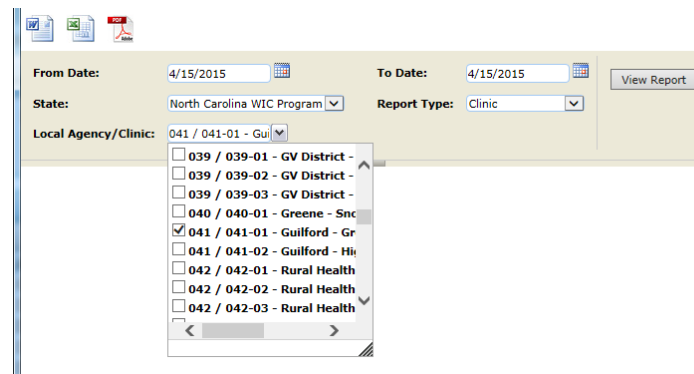
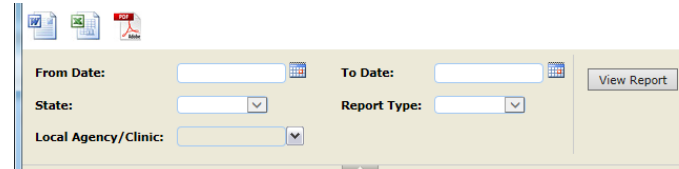


Scheduling Reports

Appointment History Report

This report lists appointment outcome information for a selected time frame and calculates a show rate if the dates are in the past.

1. From the Home screen, go to Scheduling > Reporting > Generate Reports.
2. Select Appointment History Report.
3. A new browser window opens accessing the report server.
4. Select
 - a. date(s) to cover the desired time period,
 - b. local agency or clinic report type, and
 - c. local agency or clinic(s)
5. Click View Report.



6. The report displays. Number of pages is displayed. The report is searchable.

7. To print the report, click the Adobe pdf icon.

8. A new window will open with the pdf document.

9. Print the document if desired.

Note: The bottom of the report contains summary information, including a show rate.

Note: Show rate equals the number of attended appointments minus walk-ins, divided by the number of booked appointments. Walk-in information needed to determine the show rate calculation is not available on this report, although it is included in the calculation resulting in the show rate percentage appearing on this report. Rescheduled and cancelled appointments are removed from the equation.

From Date: 4/15/2015 To Date: 4/15/2015 View Report

State: North Carolina WIC Program Report Type: Clinic

Local Agency/Clinic: 041 / 041-01 - Guil

1 of 7 Find | Next

Appointment History Report
North Carolina WIC Program
Date Range: 04/15/2015 - 04/15/2015

Report Date: 04/20/2015
Data Updated: 4/20/2015
RDD: 1.9.4.1.10

Clinic(s): 041 / 041-01 - Guilford - Greensboro

Local Agency: 041 - Guilford County								
Clinic: 041-01 - Guilford - Greensboro								
Appointment Date	Appointment Time	Family ID	Participant ID	Participant Name	Appointment Type	Appointment Outcome	Reason	Resources (if applicable)
4/15/2015	8:00 AM	F06100001468			Nutrition Education - Individual	Attended		
4/15/2015	8:00 AM	F06100001956			Food Benefit Issuance	Missed		
4/15/2015	8:00 AM	F06100002651			Subsequent Certification	Attended		
4/15/2015	8:00 AM	F06100003004			Subsequent Certification	Attended		

Appointment History Report
North Carolina WIC Program
Date Range: 04/15/2015 - 04/15/2015

Report Date: 04/20/2015
Data Updated: 4/20/2015
RDD: 1.9.4.1.10

Clinic(s): 041 / 041-01 - Guilford - Greensboro

Local Agency: 041 - Guilford County								
Clinic: 041-01 - Guilford - Greensboro								
Appointment Date	Appointment Time	Family ID	Participant ID	Participant Name	Appointment Type	Appointment Outcome	Reason	Resources (if applicable)
4/15/2015	8:00 AM	F06100001468			Nutrition Education - Individual	Attended		
4/15/2015	8:00 AM	F06100001956			Food Benefit Issuance	Missed		
4/15/2015	8:00 AM	F06100002651			Subsequent Certification	Attended		
4/15/2015	8:00 AM	F06100003004			Subsequent Certification	Attended		
4/15/2015	8:00 AM	F06100003334			Food Benefit Issuance	Attended		
4/15/2015	8:00 AM	F06100003658			Food Benefit Issuance	Missed		

Clinic Total Number of Appointments:	238
Clinic Total Number of Appointments Missed:	89
Clinic Show Rate %:	57%

Run Date/Time: 4/20/2015 4:09:02 PM Page 12 of 13

Detail Clinic Daily Appointment Schedule

This report is most commonly used to print a list of appointments for a day for a clinic.

1. From the Home screen, go to Scheduling > Reporting > Generate Reports.
2. Select Detail Clinic Daily Appointment Schedule.
3. A new browser window opens accessing the report server.
4. Select
 - a. date(s) to cover the desired time period,
 - b. local agency or clinic report type, and
 - c. local agency or clinic(s)
5. Click View Report.



From Date: To Date:

State: Report Type:

Local Agency/Clinic:

View Report

From Date: 4/15/2015 To Date: 4/15/2015

State: North Carolina WIC Program Report Type: Clinic

Local Agency/Clinic: 041 / 041-01 - Guil

039 / 039-01 - GV District -
039 / 039-02 - GV District -
039 / 039-03 - GV District -
040 / 040-01 - Greene - Snc
 041 / 041-01 - Guilford - Gr
041 / 041-02 - Guilford - Hi
042 / 042-01 - Rural Health
042 / 042-02 - Rural Health
042 / 042-03 - Rural Health

View Report

6. The report displays. Number of pages is displayed. The report is searchable.
7. To print the report, click the Adobe pdf icon.
8. A new window will open with the pdf document.
9. Print the report using the print icon on the tool bar.

Note: Default sort order is time of day, therefore family members may be split on the report.

Note: Phone number is listed on the report to assist in contacting clients.

Note: Information in the comments column has been transferred from text entered on the sticky note on other scheduling screens (i.e., quick appointments, family appointments).

From Date: 4/21/2015 To Date: 4/21/2015 View Report

State: North Carolina WIC Program Report Type: Clinic

Local Agency/Clinic: 041 / 041-01 - Guilford - Greensboro

1 of 6 Find | Next

Detail Clinic Daily Appointment Schedule
North Carolina WIC Program
Date Range: 04/21/2015 - 04/21/2015

Report Date: 04/20/2015
 Data Updated: 4/20/2015
 RDD: 1.9.4.1.4

Clinic(s): 041 / 041-01 - Guilford - Greensboro

Local Agency: 041 - Guilford County									
Clinic: 041-01 - Guilford - Greensboro									
Appointment Date	Appointment Time	Appointment Type	Family ID	Participant ID	Participant Name	Phone Number	Interpreter /Language	Resource (if applicable)	Comments
4/21/2015	8:00 AM	Food Benefit Issuance	F0610000414						
4/21/2015	8:00 AM	Mid Certification Assessment	F0610000440						
4/21/2015	8:00 AM	Nutrition Education - Individual	F06100001646						
4/21/2015	8:00 AM	Subsequent Certification	F06100002587						

1.9.4.1.4 Detail Clinic Appt Schedule (2).pdf - Adobe Reader

File Edit View Window Help

Open Print Save Copy Paste Undo Redo Find 1 / 10 100% Tools Fill & Sign Comment

Detail Clinic Daily Appointment Schedule
North Carolina WIC Program
Date Range: 04/21/2015 - 04/21/2015

Report Date: 04/20/2015
 Data Updated: 4/20/2015
 RDD: 1.9.4.1.4

Clinic(s): 041 / 041-01 - Guilford - Greensboro

Local Agency: 041 - Guilford County									
Clinic: 041-01 - Guilford - Greensboro									
Appointment Date	Appointment Time	Appointment Type	Family ID	Participant ID	Participant Name	Phone Number	Interpreter /Language	Resource (if applicable)	Comments
4/21/2015	8:00 AM	Food Benefit Issuance	F0610000414						
4/21/2015	8:00 AM	Mid Certification Assessment	F0610000440						
4/21/2015	8:00 AM	Nutrition Education - Individual	F06100001646						
4/21/2015	8:00 AM	Subsequent Certification	F06100002587						
4/21/2015	8:00 AM	Food Benefit Issuance	F06100005015						
4/21/2015	8:00 AM	Subsequent Certification	F06100006454						
4/21/2015	8:00 AM	Food Benefit Issuance	F06100006497						
4/21/2015	8:00 AM	Food Benefit Issuance	F06100006503						
4/21/2015	8:00 AM	Mid Certification Assessment	F06100006527						
4/21/2015	8:00 AM	Subsequent Certification	F06100006589						
4/21/2015	8:00 AM	Food Benefit Issuance	F06100006765						
4/21/2015	8:00 AM	Nutrition Education - Individual	F06100007028						
4/21/2015	8:00 AM	Food Benefit Issuance	F06100008317						
4/21/2015	8:00 AM	Nutrition Education - Individual	F06100008862						
4/21/2015	8:15 AM	Food Benefit Issuance	F06100000414						
4/21/2015	8:15 AM	Food Benefit Issuance	F06100000440						
4/21/2015	8:15 AM	Subsequent Certification	F06100001102						
4/21/2015	8:15 AM	Food Benefit Issuance	F06100001476						
4/21/2015	8:15 AM	Nutrition Education - Individual	F06100003008						
4/21/2015	8:15 AM	Nutrition Education - Individual	F06100005002						

Run Date/Time: 4/20/2015 4:50:26 PM Page 1 of 10

Detail Initial Certification Appointments Made Outside of Processing Standards

This report lists appointments that were scheduled outside of processing standards for a selected time frame in the selected local agency or clinic. Results can be sorted in multiple ways. Information is useful in determining if the local agency is experiencing difficulty meeting processing standards and can help decide whether changes in scheduling are needed to meet requirements. This is a companion report to the Pending List.

1. From the Home screen, go to Scheduling > Reporting > Generate Reports.
2. Select Detail Initial Certification Appointments Made Outside of Processing Standards.
3. A new browser window opens accessing the report server.
4. Select
 - a. date(s) to cover the desired time period
 - b. local agency or clinic report type
 - c. local agency or clinic(s)
 - d. sort order for data on report
5. Click View Report.

Note: In the example provided, the report type selected is local agency. Therefore the user is not able to filter by clinic when selecting local agency/clinic.



From Date: [] To Date: [] View Report

State: [] Report Type: []

Local Agency/Clinic: []

From Date: 4/1/2015 To Date: 4/20/2015 View Report

State: North Carolina WIC Program Report Type: Local Agency

Local Agency/Clinic: 001 - Alamance Co

- 013 - Cabarrus Health Alliance
- 014 - Caldwell County
- 016 - Carteret County
- 017 - Caswell County
- 018 - Catawba County
- 020 - Cherokee County
- 022 - Clay County

Sort Order: <Select a Value>

- FamilyID, ParticipantID
- WIC Category
- Processing Standard
- Days Lapsed

6. The report displays. Number of pages is displayed. The report is searchable.
7. To print the report, click the Adobe pdf icon. A new window will open with the pdf document. (This step is not shown.)

Note: The number of days past processing standards for each appointment displays in the column with that name.

Note: When an applicant is added to the pending list, the user selects a reason for scheduling the appointment outside of processing standards. That reason displays on this report in the Outside of Processing Standards Comment column. If the column is blank, the user scheduling the appointment selected no when prompted to add the individual to the Pending List. Users should always select Yes when prompted to add a participant to the Pending List.

From Date: 1/1/2015 To Date: 3/31/2015 View Report

State: North Carolina WIC Program Report Type: Local Agency

Local Agency/Clinic: 017 - Caswell Cour Sort Order: # Days Lapsed

1 of 1 Find | Next

Detail Initial Certification Appointments Made Outside of Processing Standards
 North Carolina WIC Program
 Date Range: 01/01/2015 - 03/31/2015

Report Date: 04/20/2015
 Data Updated: 4/20/2015
 RDD: 1.9.4.1.13

Local Agency(s): 017 - Caswell County
 Sort Order: # Days Lapsed

Local Agency: 017 - Caswell County								
Clinic: 017-01 - Caswell - Yanceyville								
Family ID	Parent Guardian	Participant ID	Participant Name	WIC Cat.	Method of Appt.	Staff Name	Number of Days Past Processing Standards	Outside of Processing Standards Comment
F01900000145				I	In Person		1	Client request
F01900000153				I	Phone		2	Client request
F019000001715				C	Phone		3	Client request
F01900000228				P	In Person		4	Client request
F019000001717				P	In Person		4	Client request
F019000001722				P	Phone		12	Client request
F01900000030				I	Phone		18	Client request

Run Date/Time: 4/20/2015 5:14:29 PM Page 1 of 1

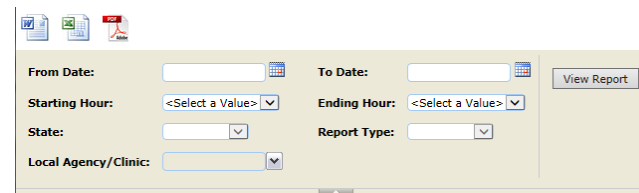
Participant Appointment Show Rate Report

This report provides information about appointments that were scheduled and kept or missed during a specified time period. It can be narrowed to provide results based on time of day. The number of walk-ins served during the selected time frame is also provided, and a show rate is calculated for the total appointments as well as each appointment type.

1. From the Home screen, go to Scheduling > Reporting > Generate Reports.
2. Select Participant Appointment Show Rate Report.
3. A new browser window opens accessing the report server.
4. Select
 - a. date(s) to cover the desired time period
 - b. hours to covered the desired time frame
 - c. local agency or clinic report type
 - d. local agency or clinic(s)

Note: If the user is interested in show rate for a certain time of day, the report can be limited to that specific time of day and be compared to reports for other times of day.

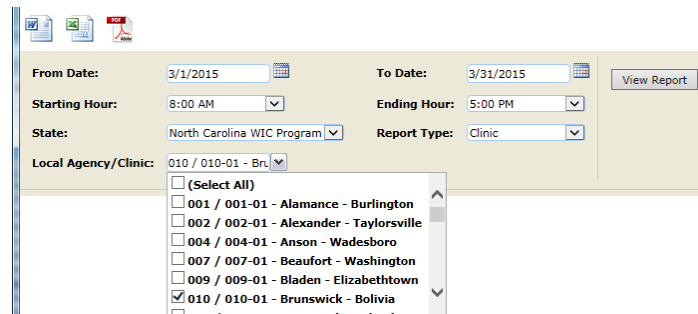
5. Click View Report.



The screenshot shows a form for generating a report. The fields are:

- From Date: [Empty]
- To Date: [Empty]
- Starting Hour: <Select a Value>
- Ending Hour: <Select a Value>
- State: [Empty]
- Report Type: [Empty]
- Local Agency/Clinic: [Empty]

A 'View Report' button is visible on the right.



The screenshot shows the same form with the following values entered:

- From Date: 3/1/2015
- To Date: 3/31/2015
- Starting Hour: 8:00 AM
- Ending Hour: 5:00 PM
- State: North Carolina WIC Program
- Report Type: Clinic
- Local Agency/Clinic: 010 / 010-01 - Br...

The 'Local Agency/Clinic' dropdown menu is open, showing a list of options:

- (Select All)
- 001 / 001-01 - Alamance - Burlington
- 002 / 002-01 - Alexander - Taylorsville
- 004 / 004-01 - Anson - Wadesboro
- 007 / 007-01 - Beaufort - Washington
- 009 / 009-01 - Bladen - Elizabethtown
- 010 / 010-01 - Brunswick - Bolivia

A 'View Report' button is visible on the right.

6. The screen refreshes to display the report.
7. To print the report, click the Adobe pdf icon. A new window will open with the pdf document. (This step is not shown.)

Note: The show rate is calculated by dividing the number of appointments kept by the total appointments.

From Date: 3/1/2015 To Date: 3/31/2015 View Report

Starting Hour: 8:00 AM Ending Hour: 5:00 PM

State: North Carolina WIC Program Report Type: Clinic

Local Agency/Clinic: 010 / 010-01 - Br

Participant Appointment Show Rate Report
 North Carolina WIC Program
 Date Range: 03/01/2015 - 03/31/2015
 Time Range: 8:00 AM - 5:00 PM

Report Date: 04/20/2015
 Data Updated: 04/20/2015
 RDD: 1.9.4.1.8

Clinic(s): 010 / 010-01 - Brunswick - Bolivia

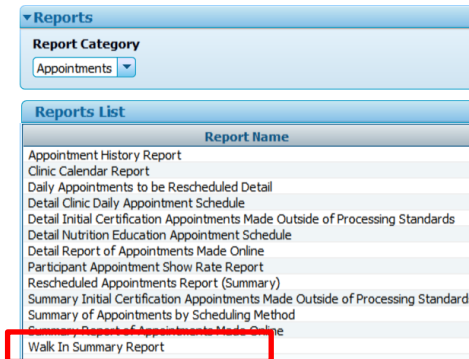
Local Agency: 010 - Brunswick County				
Clinic: 010-01 - Brunswick - Bolivia				
Open Access: Yes				
Appointment Type	Total Appointments	Total Appointments Kept	Show Rate (%)	Total # of Walk Ins
Food Benefit Issuance	103	66	64	17
Initial Certification	33	26	79	9
Mid Certification Assessment	51	29	57	1
Nutrition Education - Individual	34	19	56	14
Subsequent Certification	48	33	69	8
Clinic Total:	269	173	64	49

Run Date/Time: 4/20/2015 5:31:04 PM Page 1 of 1

Walk In Summary Report

This report provides information about services that were provided to families and individuals who did not have appointments but were served on a walk in basis.

1. From the Home screen, go to Scheduling > Reporting > Generate Reports.
2. Select Walk In Summary Report.
3. A new browser window opens accessing the report server.
4. Select
 - a. date(s) to cover the desired time period
 - b. local agency or clinic report type
 - c. local agency or clinic(s)
5. Click View Report.



From Date: [] To Date: [] View Report

State: [] Report Type: []


Local Agency/Clinic: []

From Date: 4/1/2015 To Date: 4/20/2015 View Report

State: North Carolina WIC Program Report Type: Clinic

Local Agency/Clinic: 025 / 025-01 - Craven - New Bern

- 023 / 023-01 - Cleveland - Shelby
- 024 / 024-01 - Columbus - Whiteville
- 024 / 024-02 - Columbus - Bolton
- 024 / 024-03 - Columbus - Tabor City
- 024 / 024-04 - Columbus - Chadbourne
- 025 / 025-01 - Craven - New Bern
- 025 / 025-02 - Craven - Cherry Point
- 026 / 026-01 - Cumberland - Fayetteville
- 026 / 026-02 - Cumberland - Fort Bragg
- 026 / 026-03 - Cumberland - Hope Mills


From Date: 4/1/2015 **To Date:** 4/20/2015 View Report
State: North Carolina WIC Program **Report Type:** Clinic
Local Agency/Clinic: 025 / 025-01 - Craven

1 of 9 Find | Next

Walk In Summary Report
North Carolina WIC Program
Date Range: 04/01/2015 - 04/20/2015

Report Date: 04/20/2015
 Data Updated: 4/20/2015
 RDD: 1.9.4.1.16

Clinic(s): 025 / 025-01 - Craven - New Bern

Local Agency: 025 - Craven County Health Department					
Clinic: 025-01 - Craven - New Bern					
Appointment Date	Appointment Time	Family ID	Participant ID	Participant Name	Service Received
4/1/2015	1:15 PM	F02900000246			Food Benefit Issuance
4/1/2015	1:15 PM	F02900000246			Food Benefit Issuance
4/1/2015	8:45 AM	F02900000346			Food Benefit Issuance
4/1/2015	8:45 AM	F02900000346			Food Benefit Issuance
4/1/2015	8:45 AM	F02900000346			Food Benefit Issuance
4/1/2015	12:00 PM	F02900000649			Food Benefit Issuance
4/1/2015	2:15 PM	F02900000783			Food Benefit Issuance
4/1/2015	2:15 PM	F02900000783			Food Benefit Issuance
4/1/2015	2:15 PM	F02900000783			Nutrition Education - Individual
4/1/2015	12:45 PM	F02900000843			Food Benefit Issuance
4/1/2015	12:45 PM	F02900000843			Nutrition Education - Individual
4/1/2015	11:00 AM	F02900001209			Food Benefit Issuance
4/1/2015	11:00 AM	F02900001209			Nutrition Education - Individual
4/1/2015	10:00 AM	F02900001777			Food Benefit Issuance
4/1/2015	10:00 AM	F02900001777			Food Benefit Issuance
4/1/2015	8:45 AM	F02900001876			Food Benefit Issuance
4/1/2015	8:45 AM	F02900001876			Nutrition Education - Individual
4/1/2015	2:15 PM	F02900001986			Food Benefit Issuance

Walk In Summary Report
North Carolina WIC Program
Date Range: 04/01/2015 - 04/20/2015

Report Date: 04/20/2015
 Data Updated: 4/20/2015
 RDD: 1.9.4.1.16

Local Agency: 025 - Craven County Health Department					
Clinic: 025-01 - Craven - New Bern					
Appointment Date	Appointment Time	Family ID	Participant ID	Participant Name	Service Received
4/20/2015	3:30 PM	F03000000285			Nutrition Education - Individual
4/20/2015	3:45 PM	F13000003922			Subsequent Certification
4/20/2015	3:45 PM	F13000003922			Initial Certification
4/20/2015	11:15 AM	F17500002459			Food Benefit Issuance

Total Clinic: 304
 Run Date/Time: 4/20/2015 10:03:05 PM

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6. The screen refreshes to display the report.
 7. To print the report, click the Adobe pdf icon. A new window will open with the pdf document. (This step is not shown.)
 8. The final page of the report provides a total of walk in services provided during the time period covered by the report.
- Note:** Walk in services are ordered by date and appointment time. The appointment time is assigned when the client is checked in on the dashboard; it is assigned to the nearest 15 minute time interval.