Client Services Appointment Book and Flowsheet: The Basics

Tutorial

About the tutorial

This narrated tutorial is designed to be used by new WIC staff as they begin to learn CIMS Client Services functions. The tutorial offers the opportunity to explore a few basic features of the CIMS Client Services Appointment Book and Flowsheet tabs.

By the end of the tutorial, WIC staff will have watched how to make a new appointment, explored Appointment Details, and discovered how Flowsheet features aid them in planning and communicating about clients' appointments.

About the control bar

A control bar is included at the bottom of each screen. It allows staff to move through the tutorial at their own pace, skip to areas of interest, and raise or lower the volume.

You may need to scroll to the bottom of the screen or select the maximize button in order to view it.

Control Bar Buttons & Functions

Buttons	Functions
	Rewind/Start Again
	Play
	Rewind
	Forward
	Volume
	Table of Contents
	Exit Tutorial
	Information about Adobe Captivate Version 4 (Tutorial Software)

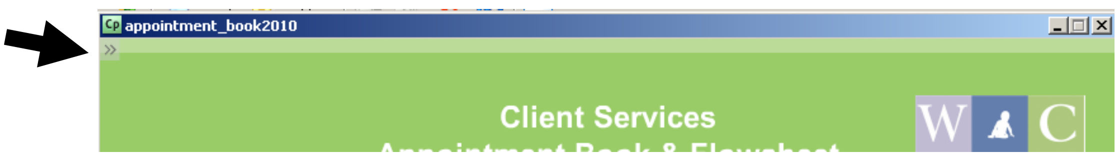
About the Table of Contents

The tutorial will start from the beginning of the option that is selected.

Table of Contents options	Description
Introduction	About the tutorial
Objectives	Outcomes achieved by completing the tutorial
Make an appointment	How to make an appointment in 6 easy steps
Changing the date	How to view more dates in the Appointment Book
Appointment details	Information about the staff and appointment time columns and about information in the appointment details area.
Flowsheet	Describes areas of the Flowsheet, how to enter notes, and how the Flowsheet works with the Appointment Book.

How to open the Table of Contents

Either select the "TOC" button from the control bar or select the double arrows  near the top of the screen.



How to close the Table of Contents

Either select the "TOC" button from the control bar or select the double arrows  next to the Table of Contents drop-down menu.

Tips for new staff

Ask about clinic procedures including:

- What communication codes or abbreviations do staff use for Flowsheet notes?
- How much time should be allotted for each appointment type?
- What appointment types should be scheduled with specific staff?
- How do you know when a client should be scheduled for an appointment with the Registered Dietician (RD)? Does the RD perform certification appointments or only "RD" appointments? Who are the RD's in your clinic?
- What procedures should you follow when a client reschedules an appointment? Clinics use one of the following procedures:
  - Change the appointment outcome to reflect it was rescheduled.
  - Delete the appointment the client is not keeping from the Appointment Book.
  - Move the rescheduled appointment to a "Reschedule" column.

Observe staff using the Appointment Book and Flowsheet features.

- Watch as they find appointment openings and make Flowsheet notes.
- Ask them to share their experiences. What helped when they began learning to use these features?

Call CIMS Support if you need help using Client Services.

- Staff will provide instructions, help you through each step, and answer your questions. CIMS Support: 1-800-841-1410 x 7.

Explore additional learning opportunities with your clinic coordinator.

- Find upcoming trainings, links to resources, and available materials on the WIC website. Visit the clinic staff page: http://www.doh.wa.gov/cfh/wic/clinic.htm
- Keep updated as new information is added to the WIC Website. Select the link, "Subscribe to What's New" at http://www.doh.wa.gov/cfh/wic/whatsnew.htm.