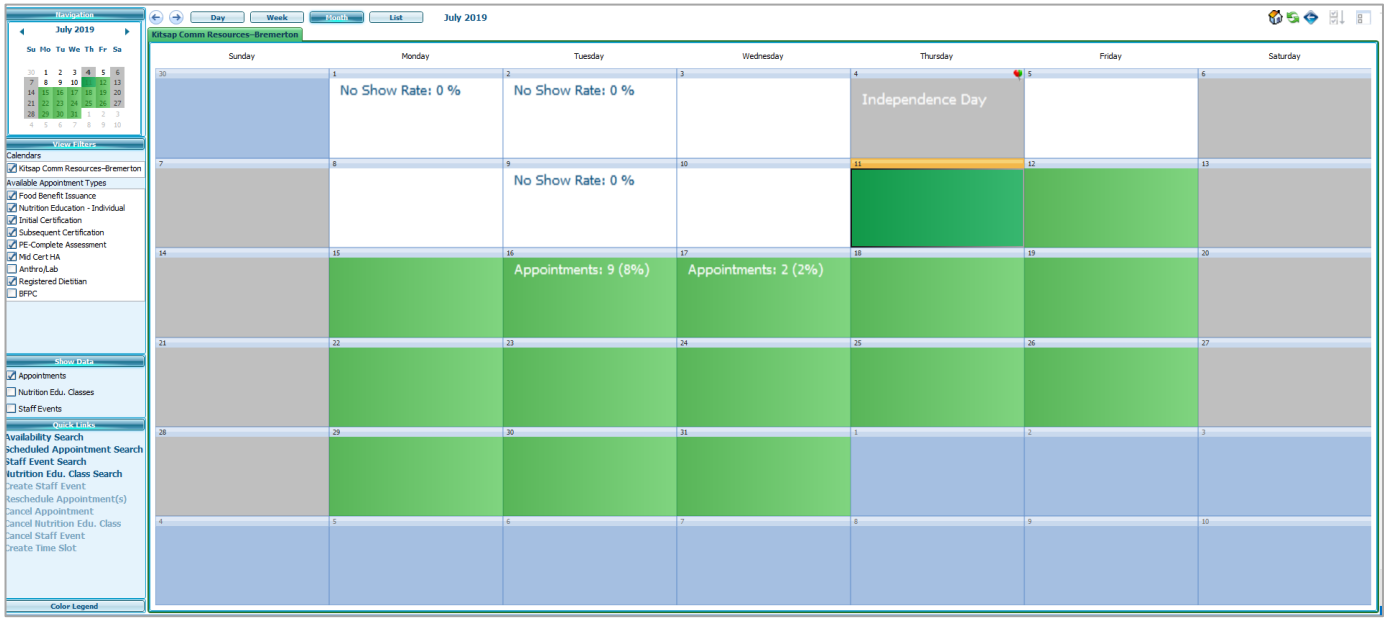
Cascades Steps

Schedule Appointments Using Clinic Master Calendar – Same Appt. Type

Follow these steps to schedule one type of appointment for one or more participants.

- Use the Clinic Master Calendar method shown here when you enter CIMS appointments instead of Quick Appointments.
- In our example, we will schedule three Initial Certifications for a family.

Steps	Cascades Screen
Step 1. Get to the Master Calendar: 1. Select **Scheduling** from Menu bar. 2. Select **Clinic Master Calendar**. **Note:** Calendar defaults to current month's view.	 

Step 2. Choose appointment type and day for your appointment(s):

1. If the appointment(s) will happen in a future month, use the **Mini Calendar** to select month and date for desired appointment(s).

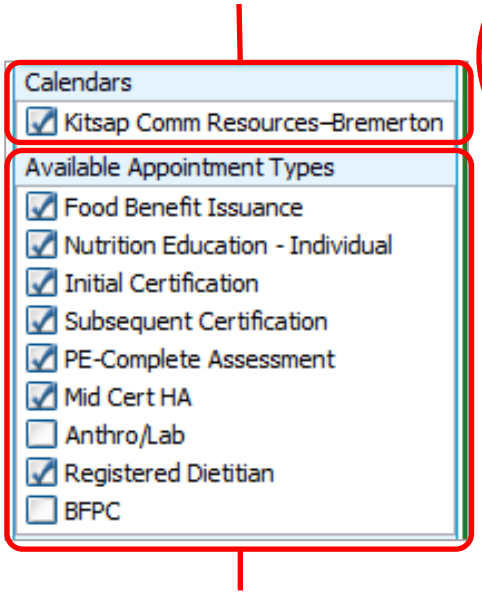
2. Check-mark the appointment types in **Available Appointment Types** box to refresh calendar with these types.

   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.

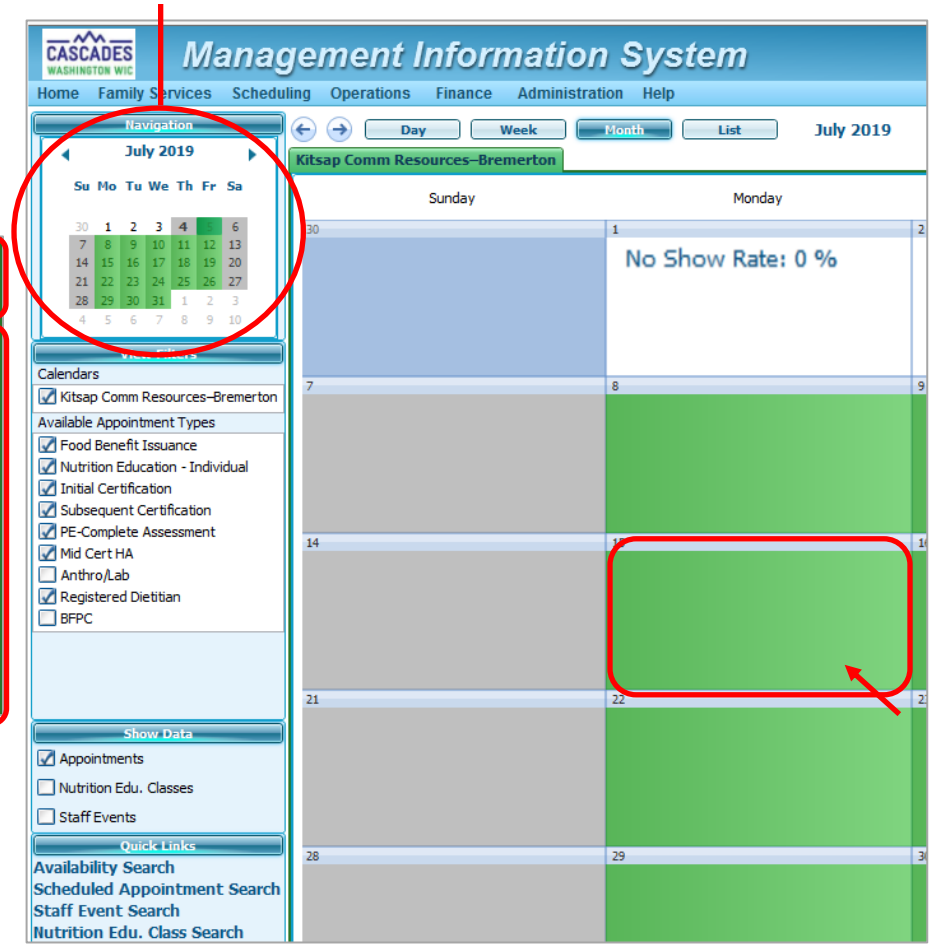
   You will choose the time of appointment(s) next.

Important
Confirm that you're in the correct clinic if your agency has multiple clinics.



- 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.



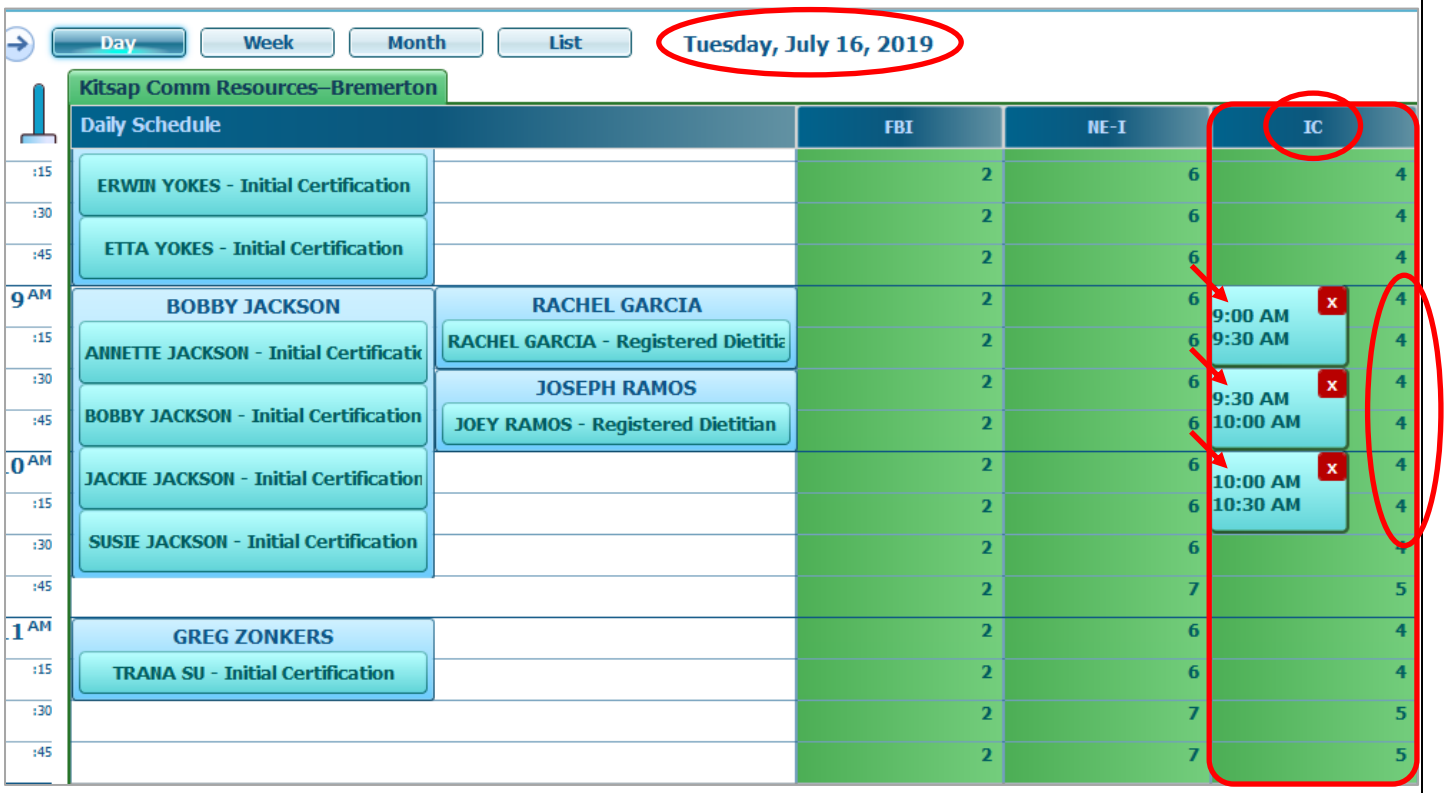
Step 3. Choose a time for your appointment(s):

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(s) by clicking your cursor into the column and time slot(s) you want to choose.
   - You can drag an appointment slot (blue box) with your cursor to extend appointment time or keep it at the default timespan.

2. Double-click one of the selected appointment slots (blue boxes) to get to the **Manage Appointments** screen.



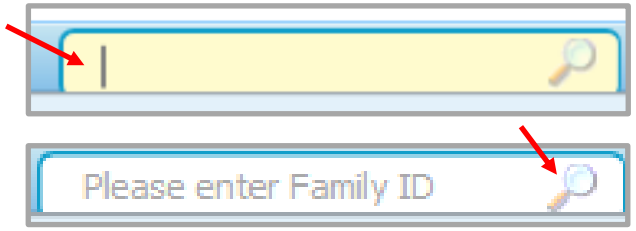
Step 4. Add your participant(s):

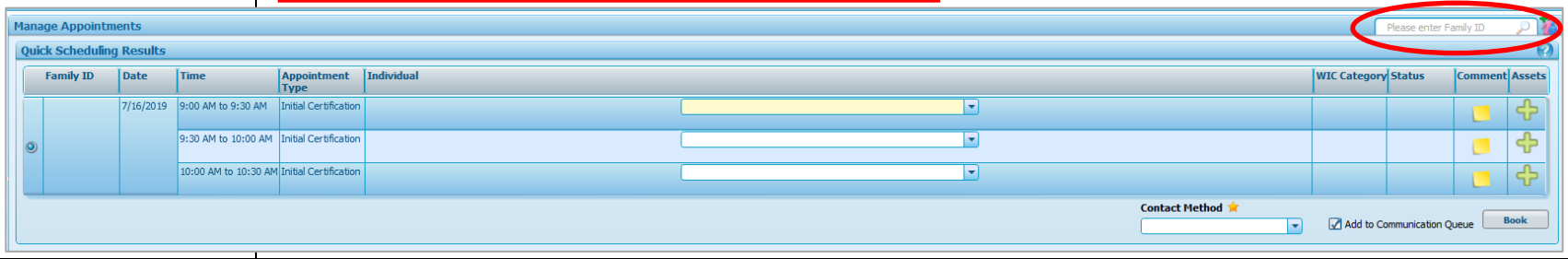
1. In the **Manage Appointments** screen, select the magnifying glass icon or place your cursor in the search box to display the **Search Criteria** pop-up screen.

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

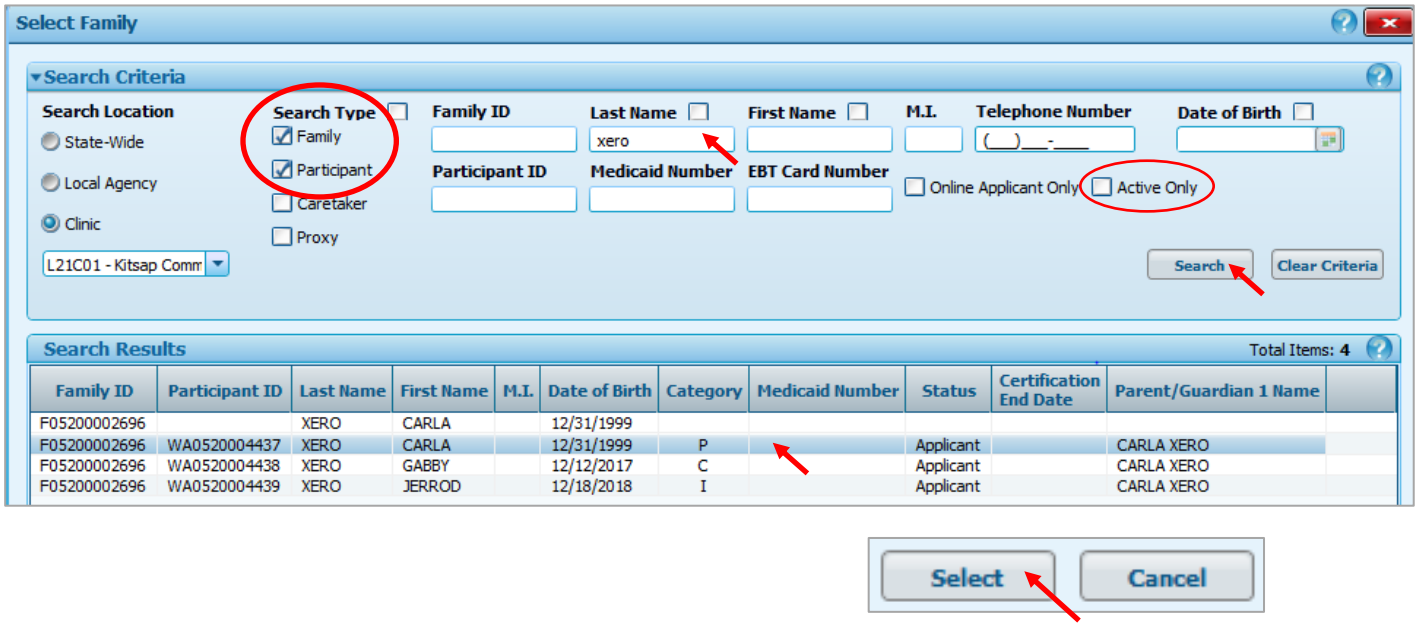




Step 5. Add your participant(s):

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 to 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.



Step 6. Book the appointment(s):

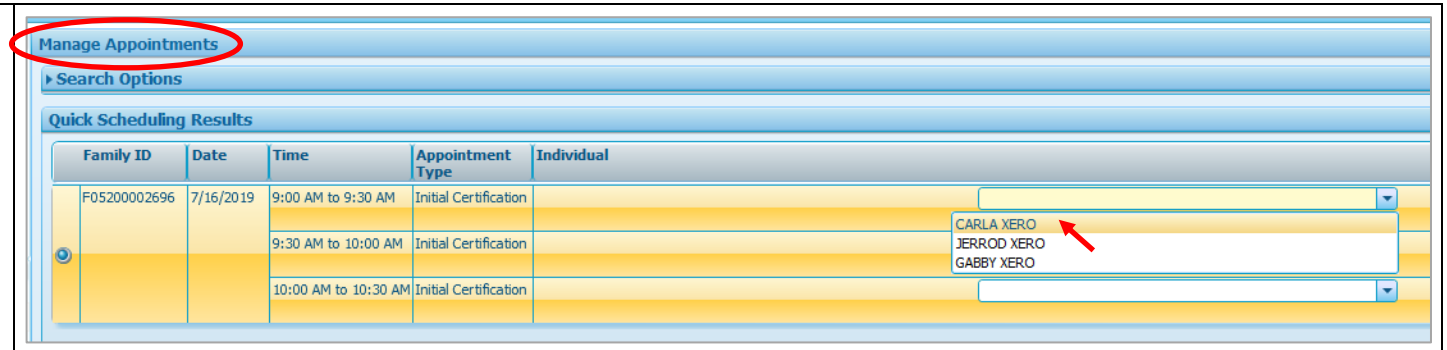
On **Manage Appointments** screen:

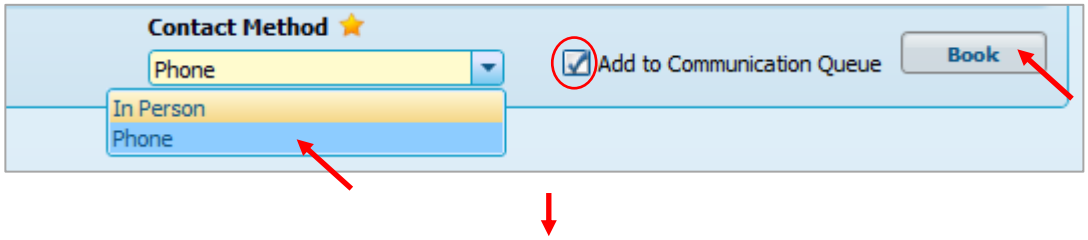
1. Confirm dates, times, and appointment types for family.
2. Select participants in each **Individual** drop-down.
3. Select **Contact Method** drop-down and choose answer:
   In-person – participant or caregiver in clinic
   Phone – participant or caregiver called clinic
4. Keep **Add to Communication 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.

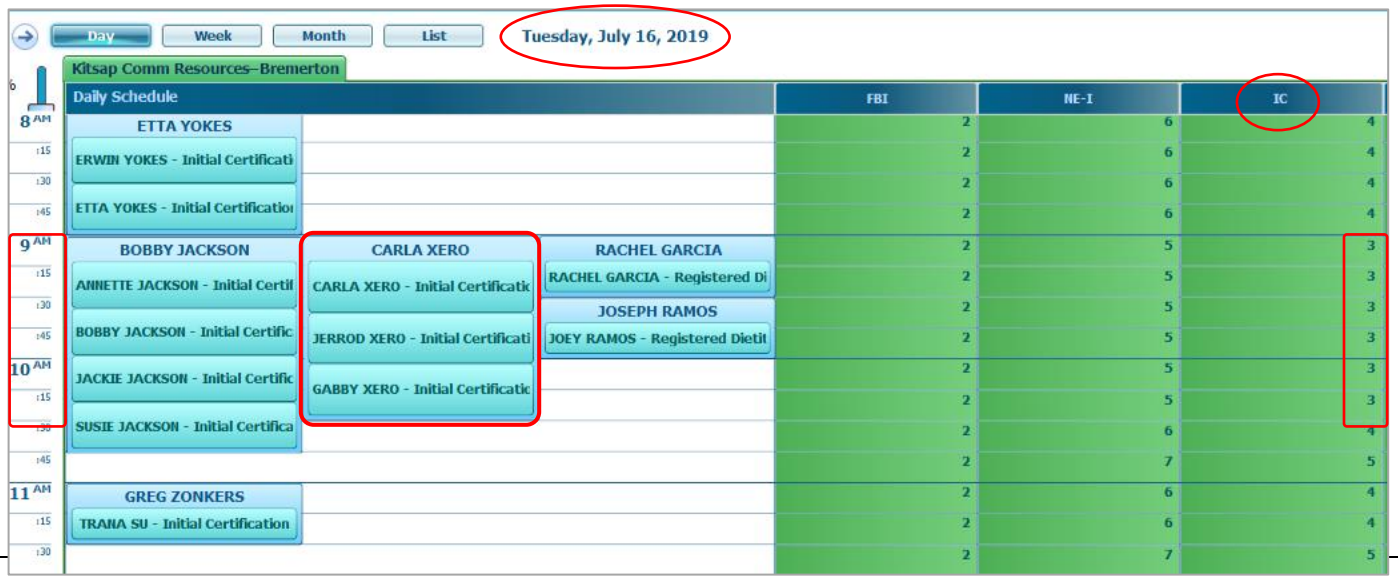
On the **Daily Schedule** screen:

➜ 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.

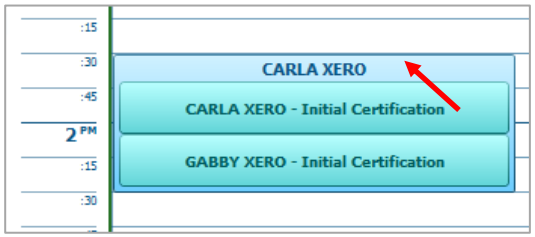






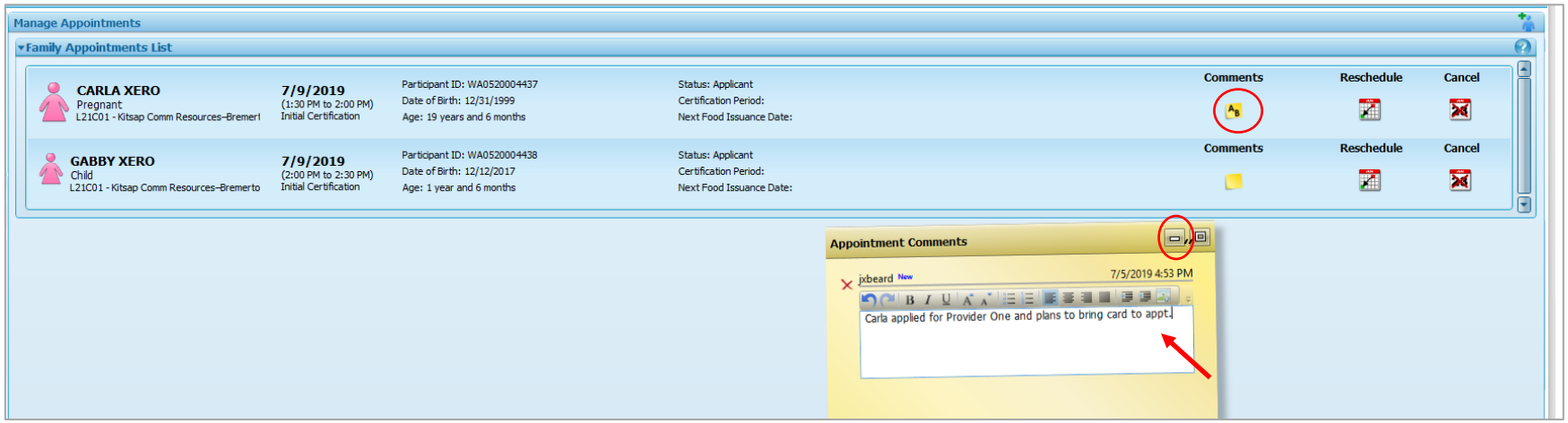
Leaving Sticky Notes:

- 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 notes that aren't specifically appointment-related.



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