

Appointment Book

This module applies to the following security roles:

Receptionist

Clerk

RN/RD

Breastfeeding Peer Counselor

KWIC Administrator



Kansas Department of Health and Environment

Bureau of Family Health

Nutrition and WIC Services

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This module requires use of the computer and the on-line KWIC Training Application.

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Objectives

Upon completion of this activity, the employee will be able to:

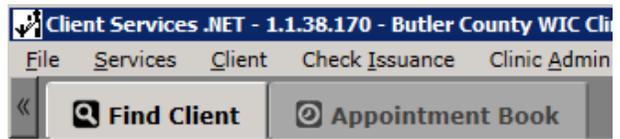
1. Schedule an appointment
2. Reschedule an appointment
3. Schedule a class
4. Issue an appointment notice
5. List three “cautions” about using the Appointment Book

Introduction

The KWIC appointment book allows appointments to be made from any WIC computer. Appointments are group based, but individual appointments may be scheduled for each member of a group.

The Appointment Book:

- Is always open as the second outer tab.
- Allows you to view the details of a client’s appointment.
- Allows you to open a client record without using Find Client (if the person has an appointment).
- Allows you to view or edit the appointment type for each member of the group.
- Can be used to view and edit appointment outcomes.
- Allows you to easily “turn the page” to another day.
- Allows you to find the next available opening based on requirements you specify.



Q: How are the allowed and blocked appointment times set up?

A: By using the dropdown menu “Clinic Admin” – Staff Calendar feature. This information is presented in the *KWIC Administrator* module.

The Appointment Book window is divided into two major sections:

- Left side - Appointment Book grid
- Right side – Scheduler

The screenshot shows the 'Appointment Book' window for 'Butler County WIC Clinic'. The left pane displays a grid with columns for staff (RN, Clerk 1, RD, BFPC) and rows for time slots. The right pane is the 'Scheduler' for July 2013, showing a calendar and appointment details for the selected date (07/30/2013, Tuesday).

Callouts in the image include:

- Column headers can be titles or staff names.** (pointing to the staff column headers)
- Click the calendar to "turn the page"** (pointing to the calendar in the Scheduler pane)
- Date Field** (pointing to the date input field in the Scheduler pane)
- Appointment cells** (pointing to a cell in the grid)
- Appointment detail for Broccoli family. Displays for selected group.** (pointing to the details for the 'Broccoli' group in the Scheduler pane)
- Instead of using Find Client, use the "Open Group" link to open the record.** (pointing to the 'Open Group' link in the Scheduler pane)

Click on the Appointment Book outer tab to open the open the Appointment Book..

- The Appointment Book initially opens to the schedule for "Today."
- The Appointment Book remains on the current date until you change the date by clicking on the calendar or entering a date in the "Date" field.
- The Appointment Book stays on the last date selected until a new date is selected or the Client Services application is closed.

Note about the training environment: Depending on the day you complete this module, there might not be appointments scheduled for that day. If there are no appointments in the grid on the current day, click in the scheduler calendar to find a day with appointments.

The screenshot shows the Appointment Book interface for Butler County WIC Clinic. The main grid displays appointments in 15-minute intervals across columns for RN, Clerk 1, RD, BFPC, Classes, and Reschedule. A Scheduler panel on the right shows the current date as Tuesday, 07/02/2013, with a calendar view for July 2013. Callouts provide the following information:

- Scroll Bar Gutter to quickly view schedule:** Points to the vertical bar on the right side of the appointment grid.
- Reschedule Column:** Points to the 'Reschedule' column header.
- No Appointment detail displays because no client is selected:** Points to the empty appointment slots in the grid.
- If there are more staff members than columns, a Scroll bar appears:** Points to the horizontal scroll bar at the bottom of the grid.

- Appointments display in 15-minute intervals. Appointments are made for 15 minutes, 30 minutes, 45 minutes, 60 minutes, 75 minutes, 90 minutes, etc.
- Clicking in the gutter of the scroll bar also allows you to quickly view the schedule.
- Using the scroll bar allows you to move slowly through the daily schedule.
- Column headers can be titles or staff names. They are listed in alphabetical order but may be arranged to meet your clinic preferences. (To set display order, use Clinic Admin - Staff Calendar - Appointment Book Column).
- Use the scroll bar at the bottom of the page to view appointment columns that do not display on the screen.
- When an appointment outcome is set to “Reschedule,” that appointment is moved to display in the Rescheduled column, making the cell the appointment originally was in available.

Appointment Book

Butler County WIC Clinic

RN Clerk 1 RD Classes Reschedule

08:15 AM

:30 AM

:45 AM

09:00 AM Carrot

:15 AM ||

:30 AM

:45 AM

10:00 AM

:15 AM

:30 AM

:45 AM

11:00 AM

:15 AM

:30 AM

:45 AM

12:00 PM Kudritzki

:15 PM

:30 PM

:45 PM

01:00 PM

:15 PM

Scheduler

July, 2013

07/03/2013

Wednesday Refresh

Find Next Available Appointment Slot

View Next Appointment

Make New Appt. Schedule Class

Select an open group

Carrot, Carla

Role RN Open Group Delete

Time 09:00 AM Duration 30 minutes Print Notice

Client Carla Carrot Category BF

Type CP Res \$ ID

Outcome <none> Diet Sp Auth

Client Carrie Carrot Category C

Type RC I/C Imm Id I/C

Outcome <none> Res \$ ID

Diet Sp Auth

Client Connie Carrot Category C

Type RC I/C Imm Id I/C

Outcome <none> Res \$ ID

Diet Sp Auth

Available appointment cells are light.

Blocked appointment cells

Selected Cell – appointment details for this cell

- Available appointment cell times are light. Once an appointment has been made and saved, the cell will turn dark to reserve the time.
- A subtle box around a cell means the selected cell has been clicked on and details so details can be viewed in the lower right hand corner.
- The last name of the Caregiver will appear in blue in the first gray cell for the appointment time.
- Black vertical slashes reserve the additional time for the group to complete an appointment.
- When an appointment has an outcome (Complete, Interrupted, No Show, or Rescheduled) the last name of the Caregiver changes color (exact color depends on your computer's settings.)

Colors vary depending on your computer color settings.

- Dark boxes indicate appointment cells that are blocked out and no appointments can be scheduled.
- The word **Multiple** appears in a cell when more than one group is scheduled for the same staff member at the same appointment time. The number of groups is in parenthesis.

:45 AM	
10:00 AM	Multiple (2)
:15 AM	
:30 AM	
:45 AM	

Changing the Date Being Viewed in the Appointment Book

Remember:

1. The Date field displays the current Appointment Book page you are viewing.
2. The “Today” link always displays the current date. When you’re done working with a different date and want to return to the current date, click the Today link.

The screenshot shows the Scheduler interface. On the left is a calendar for July 2013 with the 5th highlighted. Below the calendar is a link that says "Today: 7/5/2013". On the right, there is a date field containing "07/05/2013" with a small calendar icon to its right. Below the date field is a "Friday" label and a "Refresh" button. Further down are buttons for "Find Next Available Appointment Slot", "View Next Appointment", "Make New Appt.", and "Schedule Class".

There are several ways to change the date being viewed in the Appointment Book.

Using the “Date” Field to Change

Enter a date in the Date field and click the [**Refresh**] button to change the Appointment Book date.

Using the Calendar to Change

Instead of entering numbers in the Date Field, you can change the Appointment book page with a few clicks.

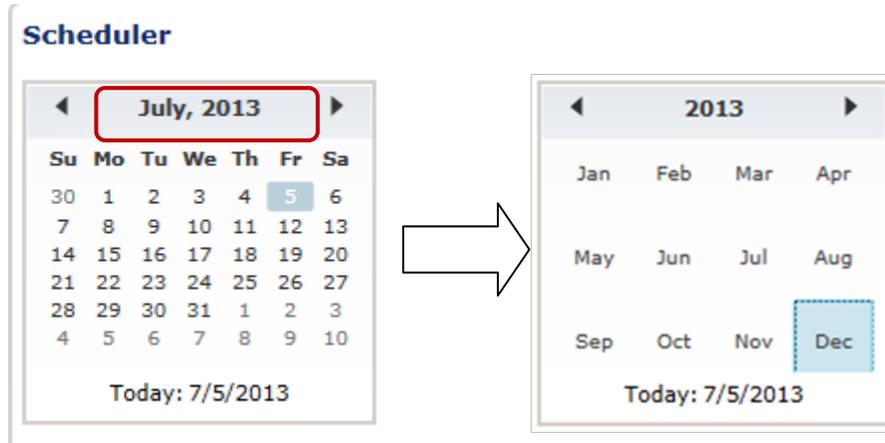
Click on the arrows to move forward or backward one month at a time. Then click the desired date in the calendar. (There is no need to use the Refresh button.)

The screenshot shows the Scheduler interface with the calendar for July 2013. The 5th is highlighted. Below the calendar, it says "Today: 7/5/2013".

The next features are probably more useful for you when you entering birthdates in other areas of KWIC. It is probably faster to enter numbers on the keyboard, but for those of us that are “keyboard-challenged, then these tips are useful.

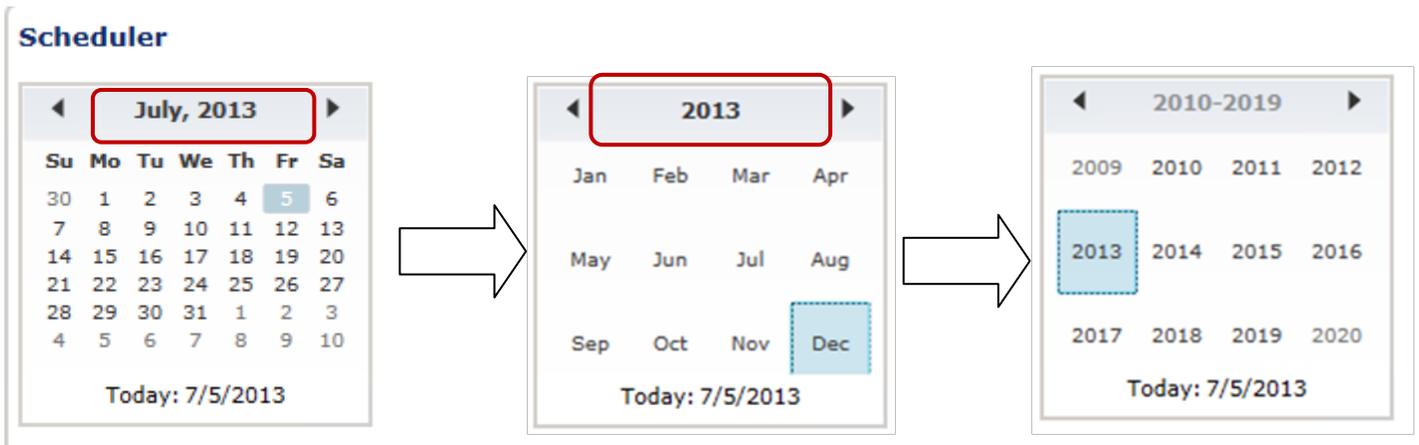
Do you want to move several months?

Instead of clicking the arrows, click the Month, Year at the top of the calendar. A grid of months will display. Click the desired month.



Do you want to move several years?

Click the Month, Year at the top of the calendar. A grid of months will display. Then click the year at the top. A grid of years will display. You can use the arrow keys to move several years if needed. Click the desired year.



The newly selected month and year display. Click the desired day.

Skill Builder

Appointment Book - Turning the Page



Open the Appointment book and:

1. Click the arrow button to advance the Appointment Book forward two months. Click a date in the calendar to refresh the page.
2. Click the arrow button to move the Appointment Book backward. Click a date in the calendar to refresh the page.
3. Use the Date field to change to a different day in the Appointment Book. (Remember to click Refresh.)
4. Click the “Today” button to return to the current date.

Scheduling Appointments for Clients

When a client is chosen on the Find Client window, the entire group associated with that client will be available in the Appointment Book to schedule the appointment.

Use Find Client to retrieve the record of Brenda Banana. She is a pregnant applicant. Follow these steps to make her a certification appointment.

1. You must always have the family group open. (That is, you must see name in Outer tabs.)
 - a. If not open, use Find Client to open the Family Group.
 - b. If there is a Family Group member with an existing appointment, you can click the name in the Appointment Book. Then use the Open Group link to open the record.
2. Click on the Appointment Book tab or “Schedule Appointment” link on her Notices tab.
3. Click on the date desired in the calendar or enter in the Date field. (Remember Processing Standards? Because she is pregnant, you need to offer her an appointment within the next ten days.)
4. Click in the “Select an open group” dropdown field. Don’t be confused when this field is blank even though you have a client record open. **Click in it and you will see all the possible open groups!!**

The screenshot shows the Appointment Book interface. At the top, there are tabs for 'Find Client', 'Appointment Book', 'Brenda Banana Group', and 'Greta Grapefruit Group'. The 'Appointment Book' tab is active, showing a calendar for July 2013. The Scheduler panel on the right shows the date 07/09/2013 (Tuesday) and a 'Select an open group' dropdown field. A yellow callout box with a red border contains the text: 'Two groups are open, but neither show in “Select an Open Group” until you click in the dropdown'. Two arrows point from this box to the 'Brenda Banana Group' and 'Greta Grapefruit Group' tabs.

5. Select Brenda Banana from the “Select an open group” dropdown field.

A close-up of the 'Select an open group' dropdown field. The text 'Banana, Brenda' is visible in the dropdown menu, indicating that the group has been selected.

- Click “Make New Appt” button to open the fields in the scheduler

NOTE: The “Make New Appt” button title changes to “Cancel New Appt” and the Appointment Detail section displays.



- In the Appointment Detail, select the appointment type of NC for Brenda (NC=New Certification.) You will learn more about the Appointment Detail in the next section.

- You can select the Role, Time and Duration by using the fields in the Scheduler but it is easier to just clicking in the Appointment Book grid – the left side. The screen shots will be for clicking in the appointment book. (Your screen will look a little different, depending on what you choose.)
 - Pick a time with either the RN or RD, as available on the date you selected.
 - Make a 45-minute appointment for Brenda Banana by clicking three cells. Note that “Scheduling...” displays in the cells you have clicked.

- Don’t save yet. First we need to work in the Appointment Detail section.**

The Appointment Detail Section

Before you finish Brenda Banana appointment, let's look at some information about the Appointment Detail section.

Here you can edit, view, or document the outcome about a specific appointment.

The screenshot shows the Appointment Detail section for a client named Brenda Banana. The interface includes a dropdown menu for "Select an open group" with "Banana, Brenda" selected. Below this is a "Role" dropdown set to "RN" and a "Time" dropdown set to "10:00 AM". A "Duration" field is set to "45 minutes". A blue "Open Group" link is visible. The "Client Brenda Banana" section shows a "Type" dropdown set to "NC", an "Outcome" dropdown set to "<none>", and several checkboxes for "Res", "Diet", "Sp Auth", "Imm", "I/C", "Id", and "ID". Below this, the "Client Bianca Banana" section is partially visible with a "Type" dropdown set to "CP".

Callouts in the image provide the following explanations:

- Caregiver's name. If the time slot is double booked, caregiver names for all the scheduled groups will show.
- Open Group link lets you "jump" to the client's record.
- Time the appointment begins
- Staff Role/name
- Type of Appointment
- Appointment Outcome
- What the Client needs to bring to the appointment
- Appointment Length

The **Duration** is for the entire group appointment.

The default appointment duration for a specific appointment type will only appear in the Appointment Book if the Flowsheet has been setup for the client. If so, when a new appointment is created on the Appointment Book, the default duration for the appointment type established on the Flowsheet will be displayed in the Duration field. If there is more than one member of the group, the durations for all group members will be added together and displayed in the Duration field. If a cell in the appointment book grid is clicked on, the duration will be reset to match the number of cells selected.

All **Client(s)** within a group are displayed in the appointment detail section regardless of their status. (Terminated members of a group will display).

The appointment **Type** will default to the client care plan type on the Flowsheet for the month of the appointment date. It defaults to "CP" (Check Pick up) when a Flow Sheet month is left blank. A default duration will appear in the Duration field, unless the

duration time is altered by clicking on the Appointment cells. See the Appointment Book Codes table later in this module to view the appointment type codes.

Check boxes:

t Brenda Banana		Category PG			
e	<input type="text" value="NC"/>	<input type="checkbox"/> Res	<input type="checkbox"/> \$	<input type="checkbox"/> ID	
e	<input type="text" value="<none>"/>	<input type="checkbox"/> Diet	<input type="checkbox"/> Sp Auth		
t Brianna Banana		Category C			
e	<input type="text" value="CP"/>	<input type="checkbox"/> I/C	<input type="checkbox"/> Imm	<input type="checkbox"/> Id I/C	
e	<input type="text" value="<none>"/>	<input type="checkbox"/> Res	<input type="checkbox"/> \$	<input type="checkbox"/> ID	
		<input type="checkbox"/> Diet	<input type="checkbox"/> Sp Auth		

These boxes indicate the items the client needs to bring to the appointment. The check boxes display things you might need for that category so are different for a woman versus a child.

Click in the box to make a check mark.

Checked items will appear on the client's appointment letter.

- I/C – bring the Infant/Child for whom the appointment is scheduled.
- Imm – bring Immunization Records.
- Id I/C – bring Infant/Child's Proof of Identity.
- Res – bring Proof of Residency (address).
- \$ – bring Proof of Income.
- ID – bring Proof of Identity for the Caregiver. Be sure to check this box for Check Pickup appointments.
- Diet – bring the Diet Questionnaire
- Spec Auth – bring the Special Formula Request From

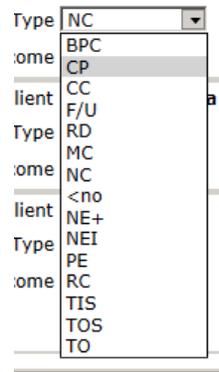
<none> is the default appointment type for terminated members of the group.

In addition, check box items will be printed on the letter and display on the client Homepage Reminders tab.

Appointment Book Codes

These codes display on the Appointment Book in the Type drop-down list.

We assume that check pickup occurs along with a certification, midcertification, and nutrition education appointments.



Code	Description	Special Notes about Use
BPC	Breastfeeding Peer Counselor	
CP	Check Pickup	Check pickup only - no other nutrition education.
CC	Complete Certification	Use only if completing cert for a "Presumed Eligible" Pregnant woman.
F/U	Follow Up	E.g. Bringing forgotten proofs.
MC	Mid-Certification	
NC	New Certification	
<no	No appointment (The client is not included in the appointment scheduled for the other group members)	
NE+	Nutrition Education – Interactive Display, Notebook, etc.	
NEI	Nutrition Education - Individual	
PE	Presume Eligible	See CRT 03.05.00 for allowed uses.
RC	Recertification	
RD	High Risk (Registered Dietitian)	
TIS	Transfer From In State	
TO	Transfer Out	
TOS	Transfer From Out of State	

Some additional information about appointments:

- Clinics schedule differently according to staffing and type of appointment. **Talk to your supervisor about details.**
- The next appointment will display on the group's Notice's tab in the "Next Appt" field unless the outcome for any previous scheduled appointment has not been documented. The previously scheduled appointment will display in the Next Appt field until an outcome is documented.

Skill Builder

Make a New Appointment



1. Retrieve the record for child Myron Mushroom. Make a new certification appointment for him on the next available clinic day with a RN or RD.
 - a. Allow 30 minutes for the appointment.
 - b. Be sure to mark the items needed in the check boxes.
 - c. Save
 - d. Print the notice. Does it reflect what you intended?
2. Retrieve the record for child Belinda Berry. Notice in her Client Header that she is High Risk. Notice that Bertha is low risk. Find a clinic day with a column for the RD and make an RD appointment for Belinda and NEI for Bertha.
 - a. Allow a total of 15 minutes.
 - b. Be sure to mark that the Identification for the caregiver should be brought.
 - c. Save
 - d. Print the notice. Does it reflect what you intended?
3. Retrieve the records for child Colleen Cranberry. Make a new certification appointment for her on the next available clinic day with a RN or RD.
 - a. Practice moving the appointment to different times, with different staff, and for different durations.
 - b. Settle on an appointment for 30-minute duration with a RN or RD.
 - c. Be sure to mark the items needed in the check boxes.
 - d. Save
 - e. Print the notice. Does it reflect what you intended?

Appointment Outcomes

Outcome for appointments include:

Outcome	Description
none	No outcome has been determined.
Complete	The appointment was completed as scheduled.
Interrupted	Appointment was not completed. Rarely used but may be used when a client has to leave in the middle of an appointment, without finishing.
No Show	The client failed to show for the scheduled appointment.
Refused	The client came in to the clinic to pick up checks but refused to stay for a scheduled secondary nutrition education appointment.
Rescheduled	The client called to reschedule the appointment.

The appointment outcome must be documented to show the next appointment scheduled for a client on the Homepage.

Doing anything in KWIC, such as finishing a certification guide or a nutrition education (if scheduled for a NE+ or NEI) or nutrition education-RD, or marking a client as attending a class, or issuing checks on the day an appointment is scheduled will automatically document the outcome of appointment as Complete.

Caution!

- Printing checks on the day that an appointment was scheduled will automatically document any appointment on that day as Complete. Sometimes a client does not attend a scheduled High Risk or Low Risk Secondary Education appointment, but still comes in to the clinic for checks. In this situation, staff should mark the appointment outcome as **Refused after** issuing checks or KWIC will mark the appointment as Complete.

When the outcome is documented for a client, the Caregiver's name in the time slot display turns a different color.

At the end of a clinic day, staff can manually change to a No Show outcome. However this can be done automatically, as described in the *No Show Management* module.

07/09/2013

Tuesday

Refresh

Find Next Available
Appointment Slot

View Next Appointment

Cancel New
Appt.

Schedule
Class

Cancel New Appointment Not Yet Saved

When making a new appointment that has not yet been saved, the **[Cancel New Appt]** button must be clicked to clear the appointment you have begun. The **[Cancel New Appt]** button appears in place of the **[Make New Appt]** button when the **[Make New Appt]** button is clicked.

- Click the **[Cancel New Appt]** button to cancel the appointment you have begun making but have not saved.
- A message will ask you if you want to cancel the new appointment
- Click “Yes” to cancel the appointment.



You must cancel the unsaved appointment to select another day for a client's appointment.

Deleting an Appointment

Deleted appointments are not documented in the Appointment History window. Rescheduled appointments are. Therefore, the **[Delete]** button is rarely used!!

There are some times when it you don't care if the original appointment documented in Appointment History. Then you would use Delete. Examples when you might use Delete instead of Reschedule:

- The appointment was made in error and saved.
- The client is still at the clinic and realizes that the appointment you just made for her will not be good and wants to change it.

Rescheduling an Appointment

If a client calls to reschedule an appointment, staff should go through a two-step process:

1. Click on the appointment to be rescheduled and change the appointment outcome to Rescheduled. *For each group member, notice the appointment type and other details so you remember it when making the new appointment. Save.*
2. Make a new appointment for the client/s.



NOTE: When an appointment outcome is set to Rescheduled, that appointment is moved to display in the Rescheduled column, making the cell the appointment originally was in now available. State Management Evaluation reviewers will be considering Rescheduled appointments when determining if appointments have been offered within processing standards.

Find Next Available Slot Button

There is another tool available to help you find an open space to schedule a client. The **[Find Next Available Slot]** button will help you locate an available time slot based on staff availability and the needs of your client.

Click **the [Find Next Available Slot]** button.

Enter the desired criteria. Click Find. The Find Opening popup window appears.

If there is no match, the calendar will stay where it began. You may try again using different search criteria. When the system finds the match to meet the requirements of your request on the “Find Opening” screen, you are taken to that day in the appointment book.

Skill Builder

Reschedule an Appointment



1. Paula Potato called to reschedule the appointments for her sons. Retrieve the record for children Patrick and Perry Potato.
 - a. Look at the Notices tab to see their next appointment and click on the appointment to bring up the Appointment Book. Review the details, making notes if needed. Make those appointments have outcomes of Rescheduled.
 - b. Make new appointments in the near future, with the same type and details.
 - c. Print the new appointment notice letter.

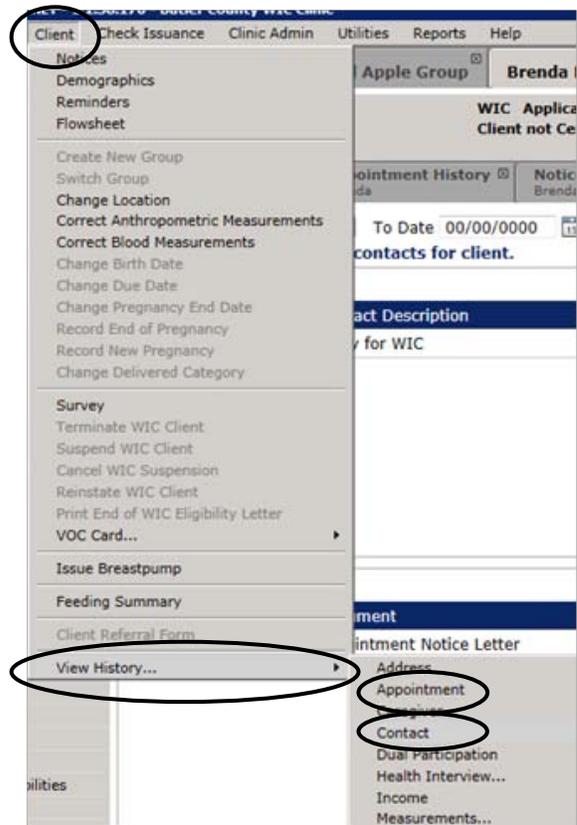
History

KWIC contains a history of appointments and printed notices.

To look at Appointment History, use the Client dropdown menu.

Go to View History – Appointment.

If you click a appointment line, you see more information, including what staff member made the appointment and when it was made.



Brenda Banana 10358816 Gender Female DOB 09/13/1986, 26 Years	WIC Applicant Client not Certified	WIC PG Due Date 12/21/2013
Appointment History Brenda	Notices Brenda	

Appointments for Client (Brenda Banana) Client Id (10358816)						
Date/Time	Duration	Location	Role	Type	Outcome	Outside Processing Standards
07/09/2013 10:00 AM	45	Butler County WIC Clinic	RN	NC	<none>	

There also is a contact documented in KWIC every time you print a notice.

To look at the list of documents printed, use the Client dropdown menu. Go to View History – Contact. Look for the “Documents Printed” list in the lower half of the window.

Brenda Banana 10358816 Gender Female DOB 09/13/1986, 26 Years	WIC Applicant Client not Certified	WIC PG Due Date 12/21/2013
Contact History Brenda	Appointment History Brenda	Notices Brenda

From Date 00/00/0000 To Date 00/00/0000 Find

Currently Viewing: All contacts for client.

Client Contacts			
Date/Time	Contact Description	Staff Person	Location
07/01/2013 02:19 PM	Apply for WIC	Donna Weber	Butler County WIC Clinic

Documents Printed			
Date/Time	Document	Staff Person	Location
07/05/2013 05:07 PM	Appointment Notice Letter	01 Train	Butler County WIC Clinic

This assumes that you **always** give the person the notice – either mailing it or handing it to them.

Skill Builder

Histories – Appointment & Documents Printed



Retrieve the record of the Potato family. (You rescheduled appointments for Patrick and Perry in the last Skill Builder.)

1. Open the History - Appointment for Patrick. Review it to ensure it reflect the rescheduled and new appointment work you recently did. Repeat for Perry.
2. Open the History – Contacts for Patrick. Review the Documents Printed portion of the window to see the letter you recently printed. Repeat for Perry.

Summary – Making Appointments

In summary, here are the basic steps in making an appointment – with some highlighted reminder cautions based on common problems.

1. Open desired group
2. Select day
3. Click in “Select an open group”.
Remember – you can have lots of groups open, but you stuck until you click in “Select an open group”.
4. Click “Make a New Appointment” button.
5. Select time and other details.
6. Double check that **all** family members are correct – or do some need changed to “no” for the appointment type?
7. Save. If the Save button is enabled, you can save. Some people see the word “Scheduling” and think KWIC is working, working, working. This is not the case – it just means those cells are identified as cells you are working with. Go ahead and save!
8. If you start the making the appointment, then go back and change anything on the Demographics tab, (e.g. “print letters in Spanish” checkbox, client address) you need to click the Refresh button so the Appointment Book “looks at” the new information.

Scheduler

July, 2013

07/09/2013

Tuesday Refresh

Find Next Available Appointment Slot

View Next Appointment

Make New Appt. Schedule Class

Today: 7/8/2013

Select an open group

Skill Builder



1. Retrieve the record for the Pea family.
 - a. Make a certification appointment for Pauline.
 - b. Look at the Flowsheet for the family and make appropriate appointments along with the appointment for Pauline for the rest of the family (Pierre, Patsy and Randy).

2. Retrieve the record for the Artichoke family.
 - a. Make an RD appointment for Amy.
 - b. Make no appointment for Alice.

3. Retrieve the record for the Onion family. Olivia is an applicant and Otto is high risk.
 - a. Make a certification appointment for Olivia
 - b. Make an RD appointment for Otto.(Hint – Otto must be with an RD so make both appointments with an RD.)

Schedule Class Button

To schedule a client for a class, start the same way as scheduling for any appointment. Click along with the following steps to schedule a class for Molly Mango.

1. Retrieve the record for child Molly Mango (caregiver Melanie Mango). Click on the Appointment Book tab.
2. Click on “Select an open group” and select caregiver Melanie Mango.
3. Click the “Schedule Class” button which opens a list of available classes.
 - a. Notice the scroll bar that lets you look at all possible.
 - b. Also notice that the Schedule Class button has changed into “Cancel Class”. Use this button if you need to stop scheduling a class for this client.
4. Click the Schedule circle for the “Healthy Snack Time” class next month. (Your dates will be different from the screen shot.)

5. A box opens with all the active family members so you have to decide which family members to schedule. Normally you would look at the Flow sheet, but for this example, select all the family members. (Notice there is a scroll bar that you can use if needed.)

Select Family Group Members Attending		
Class Attendees	Category	End Eligibility
<input checked="" type="checkbox"/> Melanie Mango	PP	9/30/2013
<input checked="" type="checkbox"/> Molly Mango	C	9/30/2013
<input checked="" type="checkbox"/> Michael Mango	I	3/31/2014

6. The Save button is enabled. Save.

To Remove a Group Member from a Scheduled Class

You can also remove a person mistakenly scheduled for a class. Let's pretend that we should have scheduled just Molly for the class. We need to remove the other two family members. Click along with the following steps.

1. Find and retrieve the Mango family and click the Appointment Book tab.
2. Select the Caregiver from the Select an Open Group list.
3. Click "Schedule Class" to show the "Select a Class" detail.

Select an open group
Mango, Melanie

Select a Class

▼ Date 07/09/2013, Tue. 10:00 AM
Healthy Snack Time Schedule

▼ Date 07/18/2013, Thu. 02:00 PM
Match Your Milk Schedule

▼ Date 08/06/2013, Tue. 10:00 AM
Healthy Snack Time **Scheduled** Edit

4. Any classes the client is scheduled for have an Edit circle instead of the Schedule circle. Click Edit to get the family to display.
5. Click the checkbox to remove a check mark for clients who should not be scheduled.
6. Save.

Select Family Group Members Attending

Class Attendees	Category	End Eligibility
<input type="checkbox"/> Melanie Mango	PP	9/30/2013
<input checked="" type="checkbox"/> Molly Mango	C	9/30/2013
<input type="checkbox"/> Michael Mango	I	3/31/2014

How are classes set up in KWIC?

Classes are set up on the Class Management window found on the Clinic Admin drop-down menu. This is presented in the *Class Management* module.

Changing System Colors & Appointment Book

In the module, *Getting Started in KWIC*, you learned that you can choose to change your screen colors in your computer's Properties menu. Just a reminder...

- The color scheme you select is especially important related to the Appointment Book.
- You need to be able to determine the differences in appointments with outcomes versus appointments without outcomes
- Appointments that do not have an outcome can be hard to read with certain color schemes. If you are going to experiment and change colors, pick a color scheme that works for the appointment book.
- Remember that your color selection affects all programs on the computer.

The image displays three overlapping screenshots of an appointment book interface, illustrating different color schemes. Each screenshot shows a grid with time slots on the y-axis and appointment categories on the x-axis: Mary Ann P, Brenda P, Classes, and Reschedule.

Light Blue Scheme (Left): Shows appointments for Mary Ann P (Higuera, Geronimo-Lu, Folkerts, Vega Pena, Murua, Geronimo-Lu) and Classes (Higuera, Folkerts, Vega Pena, Murua, Geronimo-Lu).

Light Grey Scheme (Middle): Shows appointments for Mary Ann P (Higuera, Geronimo-Lu, Folkerts, Vega Pena, Murua, Geronimo-Lu, Multiple (2), Rineheart) and Classes (Higuera, Folkerts, Vega Pena, Murua, Geronimo-Lu, Multiple (2), Rineheart).

Dark Green Scheme (Right): Shows appointments for Mary Ann P (Higuera, Geronimo-Lu, Folkerts, Vega Pena, Murua, Geronimo-Lu, Multiple (2), Rineheart) and Classes (Higuera, Folkerts, Vega Pena, Murua, Geronimo-Lu, Multiple (2), Rineheart, Santin Grana, Fugate, Scalp).

The End