**I-WIC ADMIN Module: Scheduling**

**Office Closed**

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| Step 1: Select your clinic at the top and click **GO**  Step 2: Click the **Standard Holidays** button and select all the holidays your clinic will be closed  Click **Save** and **Close** the popup  Note: when complete the selected holidays will appear with red boxes on the calendar  Step 3: Click the **Other Days Closed** button to enter all other full days the clinic will be closed  Step 4: Click the **Add** button, enter the date and reason office closed. Continue adding dates, when done, click **Save** and **Close** the popup  Note: when complete the entered days will appear with red boxes on the calendar  **To remove a previously closed day:**   * + Uncheck the Select column for the day(s) on the **Standard Holidays** popup   + Select the row with the day(s) on the **Other Closed Days** popup and select the **Remove** button   Step 5: Once all day(s) have been unselected/removed click **Save** and **Close** the popup |

**Creating Templates**

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| **Start by creating the columns that will be used in the template(s):**  Step 1: Click the **Add Column Name** button  Step 2: Click the **New** button to create a column  Step 3: Enter the name in the **Column Name** field  Mark the **Include in Appointment Search** checkbox if you want the column included when staff search for the next available appointment slot  Step 4: Click **Add**  Step 5: Select the **Clinic** from the dropdown where this column will be available  If you have multiple clinics, click **Add** again to assign that same column to a different clinic  Step 6: **Save**  Repeat until all columns have been added  \*\*\* Don’t forget the Walk-In column\*\*\*  **Now that all the columns have been added, you can begin building the first template**  Step 1: Click **New** to create a template  In the **Template** field, enter the name of the template(s) (Examples: M-F Schedule, Late Clinic, Saturday Schedule)  Step 2: Click **Save**  Step 3: Click the **Edit** button to begin building the details for this template  Step 4: Click in the **Column Name** field, select **Walk-In**, then click the **Add Column** button to add a row to the grid  Step 5: Enter the **Sort Order-** this is the order you want the column to display in the Daily Schedule. Generally, Walk-In will be the last column  Step 6: Select the row created and click the **Add** button, a row will be displayed underneath the listed column name  Step 7: Enter the **Start Time** (time the first appointment starts) and **End Time** (time the last appointment ends)  Step 8: Mark all applicable appointment types for this column. If all appointment types are allowed, check the **Select All** checkbox  Step 9: Click **Save**  Step 10: Click in the **Column** dropdown and select the next column you would like to add this template. Click the **Add Column** button to add a row to the grid and enter **Sort Order**  Step 11: Select the row and click **Add** to enter the **Start Time** (time the first appointment starts) and **End Time** (time the last appointment ends) for the morning appointments. Mark all applicable appointment types for this column. If all appointment types are allowed, check the **Select All** checkbox  Step 12: **Click Add to enter the Start Time, End Time** and appointment types for the afternoon appointments  Step 13: Click **Save**  Step 14: Once all columns have been added, click the **Close** button  The main Template screen will display showing the columns and time slots that were just added  Click the **New** button again to create the second template and repeat the steps just reviewed to add columns |

**Generating Schedule**

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| Step 1: Select your Agency at the top and click **Go**  Step 2: Select the Template from **Templates** you want to use to generate appointment slots  Step 3: Mark each **Clinic** you are generating a schedule for using this template  Step 4: Enter the **Start Date** and the **End Date** Note: End Date cannot be greater than 6 months from the Start Date  Uncheck the **Days** of the week that you do not wish to include  Step 5: Click **Generate Schedule** and **Cancel** when complete  Repeat as needed  Step 6: Review the **Daily Schedule** to ensure the changes made to the clinic reflect what was intended |

**Mass Reschedule**

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| Step 1: In **Clinic From**, select the clinic that has the existing appointments needing to be moved  Step 2: In **Clinic To**, select the clinic that the appointments need to be moved to (they can be the same clinic), click **Go**  Step 3: In **Column From**, select the individual column or all columns option that have the existing appointments needing to be moved  Step 4: In **Column To**, select the individual column or all columns option that the appointments need to be moved to (they can be the same column)  Step 5: Use the calendars to select **From** and **To** dates  Step 6: Click **Reschedule** button  Step 7: Review the **Daily Schedule** to ensure the changes made to the clinic reflect what was intended |

**Undo Schedule**

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| Step 1: Select the clinic where you would like to undo the schedule in the **Clinic** field, click **Go**  Step 2: Based on what you would like to undo:   * Select the **Column**  (Note: one column at a time can be undone) * Enter the **Start Date** and **End Date** (Note: no more than 60 days can be undone at a time) * Enter the **Start Time** and **End Time**   Step 3: Click **Delete** button  Repeat as needed  Step 4: Review the **Daily Schedule** to ensure the changes made to the clinic reflect what was intended |

**Adding Column**

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| Step 1: Select the new column name from the drop down to **Add Column** if the column you want to add is not already an option, you will need to add the column following the steps in the Create Templates box  Step 2: Select the template you would like to add the column into, click **Edit** and enter the details for that column (start/end/appointment types)  Note: you will need to change the **Sort Order** when adding additional columns  Step 3: Click **Save**  Step 4: From the Scheduling Tasks jellybean select the **Generate Schedule** and enter the details for this column, once complete **Generate Schedule**  Step 5: Check the **Daily Schedule** to be sure it looks correct |