

## Scheduling/Appointment Help Document

### **Appointment Types:**

When scheduling a client or family for an appointment, the user should select the type of appointment for which the client is being scheduled. A list of available appointment types and a brief explanation of each below:

- BVLC - Breastfeeding Lactation Consultant appointment
- BFLCV - Breastfeeding Lactation Consultant Virtual appointment
- BFLS - Breastfeeding Lactation Specialist appointment
- BFLSV - Breastfeeding Lactation Specialist Virtual appointment
- BFPC - Breastfeeding Peer Counselor appointment
- BFPCV - Breastfeeding Peer Counselor Virtual appointment
- CERT - Certification; Used for **initial** certification appointment only. In this case, the applicant has never been a client of the WIC Program before. Brand new client of any category.
- CEVAL - Child Evaluation
- EDU - Nutrition Education appointment
- EDUO - Online Education appointment (WICHealth.org)
- EDUT - Take-home Education appointment
- EDUV – Nutrition Education Virtual appointment
- EDUW - Walk-in Education appointment
- IEVAL - Infant Evaluation
- NCRD - Nutrition Counseling with Registered Dietitian appointment
- NCRDV - Nutrition Counseling with Registered Dietitian Virtual appointment

- OTHER - 'Other' appointment types including Breast Pump Issuance, Food Package/Formula Change, and Hgb Recheck, etc.
- PCERT - Priority Certification appointment. Priority appointments can be interpreted to be any appointments for any of the following categories BE, BP, IBE, IBP, IFF, and PG, migrant client of any category and a homeless client of any category.
- PFRESH - Project FRESH / Farmer's Market Nutrition Program
- PFRESHV - Project FRESH Virtual appointment (PFRESHV)
- RECERT - Recertification; Used for clients who have an **existing record** within the system and have been certified previously and do not qualify for a priority appointment (regardless of whether their Cert period has expired). Used only for clients NOT in a priority category such as **NPP, C1-C4**.
- WCC - WIC Client Connect (WCC) appointment is used for initial appointment, when scheduled by the applicant through the WCC portal. For applicants to schedule this, the clinic must include this appointment type in their daily schedule.

How a client/family is scheduled depends on client category, clinic/agency appointment types utilized on the daily schedule, and policy requirements.

#### **Client Categories:**

As a reminder, a client shall belong to the one of the following categories:

- PG – Pregnant
- BE – Breastfeeding Exclusively
- BP – Breastfeeding Partially
- NPP – Non-Lactating Postpartum
- IBE – Infant Breastfeeding Exclusively
- IBP – Infant Breastfeeding Partially
- IFF – Infant Formula Fed
- C1-C4 – Child aged 1-4

A client must meet the categorical requirement from one of the above categories, as well income and residency requirement to be considered eligible for WIC.

**Moving an Appointment vs. Scheduling a New Appointment:**

When a client/family misses a scheduled appointment, it is recommended (not required) that the agency make a 'NEW' appointment vs. moving this appointment.

- If a client calls to reschedule their upcoming appointment prior to this appointment, it is recommended that that appointment be moved to the new appointment date and time.
  - If the moved appointment is outside of the 10/20-Day requirement indicate that on the pop-up this is the client's choice.
  - When an appointment is scheduled as a CERT/PCERT the 'application date' is recorded as the date the NEW record is created/appointment is scheduled.
- If the appointment is missed it is recommended to make a new appointment. This will allow the system to record any missed appointments as well as the new appointment.
  - If a previously scheduled CERT/PCERT appointment is 'MOVED' rather than a scheduling a new appointment the 'application date' will read from the original appointment date. This client's record may then populate on the 10/20-Day report as being scheduled outside of the required timeframe.

**Scheduling Tips:**

- As a reminder a CERT/PCERT appointment must be scheduled within the following timeframes:
  - Pregnant, breastfeeding, infant and homeless individuals, as well as migrant farmworkers and their families must be scheduled within 10 calendar days of the date of first request of Program benefits to determine eligibility.
  - All other applicants/clients must be scheduled within 20 calendar days of the date of the first request of Program benefits to determine eligibility.