

Appointment Functions (Screen 18)

The Appointment Functions (Appointment Selection Menu) Screen is used to document and manage appointments scheduled for the applicant or participant. Documenting appointments in HSIS supports Local Agencies in caseload management. For additional Appointment Function (Screen 18) guidance, access the HSIS user Manual at the following website address:
http://dirm.state.nc.us/hsis/HSIS_Users_Manual.pdf.

Accessing the Appointment Selection Menu Screen

To access the Appointment Selection Menu Screen, enter the following information from the Application Selection Menu:

- Screen: = 18.
- ID: = blank.
- Date = blank.
- Action = blank.
- Press the **ENTER** key.

HSA005A	NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM	NC25	07501		
12/05/07	APPLICATION SELECTION MENU				
NEXT RECORD:	COUNTY: 085	SCREEN: 18	ID:	DATE:	ACTION:
MESSAGE:	103 PF8 TO BROWSE FORWARD, PF7 TO BROWSE BACKWARD				
00. ALPHA NAME SEARCH		27. WIC STATE OFFICE MENU			
01. PATIENT MASTER		28. FORMS ALIGNMENT			

- Next Screen: = the appropriate screen number 01 through 09.
- Next ID = participant's 9-digit Patient Master ID. (Note: the 2-digit WIC Program number plus 6-digit WIC ID cannot be used on this screen. Also note that any number typed in the ID field is invisible on screen 18.)
- Date = Appropriate date for specific action. May be left blank.
- Clinic = the 4-digit alphanumeric code for the specific WIC Clinic. Clinic codes are created by the local agency. For more information, refer to #07 Clinic Profile.
- Action code can be:
 - ▶ A = add
 - ▶ B = browse
 - ▶ C = change
 - ▶ D = delete
 - ▶ E = extend – (only for certain screens)
 - ▶ I = inquire
- Press the **ENTER** key.

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HSA180A          NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM          07501
07/07/07          APPOINTMENT SELECTION MENU

NEXT SCREEN: _   NEXT ID:          CLINIC:          DATE:          ACTION:
MESSAGE:

01. CLIENT APPOINTMENT (ADD, DELETE, BROWSE)
02. CLINIC APPOINTMENT DATE RESCHEDULE OR CANCEL (CHANGE)
03. CLIENT MISSED APPOINTMENT ENTRY (CHANGE, INQUIRE)
04. APPOINTMENT PRINT FUNCTIONS
05. TEXT FILE (ADD, CHANGE, DELETE, INQUIRE)
06. HOLIDAY SCHEDULE (ADD, CHANGE, DELETE, INQUIRE)
07. CLINIC PROFILE (ADD, CHANGE, DELETE, INQUIRE, EXTEND)
08. VIEW NUMBER OF APPOINTMENTS FOR A GIVEN DATE (INQUIRE)
09. RETURN ADDRESS(S) (ADD, CHANGE, DELETE, INQUIRE)

NOTE: FOR SYSTEM NOTES AND NEWSLETTERS (IF ANY), SELECT #05
ACTION=I AND BLANK OUT SITE FIELD (UPPER RIGHT)
```

Getting Started

Before using the HSIS appointment functions, the following steps must be taken:

- ✓ Complete the Holiday Schedule in #06 Holiday Schedule for each New Year.
- ✓ Set up Clinic Profiles in #07 Clinic Profile. For WIC appointments, use the clinic codes specified in the instructions for clinic profiles.
- ✓ Enter Return Addresses in #09 Return Addresses. Complete this item once for each agency site, unless more than one return address is needed.

Appointment Menu Selections

01. Client Appointment

This option is used:

- To make (add) an appointment for an applicant or participant,
- To delete an appointment which is no longer needed,
- To view (browse) appointments for an applicant or participant, or
- To view HIS appointment information for an applicant or participant or
- To block a specific time slot so that the computer will not permit an appointment to be made.

Adding Appointments

To schedule an appointment for an applicant or participant, include the following information on the control line in screen 18:

Chapter 1: USING THE HEALTH SERVICES INFORMATION SYSTEM (HSIS)
 Section 11: APPOINTMENT FUNCTIONS (SCREEN 18)

- Next Screen = 01.
- Next ID = 9-digit Patient Master ID number,
 - ▶ Note: WIC Program number plus WIC ID cannot be used here
- Clinic code = the appropriate code for the specific clinic.
- Date = the date of the appointment (MMDDYY).
- Action Code = A.

```

HSA180A          NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM          07501
08/12/05          APPOINTMENT SELECTION MENU

NEXT SCREEN: 01  NEXT ID: _          CLINIC: WP18          DATE: 101405  ACTION: A
MESSAGE:

      01. CLIENT APPOINTMENT (ADD, DELETE, BROWSE)
      02. CLINIC APPOINTMENT DATE RESCHEDULE OR CANCEL (CHANGE)
      03. CLIENT MISSED APPOINTMENT ENTRY (CHANGE, INQUIRE)
      04. APPOINTMENT PRINT FUNCTIONS
      05. TEXT FILE (ADD, CHANGE, DELETE, INQUIRE)
      06. HOLIDAY SCHEDULE (ADD, CHANGE, DELETE, INQUIRE)
      07. CLINIC PROFILE (ADD, CHANGE, DELETE, INQUIRE, EXTEND)
      08. VIEW NUMBER OF APPOINTMENTS FOR A GIVEN DATE (INQUIRE)
      09. RETURN ADDRESS(S) (ADD, CHANGE, DELETE, INQUIRE)

NOTE: FOR SYSTEM NOTES AND NEWSLETTERS (IF ANY), SELECT #05
      ACTION=I AND BLANK OUT SITE FIELD (UPPER RIGHT)
  
```

- Press the **ENTER** key.

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HSA181A/184A    NORTH CAROLINA HSIS - APPOINTMENT  (ADD)
NEXT SCREEN: 01 NEXT ID:          CLINIC: WP18  DATE: 101405  ACTION: A
MESSAGE: ENTER ADD -OR- PF9 FOR NEXT DATE -OR- NEXT KEY

      RETURN ADDRESS LOCATION: 01 DAY: FRIDAY    OVERBOOK: Y
CLIENT NAME: DOE, JOHN S
COUNTY: 085   CLINIC CODE: WP18  DESCRIPTION: WIC PICKUP ONLY

STAFF: WIC STAFF          WEEKS: 1 2 3 4 5  DAYS: M T W T F

#  TIME  MAX USE  #  TIME  MAX USE  #  TIME  MAX USE  #  TIME  MAX USE
01 08:30A  3    02 08:45A  3    03 09:00A  3    04 09:15A
05 09:30A  3    06 09:45A  3    07 10:00A  3    08 10:15A
09 10:30A  3    10 10:45A  3    11 11:00A  3    12 11:15A
13 11:30A  3    14 11:45A  3    15 12:00P  3    16 12:15P
17 12:30P  3    18 12:45P  3    19 01:00P  3    20 01:15P
21 01:30P  3    22 01:45P  3    23 02:00P  3    24 02:15P
25 02:30P  3    26 02:45P  3    27 03:00P  3    28 03:15P
29 03:30P  3    30 03:45P  3    31 04:00P  3    32 04:15P
33 04:30P  3

ADD ID 123456789 TO TIME SLOT 09  MAIL: u  NOTE: Bring WIC Folder
  
```

 **User Note**

The date originally entered on the control line may be a day that the clinic is not available, a holiday, or a date from a previous action. In that case, the date at the top of the screen may be different. **Always** verify the date at the top of the screen. The cursor will be at the field for return address location.

A screen appears that shows time slot availability.

 User Note

The time slots are listed chronologically in rows across 4 columns on the screen. These should be read from left to right instead of from top to bottom.

The screen displays the following columns:

- # = the time slot number
- Time = the appointment time
- Max = the maximum number of appointments available for that time slot
- Use = the number of available appointments already used for that time slot
- If there is an appointment time on this date that is convenient for the client
 - ▶ Tab to the time slot at the bottom of the screen and enter the number corresponding to the appointment time desired
 - ▶ Type Y for Yes mail or N for No mail, according to the client's preference.

 User Note

The mail field is a visual reminder to the WIC agency of the participant's preference. It is not tied to any print function on screen 18 or 19.

- ▶ Make any notations (such as pending, nutrition education topic to be discussed, ht/wt/hgb needed, wt recheck, chart number, or WIC ID number of other family members, etc.).
- ▶ Notations made here become a permanent part of the appointment record and are on the printed appointment list.
- ▶ If the appointment date shown is not the date originally entered, it can be changed to more closely coincide with the participant's issue date or other clinic appointments by tabbing back to the control line, changing the date and
- Press the **ENTER** key.
- To bring up the next available appointment date within a given clinic, press the <F9> or <F10> key.
 - ▶ <F10> is only valid with add function for daily clinics.

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HSA181A/184A      NORTH CAROLINA HSIS - APPOINTMENT      (ADD)
NEXT SCREEN: 01  NEXT ID:                               CLINIC: WP18  DATE: 101405  ACTION: A
MESSAGE: RECORD HAS BEEN ADDED - ENTER NEXT KEY

                RETURN ADDRESS LOCATION:                DAY: FRIDAY      OVERBOOK: Y
CLIENT NAME: DOE, JOHN S
COUNTY: 085    CLINIC CODE: WP18    DESCRIPTION: WIC PICKUP ONLY

STAFF: WIC STAFF                                WEEKS: 1 2 3 4 5  DAYS: M T W T F

#   TIME  MAX USE  #   TIME  MAX USE  #   TIME  MAX USE  #   TIME  MAX USE
01 08:30A  3      02 08:45A  3      03 09:00A  3      04 09:15A
05 09:30A  3      06 09:45A  3      07 10:00A  3      08 10:15A
09 10:30A  3      10 10:45A  3      11 11:00A  3      12 11:15A
13 11:30A  3      14 11:45A  3      15 12:00P
17 12:30P
21 01:30P      22 01:45P      23 02:00P  3      24 02:15P
25 02:30P  3      26 02:45P      27 03:00P  3      28 03:15P
29 03:30P  3      30 03:45P      31 04:00P  3      32 04:15P
33 04:30P  3

ADD ID 123456789 TO TIME SLOT 09      MAIL: Y      NOTE: BRING WIC FOLDER
    
```

If the maximum number of people has been assigned to a particular appointment slot, but the Overbook option is Yes, you can add more appointments. If successful, a warning message will appear: “*Warning* Timeslot is Overbooked but the Appt is Allowed.”

```

NEXT SCREEN: 01  NEXT                               CLINIC: WP1  DATE: 101405  ACTION: A
MESSAGE: *WARNING* TIMESLOT IS OVERBOOKED BUT THE APPT IS ALLOWED

                RETURN ADDRESS LOCATION:                DAY: FRIDAY      OVERBOOK: Y
CLIENT NAME: JONES, MARY Q
COUNTY: 012    CLINIC CODE: WP1    DESCRIPTION: WIC PICK UP CLASS

STAFF:                                WEEKS: 1 2 3 4 5  DAYS: M T W T F

#   TIME  MAX USE  #   TIME  MAX USE  #   TIME  MAX USE  #   TIME  MAX USE
01 08:00A  1      02 08:15A  1      03 08:30A  15     04 08:45A  1
05 09:00A  1      06 09:15A  1      07 09:30A  15     08 09:45A  1
09 10:00A  1      10 10:15A  1      11 10:30A  15     12 10:45A  1
13 11:00A  1      14 11:15A  1      15 11:30A  1      16 11:45A
17 12:00P
18 12:15P
19 12:30P
20 12:45P
21 01:00P  1      22 01:15P  1      23 01:30P  15     24 01:45P  1
25 02:00P  1      26 02:15P  1      27 02:30P  15     28 02:45P  1
29 03:00P  1      30 03:15P  1      31 03:30P  15     32 03:45P
33 04:00P

ADD ID 123456789 TO TIME SLOT 09      MAIL: Y      NOTE: PICKUP W/MDM
    
```

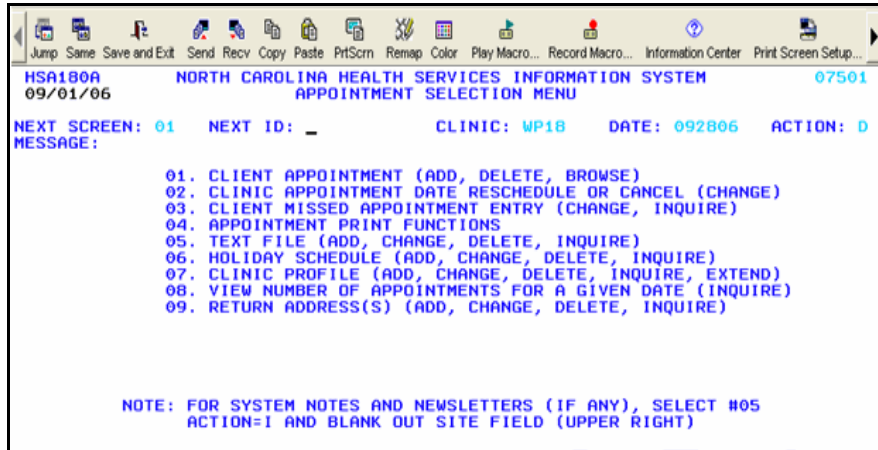
Deleting Appointments:

This function should be used to delete an appointment in the future when the user is scheduling the participant another appointment. When deleting an appointment, include the following information on the Fastpath line on screen 18:

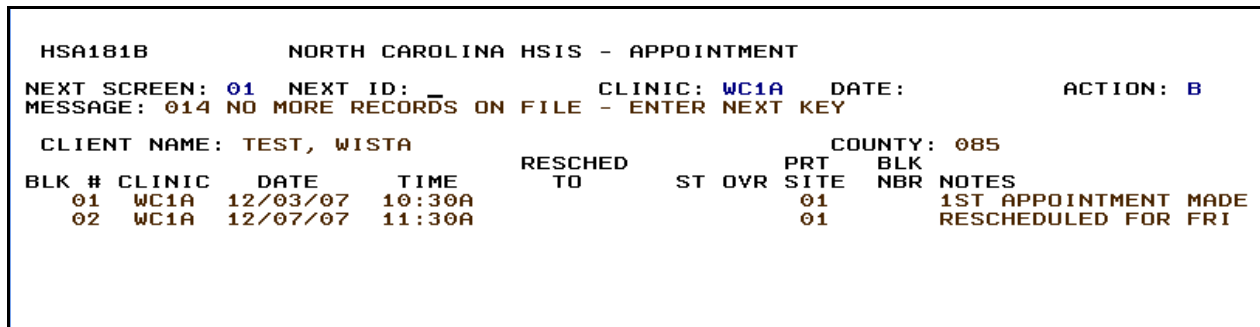
- Screen = 01
- ID = Participant’s 9-digit Patient Master ID.
 - ▶ Note: WIC Program number and WIC ID number does not allow access to the appointment functions.
- Clinic = Clinic code for appointment type as explained in #07 Clinic Profile
- Date

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 Section 11: APPOINTMENT FUNCTIONS (SCREEN 18)

- ▶ if left blank, will list all appointments that have been scheduled
- ▶ if date indicated, will list only appointments that have been scheduled on or after that date
- Action Code = D
- Press the **ENTER** key.



Scenario: The participant or parent called the office after they realized they could not make a scheduled appointment. They wanted another appointment of the same type within a few days of the original. The original appointment of 12-03-07 (to be deleted) remained on display. The new appointment of 12-07-07 was displayed at the same time.



- The screen will show appointments with a block (blk #) or sequence number (nbr).
- Enter the two-digit sequence number of the appointment to be deleted.

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 Section 11: APPOINTMENT FUNCTIONS (SCREEN 18)

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HSA181B          NORTH CAROLINA HSIS - APPOINTMENT
NEXT SCREEN: 01  NEXT ID:          CLINIC: WC1A   DATE: 120307   ACTION: D
MESSAGE: 263  APPOINTMENT RECORD SET FOR DELETION - PF3 TO ABORT

CLIENT NAME: TEST, WISTA          COUNTY: 085

BLK # CLINIC  DATE    TIME    RESCHED TO  ST OVR  PRT  BLK  NOTES
      01  WC1A  12/03/07  10:30A          01      1ST APPOINTMENT MADE
      02  WC1A  12/07/07  11:30A          01      RESCHEDULED FOR FRI

ENTER SEQUENCE NBR OF APPT TO DELETE: 01
  
```

- Press the **ENTER** key.
- When successful, the system will display the message Record Deleted.

```

HSA181B          NORTH CAROLINA HSIS - APPOINTMENT
NEXT SCREEN: 01  NEXT ID:          CLINIC: WC1A   DATE: 120307   ACTION: D
MESSAGE: 024  RECORD DELETED - ENTER NEXT KEY

CLIENT NAME: TEST, WISTA          COUNTY: 085

BLK # CLINIC  DATE    TIME    RESCHED TO  ST OVR  PRT  BLK  NOTES
      01  WC1A  12/03/07  10:30A          01      1ST APPOINTMENT MADE
      02  WC1A  12/07/07  11:30A          01      RESCHEDULED FOR FRI
  
```

Deleted appointments are also removed from history.

It is important that every WIC appointment made for a participant is kept in history to show that appointments were scheduled within processing standards and issuance was appropriate during any grace period.

The next screenshot shows the appointment list for Wista Test after deleting the 12-03-07 appointment from screen 18:

```

HSA181B          NORTH CAROLINA HSIS - APPOINTMENT
NEXT SCREEN: 01  NEXT ID: _        CLINIC: WC1A   DATE:          ACTION: B
MESSAGE: 014  NO MORE RECORDS ON FILE - ENTER NEXT KEY

CLIENT NAME: TEST, WISTA          COUNTY: 085

BLK # CLINIC  DATE    TIME    RESCHED TO  ST OVR  PRT  BLK  NOTES
      01  WC1A  12/07/07  11:30A          01      RESCHEDULED FOR FRI
  
```

Browsing Appointments

To browse or view existing appointments for a participant or applicant, enter the following information on the control line of screen 18 (HSA180A):

- Next Screen = 01
- Next ID = Participant's Patient Master ID number.
 - ▶ Note: WIC Program number and WIC ID number does not allow access to the appointment functions.
- Clinic = can be left blank to view all appointments previously scheduled or may indicate a specific clinic code if only want to view that clinic type,
- Date = can be left blank to list all appointments that have been scheduled or can indicate a specific date to list only appointments that have been scheduled on or after that date.
- Action Code = B (browse)

```
HSA180A 10/23/07 NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM Q7501
APPOINTMENT SELECTION MENU
NEXT SCREEN: 01 NEXT ID: CLINIC: DATE: ACTION: B
MESSAGE:
01. CLIENT APPOINTMENT (ADD, DELETE, BROWSE)
02. CLINIC APPOINTMENT DATE RESCHEDULE OR CANCEL (CHANGE)
03. CLIENT MISSED APPOINTMENT ENTRY (CHANGE, INQUIRE)
04. APPOINTMENT PRINT FUNCTIONS
05. TEXT FILE (ADD, CHANGE, DELETE, INQUIRE)
06. HOLIDAY SCHEDULE (ADD, CHANGE, DELETE, INQUIRE)
07. CLINIC PROFILE (ADD, CHANGE, DELETE, INQUIRE, EXTEND)
08. VIEW NUMBER OF APPOINTMENTS FOR A GIVEN DATE (INQUIRE)
09. RETURN ADDRESS(S) (ADD, CHANGE, DELETE, INQUIRE)

NOTE: FOR SYSTEM NOTES AND NEWSLETTERS (IF ANY), SELECT #05
ACTION=1 AND BLANK OUT SITE FIELD (UPPER RIGHT)
```

Press the **ENTER** key.

- Appointments will be listed from oldest to most current.

User Note

For clients who have many appointments, press the <F8> key until the most recent ones are displayed.

- The column descriptions are as follows:
 - ▶ Blk # = the sequence number.
 - ▶ Clinic = the 4-digit code created when the clinic profile was set up in 07.
 - ▶ Date = Appointment date
 - ▶ Time = Appointment time
 - ▶ Blk NBR = Block Number
 - ▶ Notes = The comments put into the Note field when the appointment was created.

HSA181B NORTH CAROLINA HSIS - APPOINTMENT									
NEXT SCREEN: 01		NEXT ID: _		CLINIC: _		DATE: _		ACTION: B	
MESSAGE: 014 NO MORE RECORDS ON FILE - ENTER NEXT KEY									
CLIENT NAME: DOE, JOHN S						COUNTY: 085			
BLK #	CLINIC	DATE	TIME	RESCHED TO	ST OVR	PRT SITE	BLK NBR	NOTES	
01	WICT	09/16/05	02:45P			01	01	COME TO WIC CLASS	
02	WP18	10/14/05	10:30A			01	01	BRING WIC FOLDER	
03	WC1A	06/12/06	01:30P			01	01		
04	WC1A	06/12/06	01:45P			01	01		
05	WP18	09/28/06	02:30P			01	01	PICK FOR JS DOE	
06	WICT	09/29/06	01:45P			01	01	SET APPT FOR JS DOE	
07	WC1A	02/05/07	02:30P			01	01	TESTING APPT IN 07	
08	WP18	05/18/07	08:30A			01	01		
09	WP12	10/30/07	10:15A			01	01	FI PICKUP W/CLASS	

Viewing HIS Interface for Scheduled Appointments:

The HIS Appointments screen (HSA750B) is used to see if and when the participant has a scheduled appointment at the Health Department and to help determine when the best date and time would be for a WIC appointment for the participant.

The HIS Appointments screen (HSA750B) displays the following data:

- Participant Last Name, First Name, and Middle Initial
- Date of Appointment
- Time of Appointment
- Day of Appointment
- Status (Scheduled)
- Note

To view the HIS Appointments screen (HSA750B):

- Go to screen 18 Appointments, screen/01 Client Appointment (HSA181B).

HSA180A NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM					06101
03/05/09		APPOINTMENT SELECTION MENU			
NEXT SCREEN: _	NEXT ID: _	CLINIC: _	DATE: _	ACTION: B	
MESSAGE:					
01. CLIENT APPOINTMENT (ADD, DELETE, BROWSE)					

```

HSA181B NORTH CAROLINA HSIS - APPOINTMENT

NEXT SCREEN: 01 NEXT ID: CLINIC: DATE: ACTION: B
MESSAGE: 014 NO MORE RECORDS ON FILE - ENTER NEXT KEY

CLIENT NAME: SMITH, MARY COUNTY: 035
RESCHED PRT BLK
BLK# CLINIC DATE TIME TO ST OVR SITE NBR NOTES
01 MH02 12/06/06 08:00A 02 73-039 OB ENROLL MJ
02 MH01 12/18/06 10:00A 02 80-277 NOB/ATH
03 MH01 12/29/06 09:30A M 02 SAB
04 FP02 02/14/07 03:00P M 02 80-277 FP ENROLL LM
05 FP01 02/22/07 08:15A M 02 80-277 SAB FU LM
06 FP01 03/08/07 10:00A M 02 80-277 CANCEL DNWAKE
07 AHRN 02/12/08 10:00A 02 80-277 FPW PE LM
08 AHMD 02/12/08 10:30A 02 80-277 FPW PE F LM
    
```

- Press the <F4> key from the Client Appointment record (HSA181B).
- The HIS Appointments screen (HSA750B) may take a few seconds to display.
- A clock may appear briefly while the system is searching for the HIS record.

```

07 AHRN 02/12/08 10:00A 02 80-277 FPW PE LM
08 AHMD 02/12/08 10:30A 02 80-277 FPW PE F LM

-

Mâ a X 19/03
    
```

- Review the data in the HIS Appointments screen HSA750B

```

HSA750B HIS APPOINTMENTS 06101
06/22/09 NC06
COUNTY: 035
MESSAGE:

PARTICIPANT NAME:
LAST: SMITH FIRST: MARY MI: _

DATE TIME DAY STATUS NOTE
06/29/2009 10:00 Monday Scheduled |
    
```

- Press the <F2> key to return to the HSIS 18 Appointments screen/01 Client Appointment (HSA181B).

- Enter the WIC appointment into WIC ADP/HSIS.

Blocking Appointments:

The blocking appointments function is used to block one appointment time slot at a time.

 **User Note**

To block or unblock an entire day,
use the Exceptions function in 07- Clinic Profile.

You can block all allowed appointments per each time slot or choose a select number of appointments in that time slot to block.

To block the schedule so that appointments cannot be added, include the following information on the control line in the 18 (appointment) screen:

- Screen = 01
- Next ID = BLOCK
 - ▶ Note: Because the Next ID field is protected, you will not be able to see what you are typing into that field.
 - First clear the ID field before entering the word BLOCK into that field
 - To clear the ID field, press the <Delete> key at least 9 times
 - You can also press the space bar 9 times until you space out of the ID field
 - Then type the word BLOCK
- Clinic = Enter the 4-digit clinic code for the specific appointment type
- Date = Enter the date the appointment schedule is to be blocked
- Action Code = A

```
HSA180A          NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM          07501
10/23/07          APPOINTMENT SELECTION MENU

NEXT SCREEN: 01  NEXT ID: type block here  CLINIC: wp12  DATE: 110607  ACTION: A
MESSAGE:

01. CLIENT APPOINTMENT (ADD, DELETE, BROWSE)
02. CLINIC APPOINTMENT DATE RESCHEDULE OR CANCEL (CHANGE)
03. CLIENT MISSED APPOINTMENT ENTRY (CHANGE, INQUIRE)
04. APPOINTMENT PRINT FUNCTIONS
05. TEXT FILE (ADD, CHANGE, DELETE, INQUIRE)
06. HOLIDAY SCHEDULE (ADD, CHANGE, DELETE, INQUIRE)
07. CLINIC PROFILE (ADD, CHANGE, DELETE, INQUIRE, EXTEND)
08. VIEW NUMBER OF APPOINTMENTS FOR A GIVEN DATE (INQUIRE)
09. RETURN ADDRESS(S) (ADD, CHANGE, DELETE, INQUIRE)

NOTE: FOR SYSTEM NOTES AND NEWSLETTERS (IF ANY), SELECT #05
      ACTION=I AND BLANK OUT SITE FIELD (UPPER RIGHT)
```

- Press the **ENTER** key.

A screen will appear that shows the time slots available and the time slots in use.

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 Section 11: APPOINTMENT FUNCTIONS (SCREEN 18)

This screen also shows the maximum number of appointments allowed per time slot, under the column Max.

- Always verify the date at the top of the screen. The date that displays may be different than the date originally entered on the control line if the original date entered is a day that the clinic is not open, a holiday or a date from a previous action.
- The cursor will be at the field for return address location.
- Tab down to the field for “Add ID” and verify that the word “BLOCK” is in this field.
 - ▶ If not, type the word BLOCK and tab to the next field.

HSA181A/184A NORTH CAROLINA HSIS - APPOINTMENT (ADD)

NEXT SCREEN: 01 NEXT ID: CLINIC: WP12 DATE: 110607 ACTION: A
 MESSAGE: 258 ENTER ADD, PF9 FOR NEXT DATE, PF10 FOR NEXT CLINIC, OR NEXT KEY

RETURN ADDRESS LOCATION: 01 DAY: TUESDAY OVERBOOK: N

CLIENT NAME:
 COUNTY: 085 CLINIC CODE: WP12 DESCRIPTION: WIC PICKUP TUESDAYS

STAFF: WIC CLERK WEEKS: 1 2 3 4 5 DAYS: T

#	TIME	MAX	USE	#	TIME	MAX	USE	#	TIME	MAX	USE	#	TIME	MAX	USE
01	08:15A	2		02	08:30A	2		03	08:45A	2		04	09:00A	2	
05	09:15A	2		06	09:30A	2		07	09:45A	2		08	10:00A	2	
09	10:15A	2		10	10:30A	2		11	10:45A	2		12	11:00A	2	
13	11:15A	2		14	11:30A	2		15	11:45A	2		16	12:00P	2	
17	12:15P	2		18	12:30P	2		19	12:45P	2		20	01:00P	2	
21	01:15P	2		22	01:30P	2		23	01:45P	2		24	02:00P	2	
25	02:15P	2		26	02:30P	2		27	02:45P	2		28	03:00P	2	
29	03:15P	2		30	03:30P	2		31	03:45P	2		32	04:00P	2	
33	04:15P	2													

ADD ID BLOCK TO TIME SLOT MAIL: NOTE:

- Type the number from the # column corresponding to the adjacent time slot to be blocked.
- Type either a Y (Yes) or N (No) for Mail.
- Enter any notes.

HSA181A/184A NORTH CAROLINA HSIS - APPOINTMENT (ADD)

NEXT SCREEN: 01 NEXT ID: CLINIC: WP12 DATE: 110607 ACTION: A
 MESSAGE: 258 ENTER ADD, PF9 FOR NEXT DATE, PF10 FOR NEXT CLINIC, OR NEXT KEY

RETURN ADDRESS LOCATION: 01 DAY: TUESDAY OVERBOOK: N

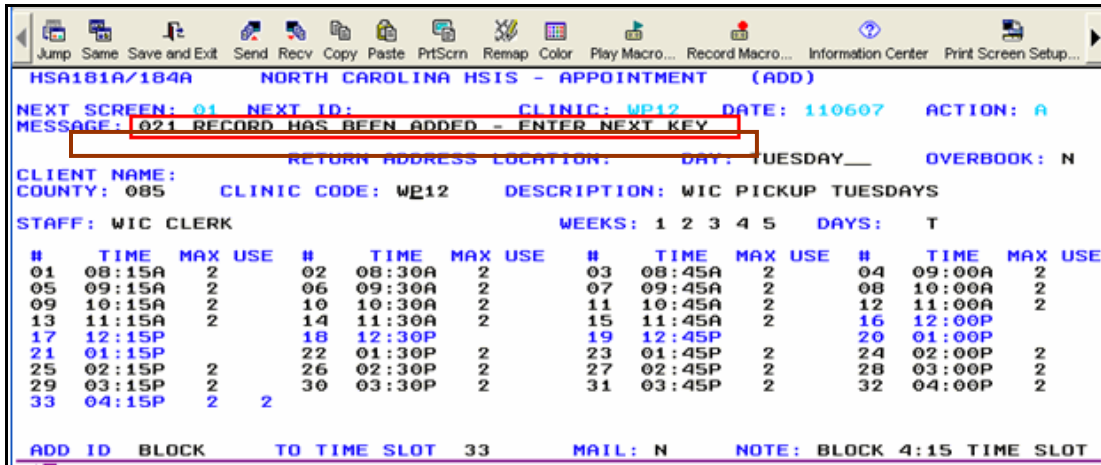
CLIENT NAME:
 COUNTY: 085 CLINIC CODE: WP12 DESCRIPTION: WIC PICKUP TUESDAYS

STAFF: WIC CLERK WEEKS: 1 2 3 4 5 DAYS: T

#	TIME	MAX	USE	#	TIME	MAX	USE	#	TIME	MAX	USE	#	TIME	MAX	USE
01	08:15A	2		02	08:30A	2		03	08:45A	2		04	09:00A	2	
05	09:15A	2		06	09:30A	2		07	09:45A	2		08	10:00A	2	
09	10:15A	2		10	10:30A	2		11	10:45A	2		12	11:00A	2	
13	11:15A	2		14	11:30A	2		15	11:45A	2		16	12:00P	2	
17	12:15P	2		18	12:30P	2		19	12:45P	2		20	01:00P	2	
21	01:15P	2		22	01:30P	2		23	01:45P	2		24	02:00P	2	
25	02:15P	2		26	02:30P	2		27	02:45P	2		28	03:00P	2	
29	03:15P	2		30	03:30P	2		31	03:45P	2		32	04:00P	2	
33	04:15P	2													

ADD ID BLOCK TO TIME SLOT 33 MAIL: n NOTE: block 4:15 time slot

- Press the **ENTER** key.



- When successful, the system will display the message Record has been added.
- If all of the appointments have been used for the time slot, the time slot will no longer be available.
- The Use column will display the maximum number of allowed appointments for the given time slot.
- If there are three openings for a given time slot and only two of them need to be blocked, type "block02" in the "Add ID" field.
- Enter Y for mail, or N for no mail, and make any notes (such as blocked due to staff meeting or if Nutritionist out of office).
- Press the **ENTER** key.
- Repeat for other times to be blocked.

02. Client Appointment Date Reschedule or Cancel

This option allows the user to reschedule all appointments from one day to another day.

User WARNING!

Because the **Reschedule** option results in deleting all of the original appointments it is **NOT RECOMMENDED** for use with WIC appointments.

It is important that every WIC appointment made for a participant is kept in history to show that appointments were scheduled within processing standards and issuance was appropriate during any grace period.

To Reschedule the Client's Appointment

- Next screen = 02
- Enter the date the new appointment is to be scheduled and/or Next ID = Pt ID
- Clinic = 2 to 4 digit clinic code
- Date = MM/YY of original date scheduled
- Action = C for Change
- Enter the new time for the rescheduled appointment.
- If an M is entered on this screen and the client receives mail from the clinic, a “missed appointment” letter will be printed to send to the client.
- Press the **ENTER** key.
- When successful message displays: Client Appointment Date Has Been Rescheduled.

As an alternative to using the “Appointment Print Function” which is discussed next, some smaller agencies or smaller sites (e.g., a site with a limited number of appointments for a day) may want to print appointments from this screen.

To View the Appointments

- Enter the clinic code
- Enter the date of appointments needed, and
- Change the action to I (inquire).
- After the appointments are shown on the screen, use “print screen” key to print the screen to the designated report printer.

03. Client Missed Appointment Entry

Action =

- C = Change
- I = Inquire

```
HSA182A      NORTH CAROLINA HSIS - MISSED APPOINTMENT ENTRY
NEXT SCREEN: 03  NEXT ID:          CLINIC:  _  DATE:          ACTION: I
MESSAGE: 237 REVIEW PROFILE: INVALID DATE -OR- CLINIC PROFILE NOT ON FILE
COUNTY:          CLINIC CODE:      DESCRIPTION:
STAFF:            DATE:              DAY:

      0          RESCHED
STAT V  PATIENT ID TO-DATE  PATIENT NAME          TIME  CLIENT APPT  NOTES
```

This option allows the user to change or inquire about the status of the client's appointment.

- Enter the letter M for Missed Appointments
- Enter the letter R and the new date if rescheduling the appointment date.

```

HSA182A          NORTH CAROLINA HSIS - MISSED APPOINTMENT ENTRY

NEXT SCREEN: 03  NEXT ID:                CLINIC: WCPU   DATE: 081009  ACTION: C
MESSAGE: 238 FOLLOW INSTRUCTION LINE BELOW - PF8 OR ENTER NEXT KEY
COUNTY: 085    CLINIC CODE: WCPU      DESCRIPTION: WIC CLINIC
STAFF: ALL                               DATE: 08/10/09   DAY: MONDAY
*** ENTER 'M' FOR MISSED APPTS, OR ENTER 'R' AND DATE IF RESCHEDULING DATE ***
  0                               RESCHED
STAT V  PATIENT ID TO-DATE  PATIENT NAME          TIME  CLIENT APPT NOTES
  r     123456789  _      TEST, MARY              1100A  APPT FOR PICK UP
  
```

04. Appointment Print Functions

The following selections are available using the Appointment Print Function:

- Pending appointment cards _ Letters for specific dates
- Missed appointment letters for specific dates
- Appointment list for specific dates
- Missed appointment list for specific dates
- Appointment statistics for specific dates
- Print clinic profiles

```

HSA183A          NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM          07501
                  APPOINTMENT REPORT REQUEST                               BILLCODE: NAA

NEXT SCREEN: 04  NEXT ID:                CLINIC:                DATE:                ACTION:
MESSAGE: PLEASE ENTER PRINT SELECTION(S), OR NEXT KEY

      ENTER 'X' FOR APPROPRIATE REPORT SELECTION(S)

      _ PENDING APPOINTMENT CARDS _ LETTERS FOR SPECIFIC DATE(S)
      _ MISSED APPOINTMENT LETTERS FOR SPECIFIC DATE(S)
      _ APPOINTMENT LIST FOR SPECIFIC DATE(S)
      _ MISSED APPOINTMENT LIST FOR SPECIFIC DATE(S)
      _ APPOINTMENT STATISTICS FOR SPECIFIC DATE(S)
      _ PRINT CLINIC PROFILES

      ENTER - CLINIC:                (WILDCARD IS '?' - EX. FP??)
              LOCATION:              (WILDCARD IS '?')
              FROM DATE:             (MMDDYY FORMAT)
              THRU DATE:             (MMDDYY FORMAT)
              PRINTER: NAAP855E     (DEFAULT PRINTER)
              TEXT ID:              (FOR CLIENT NOTICES)
              CLASS: H
              COPIES: 1
  
```

To print an appointment list for a specific date:

- Go to screen 18
- Next Screen = 04
- Press the **ENTER** key.
- Type the letter X by “appointment list for specific date(s)”
- Tab to “Enter - Clinic” and type in name of clinic to be printed.
- To print all WIC clinic appointment lists, type “W???” , if all clinics profiles are initiated as subsequently discussed in 07. Clinic Profile. Each clinic profile will print separately, but only one entry is required to request print function.
- Type in location (site number) or “??” for all locations
- Type beginning date for clinics to be printed
- Type ending date for clinics to be printed. Beginning and ending dates may be the same date if only one date is requested.
- Verify that printer selected is correct.
- Make a change on last line if more than one copy is needed (since the default is one copy).
- Press the **ENTER** key.

```
HSA183A          NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM          07501
                   APPOINTMENT REPORT REQUEST                               BILLCODE: NAA

NEXT SCREEN: 04   NEXT ID:                CLINIC:                DATE:                ACTION:
MESSAGE: PLEASE ENTER PRINT SELECTION(S), OR NEXT KEY

      ENTER 'X' FOR APPROPRIATE REPORT SELECTION(S)

      _ PENDING APPOINTMENT CARDS _ LETTERS FOR SPECIFIC DATE(S)
      _ MISSED APPOINTMENT LETTERS FOR SPECIFIC DATE(S)
      _ APPOINTMENT LIST FOR SPECIFIC DATE(S)
      _ MISSED APPOINTMENT LIST FOR SPECIFIC DATE(S)
      _ APPOINTMENT STATISTICS FOR SPECIFIC DATE(S)
      x PRINT CLINIC PROFILES

ENTER - CLINIC: w???      (WILDCARD IS '?' - EX. FP??)
        LOCATION: 02      (WILDCARD IS '?')
        FROM DATE: 010107 (MMDDYY FORMAT)
        THRU DATE: 010108 (MMDDYY FORMAT)
        PRINTER: NAAP855E (DEFAULT PRINTER)
        TEXT ID:          (FOR CLIENT NOTICES)
        CLASS: H
        COPIES: 1
```

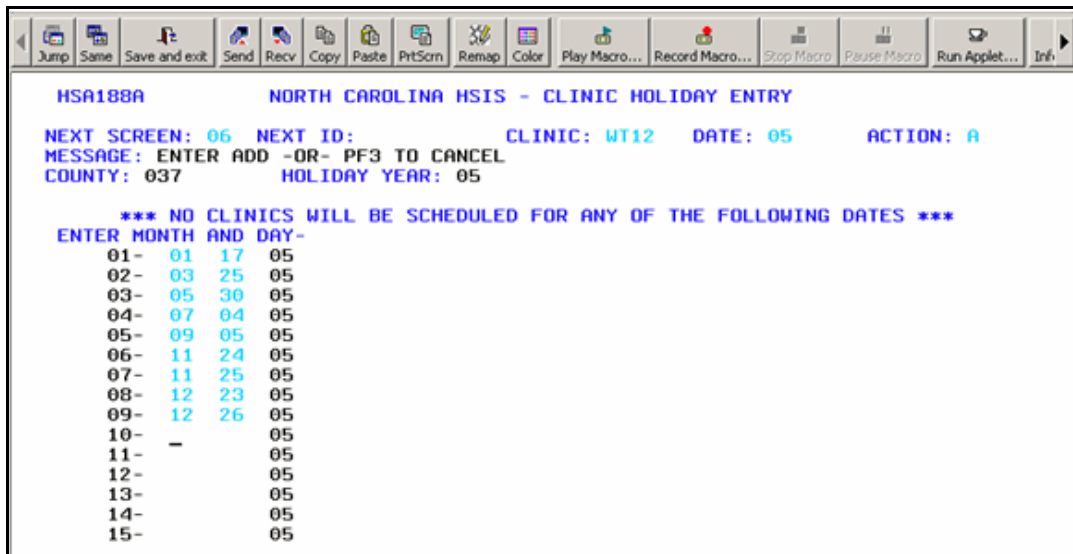
05. Text File (Add, Change, Delete, Inquire)

This option allows text to be entered in order to be printed on the appointment or missed appointment notices. The patient notices can be printed on 4x6 cards. Local agency WIC staff will not use this option, although some clinics in the agency may print cards.

06. Holiday Schedule



This option allows designated users within the local WIC agency to enter Holidays for each year. Once the holidays are entered, HSIS will automatically skip these dates when the clinic profile is entered. The Holiday Schedule can be changed as necessary. Changes can be made as soon as the holiday schedule for the county or agency is finalized, but must be done prior to initially scheduling appointments for the upcoming year.



To Add a Holiday Schedule for the Year:

- Screen = 06
- Next ID = No entry required
- Clinic = No entry required

- Date = Enter the last 2 digits of the year that holidays are scheduled in YY format (For example: 05 for year 2005)
- Action code = A
- Press the **ENTER** key.
- The first column lists the number for each of the holidays that can be entered; up to 15 are accepted for each year.
- The second column = the 2-digit number for holiday month (Example: 07 = July, 11 = November).
- The third column = the 2-digit number for the holiday date (example 25 = the twenty fifth day of the month).
- The fourth column lists the last 2 digits of the year entered earlier.
- Verify the holiday dates (month and day) before pressing the <Enter> key to save data. (Example: 01 21 = January 21th – Martin Luther King Jr. Day, 07 04 = July 4th - Independence Day holiday).
- To make changes to the Holiday Schedule, Action = C.
- To view the Holiday Schedule, Action = I.
- To delete the Holiday Schedule, Action = D.

07. Clinic Profile

The clinic profile option allows designated users in the local agency to build clinic schedules to meet their clinic needs. Clinic Profile provides specific types of appointments to be scheduled at specific times, allowing the system to move within appointment types for scheduling, and expedites the printing of appointment lists. Clinic profiles can be changed, deleted, viewed or extended.

By using the following guidance for defining WIC clinic profiles, agencies will be able to maximize scheduling of WIC related appointments.

_HSA189C		NORTH CAROLINA HSIS - CLINIC PROFILE				COUNTY: 041			
NEXT SCREEN: 07		NEXT ID:		CLINIC:		DATE:		ACTION: I	
MESSAGE: PF8 TO DISPLAY MORE CLINICS, OR ENTER NEXT KEY									
CLINIC	DESCRIPTION	WEEKS	DAYS	FROM DATE	THRU DATE	FROM TIME	THRU TIME		
WP21	VOUCHER ISSUANCE	12345	M	01/01/97	12/31/99	08:00A	04:00P		
WP21	VOUCHER ISSUANCE	12345	M	01/01/00	12/31/00	08:00A	04:00P		
WP21	WIC PICKUPS	12345	M	01/01/01	12/31/01	08:00A	05:00P		
WP21	PICK UPS	12345	M	01/01/02	12/31/02	08:00A	05:00P		
WP21	PICK UPS	12345	M	01/01/03	12/31/03	08:00A	05:45P		
WP21	PICK UPS	12345	M	01/01/04	12/31/04	08:00A	05:45P		
WP21	VOUCHER ISSUANCE	12345	M	09/24/07	12/31/07	08:00A	04:00P		
WP21	VOUCHER ISSUANCE	12345	M	01/01/08	12/31/08	08:00A	04:00P		
WP22	VOUCHERS ISSUANCE	12345	T	04/03/96	12/31/96	08:00A	04:00P		
WP22	VOUCHERS ISSUANCE	12345	T	01/01/97	12/31/99	08:00A	05:45P		
WP22	VOUCHER ISSUANCE	12345	T	01/01/00	12/31/00	08:00A	05:45P		
WP22	PICK UPS	12345	T	01/01/01	12/31/01	08:00A	05:00P		
WP22	PICK UPS	12345	T	01/01/02	12/31/02	08:00A	05:00P		
WP22	PICK UP	12345	T	01/01/03	12/31/03	08:00A	05:45P		
WP22	PICK UP	12345	T	01/01/04	12/31/04	08:00A	05:45P		
WP22	VOUCHER ISSUANCE	12345	T	09/25/07	12/31/07	08:00A	04:00P		
WP22	VOUCHER ISSUANCE	12345	T	01/01/08	12/31/08	08:00A	05:15P		

To schedule clinics, first assign a four-digit alphanumeric code, and then add the clinic to the system. WIC and HSIS staffs have agreed that all WIC clinic codes will begin with the letter W and will not be used in the first position for clinics that are not WIC. (The HSIS User Manual can be accessed at the following website address:

http://dirm.state.nc.us/hsis/HSIS_Users_Manual.pdf.)

Four alphanumeric digits are used, as follows:

- 1st digit = the letter W
- 2nd digit =
 - ▶ P for pick-up only
 - ▶ N for nutrition education and pick-up
 - ▶ C or R or X for certification, nutrition education, and pick-up
- 3rd digit = indicates site number (1-9)
- 4th digit = Can be a number or a letter. Use of any letter or number other than 1-7 allows appointments to be scheduled on any day of the week
 - ▶ Numbers 1-7 correspond to the days of the week; 1 = Monday, 2 = Tuesday, etc.
 - ▶ Letters can be used to specify types of appointments, etc.

Clinic Profile Name Examples

These are examples only. Local agencies identify clinic codes to meet their needs.

- WC11 = WIC certification clinic, site 1, Monday
- WC12 = WIC certification clinic, site 1, Tuesday
- WC13 = WIC certification clinic, site 1, Wednesday
- WC14 = WIC certification clinic, site 1, Thursday
- WC15 = WIC certification clinic, site 1, Friday
- WN19 = Low risk nutrition education class for parents/caretakers of 8-10 month olds
- WN1S = Low risk nutrition education class for Spanish-speaking children
- WP18 = Pick up only, (can be for all days of the week)

User Note

The HSIS system treats these four-digit clinic codes the same when scheduling appointments. For example, if you are trying to schedule an appointment for WC11 on June 6 and the clinic is full, press <F9> and the screen will display the June 7 schedule for clinic code WC12; press <F9> key again, and it will show the June 8 schedule for clinic code WC13.

Build the Profile

After WIC clinic codes have been determined, build the profiles on Screen 18 (HSA180A) using the following steps:

- Next Screen = 07
- Leave Next ID blank
- Enter 4-digit clinic code (refer to preceding discussion)
- Enter the last date for appointments to be scheduled in this clinic for the year. (For example, to schedule a clinic for a 6-month range, from 07-01-07 through 12-31-07, the ending date to enter is 12-31-07).

```
HSA180A          NORTH CAROLINA HEALTH SERVICES INFORMATION SYSTEM          Q7501
11/15/06          APPOINTMENT SELECTION MENU

NEXT SCREEN: 07  NEXT ID:          CLINIC: WP18  DATE: 123107  ACTION: A
MESSAGE:

      01. CLIENT APPOINTMENT (ADD, DELETE, BROWSE)
      02. CLINIC APPOINTMENT DATE RESCHEDULE OR CANCEL (CHANGE)
      03. CLIENT MISSED APPOINTMENT ENTRY (CHANGE, INQUIRE)
      04. APPOINTMENT PRINT FUNCTIONS
      05. TEXT FILE (ADD, CHANGE, DELETE, INQUIRE)
      06. HOLIDAY SCHEDULE (ADD, CHANGE, DELETE, INQUIRE)
      07. CLINIC PROFILE (ADD, CHANGE, DELETE, INQUIRE, EXTEND)
      08. VIEW NUMBER OF APPOINTMENTS FOR A GIVEN DATE (INQUIRE)
      09. RETURN ADDRESS(S) (ADD, CHANGE, DELETE, INQUIRE)

      NOTE: FOR SYSTEM NOTES AND NEWSLETTERS (IF ANY), SELECT #05
            ACTION=I AND BLANK OUT SITE FIELD (UPPER RIGHT)
```

- Action code can be
 - ▶ A = add
 - ▶ C = change
 - ▶ D = delete
 - ▶ I = inquire
 - ▶ E = extend

```
HSA189A                NORTH CAROLINA HSIS - CLINIC PROFILE
NEXT SCREEN: 07  NEXT ID:                CLINIC: WP18  DATE: 123107  ACTION: A
MESSAGE: E19. ENTER ADD INFORMATION, OR NEXT KEY
COUNTY: 085  CLINIC CODE: WP18  DESCRIPTION: WIC Pickup Only_____
STAFF: WIC Staff_____  MAIL: Y  WEEKS: 1 2 3 4 5  DAYS: M T W T F _ _
VALID FROM 010207 THRU 123107  TIME FROM 0830A THRU 0430P  OVERBOOK Y

EXCEPTION DATES:
```

The next screen (HSA189A) provides fields to describe and individualize the clinic profile:

- Clinic code is brought forward from previous page.
- Description: enter a brief description of the clinic (Example: Monday certification clinic, nutrition class for 8-10 mo. olds, WIC Pickup Only)
- Staff: enter staff title or type of staff or leave blank (Example: Nutrition staff, Clerical staff, High Risk RD, etc.)
- Mail: Type Y for Clinic Mail (or N if the Clinic will not be mailing appointment notices from screen 18).
- Weeks: Type 1, 2, 3, 4, or 5 to indicate week of month clinic will be scheduled (such as 3 if the clinic is scheduled on the 3rd Tuesday of every month). A number must be typed into the coordinating space to identify a week for the clinic to be scheduled (for this example, type the number 3 into the 3rd blank).
- Days: Type M, T, W, T, F, S, or S for day of the week clinic will be scheduled (M = Monday, T = Tuesday, etc.). A letter must be typed into the coordinating space of the day of the week for the clinic to be scheduled (Ex. If the clinic will only be held on Tuesdays only, type the letter T into the 2nd blank).
- Valid From Date (MMDDYY): Enter beginning date for the date range for this clinic profile (ex. 070105).
- Valid Thru Date (MMDDYY): The ending date is brought forward from the appointment selection menu, and may be changed on this screen if desired.
- Time From (HHMM): Enter the hours and minutes for the time that the clinic will begin: A = AM, P = PM.
- Time Thru (HHMM): Enter the hours and minutes for the time that the last appointment will be given: A = AM, P = PM.

Overbooking

When no appointment slots are available for a certain clinic day, overbooking allows staff to add participants to appointment slots. This can help staff meet processing standards for new applicants as well as meet participant needs and preferences.

However, the overbooking feature should only be used by designated staff or by permission of the site supervisor. After considering the usual appointment “no-show” rate for the clinic, the user may overbook with caution depending on available clinic space and personnel. If overbooking is a routine practice, the local agency should consider revising their appointment profiles to add more appointment slots.

- Overbook:
 - ▶ N = (No) overbooking not allowed.
 - ▶ Y = (Yes) overbooking permitted. If yes, then staff can schedule more appointments than the number of available slots listed and will also be able to schedule appointments when appointments have been blocked.
- Press the **ENTER** key.

```

HSA189A          NORTH CAROLINA HSIS - CLINIC PROFILE
NEXT SCREEN: 07  NEXT ID:          CLINIC: WP19  DATE: 123107  ACTION: A
MESSAGE: PLEASE ENTER NUMBER PER SLOT IN "SLOTS"
COUNTY: 085    CLINIC CODE: WP19  DESCRIPTION: WIC_PICKUP_ONLY
STAFF: WIC_STAFF_____  MAIL: Y  WEEKS: 1 2 3 4 5  DAYS: M T W T F _ _
VALID FROM 010207 THRU 123107  TIME FROM 0830A THRU 0430P  OVERBOOK Y
  TIME      SLOTS      TIME      SLOTS      TIME      SLOTS      TIME      SLOTS
 08:30A     03         08:45A     03         09:00A     03         09:15A     03
 09:30A     03         09:45A     03         10:00A     03         10:15A     03
 10:30A     03         10:45A     03         11:00A     03         11:15A     03
 11:30A     03         11:45A     03         12:00P     03         12:15P     03
 12:30P     03         12:45P     03         01:00P     03         01:15P     03
 02:30P     03         02:45P     03         03:00P     03         03:15P     03
 03:30P     03         03:45P     03         04:00P     03         04:15P     03
 04:30P     03
EXCEPTION DATES: 011807 021507 031507 042007 _____
  
```

Setting Time Slots

Time slots for the individual appointments must be set in order for the Clinic to be completed. At least one time slot must be filled out on this screen (HSA189A).

- Slots: Enter 2 digits in this field (01 - 99).
- Enter the maximum number of appointments for each time slot. (For example, to have 2 appointments at 8:00 AM and 3 at 8:15 AM, put 02 by 8:00 and 03 by 8:15.)
- Time slots can be left blank if not to be used for appointments (e.g. for meetings or lunch, etc.)

Exception Dates

This field can be used for specific dates when the WIC Program will not be available for appointments. Exceptions may include WIC staff training dates, or other events or functions. Exception dates are usually added to a new profile while the clinic profile is being built. Exception dates can be added to existing clinic profiles as long as no appointments currently exist on those specific dates. Exception dates that currently exist in a clinic profile can be removed so that appointments can then be made on those dates.

- Exception Dates (MMDDYY) = Enter the dates that are to be excluded from the clinic profile
- MMDDYY = (ex. September 14th) is entered 091405.
- Press the **ENTER** key to save the clinic profile. This clinic is now ready to have appointments scheduled.
- When a clinic profile has been successfully added, the screen will display the message, Record Has Been Added.

```

HSA189A          NORTH CAROLINA HSIS - CLINIC PROFILE
NEXT SCREEN: 07  NEXT ID:          CLINIC: WP19  DATE: 123107  ACTION: A
MESSAGE: RECORD HAS BEEN ADDED - PLEASE ENTER NEXT KEY
COUNTY: 085  CLINIC CODE: WP19  DESCRIPTION: WIC PICKUP ONLY

STAFF: WIC STAFF          MAIL: Y  WEEKS: 1 2 3 4 5  DAYS: M T W T F
VALID FROM 010207 THRU 123107  TIME FROM 0830A THRU 0430P  OVERBOOK Y

  TIME     SLOTS     TIME     SLOTS     TIME     SLOTS     TIME     SLOTS
08:30A    03         08:45A   03         09:00A   03         09:15A   03
09:30A    03         09:45A   03         10:00A   03         10:15A   03
10:30A    03         10:45A   03         11:00A   03         11:15A   03
11:30A    03         11:45A   03         12:00P   03         12:15P   03
12:30P    03         12:45P   03         01:00P   03         01:15P   03
01:30P    03         01:45P   03         02:00P   03         02:15P   03
02:30P    03         02:45P   03         03:00P   03         03:15P   03
03:30P    03         03:45P   03         04:00P   03         04:15P   03
04:30P    03

EXCEPTION DATES: 011807 021507 031507 042007
  
```

- To change the exception dates, follow the instructions for making changes to the clinic profiles.
- As long as no appointments have been scheduled for a specific date, the date can be added as an exception date.
- If appointments have been made, the local agency should determine whether or not they may be rescheduled.

```

HSA189A                NORTH CAROLINA HSIS - CLINIC PROFILE
NEXT SCREEN: 07  NEXT ID:          CLINIC: WP19  DATE: 123107  ACTION: C
MESSAGE: E16. ENTER CHANGES -OR- PRESS PF3 TO CANCEL ACTIVITY
COUNTY: 085  CLINIC CODE: WP19  DESCRIPTION: WIC_PICKUP_ONLY
STAFF: WIC_STAFF          MAIL: Y  WEEKS: 1 2 3 4 5  DAYS: M T W T F _ _
VALID FROM 010207 THRU 123107  TIME FROM 0830A THRU 0430P  OVERBOOK Y
TIME      SLOTS      TIME      SLOTS      TIME      SLOTS      TIME      SLOTS
08:30A    03          08:45A    03          09:00A    03          09:15A    03
09:30A    03          09:45A    03          10:00A    03          10:15A    03
10:30A    03          10:45A    03          11:00A    03          11:15A    03
11:30A    03          11:45A    03          12:00P    03          12:15P    03
12:30P    03          12:45P    03          01:00P    03          01:15P    03
01:30P    03          01:45P    03          02:00P    03          02:15P    03
02:30P    03          02:45P    03          03:00P    03          03:15P    03
03:30P    03          03:45P    03          04:00P    03          04:15P    03
04:30P    03
EXCEPTION DATES: 011807 021507 031507 042007
    
```

Changing a Clinic Profile

A clinic profile may need to be changed when staff is not going to be available due to planned time out of the office for events such as the annual WIC Conference. Exception dates or individual time slots may need to be changed.

- To change a clinic profile use action code C.
- Make changes to any part of the profile.
- Press the **ENTER** key.
- When successful, the system will display the message “Clinic has been Changed”.

```

HSA189A                NORTH CAROLINA HSIS - CLINIC PROFILE
NEXT SCREEN: 07  NEXT ID:          CLINIC:          DATE: 123107  ACTION:
MESSAGE: CLINIC HAS BEEN CHANGED - PLEASE ENTER NEXT KEY
COUNTY: 085  CLINIC CODE: WP12  DESCRIPTION: WIC PICKUP TUESDAYS
STAFF: WIC CLERK          MAIL: Y  WEEKS: 1 2 3 4 5  DAYS: T
VALID FROM 090107 THRU 123107  TIME FROM 0815A THRU 0415P  OVERBOOK N
TIME      SLOTS      TIME      SLOTS      TIME      SLOTS      TIME      SLOTS
08:15A    02          08:30A    02          08:45A    02          09:00A    02
09:15A    04          09:30A    02          09:45A    04          10:00A    02
10:15A    04          10:30A    02          10:45A    04          11:00A    02
11:15A    04          11:30A    02          11:45A    04          12:00P    00
12:15P    00          12:30P    00          12:45P    00          01:00P    00
01:15P    00          01:30P    02          01:45P    02          02:00P    02
02:15P    02          02:30P    02          02:45P    02          03:00P    02
03:15P    02          03:30P    02          03:45P    02          04:00P    02
04:15P    02
EXCEPTION DATES: 111307
    
```

Deleting a Clinic Profile

Clinic profiles that are created by mistake and have no scheduled appointments can be deleted. Existing clinic profiles that contain scheduled appointments may not be deleted.

- To delete a clinic profile use action code D.

Viewing a Clinic Profile

- To view a clinic profile Action Code = I
 - ▶ Next Screen = 07
 - ▶ Next ID = blank
 - ▶ Clinic = blank
 - ▶ Date = blank

Extending a Clinic Profile

The dates for a Clinic Profile can be extended. Do not extend a clinic if the original thru date is the end of the year. It is better to create a new Holiday schedule and create a new clinic for the New Year.

- To extend a clinic profile, Action Code = E
- Enter the Thru Date of the clinic to be extended
- Enter the new valid From and Thru dates.
- Press the **ENTER** key.
- Type the new valid “Thru Date”. This action will change the last date of the clinic.

08. View Number of Appointments for a Given Date

This option allows the user to review the daily clinic appointment schedule. It lists the number of appointment slots available and the number used.

09. Return Address(es)

This option lists the return address for the agency. Update the return address when the agencies address changes.

There is more than one address on this screen.

In order to see the other addresses, the proper Location code must be entered.

Location = can be space or some other code such as underscores or numbers.

```
HSA186A      NORTH CAROLINA HSIS - HEALTH DEPT ADDRESS ENTRY

NEXT SCREEN: 09  NEXT ID:          CLINIC:          DATE:          ACTION: I
MESSAGE: REVIEW ADDRESS ONLY

COUNTY: 085  LOCATION:

                DEPARTMENT NAME: STOKES FAMILY HEALTH CENTER
                SUB-DEPT NAME: WIC PROGRAM
                ADDRESS1: P.O. BOX 187
                ADDRESS2: HWY 8 & 89
                CITY: DANBURY
                STATE: NC
                ZIP CODE: 27016
                PRIMARY PHONE: 336 593 2400 EXT:
                ALTERNATE PHONE:          EXT:
                ALTERNATE PHONE:          EXT:
                FED ID: 6000340
```