View Appointments for Date - Introduction

Intro

This HuBERT on-demand training module…

Intro1

…is provided by the MN Department of Health WIC Program. It provides an overview of View Appointments for Date and Missed Appointments Follow-up.

View Appointments for Date

Activities Menu

The schedule of daily appointments displays in the View Appointments for Date screen. The only way to open it is to click on the **Activities** menu in the Participant List screen.

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

<no audio> Select **View Appointments for Date.**

View 1

Today is March 14th and the screen opens to the current date.

The calendar colors are the same on all of HuBERT's appointments scheduling screens.

Green is the current date, yellow is a date with resources scheduled, turquoise is all time slots for all resources are filled on that date, and red is a holiday.

It displays the daily appointments for the clinic we are working in. But we can view the schedule for other clinics in our agency by selecting them from the Clinic drop-down.

Let's view today's schedule for the Richfield clinic.

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

<no audio> Select clinic **024 – Richfield**.

Clinic

Evidently, Richfield doesn't have any appointments today. Let's look at March 20th instead.

<no audio> Click on the 20th on the calendar.

Notice all the functions are available for appointments scheduled at another clinic.

Let's go back to our current clinic.

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

<no audio> Select clinic **023 – Bloomington**.

Calendar

Since we only changed our clinic, the schedule is still for the 20th.

We can move our calendar view forward and backwards a month by using the arrows.

The slider allows us to move between the dates displayed. But this isn't a very efficient tool so we're only going to mention it and not really look at it.

HuBERT only stores 3 months of past appointment information in the database.

So, how far back can we view schedules? Go ahead and find out. Click the back arrow until it stops.

<no audio> Click the back arrow until it stops.

<no audio – no display> Click the back arrow again.

<no audio – no display> Click the back arrow again.

It will only display as far back as January 15th.

Notice that the grid still displays March 20th appointments. We would need to select a date from the calendar to see the schedule.

Let's go back to March 14th. We'll take a shortcut and close and re-open the View Appointments for Date screen.

Before we do, we should mention that although this screen can be minimized, we cannot use any other **HuBERT screens** while it is open.

<no audio> Click the **Minimize** icon.

Minimize

If we click on the Participant List screen while the View Appointments for Date screen is minimized…go ahead and click anywhere…

<no audio> Click on the **Participant List** screen.

….buttons display in the bottom left corner of our screen.

To un-minimize it, click the first icon on the left.

<no audio> Click the **first icon** on the left.

Close

It may still be a useful function though since it allows us to keep it open while using other software.

Anyway, back to closing the screen. We can either click the X in the top right corner or click the Close button. You choose.

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

OR

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

Re-Open

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

<no audio> Select **View Appointments for Date.**

Resources

All of the resources in our agency, regardless of whether they have appointment columns on the selected date, display in the Resource drop-down. Go ahead and click on it.

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

If we want to view the appointments for one specific resource, we can select them from the list.

Let's take a look at the schedule for cpa1.

<no audio> Select **cpa1.**

HH Mbr Info

The **Household Member Information** section displays some information for the participant highlighted in the screen, including Name, Date of Birth and the WIC status currently recorded in the participant's Demographics screen.

Let's select Norma Lee in the second row…

<no audio> Click on **Norma Lee** in the second row.

The Grid

And if the participant is high risk, High Risk displays in red.

The grid includes the appointment time, participant info, contact info, and appt info.

Clicking to the right of the scroll bar, displays…

<no audio> Click to the right of the scroll bar.

The Language recorded in the Demographics Language 1 field, confirmation info, and whether or not the participant attended their appointment.

Mark as Kept

Kept

Indicating an appointment has been kept can be very important since it affects no-show rates and certain report outputs.

During the end-of-day processes, HuBERT automatically selects the Kept checkbox if benefits are issued on the **same date** as the appointment.

We can also manually mark a participant as kept and need to remember to do this for participants that don't receive benefits, such as fully-breastfed infants less than 6 months old and some-breastfeeding women more than 6 months postpartum.

Kept 1

We can manually mark the highlighted participant as having kept their appointment **at any time** by clicking the **Update Kept** button.

<no audio> Click the **Update Kept** button.

The Update Kept button is a toggle. So, to remove the checkmark, we can simply click the button again.

<no audio> Click the **Update Kept** button again to remove the Kept checkmark.

We can multi-select rows to mark as Kept using CTRL + click to select non-adjacent rows…

Kept 2

<no audio> Pause for CTRL + Click on two more rows to highlight.

 Or SHIFT + click to select adjacent rows.

Kept 3

<no audio> Pause for Shift + Click on one row 4 down to highlight all rows in between.

Print

Print Schedule

The **Print Schedule** button allows us to print daily schedules based on the date, clinic and resource we have selected at the top of the screen.

Let's print CPA 1's Bloomington schedule for today. Go ahead and click the button.

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

Print Schedule 1

<no audio> Provides appointment information (time and type), participant information (State WIC ID, Household ID, Client Name and WIC Category), and contact information (Telephone #, Comment and Authorized Representative).

<no audio> Click when ready to continue module.

Print Schedule 2

Now let's print today's Bloomington schedule for all resources. Go ahead, you know what to do.

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

<no audio – failure hint> Click the up arrow or above the scroll bar.

<no audio – failure hint> Select **All Resources**.

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

Print Schedule 3

<no audio> Click when ready to continue module.

Print Notice

The **Print Notice** button opens the same Appointment Notice dialogue we saw when scheduling appointments and it prints the same letter or postcard for the participant highlighted in the grid.

<no audio> Click when ready to continue module.

Reschedule

Reschedule

We can reschedule appointments in the past, on the current date, and in the future.

And it works exactly as we saw previously in the Appointments module.

It's 11:30 in the morning and Dee Struxion's mom calls because she needs to reschedule her 12:30 appointment for later today if possible. Let's see if we can do that for her.

What's the first thing we need to do?

<no audio – failure hint> Click on Dee Struxion's row to highlight it in the grid.

Yep. We always need to select our participant in the grid. Go ahead and continue with rescheduling Dee's appointment.

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

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

Reschedule 1

As we saw before, the Reschedule screen opens to the current date and displays Dee's current appointment information.

Since we have some openings at 4:00 and 4:30, we can reschedule Dee's appointment for today. Go ahead and do that.

<no audio> 4:30 would be great!

<no audio – failure hint> Double-click the 4:30 appointment.

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

Dee has been rescheduled for 4:30 and her 12:30 appointment deleted.

Click the X to close.

<no audio> Click the X to close.

Reschedule 2

And the Child Midcert at 12:30 is deleted from the daily appointments grid.

Reschedule 3

However, we need to keep in mind that when rescheduling **we delete the appointment**, which removes any record of the missed appointment and this can affect our number if our agency is trying to track no-shows.

A good rule of thumb may be that if an appointment is in the past, we may just want to schedule a new one, instead of rescheduling, so that the missed appointment remains as part of the record.

However, if the appointment is in the future, rescheduling helps us out by automatically deleting the appointment, turning a two-step process into one.

Confirm

Confirm

Agencies have many different methods for confirming or reminding participants about their appointments.

The confirm function provides another method that agencies can choose to use to document that appointment reminders have been completed. Go ahead and click the button.

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

The highlighted participant's name, address and phone number display.

A confirmation may be defined differently depending on our agency, but once we've confirmed as indicated by our agency, we can select the **Appointment Confirmed** checkbox. Go ahead and click it.

<no audio> Click the **Appointment Confirmed** checkbox.

The **Date Confirmed** auto-fills with the current date but we can select another date if we completed our confirmation on a different day.

We can also enter a comment….

<no audio – comment displays> Left message on mom's cell

The **Print Notice** checkbox opens the same Appointment Notice dialogue we've seen a couple of times now and prints the same letter or postcard.

Click OK to save our confirmation.

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

Confirm 1

The confirmation columns are on the right side of the screen.

<no audio> Click to the right of the scroll bar.

Confirm 2

The Confirmed checkbox is checked, and the Confirmed Date and the Comment, which only displays 35 characters, are populated.

We can edit the confirmed information by clicking the **Confirm** button again.

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

We'll just add our initials to the comment….

And click OK.

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

<no audio – description of slide end> - SM added to comment.

<no audio> Click when ready to continue module.

Delete

Delete

We can delete appointments from this screen also. For instance, if we had scheduled a breastfeeding midcert for a woman who was no longer breastfeeding, we would want to delete the appointment since she wasn't actually a no-show.

Go ahead and delete Terri Bull's appointment.

<no audio> Click on Terri Bull's row to highlight it.

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

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

That's all the functionality in this screen. Go ahead and click the **Close** button and we'll take a look at one more appointment function.

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

Missed Appointments Follow-up

Missed FU

Today is March 20th and we are going to look at the Missed Appointments Follow-up, which is also found in the **Activities** menu.

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

<no audio> Select **Missed Appointments Follow-up.**

Missed FU 1

This allows us to identify participants who missed an appointment scheduled at the clinic where we are currently working.

Again, this is a function that our agency may choose to use.

The **Appointment Date Range** can be any time period in the past. Since our agency tries to follow-up with missed appointments immediately, we do this every day during our down-time. So, we are going to run the report for yesterday.

To run it for one date instead of a date range, we simply select the same date for both the **From** and **To** fields. Go ahead and use the drop-down calendars to select March 19th for both.

<no audio> Click the drop-down calendar for the From date.

<no audio> Select the 19th.

<no audio> Click the drop-down calendar for the To date.

<no audio> Select the 19th.

Missed FU 2

We can run it for one, some, or all WIC Types. Go ahead and select all the checkboxes.

<no audio> Select **Infant**.

<no audio> Select **Child.**

<no audio> Select **Pregnant.**

<no audio> Select **Breastfeeding.**

<no audio> Select **Non-Breastfeeding.**

The last step is to apply our criteria. Click the button.

<no audio> Click the **Apply Criteria** button.

FU List

The Missed Appointment list includes all participants scheduled for an appointment on March 19th who did not have a checkmark in the Kept checkbox on the View Appointments for Date screen.

It displays Appointment Information, Participant Information and a follow-up section.

We can print, follow-up or View Comments once the report is run. Let's see what prints.

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

We have a couple of options: Display on Screen, Send to Printer or Save as PDF. Let's just view it on the screen. Click OK.

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

FU Report

The Missed Appointments Follow-up report adds some contact information and can be printed from here.

<no audio> Click the **Close** button when ready to continue.

FU Button

Next let's see what the Follow-up button does.

<no audio> Click the **Follow-up** button.

Just like when we confirmed appointments, we can also follow-up with participants about their missed appointments.

Again, basic contact information displays for the participant highlighted in the Missed Appointments grid.

Once we've met our agency's standards for following up, we can document it by selecting the Completed checkbox.

<no audio> Click the **Completed** checkbox.

We have to indicate the date of the follow-up. Let's select today from the drop-down calendar.

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

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

FU Button 1

We can write a comment…<pause for comment graphic>

…and print a notice.

Since two household members missed their appointments, let's print a notice for the household.

<no audio> Click the **Print Notice** checkbox.

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

The same notice dialogue that we've seen multiple time before displays.

Go ahead and print the Letter.

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

FU Letter

The missed appointment letter is pretty short and to the point.

And although it says to call to reschedule, it doesn't provide a phone number.

Since we selected the household radio button, the system will print a letter for each member of the household.

FU Letter 1

<no audio> Same letter for Rainey Day.

FU Postcard

The postcard, when printed, is similarly worded except it indicates the type of appointment.

View Comments

Notice that even though we only completed the follow-up for Sunny, the system auto-populated Rainey's row since she is part of the same household.

Unlike other screens, we can actually view the whole comment that we wrote by clicking the View Comments button.

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

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

Update FU

We can update the Follow-up information by over-writing it.

For instance, let's say Sunny's mom called back two days later, March 22nd, and we scheduled new appointments for Sunny and Rainey and wanted to document it in the Follow-up.

Go ahead and click the Follow-up button again.

<no audio> Click the **Follow-up** button.

Notice that only the completed checkbox is selected and the date of the follow-up and Comments have cleared.

Go ahead and select today's date, March 22nd, from the Date drop-down.

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

<no audio> Click on the 22nd or the **Today** button.

And we'll add a quick comment. Go ahead and click OK again.

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

Updated FU

And our Follow-up information is updated.

Let's close out of this and take a quick look at the Appointments Tab.

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

FU in Appts Tab

Remember what we need to do to see all appointments? Go ahead.

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

FU in Appts Tab 1

The follow-up information is on the right side of the screen. Click to the right of the scroll bar.

<no audio> Click to the right of the scroll bar.

FU in Appts Tab 2

Remember, we completely over-wrote the first follow-up record we created, including the date, comment, and the fact that we had printed a Missed FU notice.

Only our most recent Follow-up information displays.

The Missed column indicates whether a missed follow-up notice was printed. However, because we didn't print another notice when we over-wrote our first follow-up, the checkbox is no longer selected.

Another thing to note is that even though we printed for the household, the checkmark will only display for the individual household member for whom the follow-up was actually printed.

End

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