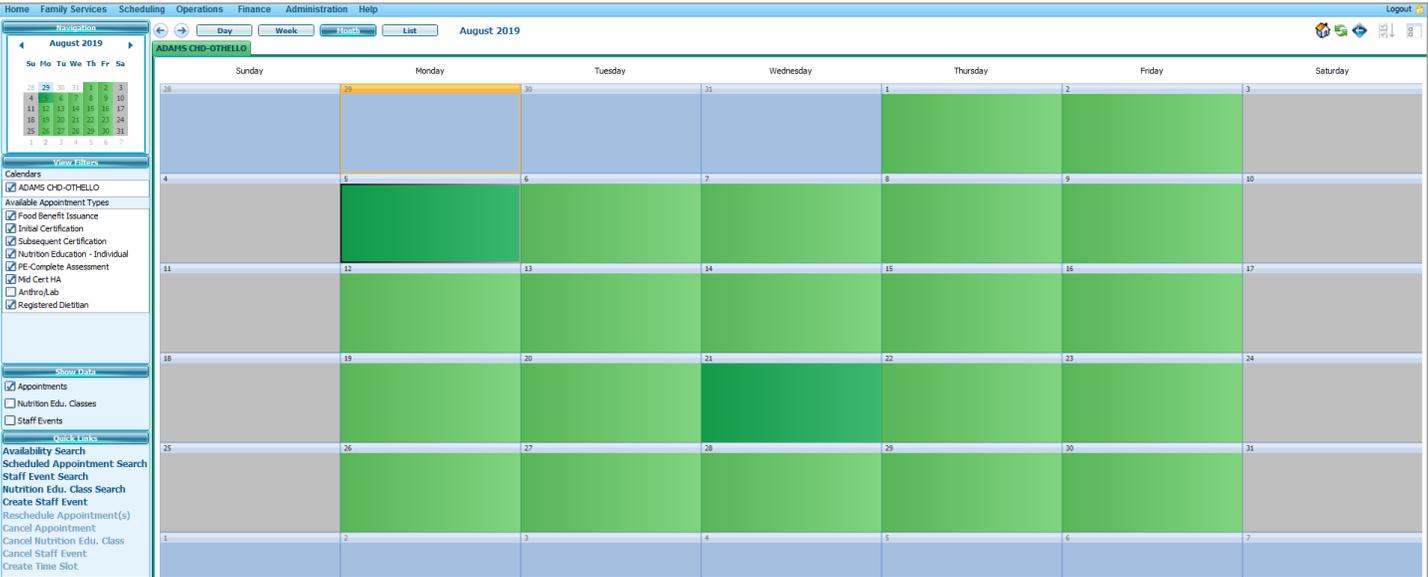# Cascades Steps
Schedule an Appointment to Transfer Between Cascades Clinics

Follow these steps to schedule an appointment for a participant who needs to transfer between two Cascades clinics.

- In CIMS, we had a Transfer In (TI) Appointment type. Cascades doesn't have this appointment type.
- If making an appointment for an **active** participant, use the **Food Benefits Issuance** (FBI) appointment type.
  - For an **expired** participant, use the **Subsequent Certification** (SC) appointment type.
- If the participant needs an appointment to transfer in from out-of-state, use Cascades Steps: Schedule an Appointment to Transfer into the Cascades System.

Steps	Cascades Screen
Step 1. Go to Master Calendar to schedule the appointment to transfer in: 1. In the menu bar, select **Scheduling**, then **Clinic Master Calendar**. **Note:** Calendar defaults to the current month's view.	

Step 2. Choose the day for the appointment:

1. Check that the appointment type **Food Benefit Issuance** is check-marked in the **Available Appointment Types** box.

2. If the appointment to transfer in will happen in a future month, use the **Mini Calendar** to select month and date for desired appointment.

   Important

   Cascades doesn't have the appointment type Transfer In (TI), like CIMS did.

   Later we'll write a Sticky Note to tell staff what appointment type we're actually scheduling.

3. Double-click the green-colored date field of your choice in the big calendar to get to the Daily Schedule-view of the calendar.

   You'll choose the appointment time next.

Use the **Mini Calendar** to quickly move to future months.

Confirm that you're in the correct clinic if your calendar shows multiple clinics.

Step 3. Choose a time and appointment type for the appointment to transfer in:
 	
1. Click your cursor into the **FBI column** and time slot you want to choose.
 	
   o Keep it at the default 15 minute timespan or follow your clinic's policy for appointment time to transfer in. To extend appointment time, drag the appointment slot (blue box) with your cursor.
 	
   o For an **expired** participant, use the **Subsequent Certification (SC)** appointment type instead.
 	
2. Double-click the selected appointment slot (blue box) to get to the **Manage Appointments** screen.	

Step 4. Add the participant: 1. In the **Manage Appointments** screen, select the magnifying glass icon or place your cursor in the search box to display the **Search Criteria** pop-up screen.	**TIP!** This search field says to enter Family ID, but it's not required. Instead: • Select the magnifying glass icon <u>or</u> place your cursor in the box. • Select the **Enter** button on your keyboard.

Step 5. Add the participant:

1. Select **State-Wide** for **Search Location**.

2. Check-mark **Family** and **Participant** boxes.

3. Enter a few letters or all of last and, if need be, first name.

4. Uncheck **Active Only** box.

5. Select **Search** button.

6. In **Search Results** box, select the participant.

7. Press the **Select** button.

Search Criteria

Search Location
- State-Wide
- Local Agency
- Clinic

Washington State WI ▾

Search Type
- ☑ Family
- ☑ Participant
- ☐ Caretaker
- ☐ Proxy

Family ID

Last Name ☐ Van Beethoven

First Name ☐ Lud

M.I.

Telephone Number (___)___-____

Date of Birth ☐

Participant ID

Medicaid Number

EBT Card Number

☐ Online Applicant Only   ☐ Active Only

[Search] [Clear Criteria]

Search Results   Total Items: 5

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Age
F22900006053	WA2290010306	VAN BEETHOVEN	LUDWIG		1/1/2018	C		Active/Certified	8/31/2020	L05 - CHI Franciscan
LF12745683		Van	Let	M	10/14/1981					L36 - Pregnancy Aid

[Select] [Cancel]

Step 6. Book the appointment:

1. Confirm date and time.

2. Select participant in **Individual** drop-down.

3. Select **Contact Method** drop-down and choose answer:
   In-person – participant or caregiver in clinic
   Phone – participant or caregiver called clinic

4. Keep **Add to Communication Queue** box checked if family wants to receive a reminder email or text.

5. Select the **Book** button.

Manage Appointments

▸ Search Options

Quick Scheduling Results

Family ID	Date	Time	Appointment Type	Individual
F22900006053	8/12/2019	9:15 AM to 9:30 AM	Food Benefit Issuance	

LUDWIG VAN BEETHOVEN

Contact Method ⭐
Phone ▾

☑ Add to Communication Queue   [Book]

In Person
Phone

See page 6, if your participant already has an FBI appointment scheduled at the "other" clinic.

You'll see the appointment on the **Daily Schedule** screen.	
Step 7. Leave a Sticky Note: **Sticky Note:** 1. Double-click on the family name at the top of the individual appointment box to get to the **Family Appointments List**. 2. Select the **yellow sticky note** icon. 3. Write the note to let other clinic staff know this appointment is actually an appointment to transfer in. 4. **Save** by selecting the minimize icon at the top right corner of the sticky note. **Note:** Because Cascades allows only reading privilege for other Cascades agencies, you won't be able to leave a Family Alert in the family record.	 **REMEMBER** If a participant cancels the appointment, any sticky notes for that appointment will be lost.

What if the participant already has an FBI appointment scheduled at the "other" clinic?

Cascades doesn't allow staff to make an appointment in two different clinics for the same appointment type. If you make an appointment for someone who already has an existing appointment for that type, you get a popup message to cancel the "other" appointment at the other clinic.

To solve this problem contact either the other clinic or Cascades Support to cancel the outdated appointment.

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To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

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