Appointment Scheduling - Introduction

Intro

This HuBERT on-demand training module…

Intro1

…is provided by the MN Department of Health WIC Program. It provides an overview of Appointment Scheduling

Schedule Appointments

Overview

Local agencies may choose different methods for scheduling appointments, such as basing it on the next nutrition contact for benefit issuance or using same-day flexible scheduling. Regardless of our agency's method, the functionality for scheduling an appointment in HuBERT is the same.

Prescreen

There are many different ways to open the Schedule Appointments screen in HuBERT. In Prescreen…

…we can select the **Schedule Appointment** checkbox.

Participant List

In the Participant List, we have a **Schedule Appointments** icon; and

Participant List1

an option in the **Participant List** menu. In the Participant Folder…

PF and GS

…we have the same icon and an option in the **Participant Activities** menu.

And in the Guided Script we have another checkbox.

Open Appts

We can pretty much schedule an appointment from any of the main screens in HuBERT and the only caveat is that the participant must have a record in the database for us to be able to schedule an appointment for them.

Today is February 21 and Rhoda Horse is due for a mid-certification assessment appointment in May. Let's take a look at Show Details for Ma.

<no audio> Click to see Ma's Show Detail panel.

Ma's MCA is due in March but we can schedule it for the same time as Rhoda. So let's do that.

<no audio> Click the **Schedule Appointments** icon.

The Appointments dialog gives us the option of scheduling an appointment or scheduling participation in a group class.

Go ahead and click on Schedule Appointment.

<no audio> Click the **Schedule Appointment** button.

Schedule Appts

The **Schedule Appointments for Household** screen displays the current month plus three future months.

Depending on how our agency maintains our appointment calendar, calendars can be created up to a year in the future.

We can see how far into the future we can schedule by clicking the right arrow.

<no audio> Click the right arrow.

Dates with available appointment columns display as yellow.

Holidays display in red.

And the font of the selected day is white.

Let's go back to the previous calendar view by clicking the left arrow.

<no audio> Click the left arrow.

We can also change our calendar view by selecting a month from the **Date** drop-down.

<no audio> Click the **Date** drop-down.

<no audio> Select **June.**

We can also schedule appointments at another of our agency's clinics by simply selecting it from the **Clinic** drop-down.

<no audio> Click the **Clinic** drop-down.

<no audio> Select **Clinic 024**.

The calendars are now displaying for the Richfield Central School clinic.

Go ahead and switch back to the Bloomington Public Health clinic, which is where we actually want to schedule these appointments.

<no audio> Click the **Clinic** drop-down.

<no audio> Select **Clinic 023**.

Now let's return our view to the February calendar using the Date drop-down again.

<no audio> Click the **Date** drop-down.

<no audio> Click above the scroll bar.

<no audio> Select **February.**

Schedule Appts 1

The green date on the calendar is the current date.

We can click on a desired date to view available appointments. Let's take a look at February 28th.

<no audio> Click on **February 28th**.

We can see there is one 15-minute appointment still available.

If we were to fill this appointment… <pause for rotation>

The 28th would display as turquoise. The one caveat is that **every single time slot** must be filled for it to display turquoise.

Schedule Menu

Let's take a quick look at some of the other features on the left side of this screen.

Like all menu options, we can access the Schedule menu and its options by using hot keys.

Alt + S opens the menu and then displays the hot keys.

The first five options in the **Schedule** menu change the mouse focus on the screen. To see what that means hit the Enter key or click on **Change Appointment Type**

<no audio> Press the **Enter** key on your keyboard or select **Change Appointment Type.**

The focus of our mouse is now on the Appt Type field and we can use hot keys, such as the arrow keys on our keyboard or by typing the first letter of different appointment types to select from the list without using our mouse.

Go ahead click on the **Schedule** menu to open it again.

<no audio> Click on the **Schedule** menu.

The next three options are functions in this screen that we'll talk about in a couple of minutes.

The last option, Exit, closes this screen.

Below the calendars, we have a couple of viewing options…

View Calendar

The default view every time we open the Schedule Appointments screen is 15 minute increments.

We can change this by selecting from the **View By** drop-down.

Click to open this drop-down.

<no audio> Click the **View By** drop-down.

We have three other increment options. Go ahead and select **½ Hour.**

<no audio> Select **1/2 hour.**

View Calendar 1

This view is not permanent and will only be maintained until we close the screen.

Notes are added for specific dates by the person who built our clinic calendar.

The button is only enabled if a note has been added for the date we've selected.

Since the button is enabled, a note has been added for February 28th. Go ahead and click the button.

<no audio> Click the **Notes** button.

This is a read-only note and the only thing we can do is read it then close it. Go ahead and do that.

<no audio> Click the **Close** button.

Our default view is by Day but we can switch it to Week to get a better idea of open appointments.

Let's take a look at week view.

<no audio> Click the **Week** radio button.

View Calendar 2

<no audio> Pan view to top of screen.

Week view will display the entire week that includes the currently selected date.

And we can more easily view open appointments.

<pause for graphics>

Notice, however, that we cannot schedule appointments while in Week view.

Once we select the Week view, we can move through the weeks by either selecting a date on the calendar…

<no audio> Click on **March 27th.**

View Calendar 3

…or by using the **Previous Week** and **Next Week** buttons.

<no audio> Click the **Previous Week** button.

Let's revert back to the default view by closing the screen.

<no audio> Click the **X** to exit the screen.

Open Appts 1

Go ahead and re-open the Schedule Appointments screen.

< no audio – failure hint> Click the **Schedule Appointments** icon.

Open Appts 2

<no audio – failure hint> Click the **Schedule Appointment** button.

Schedule Appts 2

The Schedule Appointments screen is by household, which allows us to schedule appointments for other household members who belong to the same agency without leaving the screen.

The participant who was selected when we opened this screen, which was Ma Horse, displays in the **Appointment Information** section.

But we can select Rhoda from the **Member** list.

The **Appt Type** defaults to INITIAL CERTIFICATION. Let's take a look at the available appointment types.

<no audio> Click the **Appt Type** drop-down.

The first four types: INITIAL CERTIFICATION, SUBSEQUENT CERTIFICATION, HIGH RISK FOLLOW-UP and MID CERTIFICATION**,** along with INDIVIDUAL NUTRITION EDUCATION/CHECK PICK-UP, are system-defined appt types that display for all agencies.

Appt Types

When scheduled, the cert appt types display based on the color indicated in the legend at the bottom of the screen.

All other types display in yellow.

Go ahead and click the scroll bar to view the rest of the appt types in the list.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar again.

All non-system defined appt types are managed by the individual local agency.

Some agencies choose to add appt types that are more descriptive so that they have a better idea of what type of appointment is being scheduled.

Since we're scheduling Ma's breastfeeding midcert, let's select that appt type from the list.

<no audio> Select **Breastfeeding Midcert.**

Appt Info

The **Duration,** or length of the appt, is specific to each type and is again, managed by each local agency.

<no audio> Click the **Duration** drop-down.

Depending on our local agency's policy, we can adjust the length of the appt, if necessary. For instance, we may want to increase the duration if we were working with an interpreter and knew the appt would take longer than an average appt.

We can decrease the length to as little as 5 minutes <pause for graphic> or increase it up to 120 minutes.

<no audio> Click the **Duration** drop-down to close the list.

The **WIC Category** matches the WIC Type that displays in Demographics.

We need to note that this may not reflect the WIC Type we are scheduling the appointment for. For example, we may be scheduling a woman who was previously on as breastfeeding but is now pregnant. We can't change her WIC Type in Demographics to Pregnant without certifying her so the WIC Type that displays here is breastfeeding.

The **Comments** field provides a space where we can write a very short comment specific to the appointment we are scheduling. However, it only displays in the Appointments tab and the view is limited to only 20 characters.

We'll add a quick comment so that we can see where and how it displays later. But a much more effective method for communicating about appointments is to create an alert.

Keep in mind <pause for emphasis and graphic> that when scheduling appointments, it is our responsibility to complete the Initial Contact if it is required.

However, we know we don't have to create an Initial Contact because we are scheduling a Midcert.

Refresh

The **REFRESH** button is a function that comes in most handy when same-day or flexible scheduling. Since scheduling happens so fast, we may need to refresh the screen to make sure the appointment is still available.

Overbook

HuBERT will not allow us to automatically book an appointment for two participants in the same column for the same time.

If an overlap occurs, the system will schedule the first appointment made and let us know that ours will create an overbook.

We can click **Cancel** on this message and the conflicting appointment won't be scheduled or if we choose to overbook by clicking the OK button on the message…

<no audio> Click the **OK** button.

<no audio> Click **OK** on the confirmation message.

HuBERT will create another read-only column, which means we can't add appointments to it, and display the second appointment as an overbook in red.

Schedule Appts 3

So, we want to schedule Midcert appointments for Ma and Rhoda in May.

We need a 45-minute blocks and we want to try to schedule them around the first date of their issuance cycle, which is the 22nd.

Let's look at appointments available on May 22.

<no audio> Click on **May 22.**

Schedule Appts 4

In HuBERT scheduling, a resource is the name of the appointment column.

Agencies can choose how to define their resources. It can be a specific staff person's name or a general name, either way a resource represents a staff person available for appointments.

Best practice is to schedule members of the same household in the same resource column and whenever possible, try to fill one resource column before starting another.

We also want to ask if a particular day and date works and what times might be best. Most agencies have fewer early morning and late afternoon appointments, so if possible, we may want to try to keep those for people who can't make it during the day.

Confirmation Msg

Since cpa 1 already has an appointment scheduled, following our best practices, let's schedule Ma in that column.

To schedule the appointment at 3:00, we simply double-click in the 3:00 time slot.

<no audio> Double-click the 3:00 time slot.

The **Confirm Appointment Selection** message displays all the information associated with the appointment including who, what, where, and when.

If we click **Cancel**, HuBERT won't schedule the appointment and will simply return to the Schedule Appointments screen.

We also have the option to print notices and agencies may choose to use some of this functionality so we'll take a quick look at it.

Selecting the **Generate Official Notice** checkbox**…**

Gen Office Notice

…prints the Letter of Ineligibility with the reason of Recertification Due. This is not a reason MN WIC would ever determine a participant ineligible…

Confirmation Msg 1

…so we should never print this from here (and probably never will have any reason to anyway).

We could, however, select the checkbox to generate an appointment notice.

<no audio> Click the **Generate Appointment Notice** checkbox.

This enables the Now or Later radio buttons, which default to Now, and allow us to immediately print our notice or delay its printing by sending it into a queue.

<no audio> Click the **Later** radio button.

So, how do we print it later if that's what we choose to do?

Print Queued Notices

Well, back in the Participant List screen, let's open the **File** menu.

<no audio> Click the **File** menu.

And select **System Outputs.**

<no audio> Select **System Outputs**.

Then **Documents.**

<no audio> Select **Documents.**

And this is where we can print our queued appointment notices.

<no audio> Click when ready to continue module.

Confirmation Msg 2

Back in the Schedule Appointments screen, let's select the **Now** radio button and click **OK** on the confirmation message.

<no audio> Select the **Now** radio button.

<no audio> Click the **OK** button.

Since we selected to generate an appointment notice, this dialog appears.

If we sent it to the queue to print later, the **Generate Address Label(s) First** section has to be completed for the notice to be saved to the queue.

We have two options for the notice type: Letter and PostCard.

Click **OK** and we'll take a look at them.

<no audio> Click the **OK** button.

Appt Notice

The Appointment Notice is the same for all local agencies and provides who, what, where and when.

It also lists the items that the participant may be required to bring to the appointment.

Of course, since we are scheduling a Midcert, we would want to make sure to cross out anything that doesn't apply.

Below what to bring…

Appt Notice1

…are a couple of sentences about bringing referral info and a reminder to be timely if possible.

<no audio> Click when ready to continue module.

Appt PostCard

The postcard is a much-abbreviated appointment reminder that shows who, when and where.

<no audio> Click when ready to continue module.

Schedule Appts 5

Now let's schedule a 3:30 appointment for Rhoda. Go ahead.

<no audio> Click on the **Member** drop-down.

<no audio> Select Rhoda.

<no audio> Click the **Appt Type** drop-down.

<no audio> Click above the scroll bar.

<no audio> Click above the scroll bar again.

<no audio> Select MID CERTIFICATION.

Notice that our Duration changed from 30 minutes to 15. We are going to keep the same comment since it applies for Rhoda too.

<no audio> Double-click 3:30 in the cpa 1 column.

This time, let's skip the Notices section and just click OK.

<no audio> Click the **OK** button.

Schedule Appts 6

If we hover our mouse over the appointment, it will display the participant's full name, WIC type and the appointment type.

So, that's all there is to scheduling an appointment: Make sure we have the right clinic, select the date, the household member, and the appointment type, write a short comment if desired…

Schedule Appts 7

…complete the Initial Contact if required, Refresh if necessary, double-click the time, and confirm.

We should note that appointments cannot be scheduled for a time that has already past. For instance, if we want to put a walk-in participant on the schedule so that we have a record of it and don't have any times available except for earlier in the day, HuBERT will not allow us to add them to the schedule. Instead, it will display this message.

<no audio – message description> The appointment time cannot be before the current time.

The **OK** button can be used in place of a double-click when scheduling an appt.

For instance, click the 3:45 time slot.

<no audio> Click the 3:45 time slot.

And now click OK.

<no audio> Click the **OK** button.

See? Same thing as a double-click.

Go ahead and click OK to schedule the appointment.

<no audio> Click the **OK** button.

We don't actually want to keep the 3:45 appointment so we can also delete it.

Delete Appointments

Delete Appt

The **Delete Appt** button becomes enabled once we select an appointment on the grid. Go ahead and click on the 3:45 appointment for Rhoda.

<no audio> Click the 3:45 appointment for Rhoda.

And delete the appointment. <keep the previous print screen extended>

<no audio> Click the **Delete Appt** button.

<no audio> Click the **OK** button on the confirmation message.

Let's put some of what we've learned into another scenario.

Reschedule Appts

Let's say at this point, Ma realizes trying to get to the WIC clinic by 3:00 would probably be a little tight and that 3:30 would work better.

Rhoda is already scheduled for 3:30 so we can keep her appointment but we need to reschedule Ma's for 3:45.

There isn't an actual "Reschedule" function on this screen so instead we simply delete and schedule a new one.

Start with deleting Ma's appointment. Go ahead and do what needs to be done…

<no audio – hint after 10 seconds> Click on Ma's appointment to select.

Reschedule Appts 1

<no audio – failure hint> Click the **Delete Appt** button.

Reschedule Appts 2

<no audio – failure hint> Click the **OK** button.

Reschedule Appts 3

<no audio – failure hint> Click the **Member** drop-down.

Reschedule Appts 4

<no audio – failure hint> Select **Ma.**

Reschedule Appts 5

<no audio – failure hint> Click the **Appt Type** drop-down.

Reschedule Appts 6

<no audio> Click below the scroll bar.

Reschedule Appts 7

<no audio> Click below the scroll bar again.

Reschedule Appts 8

<no audio – failure hint> Select **Breastfeeding Midcert.**

Reschedule Appts 9

Great. So, we've been on this screen for a little while. Best practices would suggest we do what next?

<no audio – failure hint> Click the **REFRESH** button.

Reschedule Appts 10

Ah. Luckily we're still good to go and 3:45 to 4:15 is still open for cpa 1. Now what?

<no audio – use the double-click…>

<no audio – failure hint> Double-click 3:45 on the grid.

Reschedule Appts 11

We aren't going to print an appointment notice.

<no audio – failure hint> Click the **OK** button.

Reschedule Appts 12

Go ahead and close the Schedule Appointments screen.

<no audio> Click the **Close** button.

The Appointments Tab

Show Details Appts

The next scheduled appointment displays in the Show Details panel, regardless of where it may be scheduled. Let's refresh it by clicking the **Hide Details/Show Details** button.

<no audio> Click the **Hide Details** button.

<no audio> Click the **Show Details** button.

<no audio – pause> Appointment for 5/22/18 at 3:45 displays.

Next we're going to look at the Appointments Tab in the Participant Folder.

<no audio> Double-click Ma's row.

<no audio> Click the **Close** button or hit the **Enter** key.

Appts Tab 1

<no audio> Click the **Appointments** tab.

Appts Tab 2

The Appointments tab automatically displays all current and future appointments scheduled at our agency for household members assigned to our agency including who, where, when and what.

They display chronologically with the earliest date and time at the top of the list.

At the bottom of the screen…

Appts Tab 3

…we have some functions. The last function, View All, displays appointments that were scheduled for dates within the last 90 days and appointments scheduled at other agencies.

<no audio> Click the **View All** button.

The first four functions affect the highlighted row in the grid.

We can delete an appointment. This is an important function in the participant folder when transferring participants from another agency since appointments do NOT automatically delete upon transfer.

The importance of this is two-fold: it keeps the other agency's no-show rates from being inflated by participants who **no longer** receive services from that agency and it keeps appointments available for other participants still belong to that agency.

In lieu of this best practice, let's delete the two appointments scheduled for Ma at Scott-Carver since she belongs to the Bloomington agency now.

<no audio> Click the second row in the grid to highlight it.

<no audio> Click the **Delete Appointment** button.

The confirmation message verifies the date and time of the appointment we want to delete.

<no audio> Click the **OK** button.

The grid goes back to our original view. We want to delete the other appointment at Scott-Carver. Go ahead and do that.

Appts Tab 3A

<no audio – failure hint> Click the **View All** button.

<no audio – failure hint> Click the second row in the grid to highlight it.

<no audio – failure hint> Click the **Delete Appointment** button

Appts Tab 3B

We can also reschedule appointments. Let's reschedule Rhoda's Midcert, which is already highlighted in the grid.

<no audio> Click the **Reschedule Appointments** button.

<no audio> Click the **Schedule Appointment** button.

Reschedule 2A

The **Reschedule Appointments for Household** screen opens to the current date.

The menu is now called **Reschedule.**

Information for the appointment being rescheduled, which is Rhoda's, displays in the **Original Appointment Information** section.

And the type and comment, if there is one, default.

When rescheduling, we can change the clinic and her appointment type if we need to. Let's change the Appt Type from MID CERTIFICATION to Midcert. Go ahead.

<no audio – failure hint> Click the Appt Type drop-down.

<no audio – failure hint> Select **midcert**.

And its duration from 30 back to 15.

<no audio – failure hint> Click the **Duration** drop-down.

<no audio> Click above the scroll bar.

<no audio – failure hint> Select **15.**

What do you think we do to reschedule the appointment for May 23rd at 3:30 for cpa 1. Go ahead.

<no audio – hint displays in 10 seconds> Click on May 23rd on the calendar.

Reschedule 2A

<no audio – hint displays in 10 seconds> Double-click on 3:30.

Reschedule 3A

The confirmation message displays the old appointment info and the new (no audio: appointment type at top of message is the new appt type = midcert).

Click **OK** to reschedule this appointment.

<no audio> Click the OK button.

Reschedule 4A

Now let's reschedule Ma by selecting her from the **Member** drop-down.

<no audio> Click the **Member** drop-down.

<no audio> Select **Ma**.

By selecting Ma, the two Appointment Information sections update.

Go ahead and reschedule Ma for 3:45.

<no audio – failure hint> Double-click the 3:45 slot on the grid beneath Rhoda's appointment.

<no audio> Click the **OK** button.

Reschedule 5A

Now let's just double-check May 22nd.

<no audio> Click on **May 22nd** on the calendar.

We don't have to double-check in the future. We can rely on HuBERT to remove the appointment that has been rescheduled. Let's close this screen.

<no audio> Click the X to close.

Print Schedule

Our rescheduled dates and times are now displayed in the Appointments Tab.

We can also print a schedule. Let's take a look.

<no audio> Click the **Print Schedule** button.

We can run it for the participant selected in the grid or all members of the household. Let's run it for the household.

<no audio> Click the **All Members of Current Household** radio button.

Although this requires a date range be entered, the dates do not affect the output. So we are just going to select Today from both of the drop-downs.

<no audio> Click the **From** drop-down.

<no audio> Click the **Today** button.

<no audio> Click the **To** drop-down.

<no audio> Click the **Today** button.

And click **OK** to print it.

<no audio> Click the **OK** button.

Print Schedule 1

The Participant Appointment Schedule Report essentially prints everything that can be viewed on the Appointments tab.

<no audio> Click when ready to continue module.

Appts Tab 4

Let’s click to the right of the scroll bar to view the rest of the information that was included on the schedule.

The **Requested Date** is the date the appointment was scheduled, which is used to insure the processing standards are met.

The Kept column is read-only and indicates if the participant came to their appointment when checked. It is automatically selected when benefits are issued on the same date as the appointment and can be manually selected in a couple of screens that we’ll see in the next module.

The **Appointment Comment** is the only place our comment displays. It is truncated to 24 characters and we cannot hover to display more. Again, write an alert.

The **Follow-up** and **Follow-up Comments** are functions found in the View Appointments for Date screen that we’ll look at in another module.

Lastly, the **Missed** checkbox has nothing to do with whether or not the participant missed the appointment. That’s already represented by the Kept checkbox.

Instead, it is an indicator for whether a Missed Appointment Reminder Letter was produced.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.