# Building the Clinic Calendar for the First Time

## Step 1 – Appointment Types

Define different types of appointments specific to your agency. (Examples: New Pregnant, Postpartum BF + Infant, VOC, etc.)

| **Description****(50 characters)** | **Short Description****(10 characters)** | **Reminder Interval\*** | **Duration**  |
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System-defined appointment types include:

* INITIAL CERTIFICATION
* SUBSEQUENT CERTIFICATION
* MID CERTIFICATION
* INDIVIDUAL NUTRITION EDUCATION/CHECK PICK-UP
* HIGH RISK FOLLOW-UP

\*REMINDER INTERVAL: A required field that indicates the number of days prior to a scheduled appointment that an automated reminder e-mail can be sent. The default for the system-defined appointments is 7 days and cannot be changed. Enter **0** if **NOT** using the e-mail feature. More information is available at:

<http://www.health.state.mn.us/divs/fh/wic/localagency/infosystem/newsysplan/projplan/memos/bcc011211.pdf>

## STEP 2 – Resources

Define your local agency staff.

**NOTE!** You can use generic descriptions (ex: CPA01, CPA2, RD1, etc.) or staff names if appointments are scheduled for specific staff.

| **Resources** |  **Resources** | **Resources** |
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## STEP 3 – Toggle Day as Holiday

Define your holidays.

| **Date** | **Holiday** |
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## Step 4 – Define Clinic to Build Calendar for

Clinic Name:

## Step 5 – Define Month/Year to Build Calendar for

* Apply From:
* Apply To:

**Reminder!** If the business days, hours and resources vary a lot each month, you may want to build your calendar one month at a time. If there are small discrepancies from month to month, you may want to build the calendar for multiple months at a time and modify the calendar as necessary.

## Step 6 – Define Business Days and Business Hours

**NOTE!** The clinic calendar is based on “WIC weeks” which means the calendar is read vertically instead of horizontally. For example, if the 1st is a Wednesday then the first Wednesday will come before the first Monday, which would be the 6th.

**Business Days** should include any days your clinic could potentially have appointments.

**Business Hours** should be broad and include the duration of the last appointment (ex: if the last 30 minute appointment is at 4:30 p.m. then the hours should extend to at least 5:00 p.m.).

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
| --- | --- | --- | --- | --- | --- |
| 1 |  |  |  |  |  |
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| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
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## Step 7 – Define Resources and Hours

Staff hours should not include lunch breaks (Example: CPA1 has a lunch break from 12:00-1:00. Therefore, her hours are 8:00 a.m. - 12:00 p.m. and 1:00 p.m. - 5:00 p.m.)

Resource:

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
| --- | --- | --- | --- | --- | --- |
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Resource:

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
| --- | --- | --- | --- | --- | --- |
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Resource:

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
| --- | --- | --- | --- | --- | --- |
| 1 |  |  |  |  |  |
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Resource:

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
| --- | --- | --- | --- | --- | --- |
| 1 |  |  |  |  |  |
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Resource:

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
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Resource:

| WIC WEEK | Monday | Tuesday | Wednesday | Thursday | Friday |
| --- | --- | --- | --- | --- | --- |
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