



Staff Tool: Best Practices for Scheduling New Applicant Certification Appointments



Processing Standards

WIC regulations require specific processing standards which determine the timeframes for scheduling certifications for new applicants.

Our current policy and procedures state that the initial contact date is the date the person first asks for WIC services in person. However, the best practice is to count the first contact whether it's by phone, in-person, or email, as the starting date for the processing standards timeframe.

The best practice of each agency should be to provide appointments for pregnant, breastfeeding, infant, and migrant applicants to determine eligibility in the timeliest manner possible.

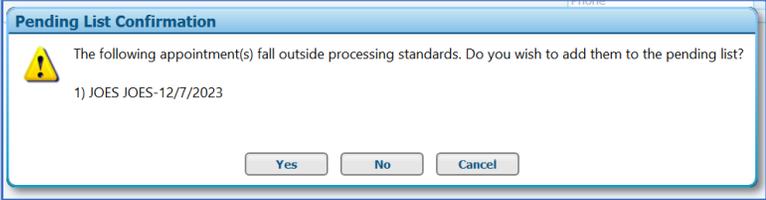
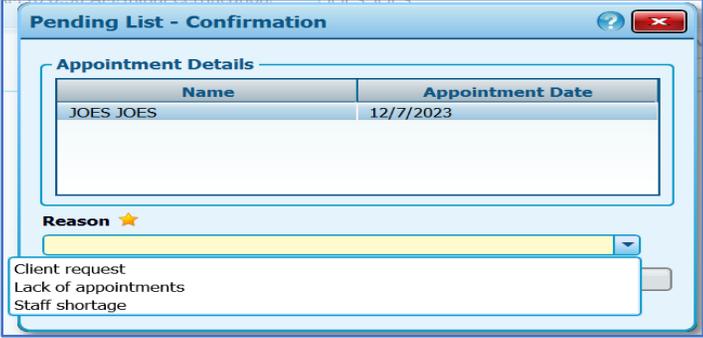
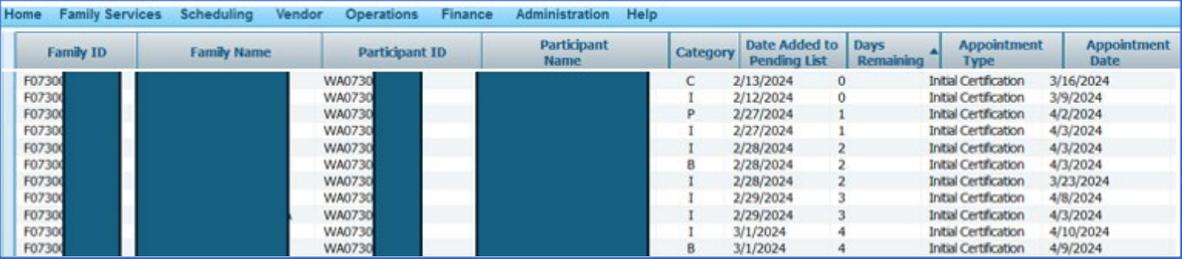
How to use the resources in Cascades to meet the Best Practices

Cascades has four resources that can help you to serve pregnant, breastfeeding, infants, and migrant applicants in the timeliest manner. They include:

- [Pending List](#)
- [Open Access Scheduling](#)
- [Overbook Slots \(Appointments\) option](#)
- [Presume Eligibility for Pregnant Applicants](#)

Pending List

Cascades currently counts all applicants the same whether they apply for WIC services in person or by phone. The **Pending List Confirmation** screen gives staff the option to add applicants to the pending list.

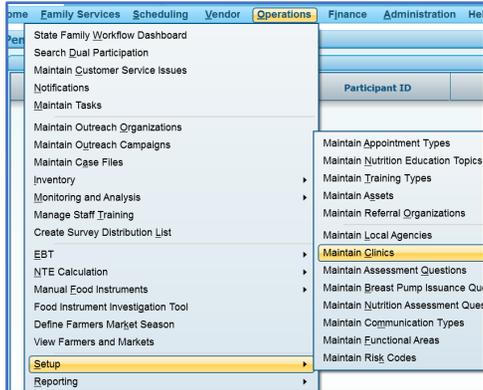
Steps	Cascades Screen																																																																																																												
<p>Step 1</p> <p>Select Yes in the Pending List Confirmation pop-up to add an applicant to the Pending List.</p>																																																																																																													
<p>Step 2</p> <p>Select the Reason why the applicant is on the Pending List.</p> <p>Note: Your agency needs to define lack of appointments and staff shortages and use the definitions consistently. You may choose to only use one of these.</p>																																																																																																													
<p>Step 3</p> <p>When the clinic receives appointment cancellations, the best practice is to refer to the Pending List to find applicants to contact for an earlier appointment.</p>	 <table border="1"> <thead> <tr> <th>Family ID</th> <th>Family Name</th> <th>Participant ID</th> <th>Participant Name</th> <th>Category</th> <th>Date Added to Pending List</th> <th>Days Remaining</th> <th>Appointment Type</th> <th>Appointment Date</th> </tr> </thead> <tbody> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>C</td><td>2/13/2024</td><td>0</td><td>Initial Certification</td><td>3/16/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>2/12/2024</td><td>0</td><td>Initial Certification</td><td>3/9/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>P</td><td>2/27/2024</td><td>1</td><td>Initial Certification</td><td>4/2/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>2/27/2024</td><td>1</td><td>Initial Certification</td><td>4/3/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>2/28/2024</td><td>2</td><td>Initial Certification</td><td>4/3/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>B</td><td>2/28/2024</td><td>2</td><td>Initial Certification</td><td>4/3/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>2/28/2024</td><td>2</td><td>Initial Certification</td><td>3/23/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>2/29/2024</td><td>3</td><td>Initial Certification</td><td>4/8/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>2/29/2024</td><td>3</td><td>Initial Certification</td><td>4/3/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>I</td><td>3/1/2024</td><td>4</td><td>Initial Certification</td><td>4/10/2024</td></tr> <tr><td>F0730</td><td></td><td>WA0730</td><td></td><td>B</td><td>3/1/2024</td><td>4</td><td>Initial Certification</td><td>4/9/2024</td></tr> </tbody> </table>	Family ID	Family Name	Participant ID	Participant Name	Category	Date Added to Pending List	Days Remaining	Appointment Type	Appointment Date	F0730		WA0730		C	2/13/2024	0	Initial Certification	3/16/2024	F0730		WA0730		I	2/12/2024	0	Initial Certification	3/9/2024	F0730		WA0730		P	2/27/2024	1	Initial Certification	4/2/2024	F0730		WA0730		I	2/27/2024	1	Initial Certification	4/3/2024	F0730		WA0730		I	2/28/2024	2	Initial Certification	4/3/2024	F0730		WA0730		B	2/28/2024	2	Initial Certification	4/3/2024	F0730		WA0730		I	2/28/2024	2	Initial Certification	3/23/2024	F0730		WA0730		I	2/29/2024	3	Initial Certification	4/8/2024	F0730		WA0730		I	2/29/2024	3	Initial Certification	4/3/2024	F0730		WA0730		I	3/1/2024	4	Initial Certification	4/10/2024	F0730		WA0730		B	3/1/2024	4	Initial Certification	4/9/2024
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Pending List (continued)

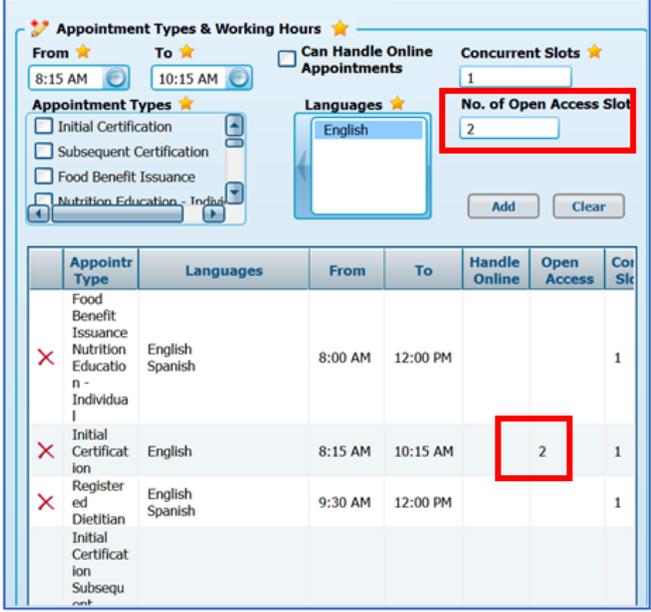
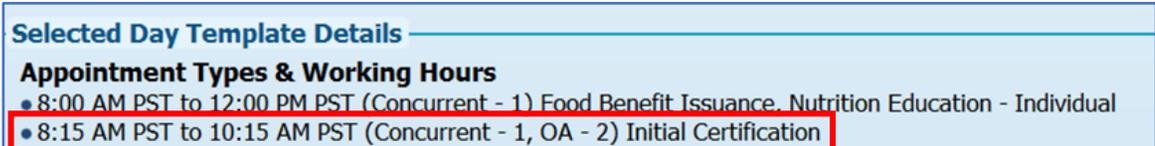
Steps	Cascades Screen
<p>Step 4</p> <ul style="list-style-type: none"> • View the Pending List • Go to Scheduling>Pending List • Schedule the applicant off the Pending List <ul style="list-style-type: none"> ○ If scheduling an applicant due to a <i>cancelation</i>, schedule the applicant in an open time slot on the Clinic Master Calendar. ○ If scheduling an applicant due to a <i>no show</i>, add the applicant as a walk-in on the Clinic Family Workflow Dashboard. 	 <p>The screenshot shows the 'Family Services' navigation bar with the 'Scheduling' tab selected. A dropdown menu is open, listing the following options: Clinic Search, Templates, Clinic Master Calendar, Block Appointment Slots, Export Appointments, Pending List (highlighted in yellow), Caseload Restrictions, and Reporting.</p>

Open Access (OA) Scheduling

Follow the “Reserve Appointment Time for New Applicants, Transfers, and Employed Persons” recommendation in [Volume 1, Chapter 3](#).

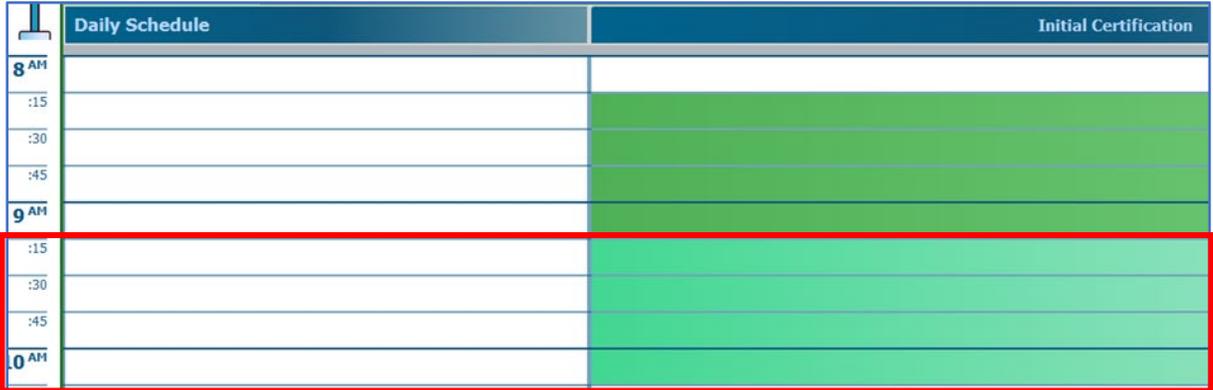
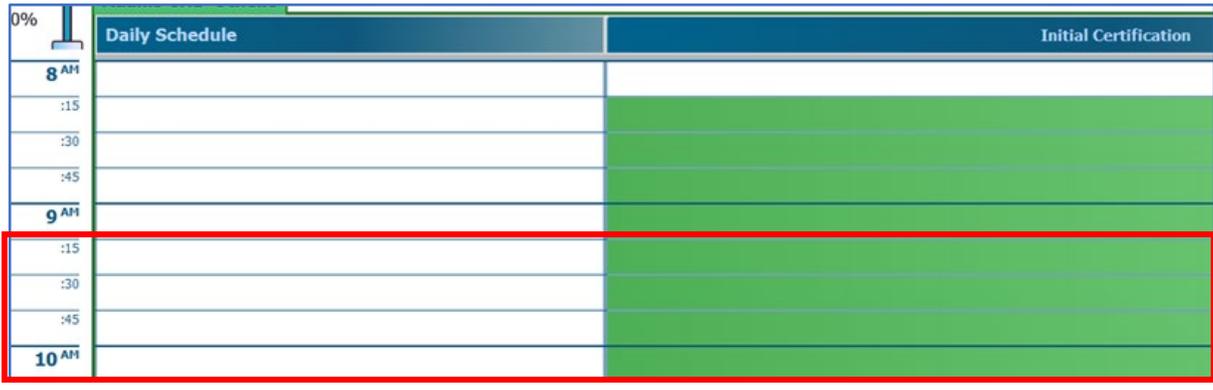
Steps	Cascades Screen
<p>Step 1</p> <ul style="list-style-type: none"> Set up Open Access (OA) slots by going to: Operations>Setup>MaintainClinics Select the pencil icon to edit the clinic and set up Open Access. 	
<ul style="list-style-type: none"> Select the Open Access Window box and enter the number of days prior to the appointment date that you want open access slots to become available to schedule. 	
<ul style="list-style-type: none"> Under Open Access Operations Defined By, we recommend you select Number of Open Access Slots, but there is an option to select Percentage of Open Access slots. 	

Open Access (OA) Scheduling (continued)

Steps	Cascades Screen																																			
<p>Step 2</p> <ul style="list-style-type: none"> Go to Scheduling>Templates>Number-based Appointment Templates. Select the template to modify or create a new template and enter the number of appointment slots in the No. of Open Access Slot field. If modifying a template, you will have the “Update” button to select and if you are creating a new template, you will have the “Add” button to select. Apply the template. The template will identify the number of OA appointments. 	 <table border="1" data-bbox="814 552 1428 909"> <thead> <tr> <th>Appointr Type</th> <th>Languages</th> <th>From</th> <th>To</th> <th>Handle Online</th> <th>Open Access</th> <th>Cor Slk</th> </tr> </thead> <tbody> <tr> <td>Food Benefit Issuance Nutrition Education - Individual</td> <td>English Spanish</td> <td>8:00 AM</td> <td>12:00 PM</td> <td></td> <td></td> <td>1</td> </tr> <tr> <td>Initial Certification</td> <td>English</td> <td>8:15 AM</td> <td>10:15 AM</td> <td></td> <td>2</td> <td>1</td> </tr> <tr> <td>Registered Dietitian</td> <td>English Spanish</td> <td>9:30 AM</td> <td>12:00 PM</td> <td></td> <td></td> <td>1</td> </tr> <tr> <td>Initial Certification Subsequent</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Appointr Type	Languages	From	To	Handle Online	Open Access	Cor Slk	Food Benefit Issuance Nutrition Education - Individual	English Spanish	8:00 AM	12:00 PM			1	Initial Certification	English	8:15 AM	10:15 AM		2	1	Registered Dietitian	English Spanish	9:30 AM	12:00 PM			1	Initial Certification Subsequent						
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<p>Notes</p> <p>Using open access in templates reserves the number of appointments selected for No. of Open Access Slots until the number of days chosen in the local clinic set up for Open Access Window.</p> <p>In our examples, we applied a template with 2 OA Initial Certification (IC) appointments from 8:15 AM to 10:15 AM.</p>	 <p>Selected Day Template Details</p> <p>Appointment Types & Working Hours</p> <ul style="list-style-type: none"> 8:00 AM PST to 12:00 PM PST (Concurrent - 1) Food Benefit Issuance, Nutrition Education - Individual 8:15 AM PST to 10:15 AM PST (Concurrent - 1, OA - 2) Initial Certification 																																			



Open Access (OA) Scheduling (continued)

Steps	Cascades Screen
<p>Notes</p> <p>The example shows the 2 OA Initial Certification appointments reserved during the 8:15 AM to 10:15 AM timeframe in a lighter color of green because it is more than or equal to 3 days prior to the calendar day.</p> <p>Staff will not be able to book these appointments at this time. (We entered three for the number of days in open access window in the clinic setup).</p> <p>Note: In our experience Cascades reserves the OA appointments at the <u>end of the template's timeframe</u>, in this case from 9:15 AM to 10:15 AM.</p>	 <p>The screenshot shows a 'Daily Schedule' interface with a vertical time axis on the left ranging from 8 AM to 10 AM in 15-minute increments. The main area is divided into two columns: 'Daily Schedule' and 'Initial Certification'. The time slots from 9:15 AM to 10:15 AM are highlighted in a light green color, indicating they are reserved. A red rectangular box highlights this specific 15-minute window.</p>
<p>When the day is less than or equal to 3 days prior to the calendar day, the 2 OA IC appointments from 9:15 AM to 10:15 AM become open and are now available to schedule. (We entered three for the number of days to open the appointment for scheduling in the open access window in the clinic setup).</p>	 <p>The screenshot shows the same 'Daily Schedule' interface. The time slots from 9:15 AM to 10:15 AM are now highlighted in a darker green color, indicating they are available for scheduling. A red rectangular box highlights this specific 15-minute window.</p>

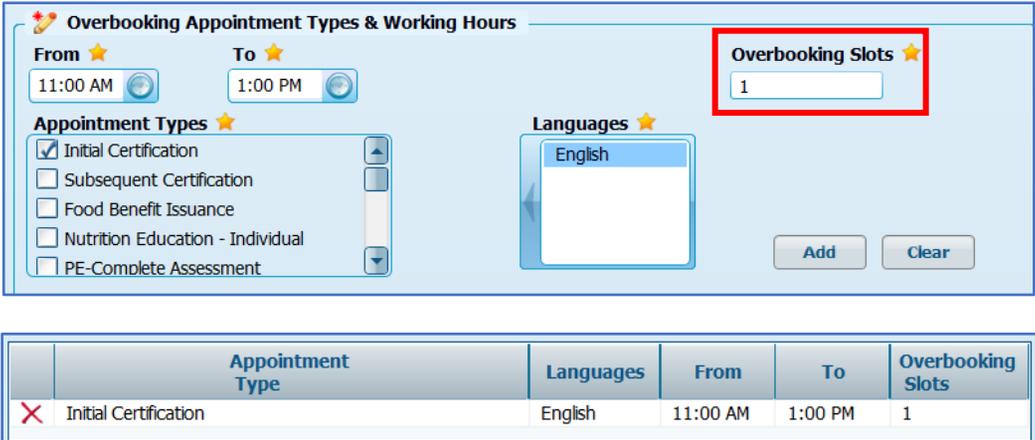
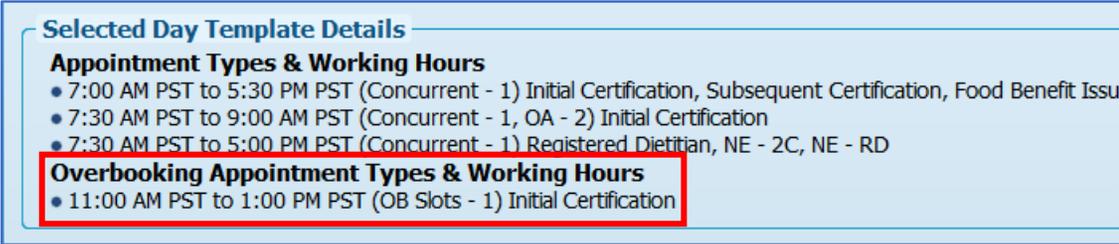
Open Access (OA) Scheduling (continued)

Steps	Cascades Screen
<p>Notes</p> <p>An agency can change the number of days for the open access window, and it will take effect immediately, and staff don't need to apply a new template.</p>	 <p>The screenshot shows the Cascades Screen configuration for Open Access Scheduling. It includes the following elements:</p> <ul style="list-style-type: none"><input type="checkbox"/> Offline Clinic<input type="checkbox"/> Check-in alert <input type="text"/> (Days)<input checked="" type="checkbox"/> Open Access Window <input type="text" value="10"/> (Days)Open Access Operation Defined By ★<input checked="" type="radio"/> Number of Open Access Slots<input type="radio"/> Percentage of Open Access

Overbooking Slots (Appointments) Option

The overbooking feature will allow staff to schedule additional participants for the selected appointment types and appointment times selected in calendar templates.

Staff first determine the days and time the clinic has the most no-show appointments (for example the first few appointments on Mondays and Fridays), then create or modify calendar templates to add desired overbooking slots.

Steps	Cascades Screen										
<p>Step 1</p> <ul style="list-style-type: none"> Go to Scheduling>Templates>Number-based appointment templates. Select an existing template to modify or create a new template and add the overbooking times and appointment type, Initial Certification, and save. 	 <table border="1" data-bbox="787 886 1822 993"> <thead> <tr> <th>Appointment Type</th> <th>Languages</th> <th>From</th> <th>To</th> <th>Overbooking Slots</th> </tr> </thead> <tbody> <tr> <td>✗ Initial Certification</td> <td>English</td> <td>11:00 AM</td> <td>1:00 PM</td> <td>1</td> </tr> </tbody> </table>	Appointment Type	Languages	From	To	Overbooking Slots	✗ Initial Certification	English	11:00 AM	1:00 PM	1
Appointment Type	Languages	From	To	Overbooking Slots							
✗ Initial Certification	English	11:00 AM	1:00 PM	1							
<p>Step 2</p> <ul style="list-style-type: none"> To apply templates, go to Scheduling>Templates>Apply templates. When a template is selected in the process, the overbooking details will be listed in the Selected Day Template Details section. 	 <p>Overbooking Appointment Types & Working Hours</p> <ul style="list-style-type: none"> 11:00 AM PST to 1:00 PM PST (OB Slots - 1) Initial Certification 										

Overbooking Slots Option (continued)

Steps	Cascades Screen
<p>Notes</p> <p>After staff apply the template, the Overbooking information <u>will not show up</u> in the history view of the Applied Template Details.</p>	<div data-bbox="793 332 1797 493" style="border: 1px solid #add8e6; padding: 5px;"> <p>Applied Template Details: 7:00 AM PST to 5:30 PM PST (Concurrent - 1) Initial Certification, Subsequent Certification, Food Benefit Issuance, Nutrition Education - Individual, PE-Complete Assessment, Mid Cert HA, BFPC, Anthro/Lab 7:30 AM PST to 9:00 AM PST (Concurrent - 1, OA - 2) Initial Certification 7:30 AM PST to 5:00 PM PST (Concurrent - 1) Registered Dietitian, NE - 2C, NE - RD</p> </div>
<p>Overbooking appointment slots <u>will show up</u> on the Clinic Master Calendar after staff schedule all the regular appointment slots.</p> <p>The overbooking appointment slots will appear and become available on the Clinic Master Calendar, indicated by a green and yellow slot.</p>	<p>The screenshot shows a grid with columns for 'IC' and a third column. The 'IC' column has a green slot. The third column has a yellow slot highlighted with a red border. Below the grid, there are labels 'JES ARC' and 'Subsequent Certification'.</p>



Presume Eligible for Pregnant Participants

Federal regulations allow the option to presume pregnant applicants eligible. The purpose is to give the pregnant participant time to find a medical provider and get prenatal care and allows WIC to then use some of the health screening data from the medical provider, such as the iron test value. It also allows eligible pregnant participants to receive a maximum of two months of food benefits, unless the participant was missing proofs.

The local agency:

1. Has the option to presume eligible pregnant participants who are income eligible.
2. Has the option to allow all staff to assign presumptive eligibility.
3. Must have a policy describing any exceptions if the local agency doesn't presume eligible all pregnant participants.

Follow the policy “Components of the Presume Eligible Certification” in [Volume 1, Chapter 18](#).

A few reminders:

- Staff may use the birth weight and length for infants certified under 4 weeks of age.
- Staff have the option to extend the certification period by 30 days when appointments aren't available for a participant's subsequent certification. See the “30 Day Extension to the Certification Period” policy in [Volume 1, Chapter 18](#).

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