



Scheduling



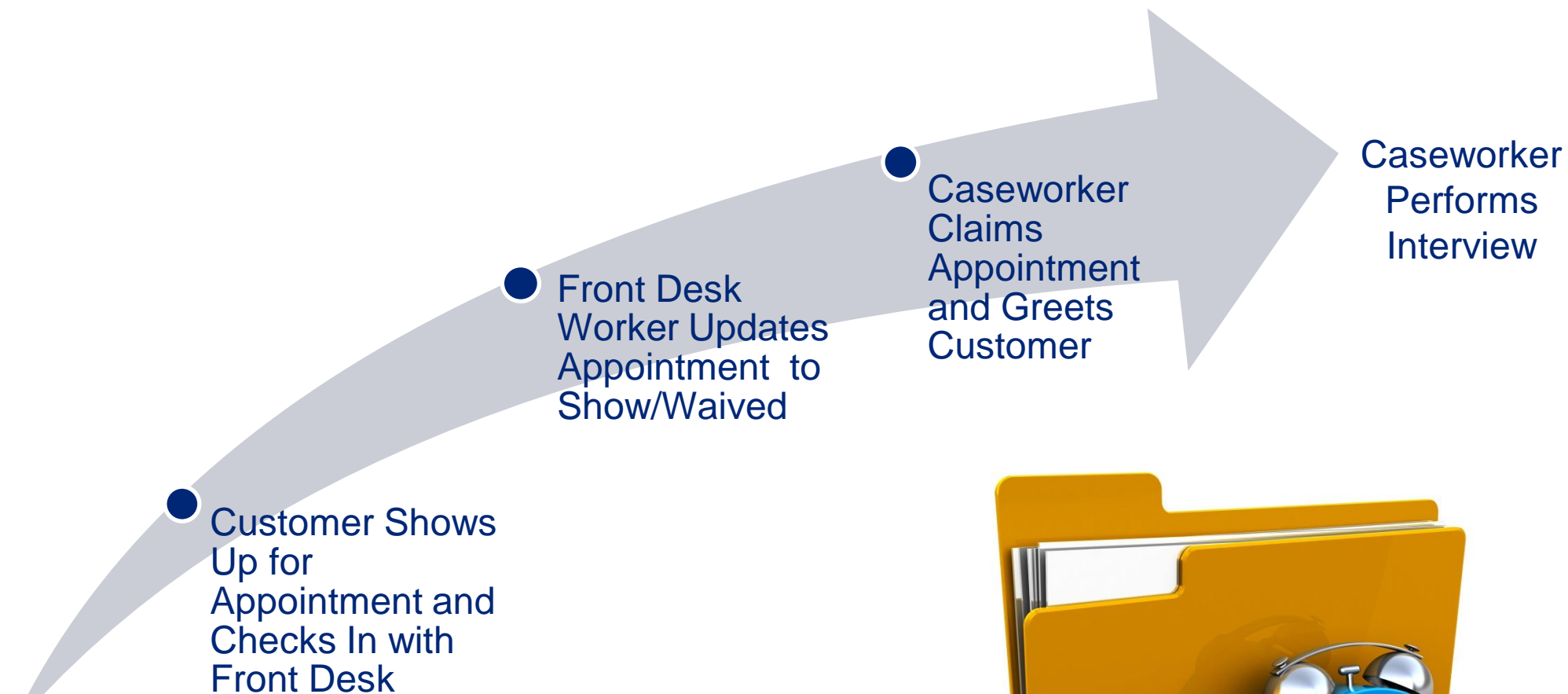
Module Learning Objectives:

After completing this Module, you will be able to:

- Know how to schedule an appointment through the **View Maintain Office Schedule** page
- Understand how to reschedule an appointment in IES
- Understand the **Office Schedule** and how to reschedule when more appointments are booked during a **Time Slot** than appointments available
- Cancel an interview
- View appointment history



Scheduling in IES Process Flow for Front Desk, PAEAs and Caseworkers



Your Manager Has Already...

- Setup the **Default Office Schedule** for your office, which dictates how many appointments can be scheduled throughout the day

Monday Tuesday Wednesday Thursday Friday Saturday

Default Office Schedule

Default Office Schedule Effective as of 08/15/2014

	15 mins	30 mins	45 mins	1 hour	Phone(2 hours)	
08:00-08:15	0	5	0	0		08:00-08:15
08:15-08:30	0					08:15-08:30
08:30-08:45	0	5		0		08:30-08:45
08:45-09:00	2				10	08:45-09:00
09:00-09:15	2		0			09:00-09:15
09:15-09:30	0	5				09:15-09:30
09:30-09:45	0			0		09:30-09:45
09:45-10:00	0	5	0			09:45-10:00
10:00-10:15	2					10:00-10:15
10:15-10:30	0	5				10:15-10:30
10:30-10:45	0		0	0		10:30-10:45
10:45-11:00	0	5			10	10:45-11:00
11:00-11:15	0					11:00-11:15
11:15-11:30	0	5	0			11:15-11:30
11:30-11:45	0			0		11:30-11:45
11:45-12:00	0	5				11:45-12:00
12:00-12:15	0		0			12:00-12:15
12:15-12:30	0	0				12:15-12:30
12:30-12:45	0			0		12:30-12:45
12:45-01:00	0	0				12:45-01:00
01:00-01:15	0					01:00-01:15
01:15-01:30	0	0				01:15-01:30
01:30-01:45	0		2	0		01:30-01:45
01:45-02:00	0	0			10	01:45-02:00
02:00-02:15	0					02:00-02:15
02:15-02:30	0	0	2	0		02:15-02:30
02:30-02:45	0			0		02:30-02:45
02:45-03:00	0					02:45-03:00
03:00-03:15	0		2			03:00-03:15
03:15-03:30	0	0				03:15-03:30
03:30-03:45	0			0		03:30-03:45
03:45-04:00	0		2			03:45-04:00
04:00-04:15	0				10	04:00-04:15
04:15-04:30	0	0				04:15-04:30
04:30-04:45	0		2	0		04:30-04:45
04:45-05:00	0					04:45-05:00
Total	0	40	10	0	40	Total
Day Total	96					

Effective Date: 08 / 15 / 2014

Monday Tuesday Wednesday Thursday Friday Saturday

Default Office Schedule

Default Office Schedule Effective as of 08/15/2014

	15 mins	30 mins	45 mins	1 hour	Phone(2 hours)	
08:00-08:15	0	5	0	0		08:00-08:15
08:15-08:30	0					08:15-08:30
08:30-08:45	0	5		0		08:30-08:45
08:45-09:00	2				10	08:45-09:00
09:00-09:15	2		0			09:00-09:15
09:15-09:30	0	5				09:15-09:30
09:30-09:45	0			0		09:30-09:45
09:45-10:00	0	5	0			09:45-10:00
04:00-04:15	0					04:00-04:15
04:15-04:30	0	0				04:15-04:30
04:30-04:45	0		2	0		04:30-04:45
04:45-05:00	0	0				04:45-05:00
Total	6	40	10	0	40	Total
Day Total	96					

Effective Date: 08 / 15 / 2014

Intake Virtual Worker's Calendar

To accommodate the task-based business process...

- Appointments in IES are scheduled on the Intake Virtual Worker's calendar, which is called the **Office Schedule**
- Rather than schedule appointments on an actual Worker's calendar, all appointments are scheduled to the Intake Virtual Worker's calendar
- Customers check-in at the front desk when they arrive for their appointment
- Actual Workers claim appointments in IES on the scheduled day



Office Schedule Page



Office Schedule

Office Schedule

← AUG 2014 →

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointments for: 8/29/2014 [Refresh](#) [Schedule Appointment](#)

	15 mins		30 mins		45 mins		1 hour		Phone(2 hours)		
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
08:00-08:15	0	0(0)	1	2(0)	0	0(0)	5	0(0)	10	0(0)	08:00-08:15
08:15-08:30	0	0(0)									08:15-08:30
08:30-08:45	0	0(0)	5	3(0)							08:30-08:45
08:45-09:00	0	0(0)									08:45-09:00
09:00-09:15	0	0(0)	3	3(0)	0	0(0)					09:00-09:15
09:15-09:30	0	0(0)					0	0(0)			09:15-09:30
09:30-09:45	0	0(0)	1	0(0)	0	0(0)					09:30-09:45
09:45-10:00	0	0(0)									09:45-10:00
10:00-10:15	0	0(0)	5	0(0)							10:00-10:15
10:15-10:30	0	0(0)					0	0(0)			10:15-10:30
10:30-10:45	0	0(0)	5	0(0)	0	0(0)					10:30-10:45
10:45-11:00	0	0(0)							10	0(0)	10:45-11:00
11:00-11:15	0	0(0)	5	0(0)	0	0(0)					11:00-11:15
11:15-11:30	0	0(0)					0	0(0)			11:15-11:30
11:30-11:45	0	0(0)	5	0(0)							11:30-11:45
11:45-12:00	0	0(0)									11:45-12:00
12:00-12:15	0	0(0)	0	0(0)	0	0(0)					12:00-12:15
12:15-12:30	0	0(0)									12:15-12:30
12:30-12:45	0	0(0)	0	0(0)	2	0(0)	0	0(0)			12:30-12:45
12:45-01:00	0	0(0)									12:45-01:00
01:00-01:15	0	0(0)	0	0(0)							01:00-01:15
01:15-01:30	0	0(0)			2	0(0)	0	0(0)			01:15-01:30
01:30-01:45	0	0(0)	0	0(0)							01:30-01:45
01:45-02:00	0	0(0)							10	0(0)	01:45-02:00
02:00-02:15	0	0(0)	0	0(0)	2	0(0)					02:00-02:15
02:15-02:30	0	0(0)					0	0(0)			02:15-02:30
02:30-02:45	0	0(0)	0	0(0)							02:30-02:45
02:45-03:00	0	0(0)									02:45-03:00
03:00-03:15	0	0(0)	0	0(0)	2	0(0)					03:00-03:15
03:15-03:30	0	0(0)					0	0(0)			03:15-03:30
03:30-03:45	0	0(0)	0	0(0)	2	0(0)					03:30-03:45
03:45-04:00	0	0(0)							10	0(0)	03:45-04:00
04:00-04:15	0	0(0)	0	0(0)							04:00-04:15
04:15-04:30	0	0(0)					0	0(0)			04:15-04:30
04:30-04:45	0	0(0)	0	0(0)	2	0(0)					04:30-04:45
04:45-05:00	0	0(0)									04:45-05:00
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
Total	0	0(0)	30	8(0)	12	0(0)	5	0(0)	40	0(0)	Total
Day Total	87		8(0)								

[Refresh](#) [Schedule Appointment](#)

Office Schedule Page



Office Schedule

Office Schedule ? * [document icon] [refresh icon] [stop icon]

◀◀ AUG 2014 ▶▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointments for: 8/29/2014 [Refresh](#) [Schedule Appointment](#)

	15 mins		30 mins		45 mins		1 hour		Phone(2 hours)		
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
08:00-08:15	0	0(0)	1	2(0)	0	0(0)		0(0)		0(0)	08:00-08:15
08:15-08:30	0	0(0)					5	0(0)			08:15-08:30
08:30-08:45	0	0(0)	5	3(0)					10		08:30-08:45
08:45-09:00	0	0(0)									08:45-09:00
09:00-09:15	0	0(0)	3	3(0)							09:00-09:15
09:15-09:30	0	0(0)					0	0(0)			09:15-09:30
09:30-09:45	0	0(0)	1	0(0)							09:30-09:45
09:45-10:00	0	0(0)									09:45-10:00
10:00-10:15	0	0(0)	5	0(0)							10:00-10:15
10:15-10:30	0	0(0)					0	0(0)			10:15-10:30
10:30-10:45	0	0(0)	5	0(0)							10:30-10:45
10:45-11:00	0	0(0)							10		10:45-11:00
11:00-11:15	0	0(0)	5	0(0)							11:00-11:15
11:15-11:30	0	0(0)					0	0(0)			11:15-11:30
11:30-11:45	0	0(0)	5	0(0)							11:30-11:45
11:45-12:00	0	0(0)									11:45-12:00

Office Schedule Page



03:30-03:45	0	0(0)	0	0(0)	2	0(0)	0	0(0)	10	0(0)	03:30-03:45
03:45-04:00	0	0(0)	0	0(0)	2	0(0)	0	0(0)	10	0(0)	03:45-04:00
04:00-04:15	0	0(0)	0	0(0)	2	0(0)	0	0(0)	10	0(0)	04:00-04:15
04:15-04:30	0	0(0)	0	0(0)	2	0(0)	0	0(0)	10	0(0)	04:15-04:30
04:30-04:45	0	0(0)	0	0(0)	2	0(0)	0	0(0)	10	0(0)	04:30-04:45
04:45-05:00	0	0(0)	0	0(0)	2	0(0)	0	0(0)	10	0(0)	04:45-05:00
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
Total	0	0(0)	30	8(0)	12	0(0)	5	0(0)	40	0(0)	Total
Day Total	87		8(0)								

Scheduling Appointments in IES Features

- Workers can schedule new appointments and reschedule/edit existing appointments
- Workers review the **Office Schedule** on the Intake Virtual Worker's calendar for a given day to determine available **Time Slots** before scheduling an appointment
- There are two **Appointment Types** for scheduling appointments: *Application* and *Other*. Most often, the **Appointment Type** will be *Application*
- Only one *Application* **Appointment Type** can be scheduled per application or case
- All appointments must be associated with an IES application or case
- IES will automatically assign appointments to the Intake Virtual Worker
- Multiple staff have the ability to schedule appointments simultaneously from the **Office Schedule**



Appointment Lengths and Program Types







Appointment Length	What type of programs should this Appointment Length be used for?
15 minutes	None - not recommended to be used at this time. This may be used for certain types of service coordination appointments in IES Phase 2
30 minutes	All SNAP-only applications
45 minutes	All SNAP + Medical appointments as well as ineligible TANF requests
1 hour	AABD and Potential TANF cash applications (which include children and/or pregnant woman) For example, if a customer requests Cash but does not have children or is not pregnant, they should not be scheduled for the 1 hour Time Slot.
Phone (2 hours)	Option of using this for phone interviews (Note: only phone interviews can be scheduled in this slot)

Scheduling - Overview



Scheduling Interviews in IES Process

Scheduling Interviews Process Steps	IES Navigation
 <p>Step 1: Register the Application</p> <p>Register the application. The Scheduling process begins on the Application Registration – Summary page</p>	<p>Application Registration > Register an Application</p>
 <p>Step 2: Assign & Submit the Application</p> <p>Indicate an appointment needs to be scheduled, assign the application to the Intake Virtual Worker and submit the application</p>	<p>Occurs within Application Registration</p>
 <p>Step 3: Review the Office Schedule</p> <p>Select a date and Time Slot to schedule the appointment on the Office Schedule</p>	<p>Occurs within Application Registration</p>
 <p>Step 4: Schedule the Appointment</p> <p>Enter the appointment details and schedule the appointment</p>	<p>Occurs within Application Registration</p>

NEXT STOP

