

## 3.10 Scheduling

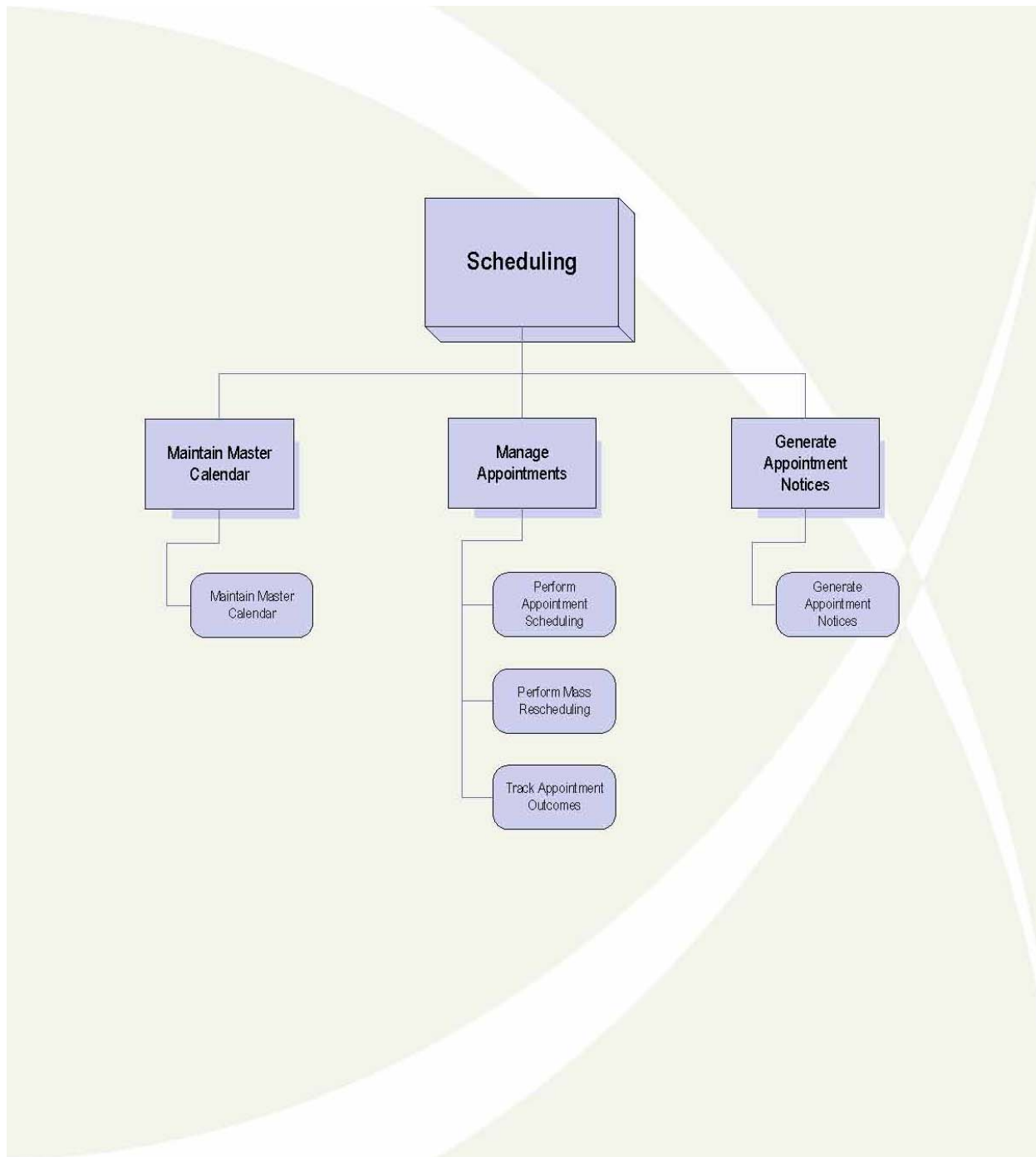
Automated scheduling capability allows WIC staff to operate and see participants more efficiently. Appointments and nutrition education classes can be scheduled months in advance and available openings can be easily identified. Scheduling functionality can also allow participants to choose a time that best meets their needs and allows WIC staff time to be managed more effectively.

A generic scheduling function can be used for numerous activities in the local agencies and clinics in addition to scheduling applicant and participant appointments. Agency personnel can schedule staff shifts, outreach activities, in-service training, and other administrative tasks using a generic scheduling function. The scheduler can also be used to track resources associated with providing customer service such as meeting rooms, audio-visual equipment, and clinic mobile units.

While the scheduling function is critical in the local agencies and clinics, it is also helpful for other areas of the WIC Program. The Vendor Management function can schedule vendor education classes, monitoring investigations, price survey visits, record audits, and rebate contract negotiations. The Customer Service area can schedule routine equipment maintenance, system training, and vendor/provider visits. State personnel can use this for planning local agency audits, meetings, and in-service training.

The Scheduling functions are:

- Maintain Master Calendar
  - Maintain Master Calendar
- Manage Appointments
  - Perform Appointment Scheduling
  - Perform Mass Rescheduling
  - Track Appointment Outcomes
- Generate Appointment Notices
  - Generate Appointment Notices



*Exhibit 3-10: Functional Decomposition Diagram – Scheduling*

### **3.10.1 Maintain Master Calendar**

The master calendar establishes the appointment days, times, and availability for the entire clinic or local agency.

#### **3.10.1.1 Maintain Master Calendar**

The system should maintain a master calendar for scheduling purposes.

##### **Inputs:**

Clinic Identification Number  
Event Slot Date  
Event Slot Description  
Event Slot Duration  
Event Slot Identification Number  
Event Slot Language Code  
Event Slot Maximum Number of Slots  
Event Slot Required Resource Type Code  
Event Slot Time  
Event Slot Type Code  
Local Agency Identification Number  
Master Calendar Create Date  
Master Calendar End Date  
Master Calendar Identification Number  
Master Calendar Start Date  
Master Calendar Type Code  
Resource Description  
Resource Identification Number  
Resource Type Code

##### **Process:**

- Accept user input specific parameters
- Generate calendar with available characteristics and slots based on these parameters

- Assign needed resources from the available resource list and remove the resource from the list for that slot
- Update the Master Calendar and Event Slot data stores

### Outputs:

Master calendar

#### Implementation Approaches

- ▶ The master calendar could be used by a local agency or individual clinic. A WIC staff person can build the master calendar by specifying the maximum available slots, the available staff, and other appointment dates, types, and durations. Additional parameters for other characteristics of appointments, such as the language of the class, can be added into the calendar. Based on these parameters, the system could create a calendar in advance. Calendars could be set-up at different levels (e.g., staff member, clinic, local agency, State agency staff, etc.). The user could be able to define event types for easy scheduling and set up. WIC staff could be able to add, update, and delete information from the calendar as necessary. The time period covered by a specific master calendar could be parameter driven so that it can also vary according to user needs.
- ▶ For each event slot on the calendar, the staff member constructing the calendar could enter the event type, responsible staff, meeting room location (if applicable), needed resources, duration, and the number of available slots for the event. The specific information associated with the event depends on the type of event.
- ▶ When scheduling an event, needed resources could be associated with the event. Meeting rooms, audio visual equipment, furniture, pamphlets/publications, and other resources could be assigned to a given slot on the calendar. As available resources are assigned to specific slots on the master calendar, the resources could be deleted from the available resource list so that they can no longer be scheduled. Once the resources are again available after the event, they could be added back to the available resources list.

## 3.10.2 Manage Appointments

### 3.10.2.1 Perform Appointment Scheduling

The system should be able to maintain an appointment schedule and allow users to schedule appointments for individual or group appointments. Using the master calendar, WIC staff should be able to track the availability of a particular date and time to ensure that a particular appointment slot is available when scheduling an appointment. Each time an appointment is scheduled for a specific slot, the system should decrement the number of available slots.

**Inputs:**

Education/Training Offer Class Code  
Event Preference Preferred Day  
Event Preference Preferred Language Code  
Event Preference Preferred Time  
Participant Family/Household Identification Number  
Participant Identification Number  
Scheduled Appointment Date  
Scheduled Appointment Number of Expected Attendees  
Scheduled Appointment Time  
Scheduled Appointment Type Code

**Process:**

- Accept user entered appointment preferences and store in Event Preference data store
- Check for appointment availability at particular time and date that meet preference parameters and present viable options or allow staff members to search the available schedule
- Collect and store daily appointment schedule data and applicant appointment data in the Scheduled Appointment data store
- Decrement the Appointment Maximum Available Slots (the maximum number of slots available for a particular day and time or for a particular class) each time a new appointment is made

**Outputs:**

Screen display of appointment schedule availability  
Screen display of individual/family appointment schedule  
Daily schedule of clinic appointments by event type

**Implementation Approaches**

- ▶ When all the slots are full (meaning the date and time is full or all class slots are filled for a particular class time), the system could notify the WIC staff of this condition. The system could allow the staff to select another time and/or date or add an appointment even when all schedule slots are full (e.g., allow overbooking to compensate for expected no shows).

- ▶ The system could allow for a variety of appointment management functions, such as searching for the next available appointment, searching for an existing appointment, printing rosters for classes, and blocking non-working time on the schedule.
- ▶ The system could allow scheduling of appointments for various types of clinic events, such as certification appointments, nutrition education visits and classes, and food benefit pick-up appointments. The system could also allow the provision of extra time slots to accommodate walk-in applicants.
- ▶ The system could accept preferences for an appointment. The preferences may include such parameters as time of day, day of week, language, linkage with other family members, and linkage with other services (such as a prenatal or well-child appointment). Once the preferences are entered, the appointment scheduler could suggest available appointments that match the preference criteria.
- ▶ The system could be flexible enough to accommodate the scheduling needs for different target audiences and levels of the WIC Program. For example, the appointment scheduler could be capable of scheduling vendor events, customer service events, and outreach activities. In some cases, as in a nutrition education or vendor training class, a staff member scheduling the appointment may need to keep track of the number of anticipated attendees.
- ▶ The system should remind users to maintain proper processing timeframes (10/20 days) by alerting staff if an appointment being scheduled does not meet the standard for the participant category.
- ▶ The system should be able to coordinate appointments for multiple members of a family/household.

### ***3.10.2.2 Perform Mass Rescheduling***

Clinics may need to reschedule all appointments on a certain day or at a certain time due to conflict, availability of staff, or adverse weather conditions. The system should have the capability to accommodate this type of situation. The system should allow the user to select a day, time, or event and reschedule all appointments for another day, time, or event.

#### **Inputs:**

Education/Training Offer Class Code

Scheduled Appointment Date

Scheduled Appointment Outcome Code

Scheduled Appointment Time

#### **Process:**

- Retrieve appointment schedule for the selected day, time, or event

- Update Scheduled Appointment Outcome Code to indicate the appointment or event is rescheduled
- Update Scheduled Appointment Date and Scheduled Appointment Time with new appointment information in the Scheduled Appointment data store

**Outputs:**

List of rescheduled appointments

**Implementation Approaches**

- ▶ The system should generate a list of applicants, participants, vendors, or other parties that have been rescheduled.
- ▶ The system should generate a notice to each applicant, participant, vendor, or other party who has had an appointment rescheduled.
- ▶ The system should generate a file of applicants, participants, vendors, or other parties that have been rescheduled to send to an autodialer.

**3.10.2.3 Track Appointment Outcomes**

The system should track attendance (or non-attendance) at scheduled events.

**Inputs:**

Education/Training Offer Class Code

Participant Family/Household Identification Number

Participant Identification Number

Scheduled Appointment Date

Scheduled Appointment Missed Reason

Scheduled Appointment Number of Actual Attendees

Scheduled Appointment Number of Expected Attendees

Scheduled Appointment Outcome Code

Scheduled Appointment Time

Scheduled Appointment Type Code

**Process:**

- Access appointment for individual, family/household, or group
- Update appointment outcome

### Outputs:

Updated appointment outcome

#### Implementation Approaches

- ▶ The user may manually enter the outcome of an appointment (e.g., attended, rescheduled, no-show) into the system.
- ▶ At the end of a clinic day, a process could run to update appointment statuses based on other actions that have taken place. For example, if a participant is certified or issued food benefits that day, then the appointment status could automatically update to “attended/kept.” If no specified actions have taken place on that participant on that day (for example, no food instruments have been issued and the appointment has not been rescheduled or cancelled), then the appointment could be marked “missed.”
- ▶ For group classes, appointment outcomes could be entered for the entire group, rather than by accessing and updating individual or family/household records.
- ▶ Appointment information for all members of the family/household could be updated simultaneously (i.e., the system could accept the status update once and apply it to all applicable people in the family/household).
- ▶ If appointment types for events such as nutrition education are established, topics covered at the event could be linked to the appointment type and captured upon marking a participant “attended” at the event/appointment.

## 3.10.3 Generate Appointment Notices

### 3.10.3.1 Generate Appointment Notices

The system should print a notice for a scheduled appointment; this should accommodate any appointment type, such as certification appointments, nutrition education visits and classes, and food benefit pick-up appointments. The notice should include information necessary to remind the individual or family of the appointment, such as the name of the person(s) with the appointment, the type of appointment, the date, and the time of the appointment.

#### Inputs:

Participant Identification Number

Scheduled Appointment Date

Scheduled Appointment Document Code

Scheduled Appointment Time



**Process:**

- Accept user request to generate an appointment notice
- Retrieve data from the Scheduled Appointment and Participant data stores
- Create appointment and reschedule notices

**Outputs:**

Appointment and reschedule notices

**Implementation Approaches**

- ▶ The system could print mailing labels to expedite the postage of notices to participants.
- ▶ The system could produce notices by individual or family.
- ▶ The system could have the ability to produce appointment reminder notices for all appointments during a period of time based on user-entered parameters. For example, a user could print appointment notices for all appointments scheduled for the following week.
- ▶ The system could have the ability to maintain appointment notice templates that can be rapidly filled with specific information related to a participant, as necessary.
- ▶ The system could have the ability to download a file into an automated dialer (autodialer), so participants could be reminded in advance of their appointments or notified that they need to reschedule a missed appointment.
- ▶ The system could have the ability to produce appointment reminders that could be sent via email.