



# Cascades Staff Tool

## Understanding Appointment and Class Notifications



Your clinic will handle notifications in two different areas in Cascades—every time you schedule an appointment with a participant and once per day to manage how and when notifications will be sent to WIC families.

### What Kinds of Notifications Does Cascades Have?

Types of Appointment Notifications:

- Scheduled
- Missed
- Cancelled
- Rescheduled

Types of Notification Methods:

- Mail
- Email
- Text

Clinic staff must document the family’s choice of notification method in the **Preferred Method of Contact** field in the **Family Demographics** screen.

\*If a family chooses **Phone**, no notification will be sent since Cascades doesn’t have an auto-dialer.

\*If the family chooses **No Contact**, then no notifications will be sent.

### Language Accommodations:

Notifications are developed at the state level for each appointment type in Cascades.

- Currently, notifications are available only in English and Spanish.
- Clinic staff must document the family’s language of choice in the **Language Read** field in the **Family Demographics** screen. If a family chooses a language other than English or Spanish, the notification will be sent in English.

### Modifying Notifications When Booking or Rescheduling Appointments:

On the **Scheduling** screen in the **Quick Scheduling Results**:

➔ Uncheck the **Add to Communication Queue** box if a notification isn’t needed.

Date	Time	Appointment Type	Individual	WIC Category	Status	Comments	Assets
4/26/2019	8:30 AM to 8:45 AM	Food Benefit Issuance	CHILD PREGGY	Child	Active/Certified		+
	8:45 AM to 9:00 AM	Food Benefit Issuance	INFANT PREGGY	Infant	Active/Certified		+
	9:00 AM to 9:30 AM	Subsequent Certification	PEGGY PREGGY	Pregnant	Applicant		+

Contact Method ★  
 In Person  Add to Communication Queue



# Cascades Staff Tool

## Understanding Appointment and Class Notifications

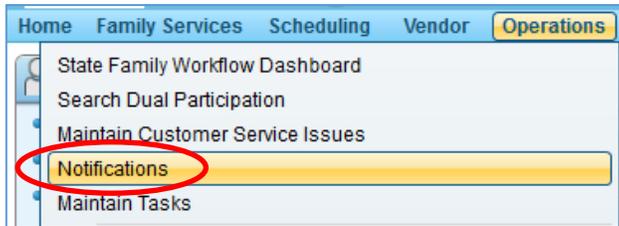


### Steps for Daily Management of Appointment Notifications:

Most clinics manage their appointment and class notifications daily, either at the end of the day or first thing in the morning.

#### Step 1: Open the Notifications screen.

→ In the menu bar, go to **Operations**, select **Notifications** in the dropdown menu.



#### Step 2: Search and view the search results.

→ Enter the desired date range in the **Search Criteria** container. → Select the **Search** button. You can sort search result columns by clicking on a column header and moving the mouse.

**Search Criteria**

Communication Method

Mail

E-Mail / Text

Phone

Appointment

Appointment Date

From: 4/18/2019 To: 4/18/2019

Appointment Type: [Dropdown] Appointment Status: [Dropdown]

Family

Family ID: [Text Box]

Family Last Name: [Text Box]

**Search Results**

**Appointment Communications - Search Results**

	E-mail/Text	Print	Phone	Family ID	Parent / Guardian Name	Preference	Appointment Type	Appointment Date	Appointment Status
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000247	BENEFIT EXCHANGE	E-mail	Nutrition Education - Individual	04/18/2019	Missed
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000272	MOMTWO YOVIDS	E-mail	Food Benefit Issuance	04/18/2019	Missed
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000287	EMAIL TEST	E-mail	Initial Certification	04/18/2019	Missed
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000242	PEGGY PREGGY	Text	Nutrition Education - Individual	04/18/2019	Missed
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000242	PEGGY PREGGY	Text	Food Benefit Issuance	04/18/2019	Missed
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000276	TEMPLATE WEBADD	Text	Initial Certification	04/18/2019	Missed
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000286	NOTIFICATIONS TEXT	Text	Initial Certification	04/18/2019	Missed

#### Step 3: Dealing with multiple notifications for one family.

- Participant has **more than one type** of appointment in a day
- **Two or more family members** are scheduled on the same day

Cascades sends a separate notification to each participant for each appointment. This has caused confusion and we are looking into whether we can change Cascades to send only one notification per family.

→ Determine which notice to send. For example, send only the notification for the first appointment.



# Cascades Staff Tool

## Understanding Appointment and Class Notifications



→ The appointments are in sequential order of time if you sort the notifications by Family ID. Click the Family ID header to sort by that number so that the first appointment of the day for the family is listed first and then the others can be deleted.

### Step 4: Delete any notices you don't want to send or print.

→ Select the red X to delete some of the family's notifications.

For example, send only notifications for the first appointment time for the whole family.

Search Results					
Appointment Communications - Search Results					
	E-mail/Text	Print	Phone	Family ID	Parent / Guardian Name
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000247	BENEFIT EXCHANGE
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000272	MOMTWO YOVITS
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000287	EMAIL TEST
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000242	PEGGY PREGGY
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000242	PEGGY PREGGY
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000276	TEMPLATE WEBADD
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000286	NOTIFICATIONS TEXT

### Step 5: Do you want to send notification now or with the nightly batch process?

→ If the Email/Text boxes are left checked Email and Text notifications will be sent immediately.

→ Uncheck Email/Text box if you want the nightly batch process to send notifications for those participants.

**Search Criteria**

**Communication Method**  Mail  
 E-Mail / Text  
 Phone

**Appointment**   
**Appointment Date**  
 From: 9/17/2021 To: 9/17/2021  
**Appointment Type**  **Appointment Status**

**Family**   
**Family ID**   
**Family Last Name**

Search Clear Criteria

**Search Results** Total Items: 9

**Appointment Communications - Search Results**

	E-mail/Text	Print	Phone	Family ID	Parent / Guardian Name	Preference	Appointment Type	Appointment Date	Appointment Status	Attachments
X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LF13602785	Ver I. Gar	Mail	NE - 2C	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF11227121	Ste M. Co	Mail	Subsequent Certification	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF11227121	Ste M. Co	Mail	Subsequent Certification	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF13601619	Jes Val	Mail	NE - 2C	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF13601619	Jes Val	Mail	NE - 2C	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF13601619	Jes Val	Mail	NE - 2C	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF13603427	Bre L. Bot	Mail	Subsequent Certification	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF13603427	Bre L. Bot	Mail	Food Benefit Issuance	09/17/2021	Scheduled	
X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LF11227781	May L. Mir	Mail	NE - 2C	09/17/2021	Scheduled	

Sent-By (E-mail) System Default **Print Mailing Labels?** Yes Attachments Preview Communication Complete Communications Cancel



# Cascades Staff Tool

## Understanding Appointment and Class Notifications



- Email/Text: The nightly process automatically sends notifications:
- Emails 3 days in advance of booked appointments
  - Texts 2 days in advance of booked appointments

- Print: There is no nightly batch process for Print notifications.
- Print is managed manually in the **Notifications** screen.
  - Complete scheduled appointments in advance to allow for clinic and postal service processing.

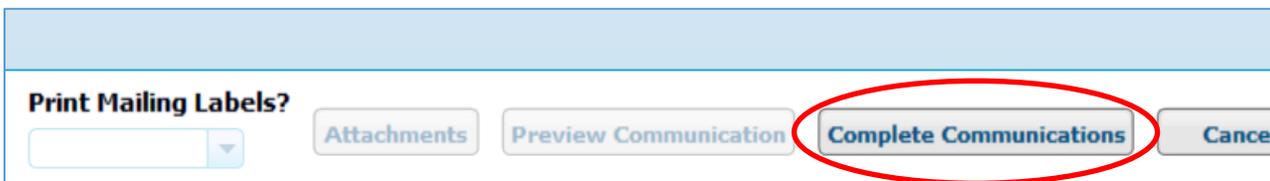
### **Step 6: Select the Complete Communications button.**

Once you select the **Complete Communications** button at the bottom of the screen:

- ➔ Mail notifications will print. Staff can choose to print mailing labels for Mail notifications.
- ➔ Email and Text notifications with check-marked boxes will send.

\*If a family chose **Phone**, no notification will be sent since Cascades doesn't have an auto-dialer.

\*If the family chose **No Contact**, then no notifications will be sent.



- After notifications have been sent, they no longer appear on the **Notifications** screen in **Search Results**.
- You can view sent notifications in the family's **Journal of Transactions** screen.



# Cascades Staff Tool

## Understanding Appointment and Class Notifications



### About Missed Appointments:

- Missed appointment reminders may not show in **Search Results** until the following morning. Mailed notices for missed appointments can then be printed.
- Email and Text messages will be sent by the nightly process on the day of the missed appointment.

### About Rescheduled Appointments:

- If **Search Results** show a scheduled appointment that is also rescheduled, the queue only sends a notification for the rescheduled appointment, not both.

### About Cancelled Appointments:

- When an appointment has been cancelled, Cascades won't send a scheduled and cancelled notification. It will send the cancelled notification only, even if they both appear in **Search Results**.

### Previewing Notifications:

To preview a notification:

- ➔ Highlight the row. ➔ Select the **Preview Communication** button.

▼ Search Results

▼ Appointment Communications - Search Results

	E-mail/Text	Print	Phone	Family ID	Parent / Guardian Name	Preference	Appointment Type	Appointment Date	Appointment Status	Attachments
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000247	BENEFIT EXCHANGE	E-mail	Nutrition Education - Individual	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000272	MOMTWO YOYVITS	E-mail	Food Benefit Issuance	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000287	EMAIL TEST	E-mail	Initial Certification	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LF11931431	Azala Acosta	E-mail	Subsequent Certification	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000242	PEGGY PREGGY	Text	Nutrition Education - Individual	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000242	PEGGY PREGGY	Text	Food Benefit Issuance	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000276	TEMPLATE WEBADD	Text	Initial Certification	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F00100000286	NOTIFICATIONS TEXT	Text	Initial Certification	04/18/2019	Missed	
✗	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LF11931436	Elda Garza	Text	Subsequent Certification	04/18/2019	Missed	

Sent-By (E-mail)  Print Mailing Labels?  Attachments

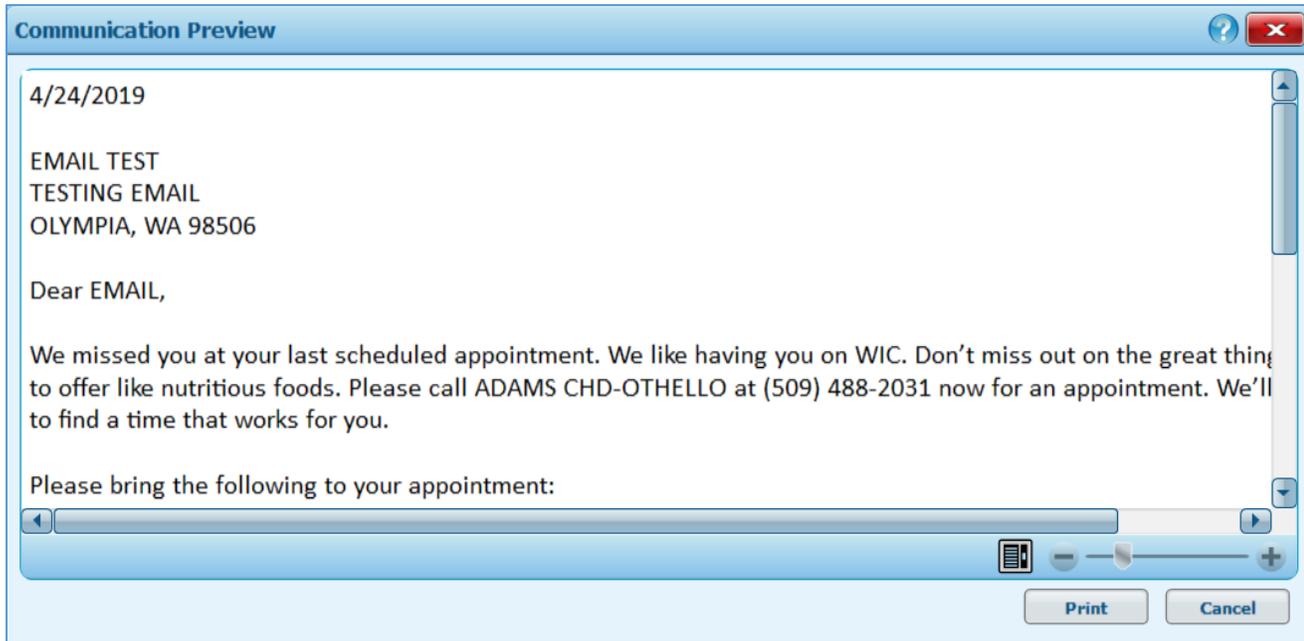


# Cascades Staff Tool

## Understanding Appointment and Class Notifications



Example of Notification Preview:



### Sample Scheduled Appointment Reminder, Text (limit is 120 characters):

Your WIC appt is on <Appointment Date> @ <Appointment Time>. Please call <Clinic Phone Number> if you need to reschedule. <Clinic Name>

**Note:** Cascades doesn't support sending texts to Apps like WhatsApp.

This institution is an equal opportunity provider.  
Washington WIC doesn't discriminate.

To request this document in another format, call 1-800-841-1410.  
Deaf or hard of hearing customers, please call 711 (Washington Relay)  
or email [wic@doh.wa.gov](mailto:wic@doh.wa.gov).



DOH 961-1190 May 2023