Follow these steps to schedule an appointment for a participant who needs to transfer between two Cascades clinics.

- In CIMS, we had a Transfer In (TI) Appointment type. Cascades doesn’t have this appointment type.
- If the participant needs an appointment to transfer in from out-of-state or a CIMS clinic, use Cascades Steps: Schedule an Appointment to Transfer into the Cascades System.

### Steps

#### Step 1. Get to Master Calendar to schedule the appointment to transfer in:

1. In the menu bar, select **Scheduling**, then **Clinic Master Calendar**.

**Note:** Calendar defaults to the current month’s view.
Cascades Steps
Schedule an Appointment to Transfer Between Cascades Clinics

Step 2. Choose appointment type and day for your appointment:

1. Check that the appointment type Food Benefit Issuance is check-marked in the Available Appointment Types box.

2. If the appointment to transfer in will happen in a future month, use the Mini Calendar to select month and date for desired appointment.

   **Important**
   Cascades doesn’t have the appointment type Transfer In (TI), like CIMS did.
   Later we’ll write a Sticky Note to tell staff what appointment type we’re actually scheduling.

3. Double-click the green-colored date field of your choice in the big calendar to get to the Daily Schedule-view of the calendar.
   You’ll choose the appointment time next.

   Use the Mini Calendar to quickly move to future months.

   Confirm that you’re in the correct clinic if your calendar shows multiple clinics.
**Step 3. Choose a time for your appointment to transfer in:**

1. Click your cursor into the FBI column and time slot you want to choose.
   - Keep it at the default 15 minute timespan or follow your clinic’s policy for appointment time to transfer in. To extend appointment time, drag the appointment slot (blue box) with your cursor.

2. Double-click the selected appointment slot (blue box) to get to the Manage Appointments screen.

**Step 5. Add your participant:**

1. In the Manage Appointments screen, select the magnifying glass icon or place your cursor in the search box to display the Search Criteria pop-up screen.

   **TIP!**
   
   This search field says to enter Family ID, but it’s not required. Instead:
   - Select the magnifying glass icon or place your cursor in the box.
   - Select the Enter button on your keyboard.
**Cascades Steps**

**Schedule an Appointment to Transfer Between Cascades Clinics**

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**Step 6. Add your participant:**

1. Select State-Wide for Search Location.
2. Check-mark Family and Participant boxes.
3. Enter a few letters or all of last and, if need be, first name.
4. Uncheck Active Only box.
5. Select Search button.
6. In Search Results box, select your participant.
7. Press the Select button.

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**Step 7. Book the appointment:**

1. Confirm date and time.
2. Select participant in Individual drop-down.
3. Select Contact Method drop-down and choose answer: In-person – participant or caregiver in clinic
   Phone – participant or caregiver called clinic
4. Keep Add to Communication Queue box checked if family wants to receive a reminder email or text.
5. Select the Book button.

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You’ll see the appointment on the **Daily Schedule** screen.

### Step 8. Leave a Sticky Note:

**Sticky Note:**

1. Double-click on the family name at the top of the individual appointment box to get to the **Family Appointments List**.

2. Select the **yellow sticky note** icon.

3. Write the note to let other clinic staff know this appointment is actually an appointment to transfer in.

4. **Save** by selecting the minimize icon at the top right corner of the sticky note.

**Note:** Because Cascades allows only reading privilege for other Cascades agencies, you won’t be able to leave a Family Alert in the family record.

**REMEMBER**

If a participant cancels or reschedules the appointment, any sticky notes for that appointment will be lost.
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To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)
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