



# Cascades Steps



## Walk-in Appointments in the Clinic Workflow Dashboard

### The Clinic Workflow Dashboard:

- is located under **Family Services** and on the **Home** page.
- displays only today's scheduled appointments.
- displays appointment activity for the clinic: Appointments, Checked-In, In Progress, Completed.

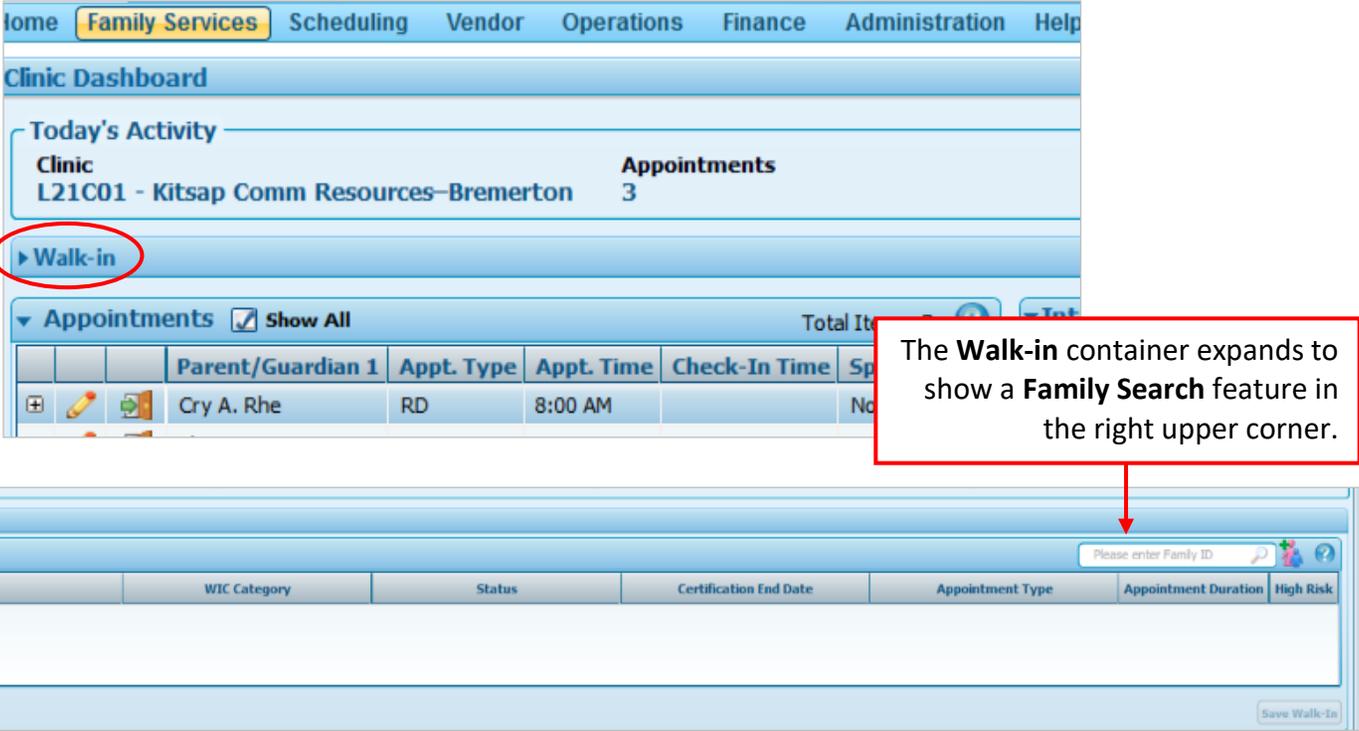
### The Walk-in Appointment:

- serves participants who aren't in today's schedule, or who missed their appointments today and came in later the same day.
- The **Walk-in** tab is located between the container showing **Today's Activity** and the **Appointments** container.

The screenshot shows the 'Clinic Dashboard' interface. At the top, there is a navigation menu with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. Below this, the 'Clinic Dashboard' header includes 'Today's Activity' with a sub-header 'Clinic L21C01 - Kitsap Comm Resources-Bremerton' and four summary boxes: 'Appointments 3', 'Checked-In 0', 'In Progress 0', and 'Completed 0'. A 'Walk-in' tab is highlighted with a red circle. Below the dashboard are several data containers: 'Appointments' (Total Items: 2) with a table listing two appointments; 'Intake' (Total Items: 0); 'Assessment' (Total Items: 0); 'Care Plan' (Total Items: 0); 'Issue Food Benefits' (Total Items: 0); and 'Waiting Room' (Total Items: 0). Each container has a table with columns for 'Parent/Guardian 1', 'Appt. Type', 'Appt. Time', 'Check-In Time', and 'Special Need'.

Parent/Guardian 1	Appt. Type	Appt. Time	Check-In Time	Special Need
Cry A. Rye	RD	8:00 AM		No
Elv Rey	RD	8:00 AM		No

## Walk-in Appointments in the Clinic Workflow Dashboard

Steps	Cascades Screen
<p><b>1. Open Clinic Family Workflow Dashboard:</b></p> <p>Select <b>Clinic Family Workflow Dashboard</b> in the <b>Family Services</b> container on the Cascades <b>Home</b> page.</p>	
<p><b>2. Expand the Walk-in container:</b></p> <p>Select on the triangle-shaped expander to open the <b>Walk-in</b> container.</p>	 <div data-bbox="1499 995 1984 1143" style="border: 1px solid red; padding: 5px; width: fit-content;"> <p>The <b>Walk-in</b> container expands to show a <b>Family Search</b> feature in the right upper corner.</p> </div>

### 3. Search for the Family File:

You can search for the family in different ways:

- Enter the Family ID into the **Family Search** feature.
- Use the **Family Search** icon and select your family from the **Select Family** pop-up window.

#### For new families:

If the family is new, create a new Family by clicking the **New Family** icon.

Enter Family ID into the Family Search feature.

Select the Family Search icon, then select the desired family name.

Select New Family icon to create a new family.

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
LF12597340	LWA13418970	Lew	Kai	A	10/10/2017	C		Active/Certified	3/31/2019	Mar Lob
LF12597925	LWA13419178	Log	Kim	G	11/15/2017	C		Active/Certified	11/30/2018	Don Pal
LF12598499	LWA13414688	Liu	Sos	I	5/17/1977	C		Active/Certified	7/31/2019	El Jon
LF12598499	LWA13417302	Liu	Jsy	M	6/28/2014	C		Active/Certified	4/30/2019	Mag Us
LF12598610	LWA125915856	Lop	Ama	E	3/14/1982	N		Active/Certified	9/30/2019	Car Cot
LF12598610	LWA13419934	Liq	Ari	R	9/5/2018	I		Active/Certified	3/31/2019	Ama Lop
LF12599216	LWA13415627	Law	Kam	L	2/12/2015	C		Active/Certified	3/31/2019	Ama Lop
LF12599216	LWA13411138	Lee	Reb	N	12/14/1983	C		Active/Certified	2/28/2019	Reb Lee
LF13411138	LWA13417010	Lee	Eva	D	2/8/2016	C		Active/Certified	2/28/2019	Reb Lee
LF13411174	LWA13411501	Lam	Cly	R	12/19/1986	C		Active/Certified		
LF13411501		Loe	Tom	G						

### 4. Set Appointment Type(s) and Duration(s):

Determine what services this family will receive today.

- Adjust appointment types and times, if necessary.
- Select **Add** to add any additional appointments.

Select Save Walk-in button.

Family ID	Individual	WIC Category	Status	Certification End Date	Appointment Type	Appointment Duration	High Risk
LF12597925	Kim G. Log	Child	Active/Certified	11/30/2018	Food Benefit Issuance	15	No
LF12597925	Kim G. Log	Child	Active/Certified	11/30/2018	Subsequent Certification	30	No
LF12597925	Kim G. Log	Child	Active/Certified	11/30/2018	Nutrition Education - Individual	15	No

## Cascades Steps

### Walk-in Appointments in the Clinic Workflow Dashboard

#### 5. The Family is now in the Waiting Room.

- View the Waiting Room in the Clinic Workflow Dashboard.
- The family is ready to be served.
- Click the **plus** sign to see all participant appointment types.
- Notice the green **Walk-in** icon in the **Appt. Time** column.
- Walk-ins will show in your clinic statistics reports.

The **plus** sign turns into a **minus** sign once you select it.

Waiting Room						Total Items: 1
	Parent/Guardian 1	Appt. Type	Appt. Time	Check-In Time	Special Need	
☰	Dom G. Fal	FBI	🚶	10:16 AM	No	

Name	Appt. Type	Appt. Time	Special Needs
Kin G. Log	FBI	🚶	
Kin G. Log	SC	🚶	
Kin G. Log	NE-I	🚶	

The green walking person is the icon for a **Walk-in**.

### Tip!

If a scheduled participant missed her appointment today and later shows up as a walk-in (today) you may record her as a Walk-in this way:

1. Cancel today's earlier appointment.
2. Check her in as a Walk-in.

This will keep your clinic appointment statistics accurate.

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 961-1711 May 2019