Appointments and Scheduling

This CalSAWS Quick Guide (QG) provides the end-user with functional instructions on scheduling appointments and setting up an office schedule to display worker availability in the System.

The QG can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The QG may include functional instructions, as well as screenshots from the System. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

CalSAWS Process

In CalSAWS users can set up worker availability to assist with appointment scheduling. Users can also view and update any scheduled appointments when needed.

This guide provides information on the following topics:

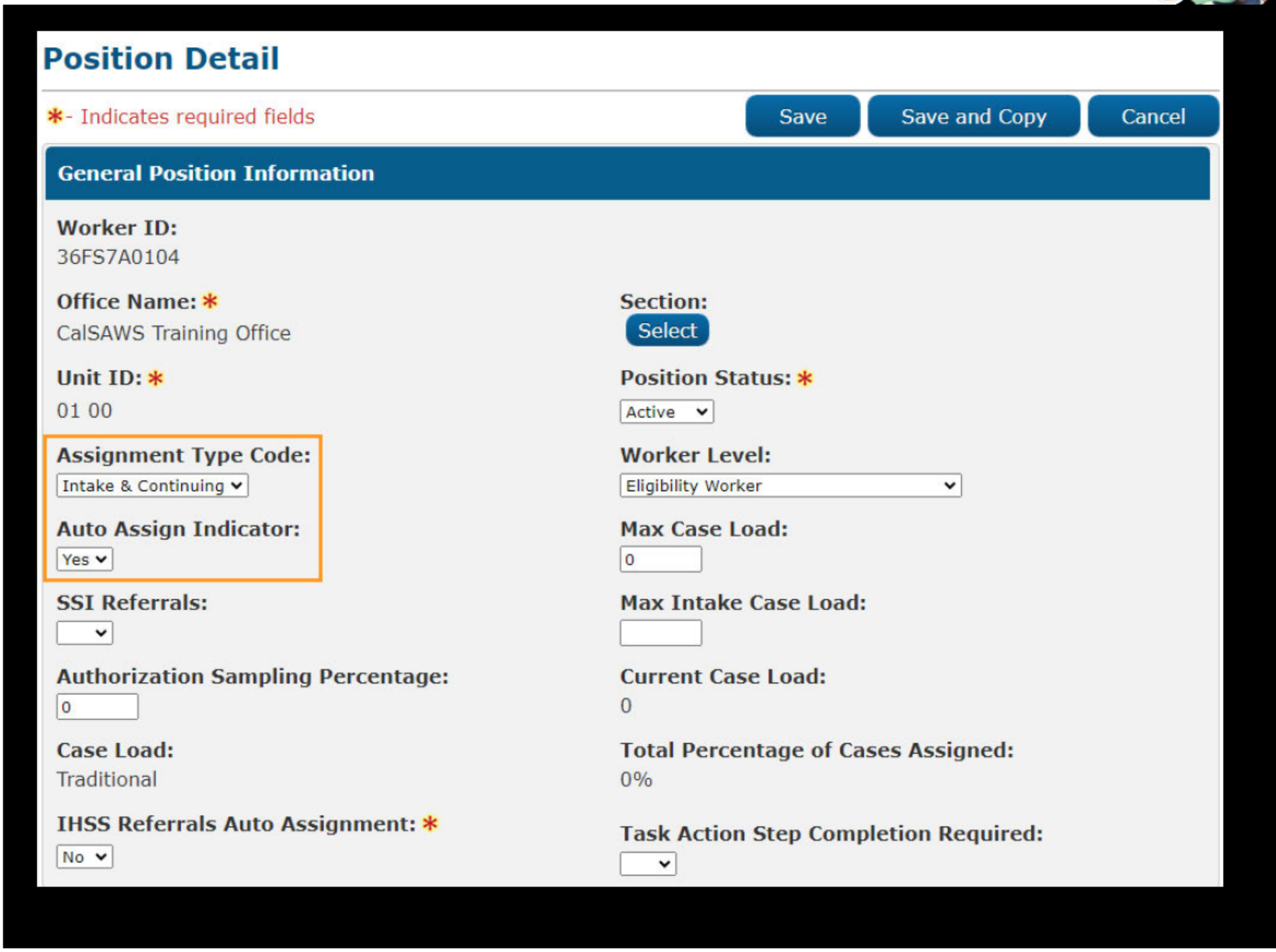
- Position Detail Page – Configuring positions (worker IDs) to allow for automatic program assignment and scheduling of appointments
- Maintain Worker Schedule Page – Entering and maintaining availability
- Office Schedule Page – Viewing daily availability and scheduled appointments
- Worker Schedule Page – Viewing and updating weekly availability
- Pending Assignment List Page – Scheduling intake appointments for unassigned programs
- Customer Schedule Search Page – Scheduling and modifying appointments within a case
- My Schedule – Viewing the logged in user's schedule on the Home Page
- Worker Schedule Search Page – Viewing all scheduled appointments for a specific worker ID
- Customer Appointment Search Page – Searching for scheduled appointments outside a case

Position Detail Page

The Position Detail page information must be configured appropriately for the System to recognize positions (worker IDs) that can accept appointments for their assigned office.

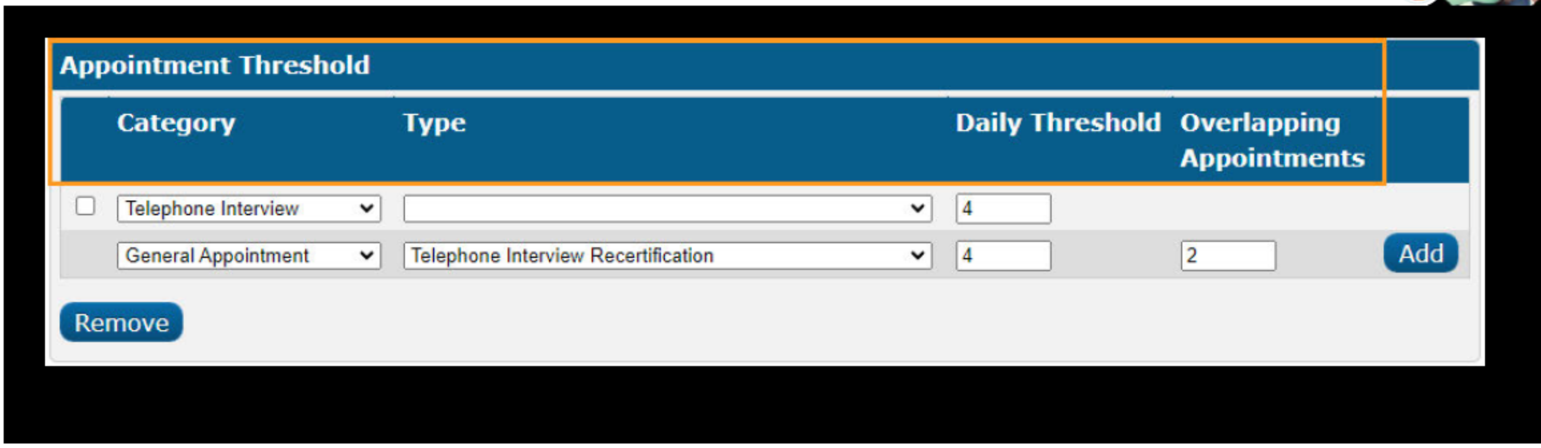
In addition to the mandatory fields, the following page elements should be updated on the Position Detail page:

- Assignment Type Code drop list
  - Must contain a value for the position to display on the Maintain Worker Schedule page
  - Determines if the position can accept Intake case assignments only, Continuing case assignments only or both
  - Enables the position to display when scheduling intake appointments through the Pending Assignment List page if one of the Intake options is selected
- Auto Assign Indicator drop list
  - Selecting Yes indicates programs can be automatically assigned to a position
  - Selecting No does not allow the System to automatically assign programs to a position

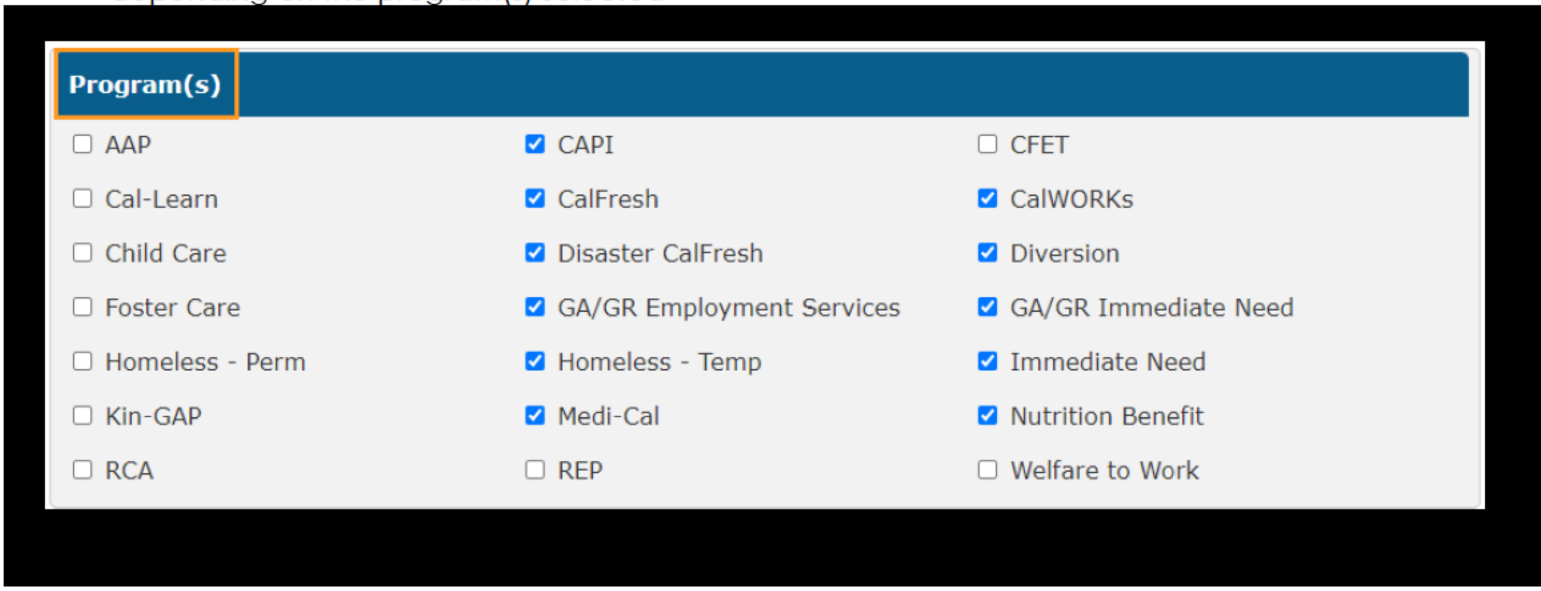


- Appointment Threshold page section
  - Indicates the Category, Type and Daily Threshold of renewal appointments that can be auto-scheduled with the position
  - The categories used by batch for auto-scheduling renewal appointments include:
    - Telephone CW/CF RE Interview
    - Re-Evaluation CW/CF Interview
    - Re-Evaluation Interview
    - General Appointment with a Type of Telephone Interview Recertification
  - A threshold for Overlapping Appointments can be entered when the Category is General Appointment and the Type is Telephone Interview Recertification
  - An entry is required for renewal batch appointment generation

The logic evaluates the Position Detail page for the worker ID assigned to the program to determine that worker's availability. If the worker has availability set up on the Office Schedule page and a Daily Threshold set up on the Position Detail page, the batch job attempts to schedule the renewal appointments.



- Program(s) page section
  - Indicates the programs that can be assigned to a position
  - Enables the position to display only for the specific programs selected when scheduling intake appointments through the Pending Assignment List page
  - Determines auto-scheduled renewal appointment assignment for different batches depending on the program(s) selected



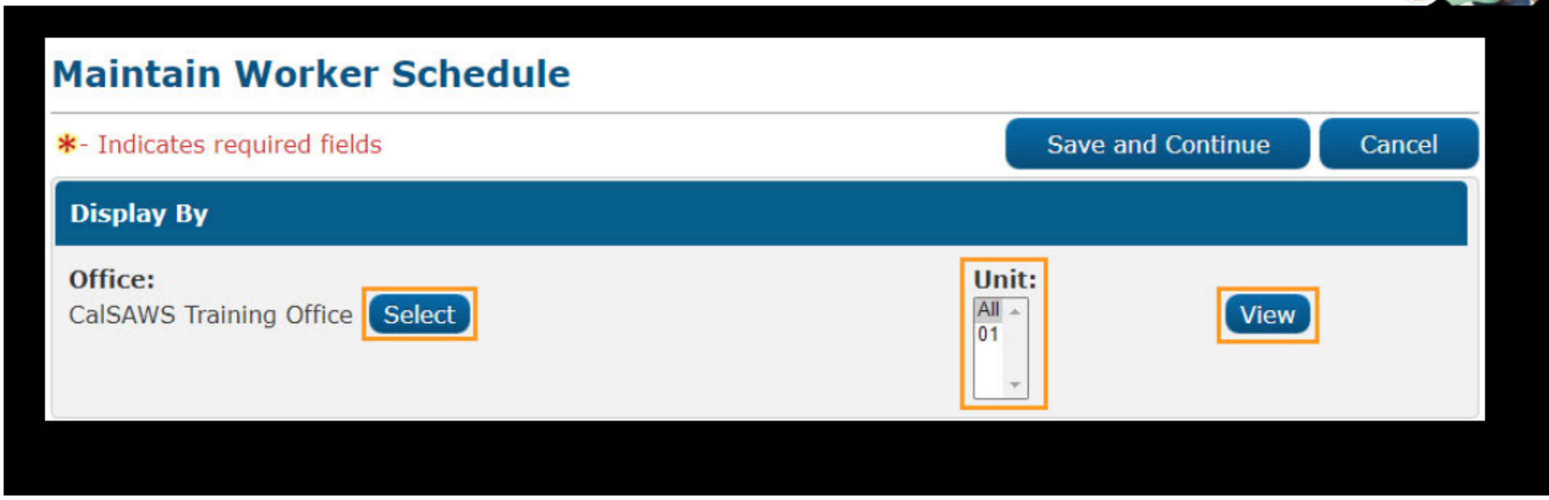
As a reminder, other non-mandatory fields should be completed on the Position Detail page according to your County's policy and procedures.

Maintain Worker Schedule Page

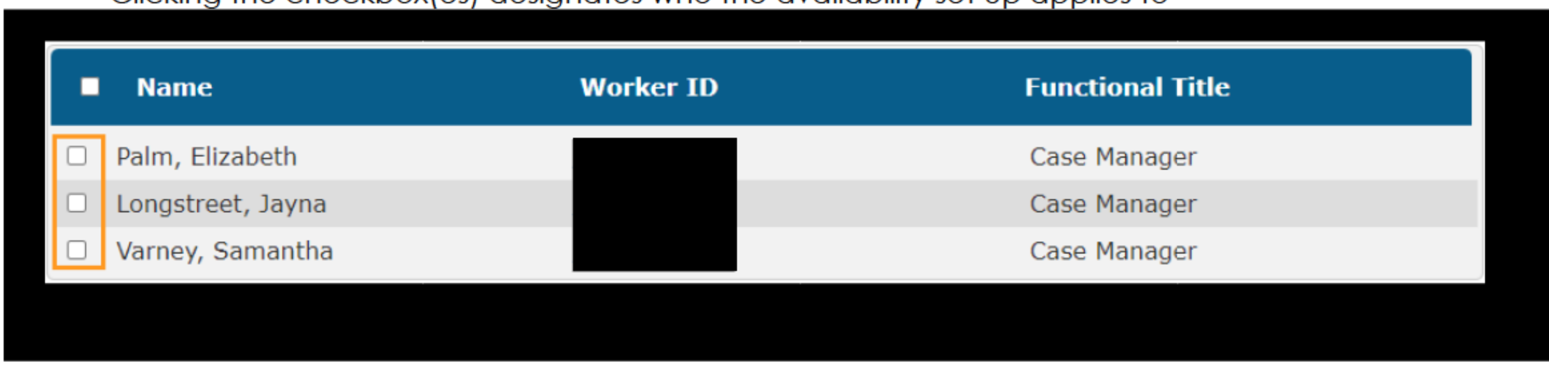
Once the Position Detail page is configured appropriately for a position, their availability also needs to be set up. These updates are primarily made through the Maintain Worker Schedule page.

The Maintain Worker Schedule page includes the following page sections:

- Display By
  - Office field – Defaults to the logged in user's office but a different office can be chosen by clicking the Select button
  - Unit multi-select list – Displays all the units in the selected office and allows for multiple units to be viewed
  - View button – Refreshes the page to display Office and Unit(s) selections

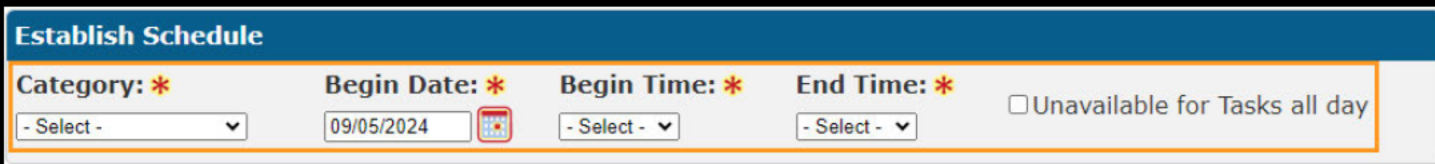


- Name
  - Displays all names, worker IDs and titles for the Office and Unit(s) selected
  - Clicking the checkbox(es) designates who the availability set up applies to

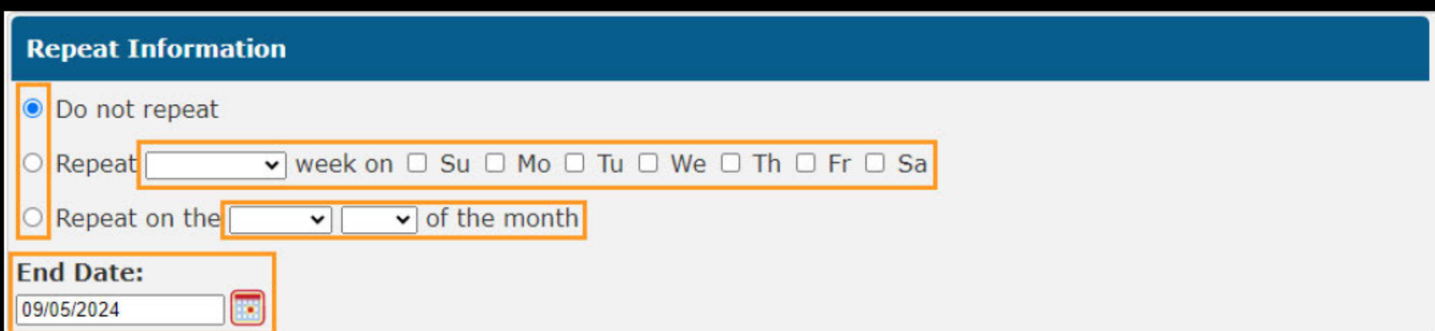


- Establish Schedule
  - Category drop list – Only one option can be selected at a time from the following types of availability:
    - Available – Designates availability for any type of appointment
    - Available for Appraisal
    - Available for IN/ES – Designates availability for Immediate Need or Expedited Service appointments
      Note: The System uses the category of Available for auto-scheduling renewal appointments and for suggesting appointments on the Customer Appointment Detail page. The categories of Available and Available for IN/ES are the only two that display when scheduling an intake appointment through the Pending Assignment List page.
    - Available for NC – Designates availability for Non-Compliance appointments
    - Desk Time
    - Leave
    - Lunch
    - MSUDRP – Designates availability for Mandatory Substance Use Disorder Recovery Program appointments
    - Telecommuting Days
    - Unavailable
    - Unavailable for Tasks
    - Vacation Days
  - Begin Date field – Establishes the start date for the availability
  - Begin Time field – Establishes the start time for the availability

- End Time field – Establishes the end time for the availability
- Unavailable for Tasks all day checkbox – When clicked, it designates that the worker ID(s) cannot accept tasks during this availability period



- Repeat Information
  - Do not Repeat radio button – Doesn't repeat the availability being set up
  - Repeat radio button – When clicked, a frequency from the drop list must be selected and the checkbox(es) for the specific day(s) of the week the frequency applies to must be clicked
  - Repeat on the radio button – When clicked, must also select how often and which day of the month the frequency applies
  - End Date field – Indicates the end date for the availability



To set up worker availability:

1. Place the cursor over **Admin Tools** on the **Global** navigation bar
2. Select **Office Schedule** from the **Local** navigator
3. Click the **Maintain Worker Schedule** link on the **Task** navigation bar
4. On the **Maintain Worker Schedule** page:
   A. If necessary, update the **Office** and **Unit** in the **Display by** page section, then click the **View** button
   B. Click the **Name** checkbox(es) for all applicable worker ID's
   C. Select **<Category>** from the **Category** drop list
   D. Enter **<Date>** in the **Begin Date** field
   E. Select **<Time>** from the **Begin Time** drop list
   F. Select **<Time>** from the **End Time** drop list
   G. Click the **Unavailable for Tasks all day** checkbox, if applicable
   H. In the **Repeat Information** page section, select the appropriate repeat option
   I. Enter **<Date>** in the **End Date** field
   J. Click the **Save and Continue** button

The Maintain Worker Schedule page allows users to indicate the type of availability for worker IDs by building and layering different periods of availability. Layering is helpful when there are staff that may work the same hours but are available for different tasks throughout the day. The most recently saved layer of availability overrides the prior layer. This includes if a lower-level layer is edited, it then becomes the most recent.

Scenario 1: All worker IDs in the unit work from 8am-5pm and are available for appointments, however everyone has staggered lunches. The schedule needs to be set up for a one-month period.

- Add the first layer selecting all worker IDs with the Category of Available
  - Begin Date: 1st of the month
  - End Date: Last day of the month
  - Begin Time: 8am
  - End Time: 5pm
  - Repeats every Monday through Friday
- Add the next layer for each individual worker ID with the Category of Lunch
  - Begin Date: 1st of the month
  - End Date: Last day of the month
  - Begin Time: Start of lunch
  - End Time: End of lunch
  - Repeats every Monday through Friday

The System knows that the worker IDs are not available for appointments during lunch and does not automatically suggest or schedule appointments that conflict or overlap with that time. However, users can still manually schedule conflicting/overlapping appointments if needed.

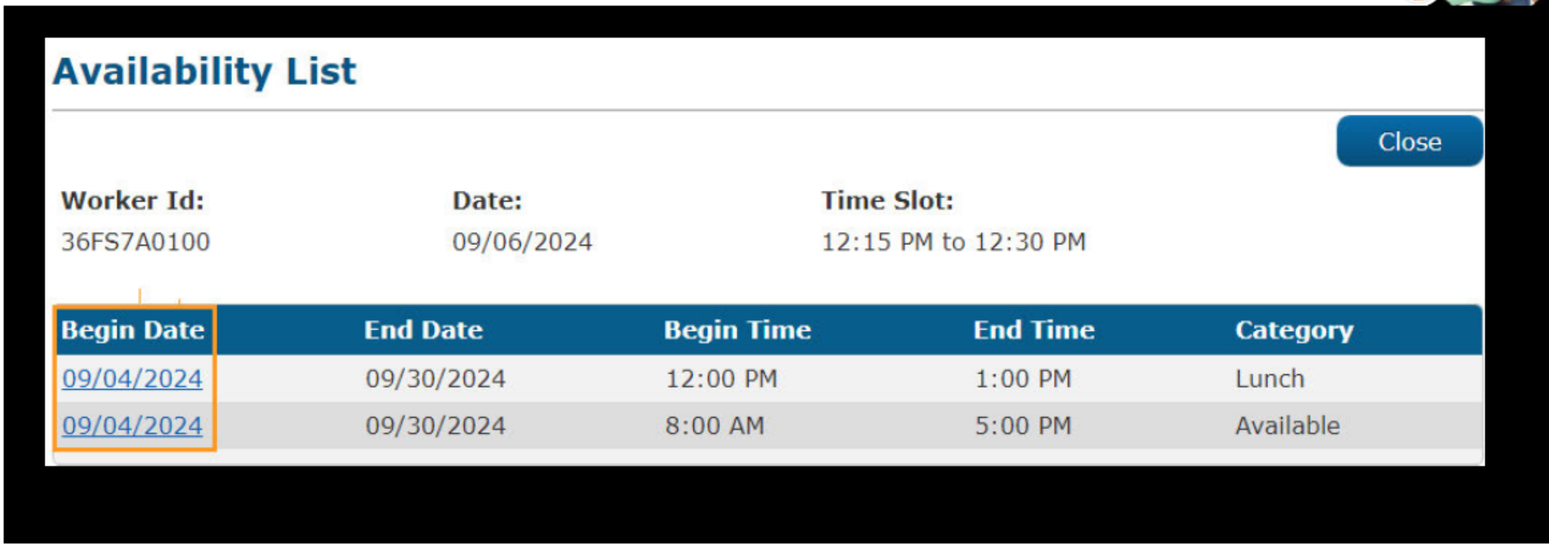
Scenario 2: The Office Schedule is set up for the month as stated in Scenario 1 but now a worker requests vacation time for a one-week period.

- Add a new layer for the worker ID with the Category of Vacation
  - Begin Date: Start of vacation
  - End Date: End of vacation
  - Begin Time: 8am
  - End Time: 5pm
  - Repeat every workday of the vacation period

The System now sees vacation as the most recent layer of availability and does not automatically suggest or schedule appointments during that time.

All availability entered on the Maintain Worker Schedule page reflects on the Office Schedule page for users to view and edit when needed. A user can click on the color boxes to access the Maintain Worker Schedule page to edit or remove a specific availability record if needed.

If the color box that is clicked has more than one layer of availability, the Availability List page displays all the layers. The user must click a Begin Date hyperlink to access the Maintain Worker Schedule page for the record they wish to access.



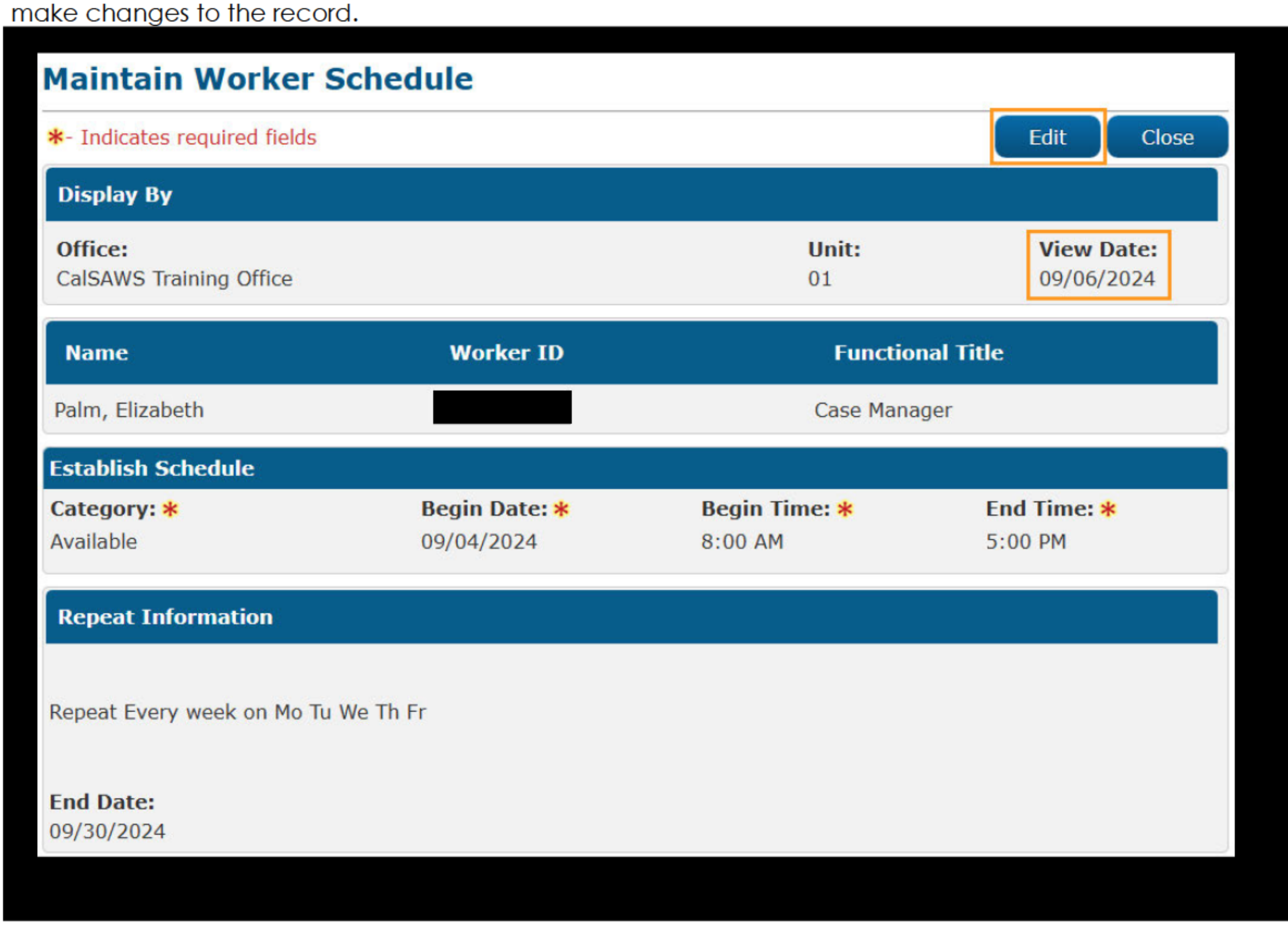
Availability List

Close

Worker Id: 36FS7A0100
Date: 09/06/2024
Time Slot: 12:15 PM to 12:30 PM

Begin Date	End Date	Begin Time	End Time	Category
09/04/2024	09/30/2024	12:00 PM	1:00 PM	Lunch
09/04/2024	09/30/2024	8:00 AM	5:00 PM	Available

When first accessed, the Maintain Worker Schedule page displays in View mode. The View Date that displays reflects the date for which the color box was clicked. The user can click the Edit button to make changes to the record.



Maintain Worker Schedule

*- Indicates required fields

Edit Close

Display By

Office: CalSAWS Training Office
Unit: 01
View Date: 09/06/2024

Name	Worker ID	Functional Title
Palm, Elizabeth	[redacted]	Case Manager

Establish Schedule

Category: *	Begin Date: *	Begin Time: *	End Time: *
Available	09/04/2024	8:00 AM	5:00 PM

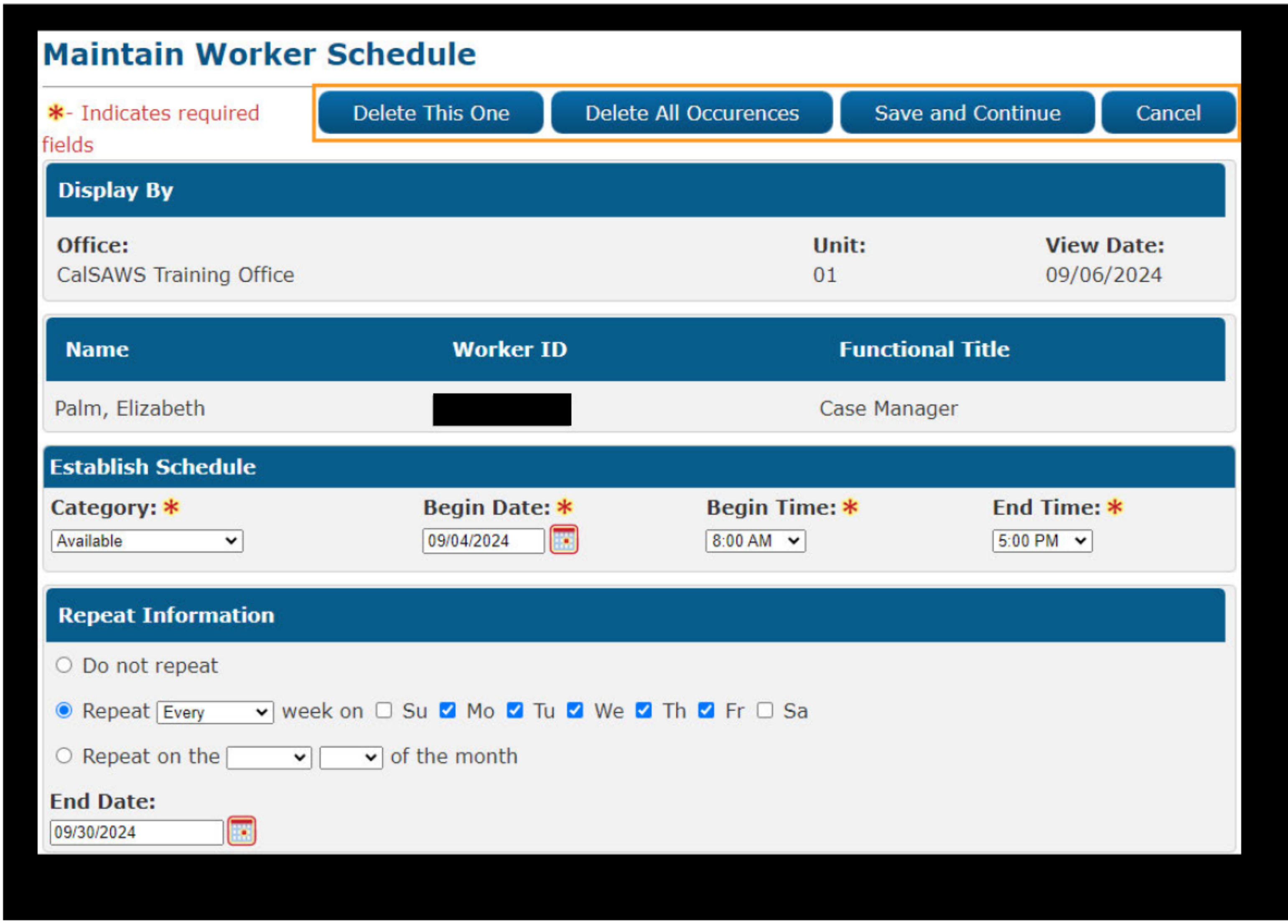
Repeat Information

Repeat Every week on Mo Tu We Th Fr

End Date:
09/30/2024

Once in Edit mode, the Maintain Worker Schedule page elements become enabled to make changes and the following buttons display:

- Delete This One – Deletes only the specific record for the View Date and time block listed on the page
- Delete All Occurrences – Deletes the entire record of availability
- Save and Continue – Saves any changes made on the page
- Cancel – Cancels any changes made



When making edits to a record, keep in mind if this is a layered record, once it is edited, it becomes the most recent record recognized by the System.

Scenario 3: The Office Schedule is set up for the month as stated in Scenario 1 but the Available record needs to be adjusted for a worker ID to be 9am to 4pm.

- Current layers: Available (oldest) and Lunch (most recent)

The supervisor edits the Maintain Worker Schedule page Available record.

- New layers: Lunch (oldest) Available (most recent)

The Lunch record would also need to be edited and saved, even if no changes are made to it, so that it becomes the most recent layer record. Otherwise, the Lunch period is not taken into account by the System.

Office Schedule Page

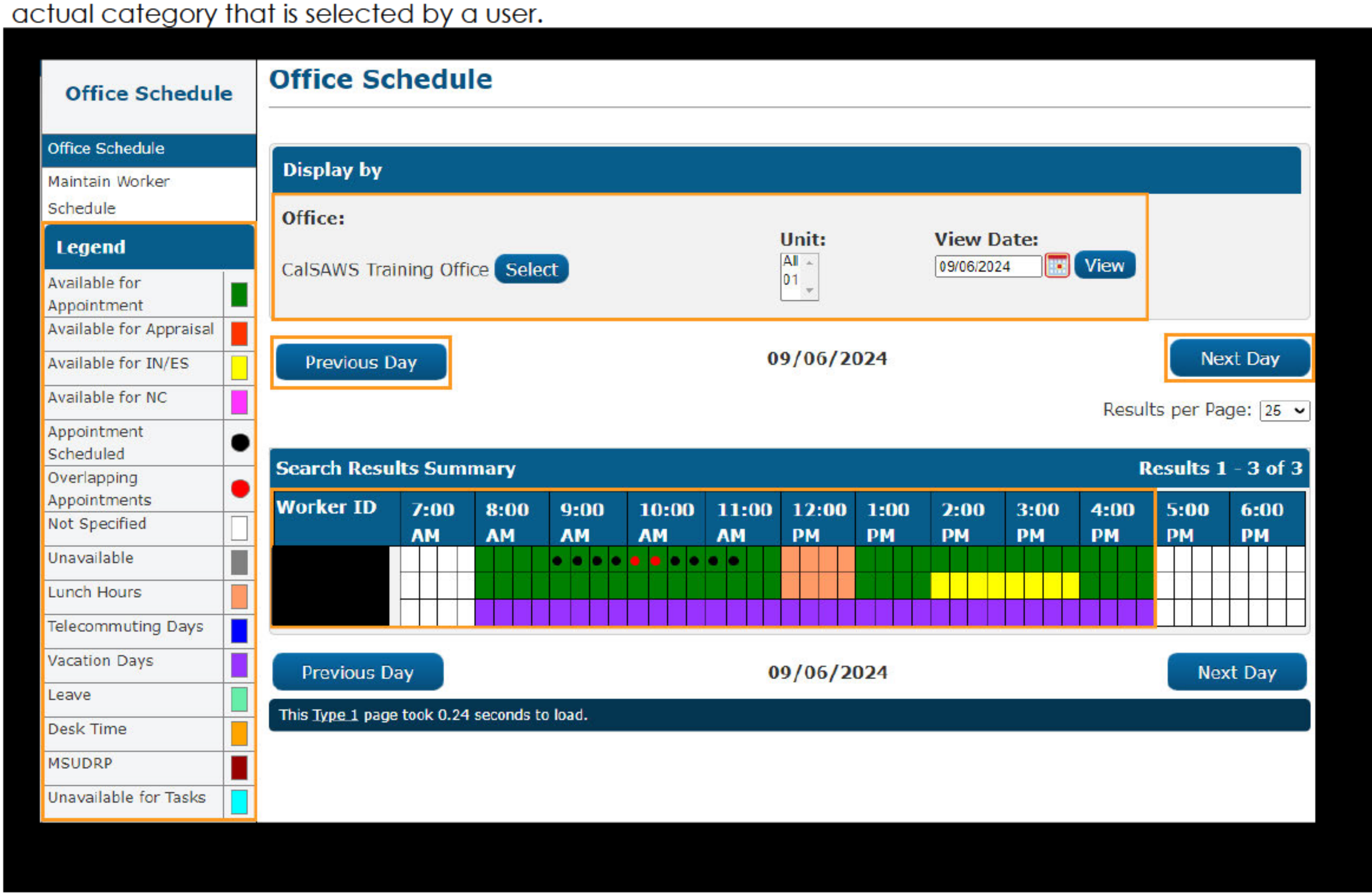
The Office Schedule page displays an overview of all appointments scheduled and the availability that has been set up by the County of all worker IDs in an office. Only users with the appropriate security rights have access to view and update this page. It is accessed by placing the cursor over Admin Tools on the Global navigation bar and selecting Office Schedule from the Local navigator.

The worker availability that displays on the Office Schedule page, facilitates scheduling appointments in the System for the:

- Pending Assignment List page
- Customer Appointment Detail page
- Auto-scheduling of renewal appointments, for Counties who have opted-in to this functionality

When navigating to the Office Schedule page, the default displays the schedule for the logged in user's office, unit and the current date. However, users can select to view the schedule for a different Office, specific Unit, and a different View Date by updating these fields in the Display by page section and clicking the View button. The display date can also be updated using the Previous Day and Next Day buttons.

The Legend on the left of the page identifies the type of availability set up for each worker, which displays on the Search Results Summary page section. The only exception is the category of Not Specified, which is the default value prior to any category selection for that time slot and not an actual category that is selected by a user.



On this page, a user can also:

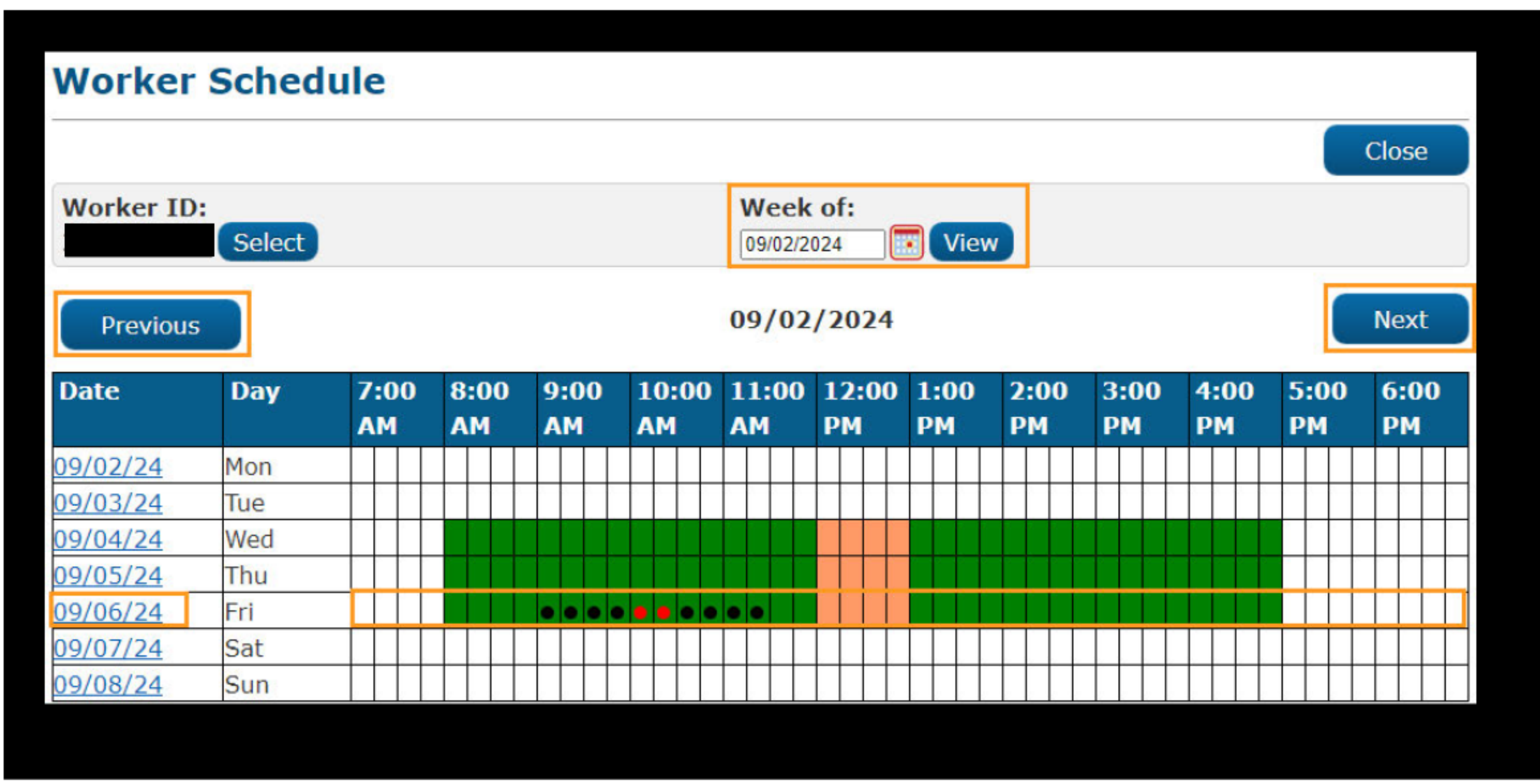
- Place the cursor over the Worker ID hyperlink to display the name of the assigned worker
- Click the Worker ID hyperlink to navigate to Worker Schedule page
- Click any of the color boxes to navigate to the:
  - Maintain Worker Schedule page of the previously set up availability, if there are no layers of availability
    OR
  - Availability List page that displays all layers of availability
- Click a black dot to navigate to the Customer Appointment Detail page
- Click a red dot to navigate to the Appointment list page that displays the overlapping appointments

Worker Schedule Page

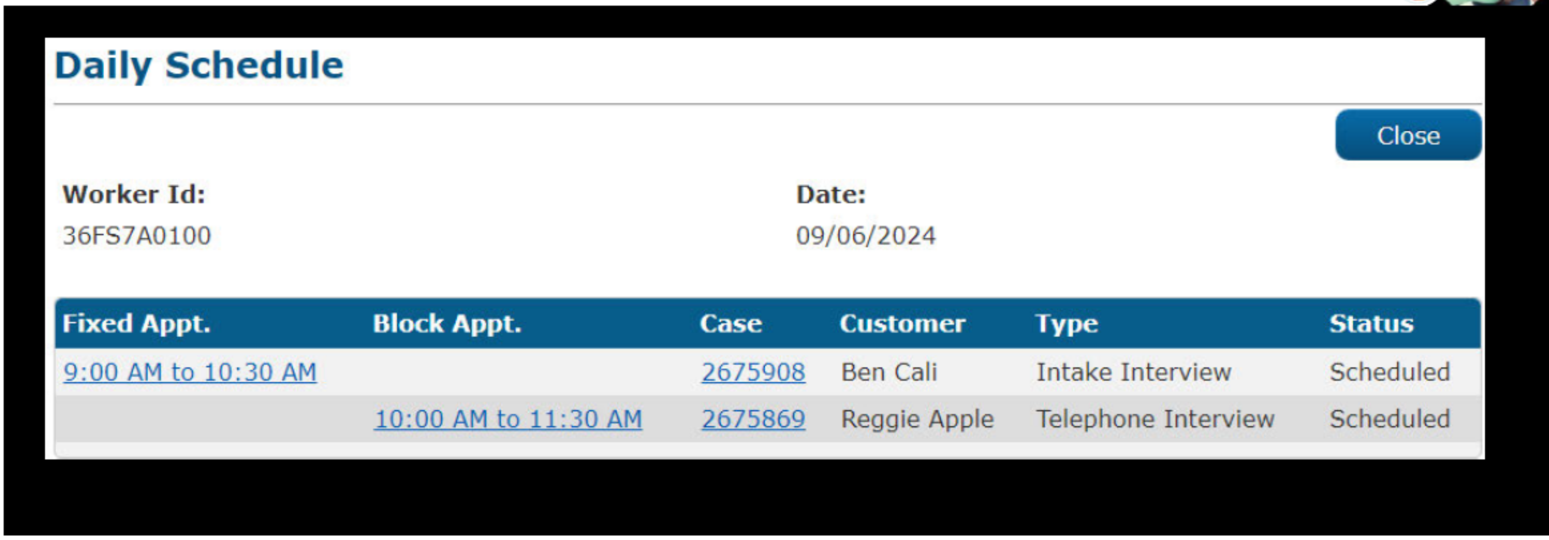
As previously mentioned, the Worker Schedule page can be accessed from the Office Schedule page by clicking the Worker ID hyperlink. This page displays the weekly availability set up for the worker ID and includes appointments that are already scheduled.

On this page, a user can:

- Change the displayed week by:
  - Entering a different date in the Week of field and clicking the View button
  - Clicking the Previous or Next buttons



- Click the Date hyperlink to access Daily Schedule page and view appointments scheduled for the worker ID



Daily Schedule

Close

Worker Id: 36FS7A0100

Date: 09/06/2024

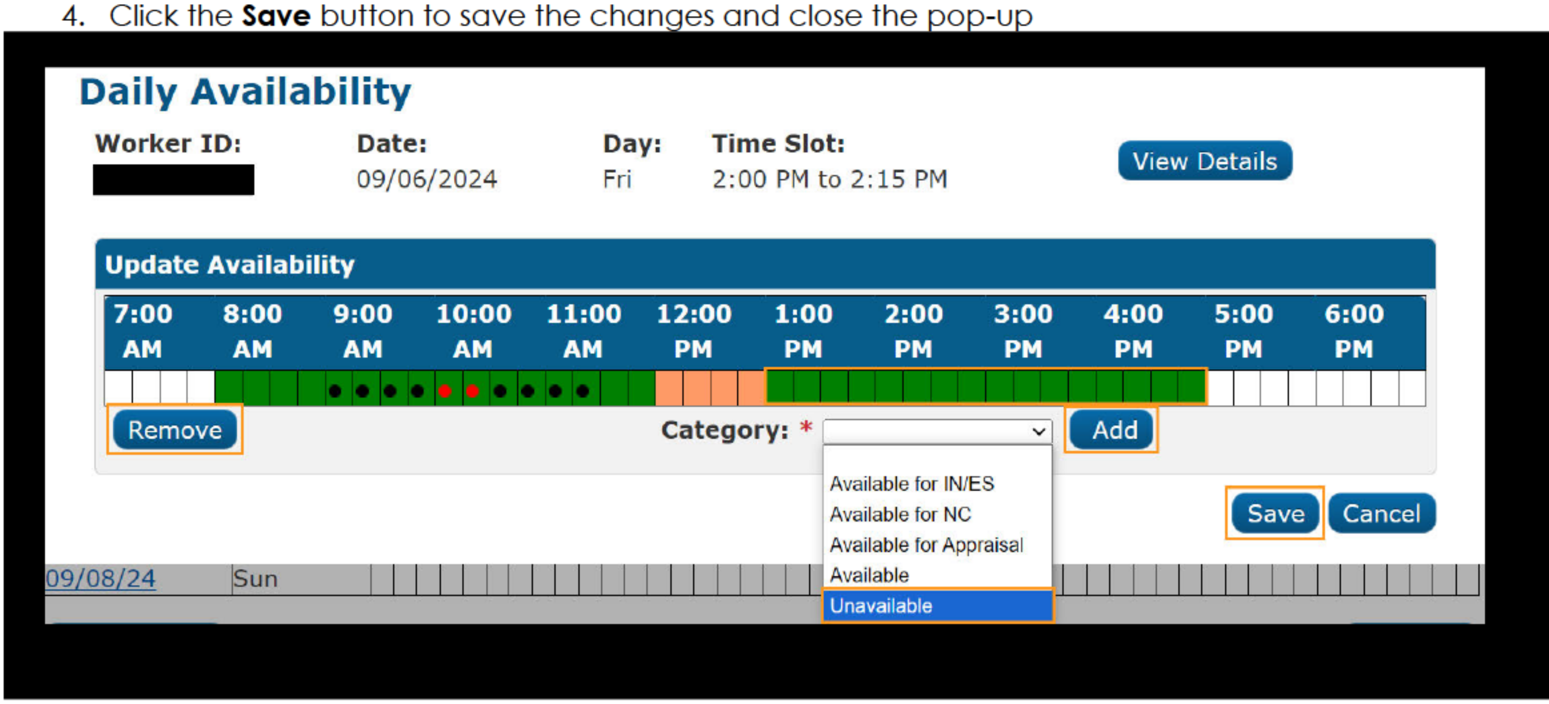
Fixed Appt.	Block Appt.	Case	Customer	Type	Status
9:00 AM to 10:30 AM		2675908	Ben Cali	Intake Interview	Scheduled
	10:00 AM to 11:30 AM	2675869	Reggie Apple	Telephone Interview	Scheduled

- Click a black dot to navigate to the Customer Appointment Detail page
- Click a red dot to navigate to the Appointment List page to view the overlapping appointments
- Click any of the boxes to navigate to the Daily Availability pop-up for the day clicked

The Daily Availability pop-up allows a user to modify the worker's availability for the day. This is only available from the Worker Schedule page and may be one of the simplest ways to make changes to a worker's schedule for a single day.

Scenario: Worker was originally scheduled as Available until 5pm but leaves for the day at 1pm. Their availability needs to be changed from Available to Unavailable.

1. Click any box for the day that needs to be updated
2. On the **Daily Availability** pop-up, click and highlight the boxes from 1pm-5pm
3. Depending on your County's policy and procedures, either click the **Remove** button to delete the availability or select **Unavailable** from the **Category** drop list and click the **Add** button
4. Click the **Save** button to save the changes and close the pop-up



Note: Removing or changing availability does not update any appointments already scheduled with the worker ID. Appointments would need to be reassigned or rescheduled manually, if needed.

Pending Assignment List Page

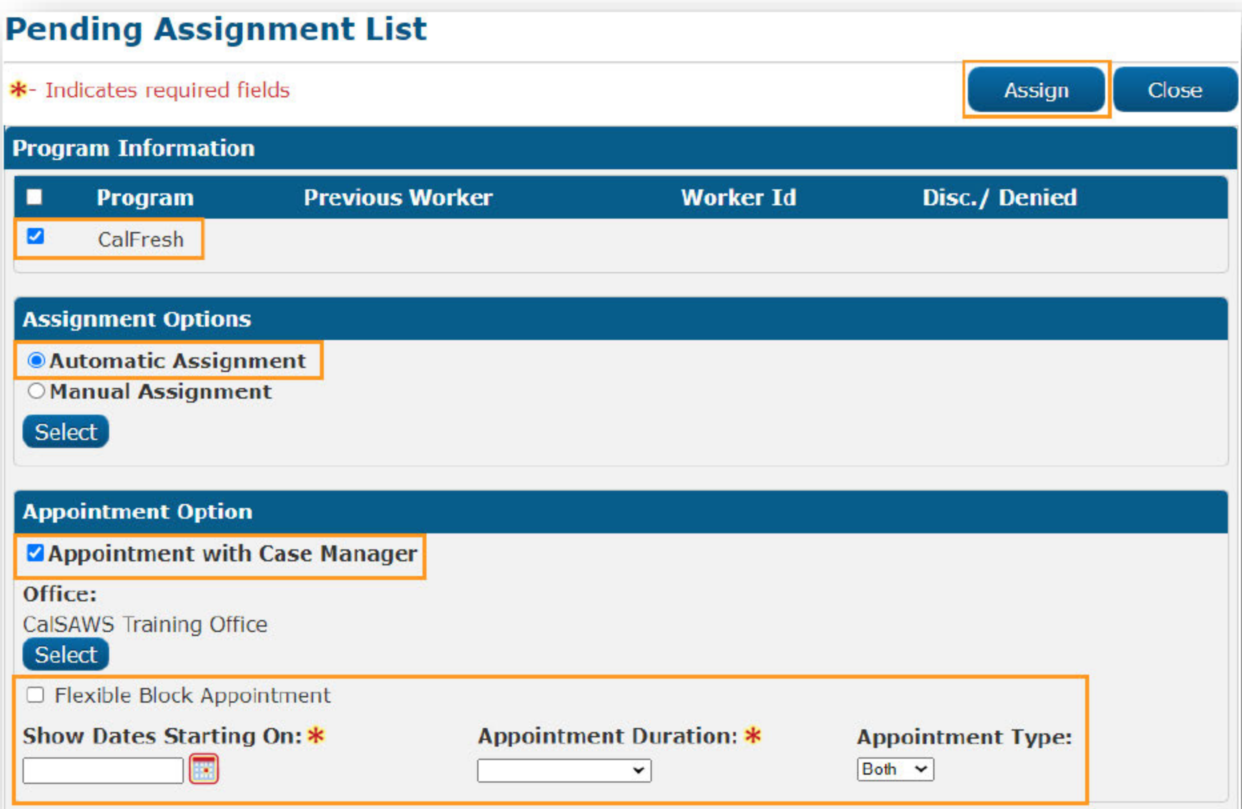
In the System, when a program is pended and is not assigned to a worker ID, it can be assigned and an appointment may be scheduled at the same time through the Pending Assignment List page. As a reminder, appointments only display if the worker ID availability is set up with the categories of Available and Available for IN/ES. Also, the Position Detail page should have been configured appropriately for the worker ID, as previously described.

To search for appointments on the Pending Assignment List page, the user must:

- Select the appropriate program(s)
- Click the Automatic Assignment radio button
- Click the Appointment with Case Manager checkbox

The page then refreshes with additional elements to search for available appointments based on the Office Schedule set up by the County:

- Office Select button – Navigates to the Select Office page to select the office in which to search for available appointments
- Flexible Block Appointment checkbox – Creates the appointment as a flexible appointment
- Show Dates Stating On field – Captures the start date to display appointments from
- Duration – Establishes the duration of the appointment
- Appointment Type – Provides the following appointment type options:
    - Intake – Displays availability that was set up with the category of Available
    - IN/ES – Displays availability that was set up with the category of Available for IN/ES
    - Both – Displays both Available and Available for IN/ES availability



Pending Assignment List

*- Indicates required fields

Assign | Close

Program Information

	Program	Previous Worker	Worker Id	Disc./ Denied
☑	CalFresh			

Assignment Options

◉ Automatic Assignment
○ Manual Assignment
Select

Appointment Option

☑ Appointment with Case Manager
Office:
CalSAWS Training Office
Select

☐ Flexible Block Appointment

Show Dates Starting On: * | Appointment Duration: * | Appointment Type: Both

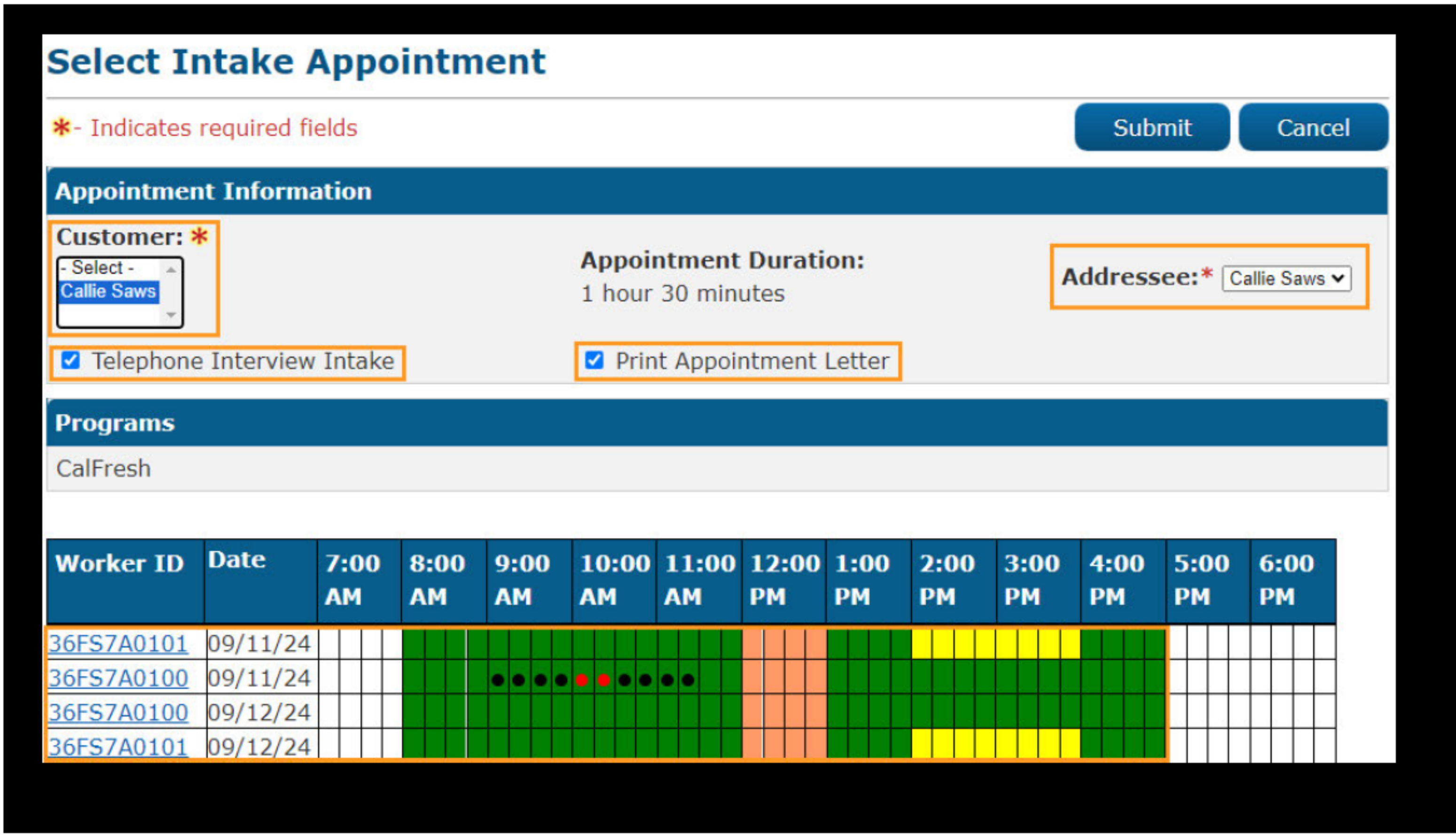
After completing all required fields, the user must click the Assign button to navigate to the Select Intake Appointment page.

Select Intake Appointment Page

The Select Intake Appointment page displays the available appointment slots based on the search criteria entered on the Pending Assignment List page. On this page, the user can select the appointment and worker ID to assign the program to.

The following page elements display:

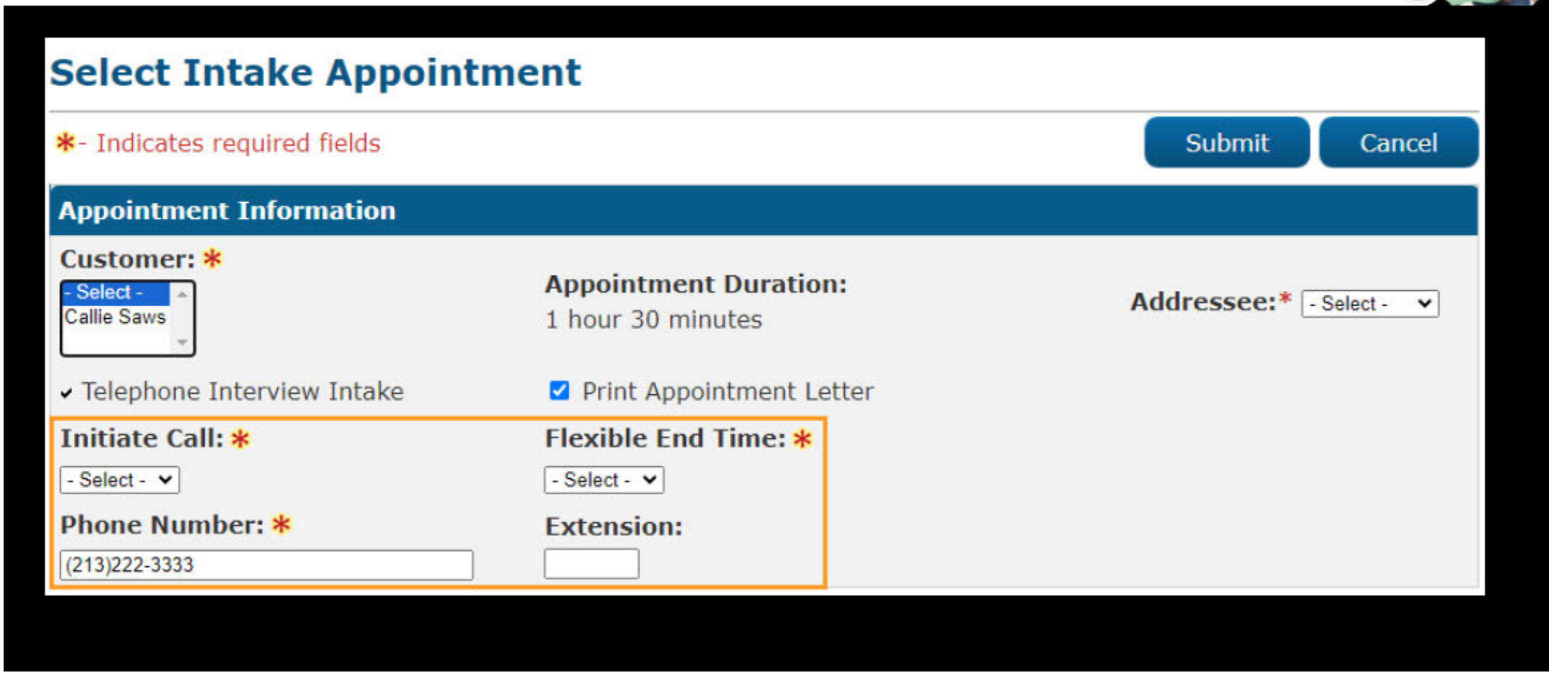
- Customer multi-select list – Specifies who must attend the appointment
- Addressee drop list – Identifies who to address the appointment letter to
- Telephone Interview Intake checkbox – Designates if the appointment is a telephone interview
- Print Appointment Letter checkbox – Triggers the System to generate an appointment letter



If the user clicks the Flexible Block Appointment checkbox on the Pending Assignment List page, the System displays the following additional fields to schedule the flexible appointment:

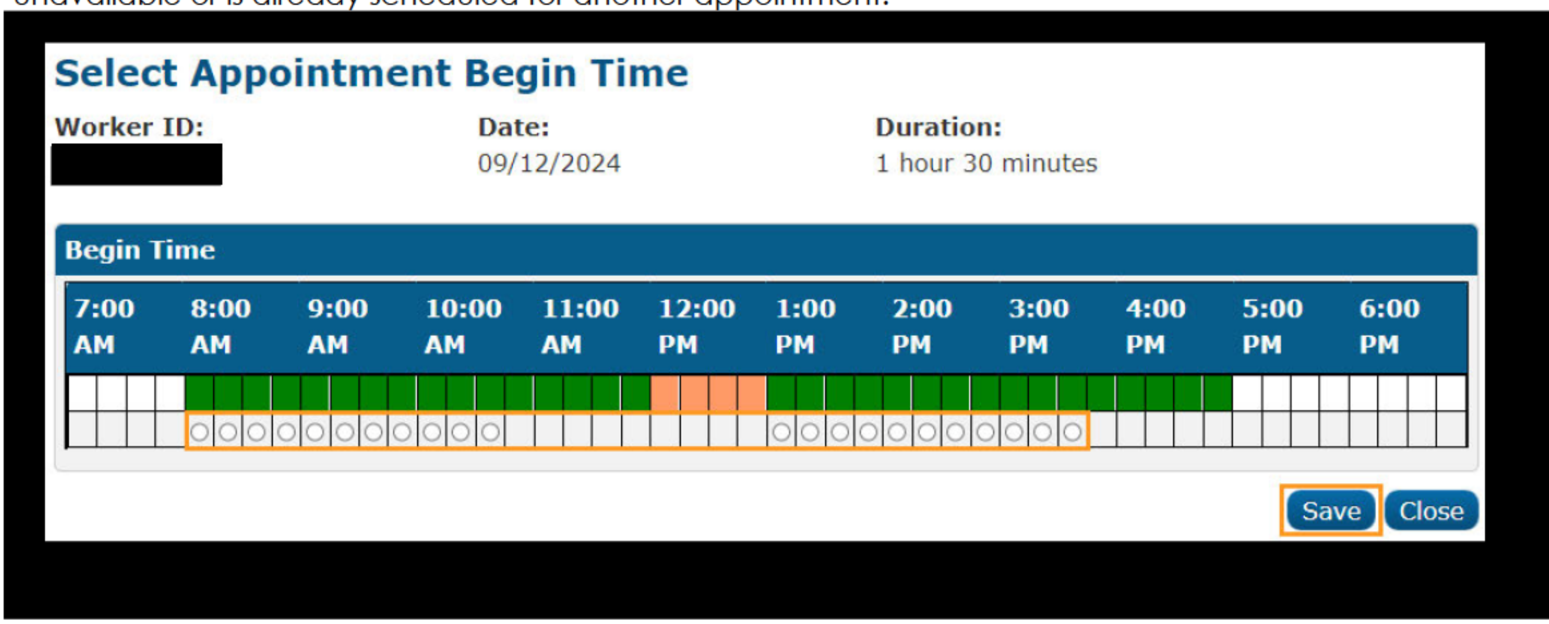
- Initiate Call drop list – Indicates whether the call should be initiated by the customer or worker
- Flexible End Time drop list – Designates the time the flexible appointment should end
- Phone Number and Extension fields – Captures the phone number of the flexible appointment

Flexible appointments automatically set as a telephone interview. The user must designate who initiates the call, the flexible end time, and the phone number. The available appointment slots only display after a Flexible End Time is selected.

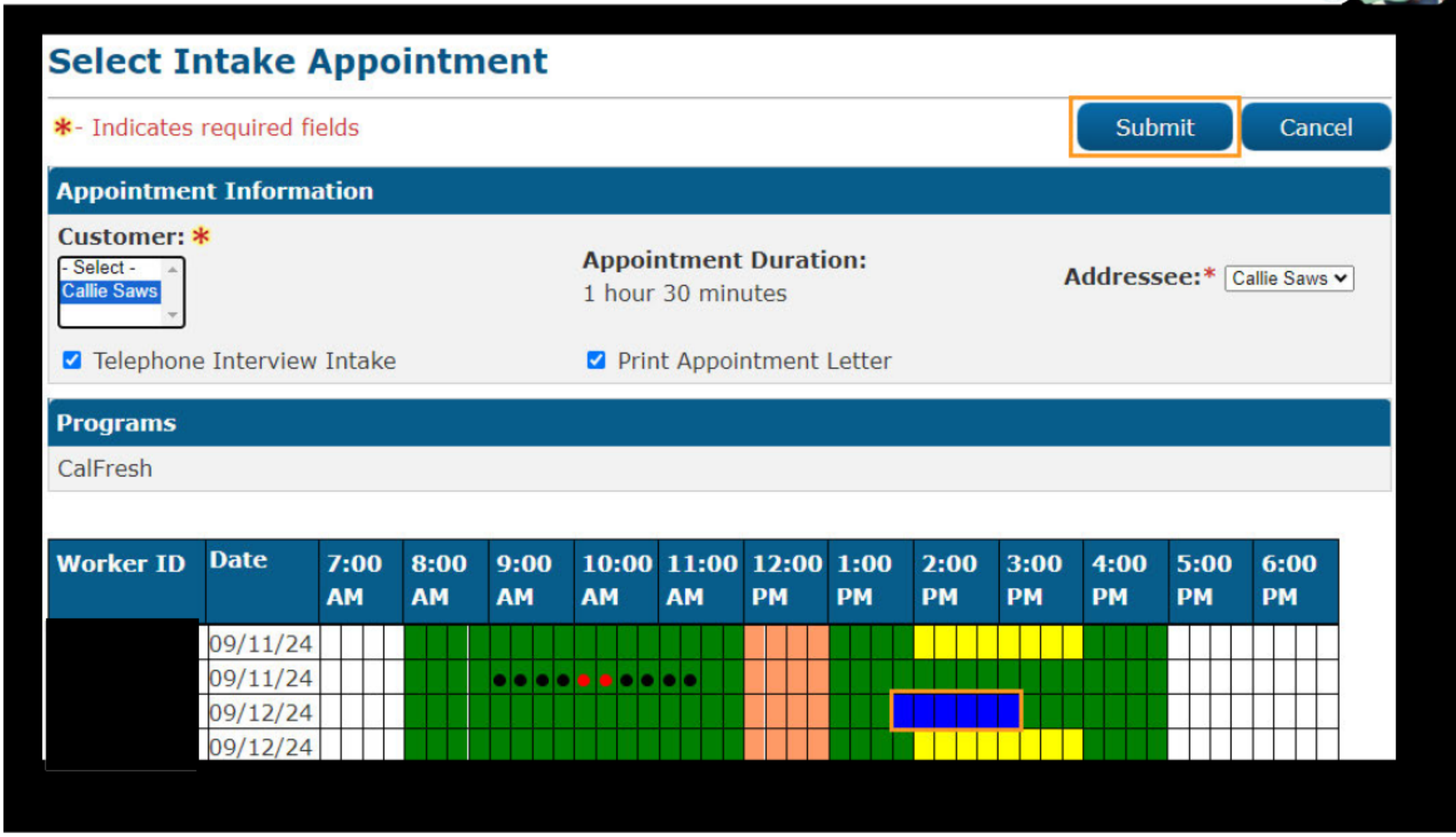


To select an appointment slot, a user can click any box in the row for the worker ID and date they want the appointment scheduled. The Select Appointment Begin Time pop-up displays.

Here the user must click one of the available Begin Time radio buttons to designate the appointment begin time. The radio buttons only display if there are appointments that match the search criteria and can be scheduled within the timeframes without causing conflict to time the worker ID is unavailable or is already scheduled for another appointment.



After clicking the appropriate radio button and clicking the Save button, the Select Intake Appointment page displays the selected appointment slot in a blue color. The user must click the Submit button to finalize scheduling the appointment.



The following steps outline the process to schedule an intake appointment for an unassigned program(s) through the Pending Assignment List page, from within the context of a case:

1. Place the cursor over **Case Info** on the **Global** navigation bar
2. Select **Worker Assignment** from the **Local** navigator
3. On the **Pending Assignment List** page:
   A. Click the **<Program(s)>** checkbox(es) in the **Program Information** page section
   B. Click the **Automatic Assignment** radio button in the **Assignment Options** page section
   C. Click the **Appointment with Case Manager** checkbox in the **Appointment Option** page section
   D. Confirm or, if necessary, select the **Office** to schedule the appointment in by clicking the **Select** button and conducting a search
   E. Click the **Flexible Block Appointment** checkbox, if appropriate
   F. Enter **<Date>** in the **Show Dates Starting On** field
   G. Select **<Duration>** from the **Appointment Duration** drop list
   H. Select **<Type>** from the **Appointment Type** drop list
   I. Click the **Assign** button
4. On the **Select Intake Appointment** page:
   A. Select **<Name(s)>** from the **Customer** multi-select list
   B. Select **<Name>** from the **Addressee** drop list
   C. Click the **Telephone Interview Intake** checkbox, if appropriate
   D. Click the **Print Appointment Letter** checkbox, if appropriate
   E. Select **Customer** or **Worker** from the **Initiate Call** drop list, for flexible appointments
   F. Select **<Time>** from the **Flexible End Time** drop list, for flexible appointments
   G. Enter **<Number>** in the **Phone Number** field, for flexible appointments
   H. Enter **<Extension>** in the **Extension** field (if applicable), for flexible appointments

   I. From the available appointments, click any box in the row for the appropriate **Worker ID** and **Date**

5. On the **Select Appointment Begin Time** pop-up:
   A. Click the appropriate **Begin Time** radio button
   B. Click the **Save** button
6. On the **Select Intake Appointment** page, confirm the appointment selected and click the **Submit** button
   Note: If the appointment selected is incorrect, repeat steps 4i and 5 to select a different appointment.

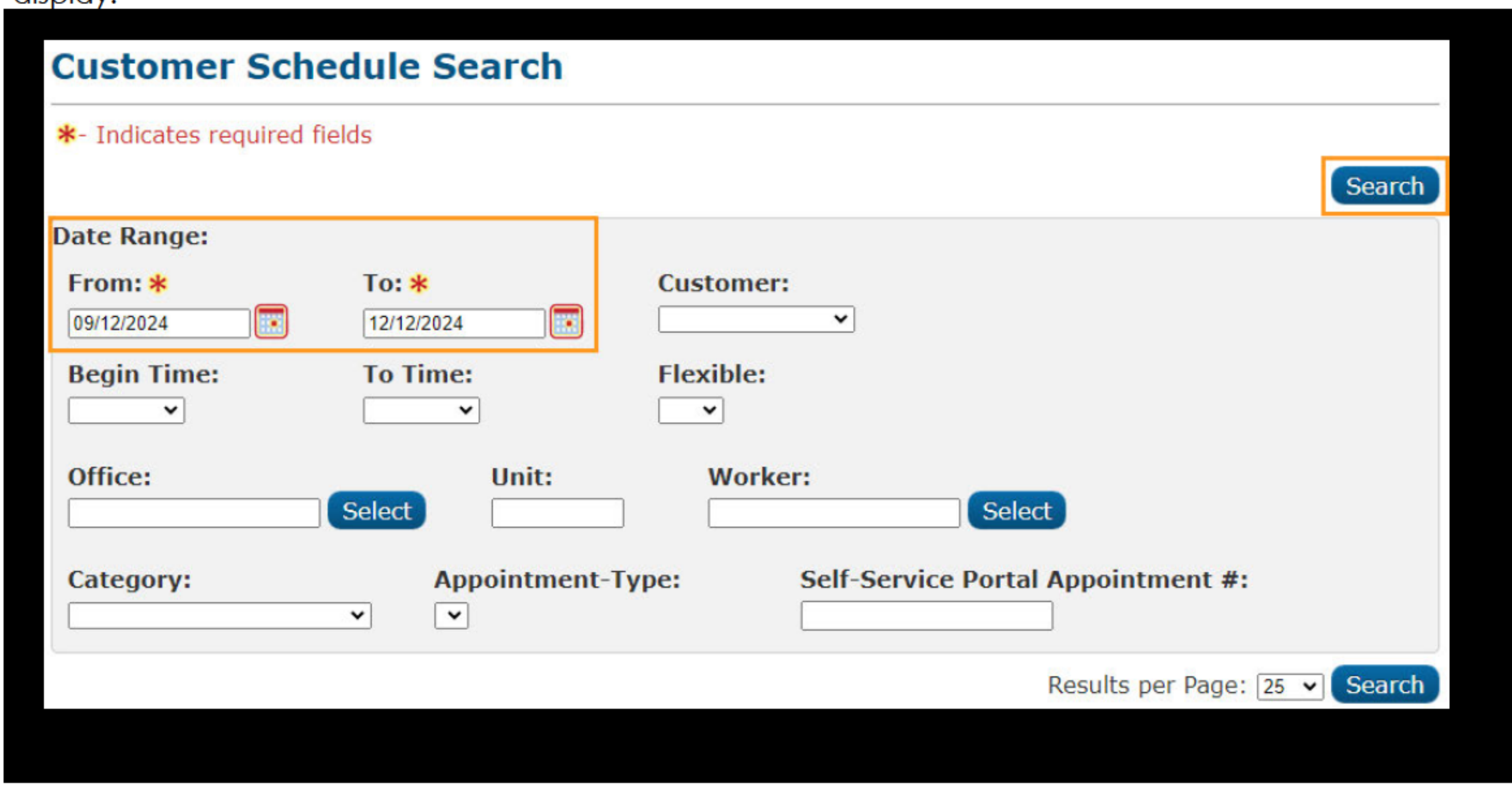
Both the program and the appointment are assigned based on the worker ID selected on the Pending Assignment List page. The scheduled appointment can be viewed on the Customer Schedule Search page.

Customer Schedule Search Page

The Customer Schedule Search page can be accessed under Case Info, Eligibility or Admin Tools on the Global navigation bar and by selecting Customer Schedule from the Local navigator.

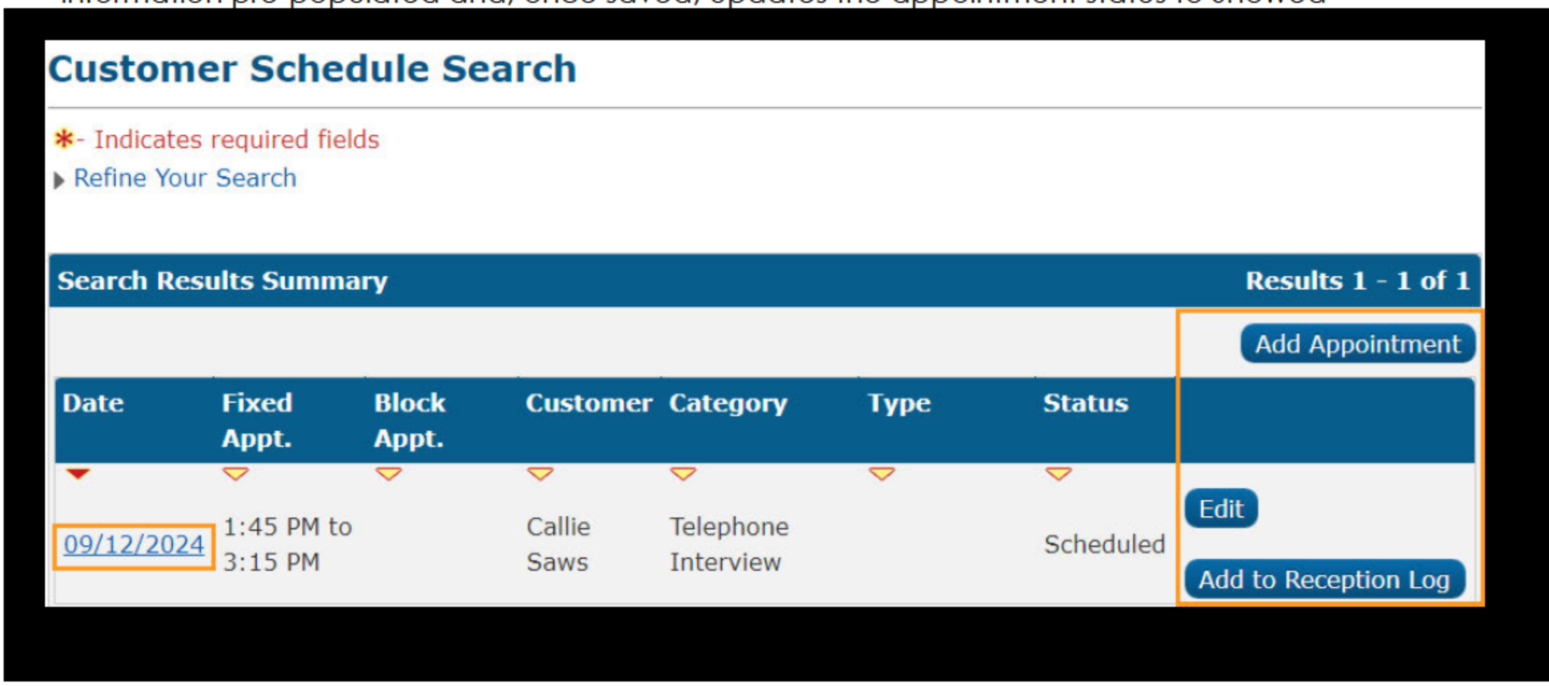
The Customer Schedule Search page can be used within the context of a case to search for existing customer appointments using specific search criteria.

The Date Range auto populates to search the next 90 days; however, it can be modified to display a wider range of appointments, as well as those in the past. Clicking the Search button displays the Search Results Summary page section where a list of appointments meeting the search criteria display.



In the Search Results Summary page section, the following elements display:

- Add Appointment button – Navigates to the Customer Appointment Detail page in Create mode where an appointment can be created
- Date hyperlink – Navigates to the Customer Appointment Detail page in View mode where users can:
  - View the appointment details
  - Edit attendance
  - Reschedule an appointment
  - Edit the appointment
- Edit button – Navigates to the Customer Appointment Detail page to Edit mode where the appointment can be changed or removed
- Add to Reception Log button – Opens a Reception Log Detail pop-up with the appointment information pre-populated and, once saved, updates the appointment status to Showed



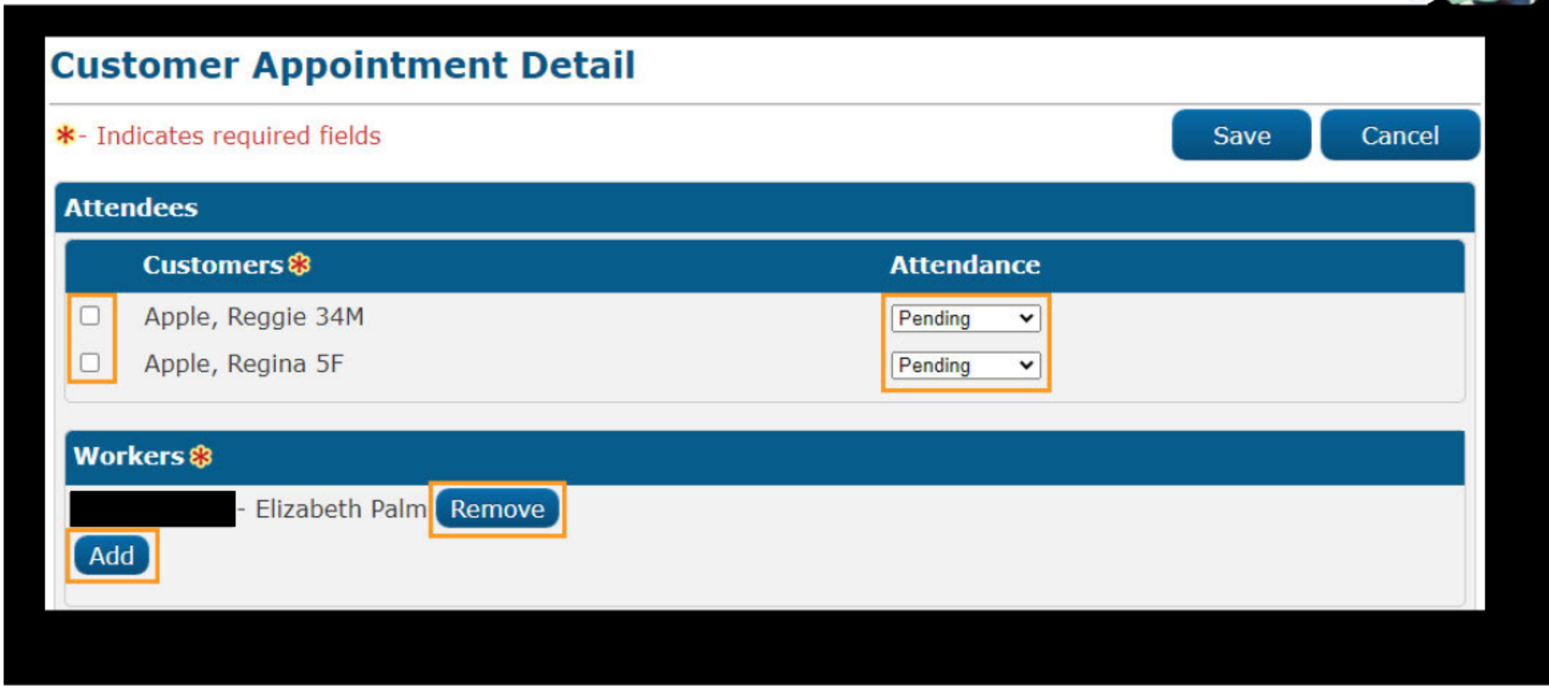
Customer Appointment Detail page

The Customer Appointment Detail page allows users to create or modify existing customer appointments. The page consists of three (3) page sections:

- Attendees
- General Information
- Dates

The Attendees page section allows users to select the appropriate customer(s) and worker for the appointment. The following elements display:

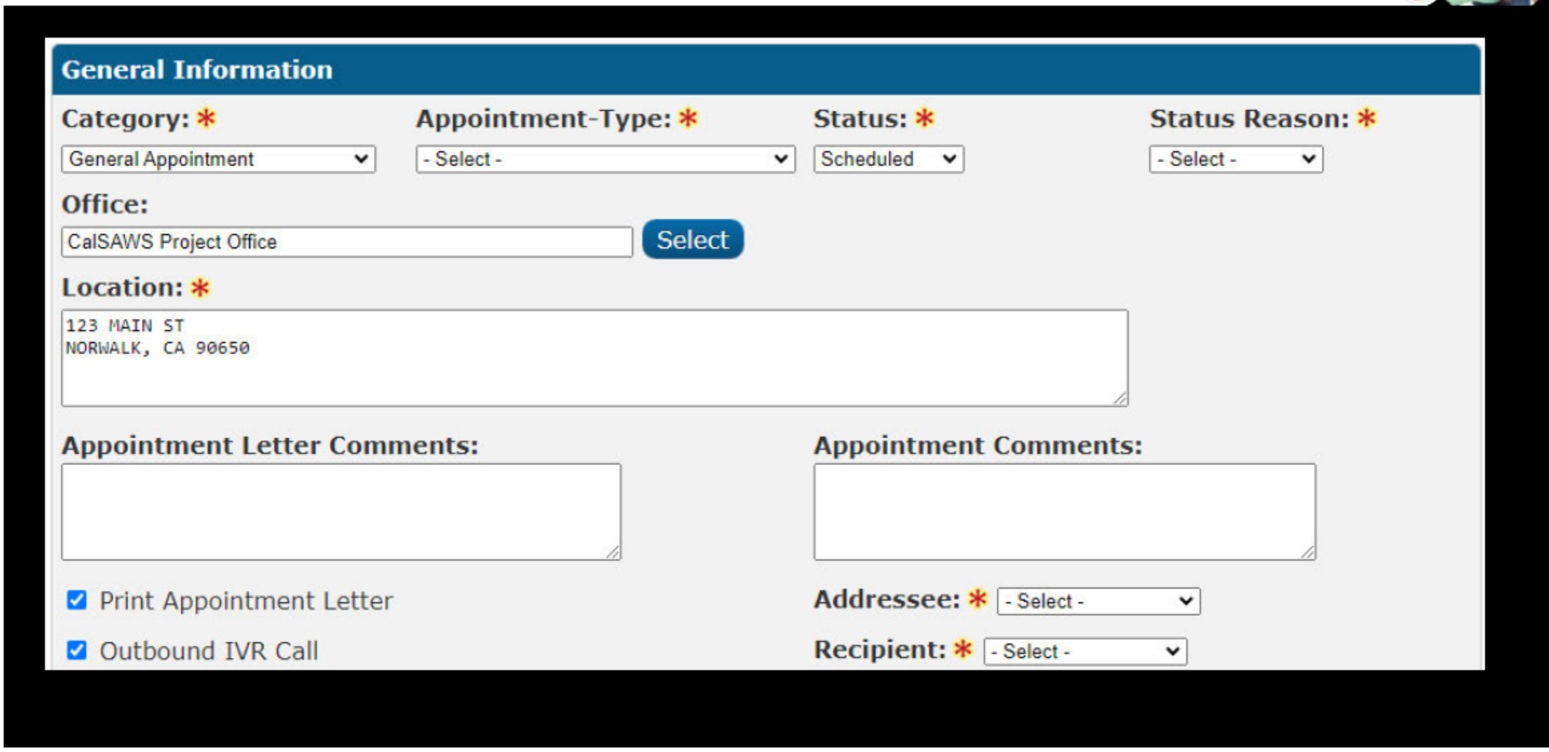
- Customers checkbox – Selects the appropriate person(s) who need to attend the appointment
- Attendance drop list – Defaults to pending and can be updated to Canceled, No Show, Rescheduled and Showed to edit a customer's attendance status
- Workers page sub-section – Defaults to display the assigned program worker(s) on the case and can be changed by using the Add and/or Remove buttons
- Add button – Navigates to the Select Worker page to conduct a search for a worker ID
- Remove button – Removes the worker listed next to the button



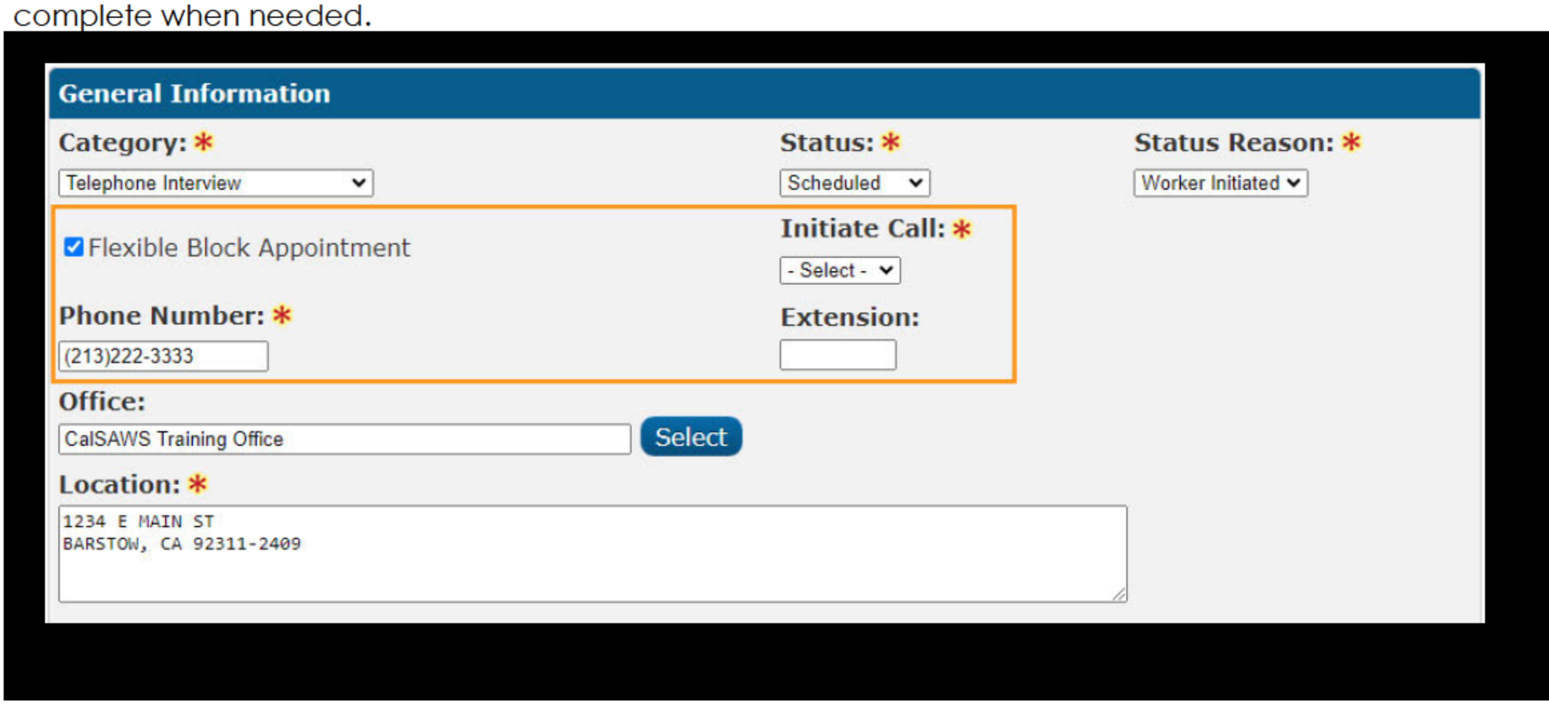
The General Information page section allows users to enter the type of appointment scheduled, specify the location and generate an appointment letter.

The following elements display:

- Category drop list – Designates the category of the customer appointment
- Appointment Type drop list – Depending on the Category selected, the Appointment-Type drop list dynamically displays to specify the type
- Status drop list – Captures the status of the appointment
- Status Reason drop list – Dynamically displays if the appointment Status is Cancelled, Rescheduled or Scheduled; and captures the reason for the status
- Office field – Displays the assigned office of the worker selected but can be modified by clicking the Select button
- Select button – Navigates to the Select Office page to conduct a search for an office
- Location field – Displays the address for the selected office but can be modified as needed
- Appointment Letter Comments field – Captures any comments that should display on the appointment letter
- Appointment Comments field – Captures comments that are pertinent to the appointment but do not need to be entered on the appointment letter
- Print Appointment Letter checkbox – Triggers the System to populate an appointment letter or notice once the appointment is saved
- Addressee drop list – Only displays if the Print Appointment Letter checkbox is clicked and identifies who the appointment letter should be addressed to
- Outbound IVR Call checkbox – Only displays if the customer has opted in to outbound IVR; and allows the System to send an appointment reminder
- Recipient drop list – Only displays if the Outbound IVR Call checkbox is clicked and identifies which person to call



Certain appointment categories, such as Telephone Interview, allow for flexible appointments to be scheduled. When these specific appointment categories are selected, the Flexible Block Appointment checkbox displays, and when selected, the Initiate Call and Phone number fields dynamically display and must be completed. The Extension field also displays but is optional to complete when needed.

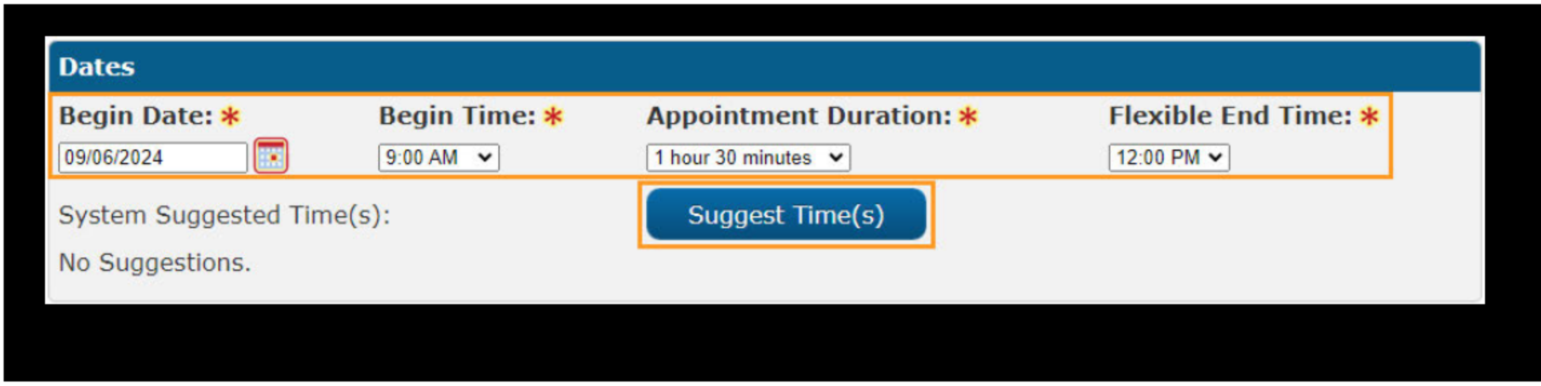


In the Dates page section, the date and time of the appointment can be specified.

The following elements display:

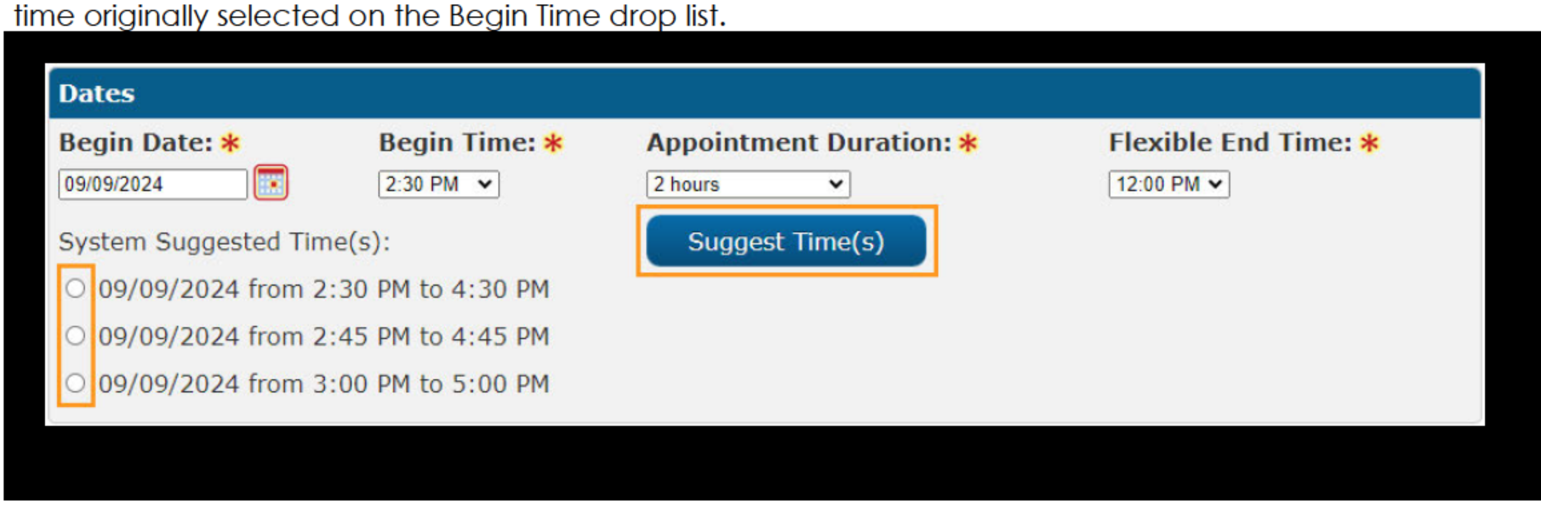
- Begin Date field – Captures the appointment date
- Begin Time drop list – Selects the appointment begin time
- Appointment Duration – Designates the duration of the appointment

- Flexible End Time – Only displays if the Flexible Block Appointment checkbox was clicked and captures the end time of the flexible appointment
- Suggest Times button – Searches for available appointment slots for the worker ID listed based on the Office Schedule page set up and the options selected on this page section



The appointment Begin Date, Begin Time, Appointment Duration and Flexible End Time (if applicable) must always be entered to schedule an appointment. After entering this information, the System can also suggest available times from the selected worker's schedule that was set up on the Office Schedule page when the user clicks the Suggest Time(s) button.

After clicking the Suggest Times button, the page refreshes and displays System Suggested Times based on the criteria entered and the worker's scheduled availability. Click the radio button next to one of the System Suggested Times to select that appointment. The user can also elect to keep the time originally selected on the Begin Time drop list.



Once a selection is made, click the Save button to schedule the appointment.

My Schedule

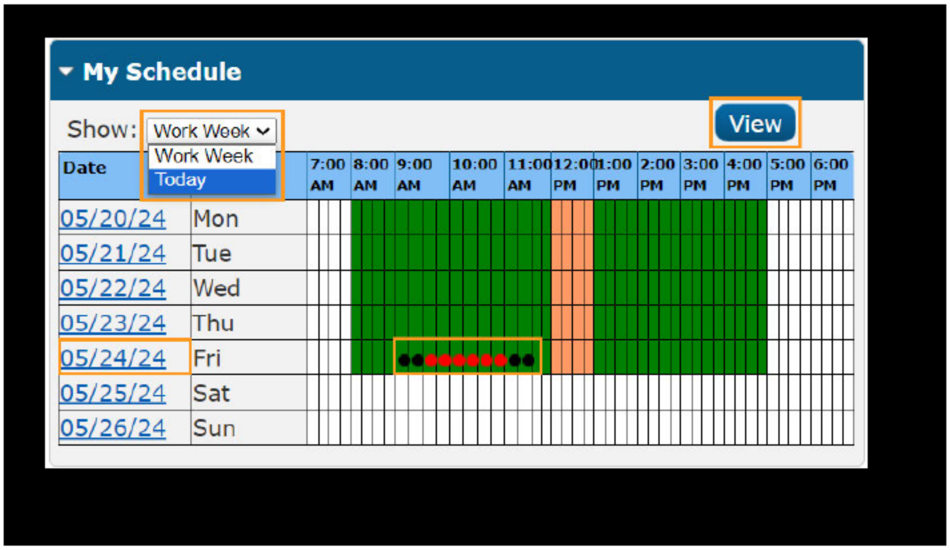
The My Schedule page section on the Home Page is expandable by clicking the Expand caret. This table displays the schedule of the logged in user.

The display defaults to show the user's availability and scheduled appointments for the week. However, it can be updated to view only the availability and appointments for the current System date by selecting Today from the Show drop list and clicking the View button.

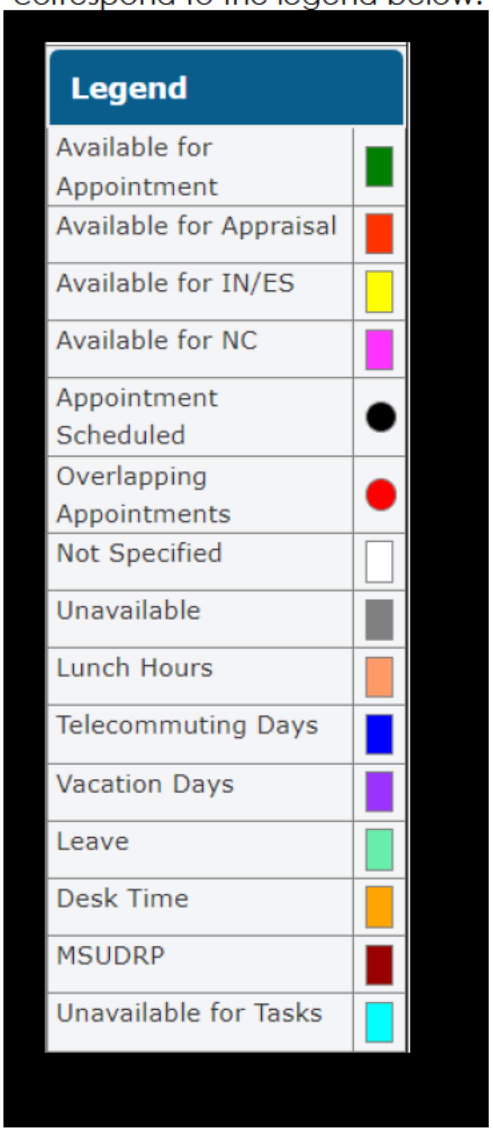
In addition, the following elements display:

- Date hyperlink – Navigates to the Daily Schedule page

- Overlapping Appointments (red dot ●) – Navigates to the Appointment List page
- Appointment Scheduled (black dot ●) – Navigates to the Customer Appointment Detail page



The colors on the schedule are based on the availability set up on the Office Schedule page and correspond to the legend below.



Date Hyperlink

Clicking the Date hyperlink navigates to Daily Schedule page that displays all the appointments scheduled with the logged in user for the date selected.

On the Daily Schedule page, clicking the Fixed Appt. or Block Appt. hyperlinks, depending on the appointment type, navigates to the Customer Appointment Detail page where the customer's appointment can be viewed or edited.

Daily Schedule

Close

Worker Id: 36LSZZMQ00

Date: 05/24/2024

Fixed Appt.	Block Appt.	Case	Customer	Type	Status
9:00 AM to 11:30 AM		1130148	Barry Canary	Intake Interview	Scheduled
	9:30 AM to 11:00 AM	1130149	Reggie Apple	Telephone Interview	Scheduled

Overlapping Appointments

The red dots indicate that there overlapping scheduled appointments.

Clicking the red dots navigates to the Appointment List page that lists all the appointments scheduled for the user. Clicking the Fixed Appt. or Block Appt. hyperlinks, depending on the appointment type, navigates to the Customer Appointment Detail page to view and make any necessary changes to the scheduled appointments.

Appointment List

Close

Worker Id: 36FS7A0100

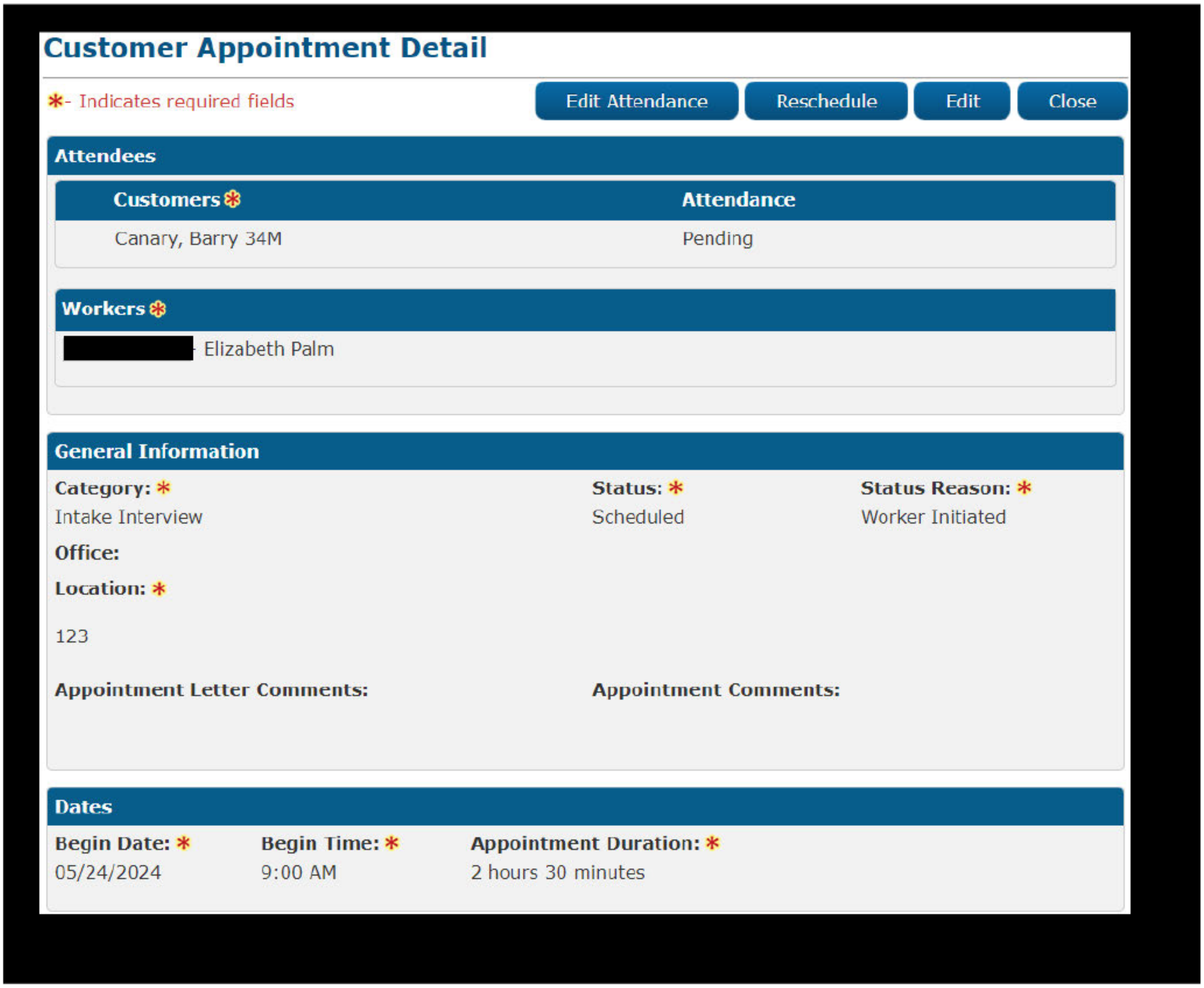
Date: 09/06/2024

Time Slot: 10:00 AM to 10:15 AM

Fixed Appt.	Block Appt.	Case	Customer	Type	Status
9:00 AM to 10:30 AM		2675908	Ben Cali	Intake Interview	Scheduled
	10:00 AM to 12:30 PM	2675869	Reggie Apple	Telephone Interview	Scheduled

Appointment Scheduled

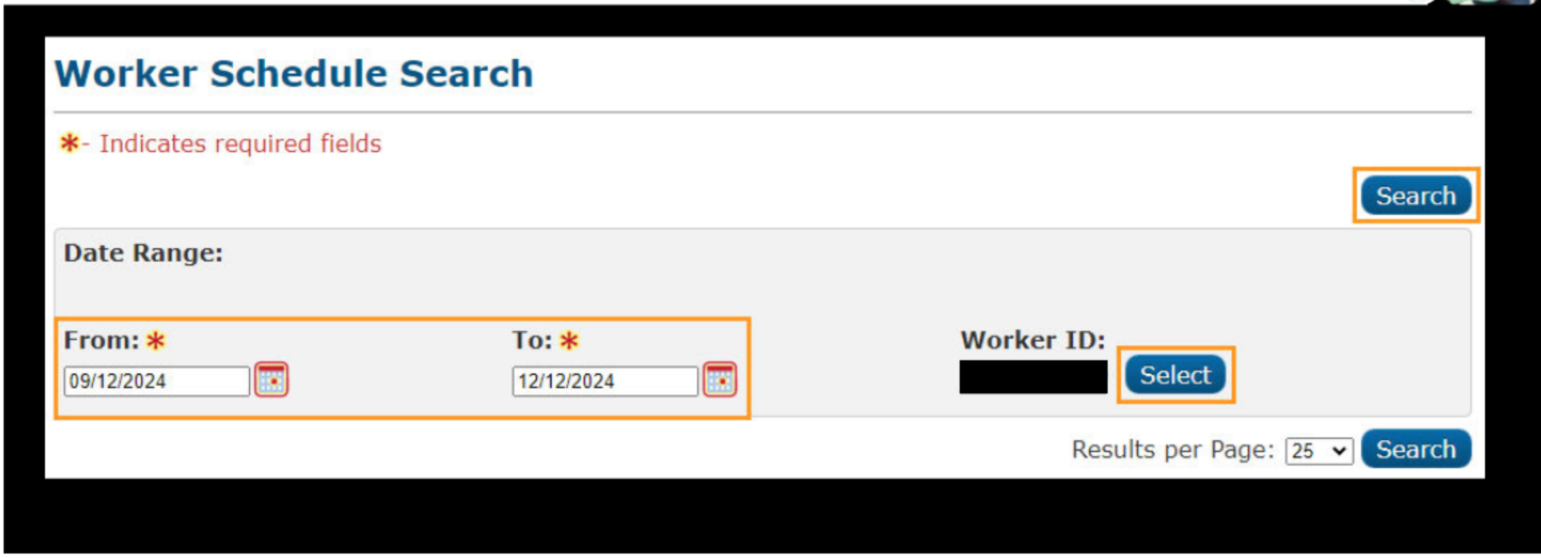
The black dots indicate that there is a scheduled appointment. Clicking the black dots navigates to the Customer Appointment Detail page to view or edit the scheduled appointment.



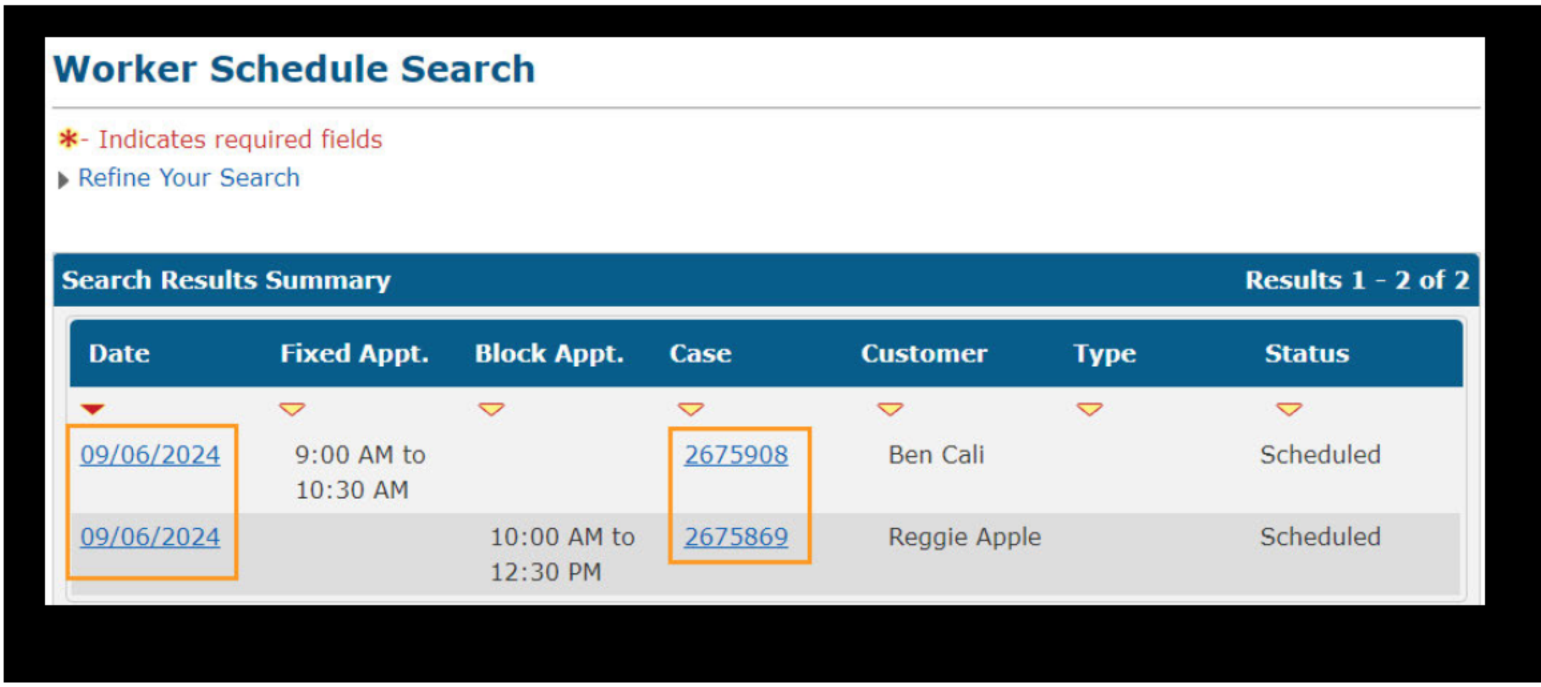
Worker Schedule Search Page

A list of all appointments for a specific worker ID can be viewed on the Worker Schedule Search page. To access this page, place the cursor over Admin Tools on the Global navigation bar and select Worker Schedule from the Local navigator.

The date range defaults to the next 3 months but can be modified as needed. The Worker ID field populates with the logged in user but can be changed as needed by clicking the Select button and conducting a search for a different worker ID. Clicking the Search button returns a list of appointments, that match the search criteria, in the Search Results Summary page section.

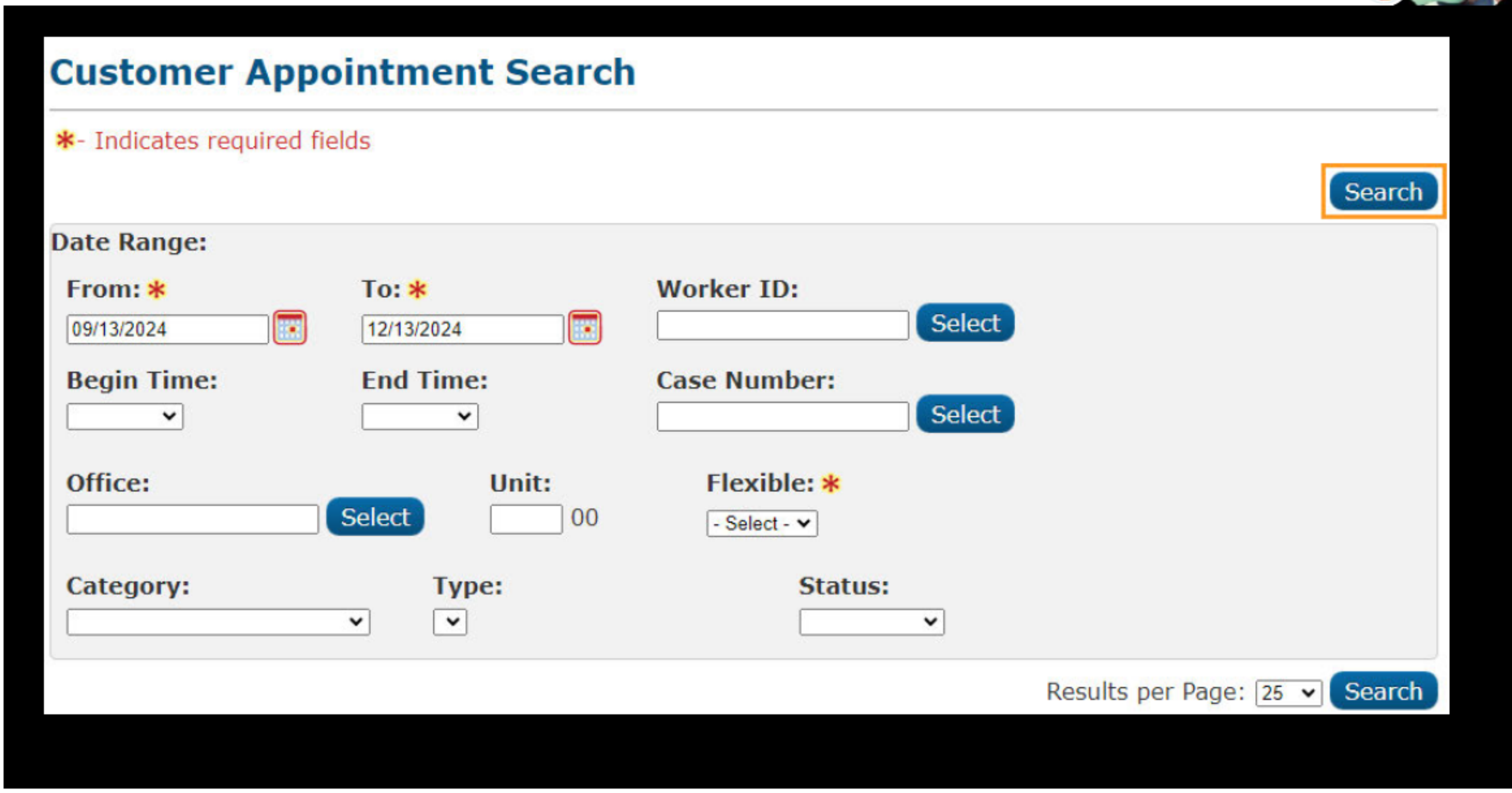


Clicking the Date hyperlink for an appointment navigates to the Customer Appointment Detail page. Clicking the Case hyperlink navigates to the customer's Case Summary page.



Customer Appointment Search Page

The Customer Appointment Search page can be utilized to search for and view appointments at the worker, office, unit and County level, as well as by appointment type and status.



To access the Customer Appointment Search page:

1. Place the cursor over **Admin Tools** on the **Global** navigation bar
2. Select **Worker Schedule** from the **Local** navigator
3. Click the **Customer Appointment Search** link on the **Task** navigation bar
4. On the **Customer Appointment Search** page:
   A. Enter **<Dates>** in the **Date Range From** and **To** fields
   Note: The Date Range must be within 3 months.
   B. Select **Yes** or **No** from the **Flexible** drop list
   C. Enter additional search criteria as needed
   D. Click the **Search** button

After clicking the Search button, the page refreshes to display the Search Results Summary page section.

In the Search Results Summary page section, the following displays:

- Date hyperlink – Navigates to the Customer Appointment Detail page
- Case Number hyperlink – Navigates to the Case Summary page for the case
- Worker ID hyperlink – Navigates to the Worker Detail page
- Category – Displays the appointment category
- Status – Displays the status of the appointment
- Begin Time – Displays the appointment start time
- End Time – Displays the appointment end time
- Edit button – Navigates to the Customer Appointment Detail page in Edit mode

Search Results Summary							Results 1 - 3 of 3
Date	**Case Number**	**Worker ID**	**Category**	**Status**	**Begin Time**	**End Time**	
09/13/2024	2675908	[redacted]	Intake Interview	Scheduled	9:00 AM	10:30 AM	Edit
09/16/2024	2675909	[redacted]	Telephone Interview	Scheduled	1:45 PM	3:15 PM	Edit
09/16/2024	2675910	[redacted]	General Appointment	Scheduled	1:00 PM	2:30 PM	Edit