

# WHY WAS IT DESIGNED THIS WAY? CAN WE HAVE A DO-OVER? WIC PROGRAM APPOINTMENT SCHEDULING SYSTEMS – LET’S THINK TWICE

## PRESENTED BY DAWN MIDDLETON AND AMANDA WRIGHT

**TIME REQUIRED:** 90 minutes

**SECTION PURPOSE:** Using a combination of small group work, didactic power point presentation, and peer case study, we will explore the origin of our WIC appointment scheduling systems, how we learned to schedule appointments, and review best and evidence-based practices for improving the efficiency and effectiveness of WIC appointment scheduling systems. This will include analysis of sample WIC program data and sharing of experiences of a WIC agency staff person who has collected and used data and information to streamline appointment time intervals and appointment scheduling criteria.

### **LEARNING METHODOLOGIES:**

- Lecturette
- Individual activity
- Small group activity
- Large group discussion

### **MATERIALS NEEDED:**

- Laptop
- Projector
- Projector screen
- Flipchart easel
- Newsprint
- Markers
- *PowerPoint slides - WIC Program Appointment Scheduling Systems*
- *Worksheet – Calculating Participant and Nutritionist Appointment Times*
- *Handout – Nutritionist Desk Study Tool*
- *Handout – Streamlining Appointment Scheduling Criteria: Before and After*

### **DESCRIPTION:**

#### **Step 1: Welcome participants and review the goal and learning objectives**

- Goal: Increase participant awareness and knowledge of key concepts associated with developing and implementing efficient and effective WIC appointment scheduling systems
- As a result of this training, participants will be able to:
  - Examine rationale for streamlining appointment time intervals and scheduling criteria
  - Analyze data to identify to determine average time in face-to-face contact with a nutritionist
  - Describe 2-3 best practices in the development and implementation of a WIC agency appointment scheduling system
- Participants introduce themselves and one word to describe the process of making an appointment for a WIC participant at their agency sites

## **Step 2: Where did it all start small group work**

- Facilitator places participants in groups of 3, across agencies and asks participants to consider:
  - How was your appointment schedule template and scheduling approach was developed?
  - How did they learn to schedule appointments?
- Facilitator asks participants to share what came up for them during their discussions in large group

## **Step 3: Conduct lecturette on clinic systems and role of appointment scheduling systems**

- Using the PowerPoint slides, conduct a lecturette on clinic systems and role of appointment scheduling systems, emphasizing the following points:
  - Appointment scheduling impacts multiple aspects of clinic flow
  - Appointment scheduling can improve your productivity and wait time

## **Step 4: Conduct Calculating Participant and Nutritionist Appointment Times activity**

- Trainer starts by asking participants to raise their hand if this applies to them:
  - Schedule has 1 appointment time interval
  - Schedule has 2 appointment time intervals
  - Schedule has 3 appointment time intervals
  - Schedule has 4 or more appointment time intervals
- Trainer reflects on responses noting that there is a great deal of variation
- Handout Calculating Participant and Nutritionist Appointment Times worksheet
  - Participants review a worksheet that includes sample WIC program data describing time in face-to-face contact with the nutritionist for a typical day in a WIC clinic and are asked to calculate the average time in face-to-face contact with a nutritionist across all appointments to consider opportunities to streamline the number of appointment intervals they currently use in their appointment scheduling templates.
  - Each participant completes the worksheet alone

## **Step 5: Process activity**

- Small Group Discussion: participants share reflections on data derived from completed the worksheet in their small groups and key questions.
- Process and Report Out: in large group trainer asks participants to share their reflections from completion of the worksheet and small group discussion.
- Handout the Nutritionist Desk Study Tool for participants to take home and use

## **Step 6: Conduct lecturette with local agency case study**

- WIC agency staff person shares their experience, as part of a WIC learning collaborative, in working with their team to identify average time in face-to-face contact with a nutritionist and how they used that data to propose new standardized intervals for appointments and streamline appointment scheduling criteria.
- Facilitator presents evidence-based and best practices for design and implementation of an appointment scheduling systems with a focus on:
  - Standardizing appointment interval length
  - Streamlining appointment scheduling criteria
- Facilitator asks what are you taking away from this session? How can the WIC training center assist you?

## Calculating Participant and Nutritionist Appointment Times

Below is real data, pulled from a cycle time study that several local agencies completed in 2016-2017, that looked at how long participants were spending with staff. The data below includes information about visits seen in one day, by QNS at one local agency, including: the visit type (e.g., HNU, certification), number of participants, and the start and end times. We have calculated the total time spent with QNs for you.

Using the last column, Total Time Spent with QN, please calculate the average time spent with a nutritionist on each visit.

Visit	Visit Type	# Participants	Start Time	End Time	Total Time Spent with QN
1.	HNU	1	8:05 AM	8:26 AM	0:21
2.	Nutrition Education	1	8:26 AM	8:35 AM	0:09
3.	HNU	1	8:54 AM	9:06 AM	0:12
4.	HNU	1	9:09 AM	9:36 AM	0:27
5.	Recertification	1	9:30 AM	9:54 AM	0:24
6.	Recertification	2	10:03 AM	10:19 AM	0:16
7.	HNU	3	10:09 AM	10:39 AM	0:30
8.	Nutrition Education	2	10:16 AM	10:22 AM	0:06
9.	Nutrition Education	1	10:13 AM	10:23 AM	0:10
10.	Recertification and Nutrition Education	3	10:44 AM	11:06 AM	0:22
11.	Recertification	1	10:44 AM	10:57 AM	0:13
12.	Recertification and Nutrition Education	4	11:08 AM	11:27 AM	0:19
13.	Recertification and Nutrition Education	2	12:10 PM	12:31 PM	0:21
14.	Nutrition Education	1	12:40 PM	12:44 PM	0:04
15.	Initial Certification	2	1:14 PM	1:46 PM	0:32
16.	Nutrition Education	2	1:25 PM	1:31 PM	0:06

Average Time Spent  
with Nutritionist

## Nutritionist Desk Study Tool

Please complete the following table over the course of one day for one nutritionist. For each visit, record the visit type (e.g., HNU, certification), number of participants, the start and end times, and any important notes (e.g., categorized as high risk, language barriers, etc.).

Visit	Visit Type	# Participants	Start Time	End Time	Notes
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					

Visit	Visit Type	# Participants	Start Time	End Time	Notes
15.					
16.					
17.					
18.					
19.					
20.					
21.					
22.					
23.					
24.					
25.					
26.					
27.					
28.					
29.					
30.					

# Streamlining Appointment Scheduling Criteria: BEFORE

## Time Frames for Scheduling in WICSIS

### Initial Certification

# of Pt's	
1	30 minutes
2	45 minutes
3	45 minutes
4 or more	1 hour

### Nutrition Education/ IRV

1	15 minutes
2	15 minutes
3 or more	30 minutes

### High Risk Counseling /HNU HR

1	15 minutes
2	30 minutes
3	30 minutes
4 or more	45 minutes

### Voc's In-State w/ Active Certs

1	15 minutes
2	15 minutes
3	30 minutes
4 or more	30 minutes

### Recertification/ Re-Entry

15 minutes
30 minutes
45 minutes
60 minutes

### Weight Check or BW

15 minutes
30 minutes Maximum

### HNU W/BW or w/o BW

15 minutes
30 minutes
45 minutes
60 minutes

### Voc's Out of State w/ Active Certs

30 minutes
30 minutes
45 minutes
45 minutes

### Appointments are scheduled with:

Certifications	Nutritionist
High Risk	Nutritionist
Food Package III	Nutritionist
HNU/ BW	Support Staff
Weight Check	Support Staff
Nutrition Education	Support Staff
IRV	Support Staff

### What should we look at when scheduling future appt?

Foster Child  
Next Check Date  
 Site, Location, Different Site  
 Appointment Type  
 Notes  
 Termed  
 Amount of Time Needed  
 Enrollment Cycle  
 Cert End Date  
 Clinic Schedule  
 Time Consumer Needs  
 Due Date  
 Pro-Ration  
 Package or Profile Change  
 Scheduling Appointment Correctly

### GUIDELINES TO FOLLOW:

- \*Discuss appt. times and availability with clients
- \***Double time allotment and stagger when scheduling a Cert, HR or VOC with support staff**
- \*Document unusual circumstances in **NOTES**
- \*Do Not skip 15 min. time frames – this will **open up** more time
- \*Use one staff name to entirety
- \*Talk to client about appt. needs – offer best choice for them
- \***BEST PRACTICE** - NO NEW (never on before) @ 2:45 or after on early days, or @ 5:15 or after on late days; 3:30 or later appts. schedule into evening clinic
- \*Last subcert appt. @ 3 pm on early days and 5:30 pm on late days
- \*Must Schedule Nutr. Ed. appts. into GROUP when possible!!!
- \*Friday prior to Saturday & Saturday appts. should be twice the amount of time i.e. 1 subcert ½ hour not 15 min., exception is when you have multiple **appts** for family only extend certification.

**\*PAY ATTENTION TO DETAIL**

# Streamlining Appointment Scheduling Criteria: AFTER

## Time Frames for Scheduling in WICSIS

### 15 Minute Slots

HNU  
BW  
NE  
Single Recertification  
Food Package Change  
Prenatal/HLTH NUT.  
High Risk

### 30 Minute Slots

Food Package III  
Multiple People Appts.  
Interpreter/Language  
Multiple Certifications  
Multiple High Risk  
VOC's  
New Never Been On Certification

### **Appointment Scheduling Criteria:**

- 15 min. or 30 min. slots utilized only.
- No extending for **ANY** circumstances
- No Appts. Greater than 30 minutes unless **EXTREME** Circumstance with a NOTE in WICSIS!! (Examples: Hearing Impaired, and Extreme Language Barrier)
- **Extend 15 minutes to 30 minutes if needing to issue a Pump or Breastfeeding Issues with a WICSIS NOTE!!**
- Certifications **ONLY** on the bottom line!

#### GUIDELINES TO FOLLOW:

- \*Discuss appt. times and availability with clients
- \*Document unusual circumstances in **NOTES**
- \*Do Not skip 15 min. time frames – this will open up more time
- \*Talk to client about appt. needs – offer best choice for them
- \***BEST PRACTICE** - NO NEW (never on before) @ 2:45 or after on early days, or @ 5:15 or after on late days; if they need 3:30 or later schedule into evening clinic
- \*Last subcert appt. @ 3 pm on early days and 5:30 pm on late days
- \*Must Schedule Nutr. Ed. appts. into GROUP when possible!!!

**\*PAY ATTENTION TO DETAIL\***

Developed by: The Staff of Oswego County Opportunities, Inc., WIC Program

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