Appointment Scheduling Guide

How to use Q-Flow's scheduling interfaces for scheduling appointments, creating follow-up appointments, and rescheduling existing appointments.

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Creating a new appointment

Q-Flow offers an Appointment Wizard that's optimized for creating new appointments in a few short steps, which will be described below. There are additional Q-Flow interfaces for scheduling appointments, such as the Appointment page and the Scheduling Console, both make use of parameters described below.

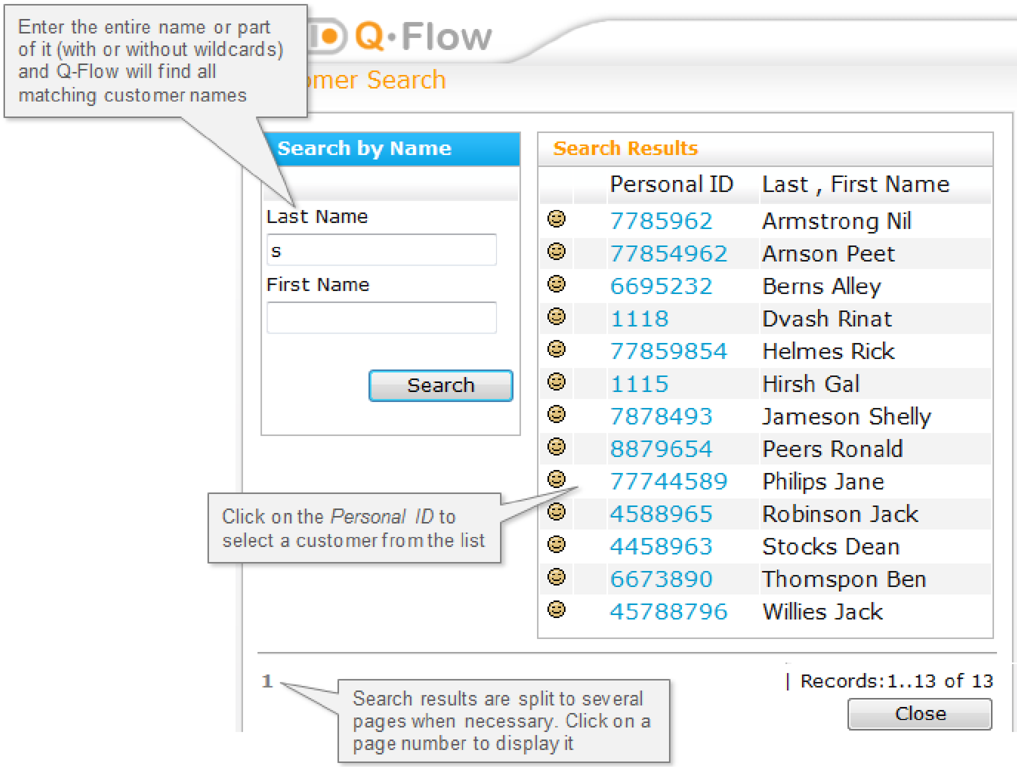
The Appointment page is accessed by clicking New + on the Calendar page (*Tools > Calendar*). The Scheduling Console is also available from the Tools menu.
For the steps below start by opening the appointment wizard (*Tools > Appointment Wizard*).

Step 1. Identifying the customer

To create a new appointment you should first identify the customer. There are a number of ways to do so:

- If you know the customer's **Personal ID** enter it and the **ID Type**.
- If you know all or part of the customer's first or last name, click **Find** in order to open the **Customer Search** pop-up, where you can look for customer based on these details.
- Create a new customer record by clicking **New**.
- Click **Reload Last** to select the same customer you most recently selected anywhere throughout the Q-Flow system.

Once you identified the customer, click the **Select** button or **Change Customer** in order to clear your selection. Click the **Next** button to continue to finding a vacancy for the appointment.



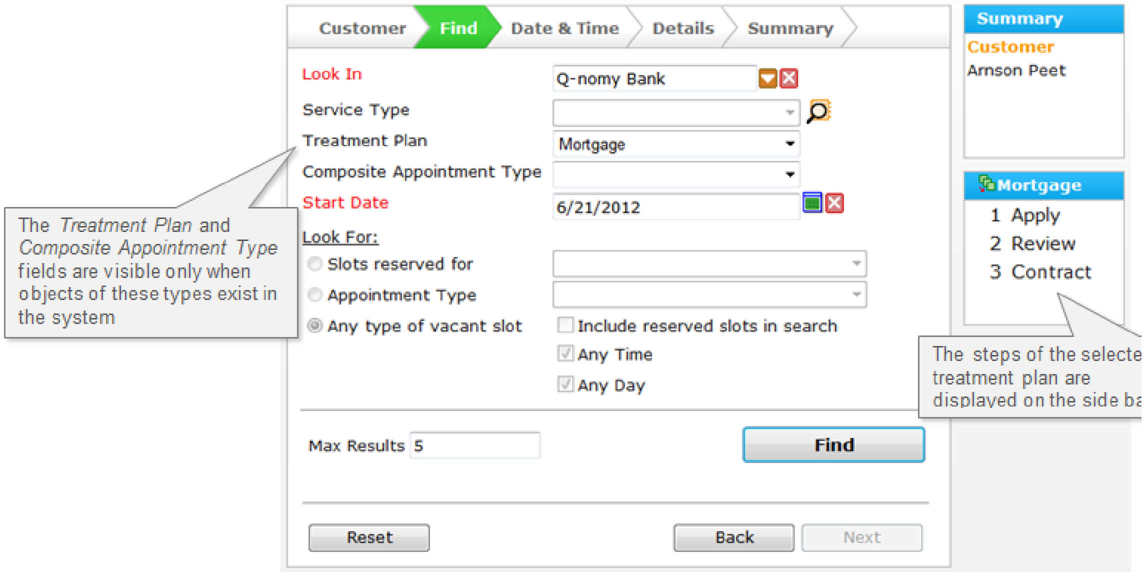
Tip

You may click the **Reset** button at any point in the process to reset all selections in the wizard and start again from the first step. The **Back** button will move you a step back in the process while keeping your previous selections.

Step 2. Finding a calendar

To define search criteria for a matching vacant slot:

1. From the **Look In** drop down, select a unit or a specific service. You may also select one of the following:
   - The Service Type you are looking for.
   - A Composite Appointment Type (consisted of a synchronized group of services). You can read more about this option here.
   - A Treatment Plan. When you select a plan, its details are displayed on the left-hand side of the screen.

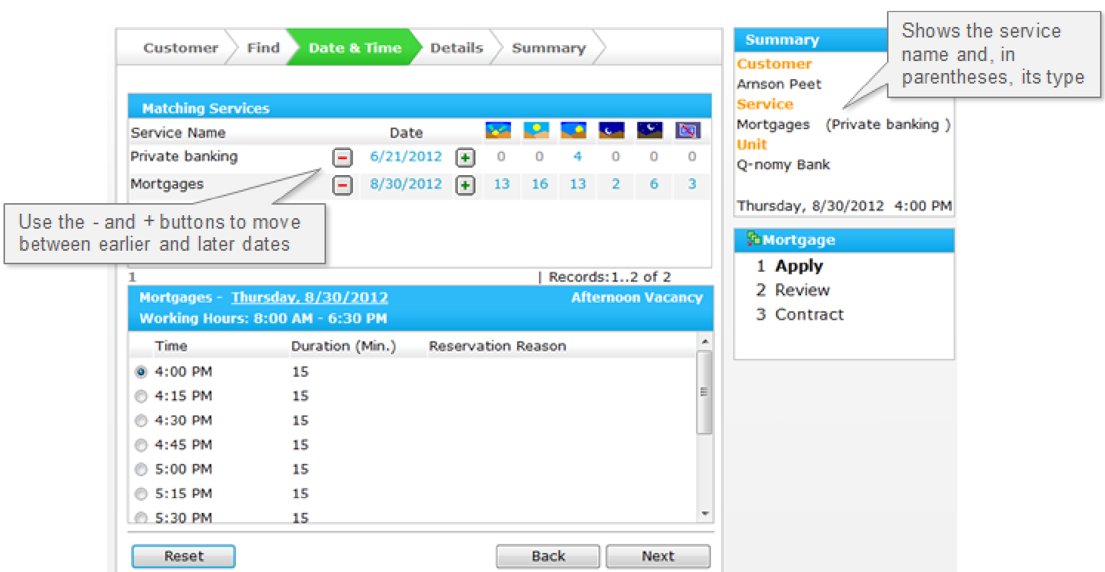


Leave the **Service Type** box empty to include all service types in the search.

2. You may enter a **Start Date**, which is the day the search for a vacancy begins.
3. When you are not using a treatment plan or a composite appointment you may choose to **Look For slots by their Slot Reservation Reason**, by **Appointment Type**, or **Any type of vacant slot** either at **Any Time of the day** or by one or more selected **Day Period**.
4. You may change the number of maximum results displayed. Once the search criterion is set, click the **Find** button.

Step 3. Selecting a vacant slot

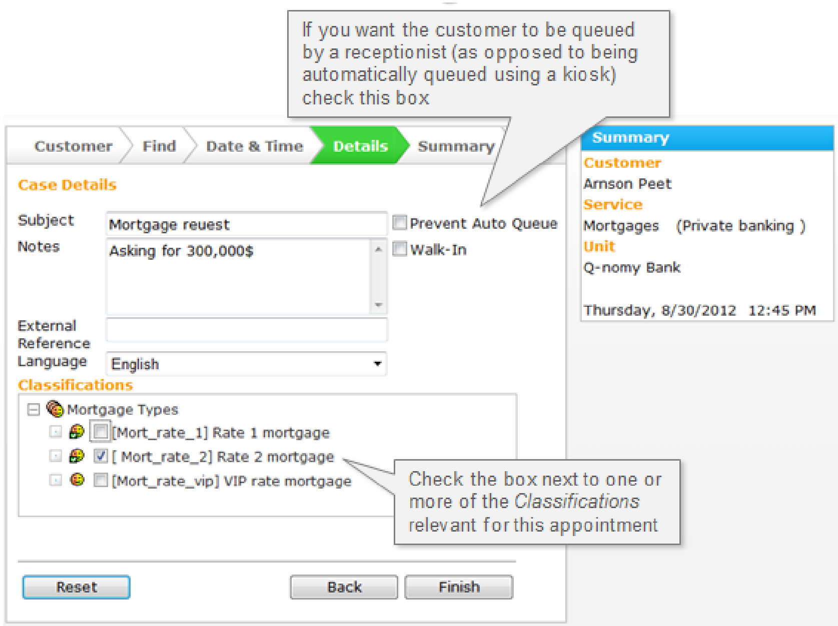
Q-Flow will now show all the services and resources found based on the search criteria set in the previous step.



Use the **+** and **-** buttons to browse through available dates in each of the available services and click on the date or on one of the numbers of vacant slots on a day period in order to display the list of available slots. Select a slot by clicking the radio button on its side, and click the **Next** button to continue to filling in the case details.

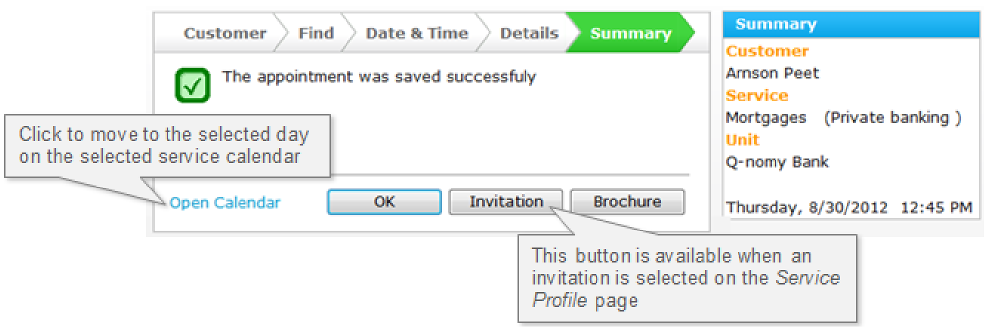
Step 4. Appointment details

Now you may enter the case details such as **Subject**, description, and **Language**. If the appointment is set for a walk-in customer, check the appropriate box to indicate this fact. You may also select classifications that match this appointment.



Click the **Finish** button to complete the process and view the appointment summary.

Step 5. Summary



You may now move to the calendar, print an invitation or a brochure for the customer, or click **OK** to reset the wizard and start again from the first step.

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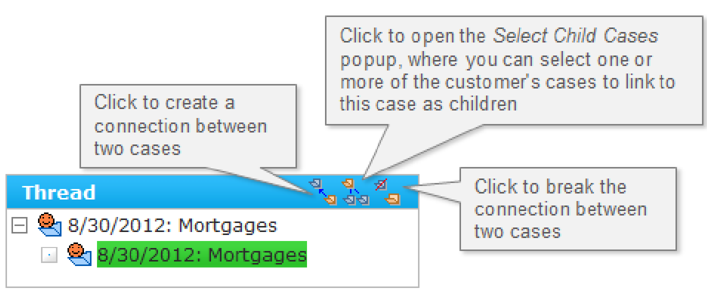
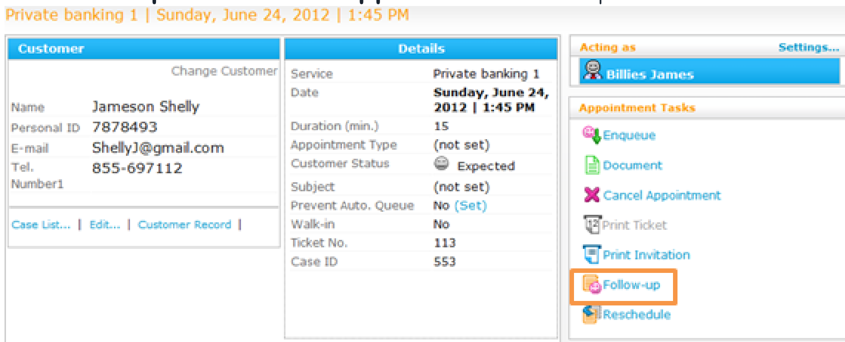
Scheduling a follow-up appointment

This option, accessible from the Appointment and Case forms, helps you arrange a continuance appointment for the customer. The fact this is a follow-up appointment will be evident in the Case form **Thread** panel.



Follow these steps to create a follow-up appointment from the calendar.

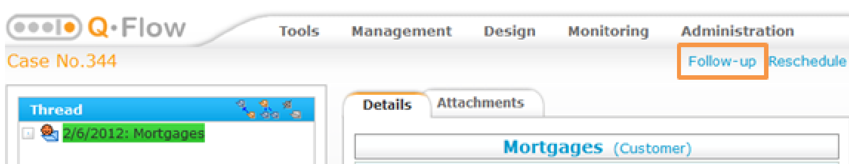
1. Go to **Tools > Calendar**.
2. Select the appointment for which you want to create a follow-up and click on its case number in order to open its appointment form.
3. Click the **Follow-up** button on the **Appointment Tasks** panel.



   This will copy the customer details to a new appointment form and move you to the **Date & Time** tab of the Appointment Wizard where you may now continue scheduling the appointment from step 3 above.
4. If the suggested services or date in the **Date & Time** tab do not fit your requirements, you may click on **Back** and redefine the search criteria.

You may also create a follow-up appointment from the Case form by following these steps.

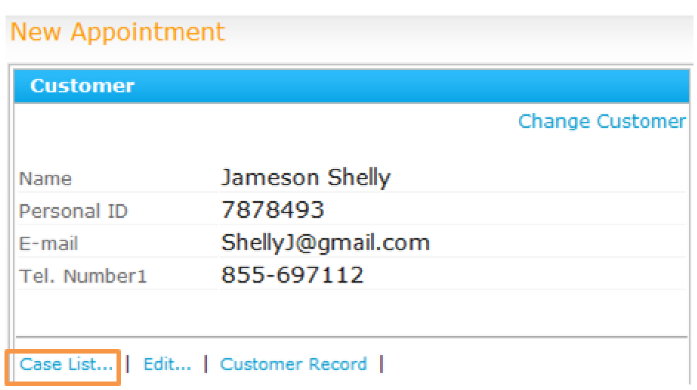
1. Open the case form, either via the **Tools > Case Search** page or otherwise.
2. Click the **Follow-up** button to copy the customer details to a new appointment form and move you to the **Date & Time** tab of the Appointment Wizard to continue as explained on step 3 above.



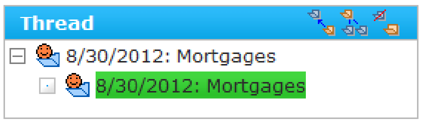
Defining a new appointment as a follow up

Follow these steps in order to define a new appointment you are currently creating as a follow up to a past appointment.

1. While creating the new appointment, select a customer (as explained on step 1 above) and then click on **Case List** in order to see the his or her case history.



2. You may **Filter** the cases shown on the **Customer Case List** popup by the time they were opened.
3. Select a case from the list to be the parent of the new case you are opening and click on its number.
4. On the Thread panel, click the button to open the **Select Child Cases** popup.
5. Check the box next to one or more cases you want this case to parent.
6. The **Thread** panel will now reflect your action.



7. You may cancel the connection between the cases at any time by selecting the child case on the **Thread** panel and clicking the button.

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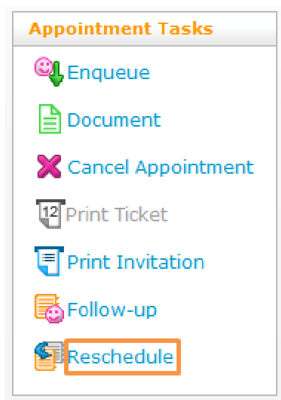
Rescheduling an appointment

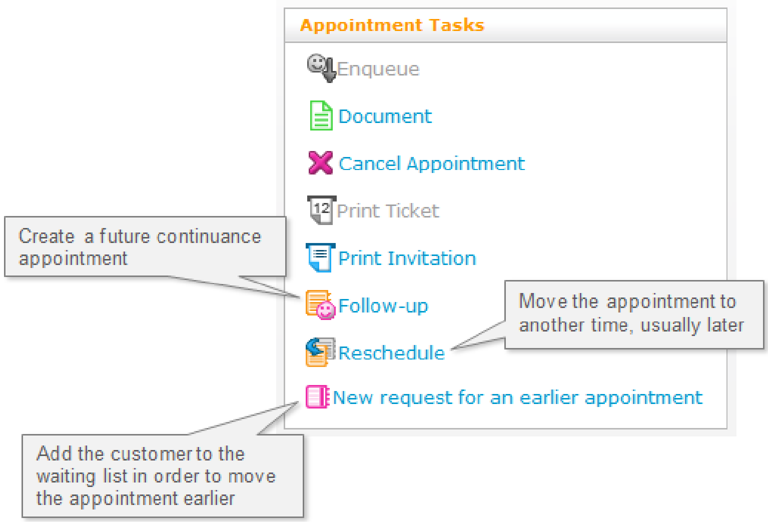
This option helps you move an appointment to a new time and date, or to place it on another service's schedule.
Follow these steps in order to reschedule an appointment.

1. Go to **Tools > Calendar** and select the appointment you want to reschedule.
2. Click on the appointment and select **View appointment details**.
3. Click the **Reschedule** button on the **Appointment Tasks** panel.



This will open the **Date & Time** tab of the Appointment Wizard on the same date. Now you may select a new date, as explained on step 3 above.

Another option, available on the Appointment form, is clicking **New request for an earlier appointment** in order to create a new Appointment Request in case an earlier date becomes available. This option is not available for today's appointments.



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Communication panel

When available, the Communication panel displays notifications sent to customers, including notification attachments. From the Communication panel you can manually issue notifications and view the delivery status of notifications sent to the selected customer. For more information, read the Communication Panel Guide.

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The Acting as panel

This panel, available on the Calendar page, lists the usernames and status of the users the agent may act on behalf. You can read about it on this article.

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See also

- Refer to this article to learn how to schedule an appointment for a customer group
- More information on standards used throughout the Q-Flow system.
- More information on the calendar.
- More information on the waiting list.
- More information on treatment plans.
- More information on scheduling composite appointments.

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