

No Show Management

This module applies to the following security roles:

Clerk
RN/RD



Kansas Department of Health and Environment
Bureau of Family Health
Nutrition and WIC Services
1000 SW Jackson, Suite 220
Topeka, KS 66612-1274
(785) 296-1320
www.kansaswic.org

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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. Document clients as no shows for appointments.
2. Print no show letters.

What Is No Show Management?

The No Show Management window is used to document that a client did not show up for their scheduled appointment and to print No Show Letters. It is recommended that No Show Management be completed daily, and letters sent daily, or for small clinics, at least weekly, usually the end of the week. This will allow for No Shows to be updated in the Appointment History, but save confusion and postage if clients call the next day to reschedule the missed appointment.

All clients, who have not been seen for a scheduled appointment or who did not pick up checks on the appointment date selected, are listed for review in this window. The touch of a button updates all the client's records at one time. No Show Letters are printed from this same window. This window is concerned with appointment results only, not services (contacts) provided.

To Mark Appointment Outcomes in the Appointment Book

Go to the Appointment Book. Use the calendar and click on the first Monday of the current month. Note that a couple families have appointments. Depending on your computer's color scheme setting, appointments in the Appointment Book grid with no outcomes appear in blue. Completed appointments appear in black.

Click on the 10:45 AM appointment for Kiwi. Notice in the appointment detail that this is an appointment for Kelly Kiwi.

Possible appointment outcomes are Complete, Interrupted, No Show, Refused, or Rescheduled.

Kelly's appointment outcome is <none>. If her appointment had been completed on this date or she had been issued checks, KWIC will automatically mark her appointment as "Complete." (Be aware that any changes to her record will make an outcome of complete. We'll address that later.)

The screenshot shows a software interface for appointment management. At the top, the client name is 'Kiwi, Kelly'. Below that, there are fields for 'Role' (Clerk 1), 'Time' (10:45 AM), and 'Duration' (15 minutes). There are buttons for 'Open Group', 'Delete', and 'Print Notice'. Below these fields, there is a section for 'Client Kelly Kiwi' with a 'Type' dropdown (RD) and several checkboxes for 'Res', '\$', 'ID', 'Diet', and 'Sp Auth'. The 'Outcome' dropdown menu is open, showing a list of options: '<none>', 'Complete', 'Interrupted', 'NoShow', 'Refused', and 'Rescheduled'.

Other possible situation and outcomes include:

- If Kelly comes on the day of her appointment and refuses to attend the high risk appointment, but wants her checks, the WIC clerk should mark the appointment outcome as “Refused” **before** checks are issued.
- If Kelly calls on the day of her appointment and states she is ill and wishes to reschedule, the appointment should be marked as “Rescheduled” before a new appointment for Kelly is made.
- Kelly’s appointment should be marked as “Interrupted”, if she comes for her high risk appointment but before it is completed, she becomes ill and has to go home.
- Appointments may be marked as “No Show” on the appointment book by WIC staff or automatically by KWIC using No Show Management, as discussed in this module.

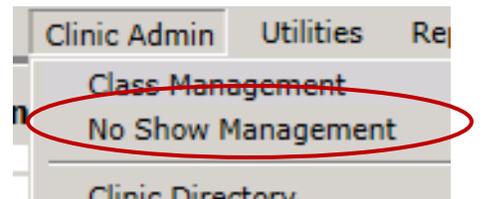
For this module, we’re going to say that Kelly did **not** come for her appointment and did not call to reschedule so we need to send her a no-show letter..



It is always a good idea to review appointments for the day using the Appointment book, before opening No Show Management. Any appointments not marked Complete, Interrupted, Refused or Rescheduled should be marked as such before opening No Show Management.

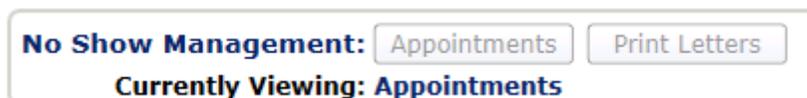
Using No Show Management to Mark Appointment Outcomes

1. To open No Show Management click on the [ClinicAdmin] menu tab, then click on [No Show Management] in the drop down list.



There are two buttons in the No Show Management window:

- Appointments
- Print Letters



Appointments Button

The Appointments button is used to document a No Show Outcome for any appointment without an outcome.

No Show Management: Appointments | Print Letters
Currently Viewing: Appointments

Appointments
Enter the Clinic and Date, then press Find to display all appointments with no outcome.

Clinic: Butler County WIC Clinic
No Show Date: 09/02/2013

Find | Reprint
Reset | Update Appointments

Client Appointments With No Outcome
Butler County WIC Clinic

All

Primary Caregiver	Client	Appt. Time	Type	Role	Change to No Show?	Print
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1. If necessary, change the Clinic in the drop down list.
2. Enter the No Show date you want to review. For this example choose the first Monday in the current month. (Click along to complete No Show Management for that day.)
3. Click the **[Find]** button to show a list of all clients who were scheduled for an appointment but had no outcome for their scheduled appointment.



NOTE: The screen may be blank if appointment outcomes have been documented in the Appointment Book throughout the day.

4. Review the names in the display list. In this example, we'll pretend that all of the names on the list should be marked No Show.



NOTE: In some situations, you might find that a client's name is listed but should not be marked as a No Show. Then close the No Show Management Window. Return to Find Client, select the client, and update the appointment outcome in the Appointment Book. Save the changes by clicking the **Save** icon. Only clients with no appointment outcome on the Appointment Book appear in this list. If staff manually marked a client as a No Show on the Appointment Book, they will not appear on this list. However, the client will appear on the Print Letters tab.

5. Click the **[Update Appointments]** button. The appointment outcomes will be updated to No Show.

If you are in a small clinic whose procedure is to run No Show Management only weekly, remember to repeat this process for **every** day in which you had appointments!



ADDITIONAL INFORMATION:

- ❑ Click the **[Reset]** button, on the Mark Appointment Outcomes tab, to clear the screen and start a new search.
- ❑ The **[Update Appointments]** button must be clicked before you move to the Print No Show Letters tab.
- ❑ The Caregiver's name will appear with each client name, but only one letter will be printed for each group.
- ❑ Leaving a box empty (with no X) on the Mark Appointment Outcome tab will leave the appointment without an outcome recorded.
- ❑ If a No Show is recorded by mistake, it must be corrected in the Appointment Book. Changing the appointment outcome in the Appointment Book updates the Appointment History with the corrected information.
- ❑ The **[Reprint]** button, on the Mark Appointment Outcomes tab, reprints the No Show Letters for the selected date that had been previously printed.

Print Letters Button

After updating appointments the KWIC System moves you to the Print Letters tab automatically. The site and date are the same that you chose on the Appointments tab.

No Show Management:

Currently Viewing: **Print Letters**

Print Letters

1. Click the Print Letter box to cancel letter printing for the group.
 2. Press the Print No Show Letters button.

Groups With No Show Appointments
 Butler County WIC Clinic

All

Role Description	Time	Primary Caregiver	Print Letter?
Clerk 1	08:15 AM	Pea, Pauline	<input checked="" type="checkbox"/>
Clerk 1	10:45 AM	Kiwi, Kelly	<input checked="" type="checkbox"/>

To Print No Show Letters

1. All clients who have an appointment outcome of No Show on the selected day are displayed on the Print Letters tab. This list may vary somewhat from the list on the Appointments tab as the outcome of No Show may have already been manually set in the Appointment Book.
2. Review the list of clients in the display box. No Show Letters will print for all clients with an X in the **Print Letters? box**. You may remove the X by clicking in the box. For the purpose of this exercise, leave the X's because there are not many.
3. Click the [**Print No Show Letters**] button to print a No Show Letter addressed to each Caregiver. The letter will list all the appointments that were missed by the group on the selected day. Review the printed letters.

The No Show Letter will be printed in Spanish if the Print Letter in Spanish checkbox is selected on the Demographics tab.

ADDITIONAL INFORMATION:

- Click the [**Select All**] button to check all boxes in the **Print Letter?** with an X.
- Click the [**Clear All**] button to remove all X's in the **Print Letter?** List.
- A No Show Letter (NSL) contact is created for each client.
- Addresses on the letters show through a window envelope.

Although you may be tempted to return to the Appointments tab from the Print Letters tab and make changes, changes will not be recorded from the Appointments tab once the [**Update Appointment**] button is clicked.

SKILL BUILDER

Talk to your supervisor about the clinic routine for:

1. Who is assigned to complete No Show Management?
2. Who is the back-up if the main person is absent or busy?
3. When is it completed?
4. When are No-Show letters mailed?



The End