Follow these steps to schedule an appointment for a participant who needs to transfer in from out-of-state or a CIMS clinic.

- 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 between two Cascades clinics, use Cascades Steps: Schedule an Appointment to Transfer Between Cascades Clinics.

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<thead>
<tr>
<th>Steps</th>
<th>Cascades Screen</th>
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<tr>
<td><strong>Step 1. Create a new applicant record:</strong></td>
<td></td>
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<tr>
<td>1. In the menu bar, select Family Services, then New Family.</td>
<td>![New Family Screen]</td>
</tr>
<tr>
<td>2. In the New Family screen, fill out all information necessary to schedule the appointment for this “applicant”.</td>
<td></td>
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<tr>
<td>- In our example, we’re scheduling an appointment to transfer in a 1-year old child.</td>
<td>![New Family Example]</td>
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**When filling out the New Family screen, take care to:**

- Fill out all fields marked with stars.
- **Don’t** ask for Marital Status or Education Level.
- Assess for all other fields.
- If the parent/guardian is also a participant, check-mark the Participant checkbox.
Cascades Steps
Schedule an Appointment to Transfer into the Cascades System

In the Add Participant section:
3. Add participant information. Then, select Add to add your participant.

4. If you have multiple participants, continue adding participants in the Add Participant container.

5. Once you have added all participants, select Save.

Step 2. Move to the Master Calendar to schedule the appointment to transfer in:
1. In menu bar, select Scheduling, then Clinic Master Calendar.

Note: Calendar defaults to the current month’s view.
Step 3. Choose appointment type and day for your appointment to transfer in:

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

2. If the appointment 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 Family Alert 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.

4. 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 agency has multiple clinics.
### Cascades Steps

**Schedule an Appointment to Transfer into the Cascades System**

**Step 4. 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.

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**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 and
- Select the **Enter** button on your keyboard.
**Cascades Steps**

Schedule an Appointment to Transfer into the Cascades System

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**Step 6. Add your participant:**

1. Leave current clinic 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 to transfer in:**

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.
Cascades Steps
Schedule an Appointment to Transfer into the Cascades System

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

Step 8. Leave a Sticky Note and a Family Alert:

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 a 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.

REMEMBER
If a participant cancels or reschedules the appointment, any sticky notes for that appointment will be lost.
Cascades Steps
Schedule an Appointment to Transfer into the Cascades System

Family Alert:

1. In the menu bar, select Family Services, then Family Search.

2. Follow Step 6 to find the family.

3. In the family record’s Quick Links, select Family Alerts.

4. Select the Add button in the right bottom corner to add the new family alert.

5. Write the family alert to let other clinic staff know this appointment is actually an appointment to transfer in.

   Leave all default settings in the Maintain Alerts screen.
   • As the End Date, enter the day after the scheduled appointment to transfer in.

6. Select Save.
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DOH 961-1171 August 2019