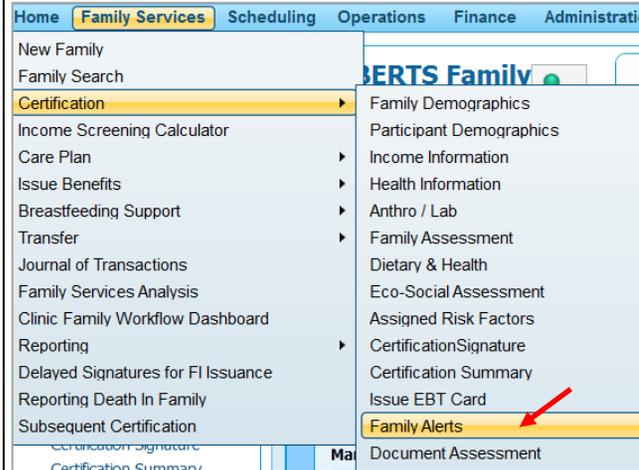


TIP!
Add a sticky note that the RD will do both appointment types. Follow steps on page 6.

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.

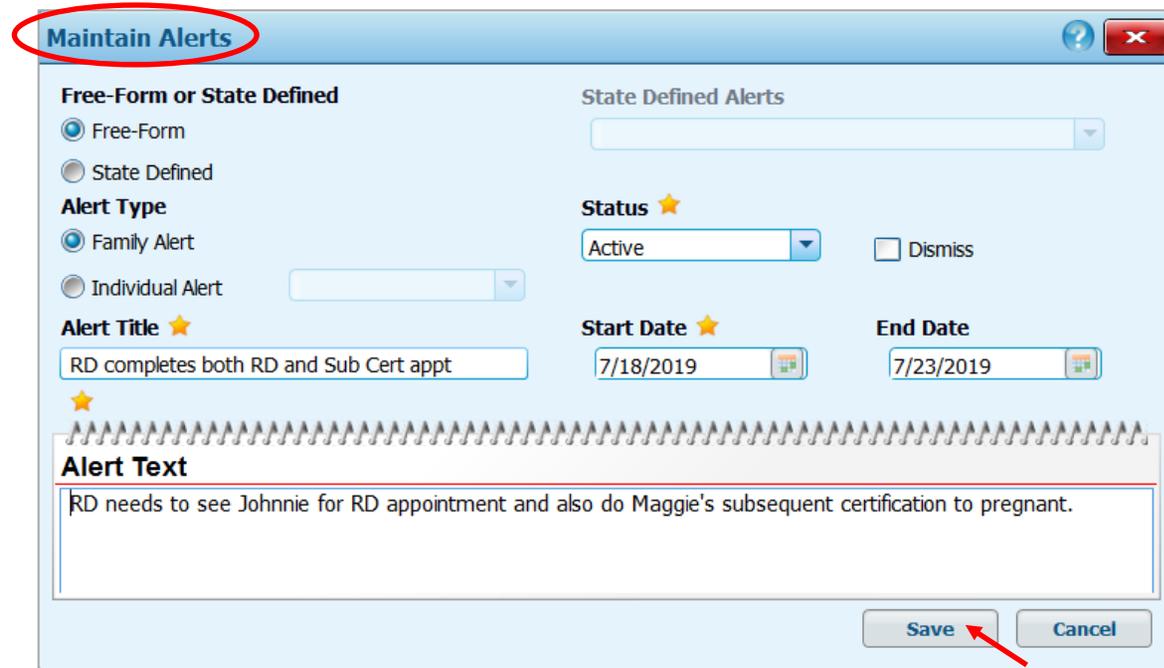


Step 8. Enter Alert information:

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**.





Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Multiple Appt. Types



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.

The screenshot shows the 'Alert Information' section with a 'Filter Alerts' dropdown set to 'Show Active Alerts'. Below is the 'Alerts List' table with one row of data. The 'Alerts List' title is circled in red. A red arrow points from the red X icon in the first row of the table to a larger red X icon below the table.

	Status	Alert Title	Alert Text	Participant Name	Start Date	End Date	Created By	Created Date
		Active	RD completes both RD and Sub Cert appt	RD needs to see Johnnie for RD appointment and also do Maggie's subsequent certification to pregnant.	7/18/2019	7/23/2019		7/18/2019

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To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

DOH 961-1171 July 2019

