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| CDIS calendar process |
| Victorian Maternal and Child Health (MCH) Child Development Information System (CDIS)  December 2020 |

Contents

[Overview 2](#_Toc58046132)

[Calendar features and functions 2](#_Toc58046133)

[Other hints and tips 8](#_Toc58046134)

[CDIS calendar set-up process 9](#_Toc58046135)

[Open new appointment – ‘Schedule Appointment’ window 9](#_Toc58046136)

[1. Staff member or reliever allocation to site on any given day 10](#_Toc58046137)

[2. Add admin, lunch and staff meetings to site calendar 13](#_Toc58046138)

[3. Block out time for planned non-client appointments 16](#_Toc58046139)

[Make a new client appointment from the calendar 19](#_Toc58046140)

[Important note when making new client appointments 23](#_Toc58046141)

[Start a client appointment from the calendar – KAS and Additional 24](#_Toc58046142)

[Start a client appointment – telephone consult, case consult and clinical admin 25](#_Toc58046143)

[Make a new client appointment from client history 26](#_Toc58046144)

[Cancel or edit a client appointment from the calendar 30](#_Toc58046145)

[Important note: Do not delete a client appointment from client history 34](#_Toc58046146)

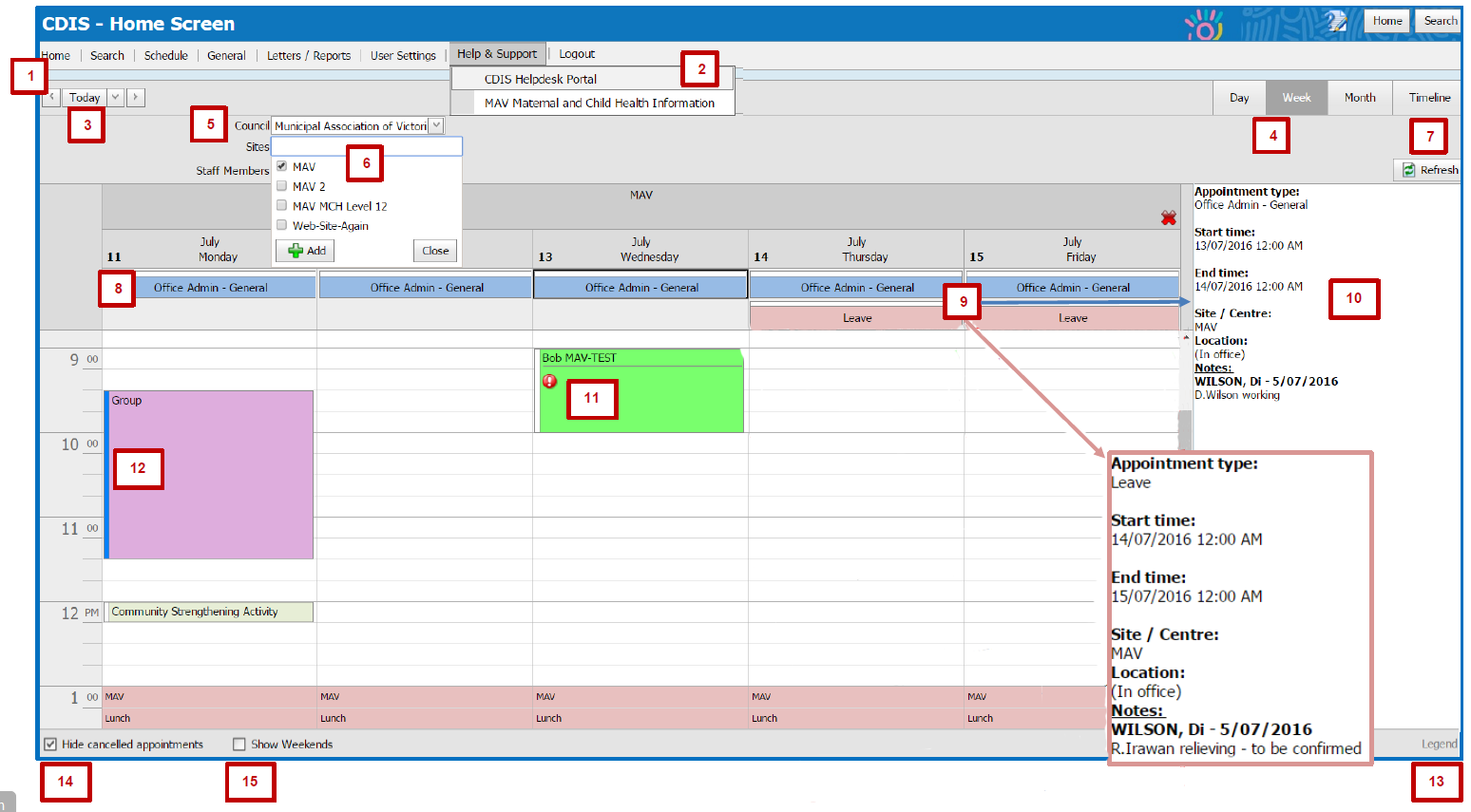
[Make a new non-client appointment from the calendar 35](#_Toc58046147)

[Cancel or edit a non-client appointment from the calendar 37](#_Toc58046148)

# Overview

## Calendar features and functions

Figure 1: Calendar home screen



### 1. Home screen

* The home screen is where you will find the calendar.

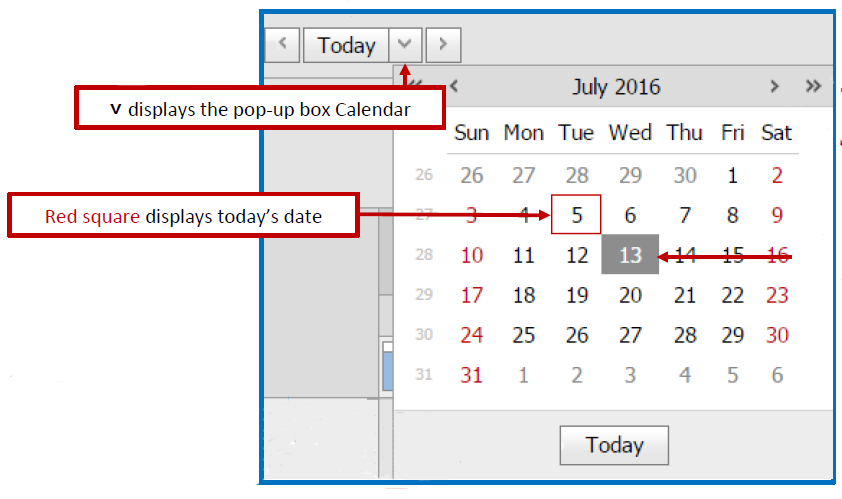
### 2. Help and support menu

* Includes links to the CDIS Helpdesk portal and the MCH web page.

### 3. Date selection

Select the down arrow to display the calendar pop-up box for picking dates.

Figure 2: Calendar date picker



Calendar navigation buttons:

* left and right arrows: moves by one increment – a day, week or month depending on which calendar view is selected
* today button: displays today’s date in calendar view, whichever calendar display is selected
* Down arrow: displays calendar pop-up box.

Calendar pop-up box shows one month of dates and features:

* double left and right arrows: move back or forward one year
* left and right arrows: move back or forward one month
* reds square around today’s date
* shaded square on date selected in calendar view
* today button: select to go to today’s date in the calendar view for whichever calendar display is selected.

### 4. Calendar view

* ‘Calendar Week’ view is best for viewing and making appointments.
* You can view a number of different sites at the same time (select sites, then select the Add button)
* Site calendars can be closed (one at a time) if not needed to be viewed by selecting red X to close
* If you select a particular day while in Calendar Week view, then select day, month or timeline – it will display the day that was last selected (as per view selected).
* Select a day before changing to day, week or month view otherwise it will default back to the previous selected date.
* While Victorian Public Holidays are ‘greyed out’ in the CDIS calendar, appointments can still be booked. Be careful to check this when booking appointments. It is recommended that Victorian Public Holidays be ‘blocked out’ by making a new appointment from 8.00 am to 5.00 pm with appointment type as ‘Centre Closed’. This will make it more obvious that the centre is not open on that day.

### 5. Council

Council is set to default in your user settings.

### 6. Site and staff members

* CDIS calendar is by site (**not** staff member).
* Site is set to default in your user settings.

### 7. Refresh button

* If there is a problem with the calendar view after adding information, simply select the Refresh button.
* To view a newly made appointment in the ‘Appointment Summary’, select a blank space or the Refresh button and then select the appointment that you wish to view.

### 8. All-day appointments

* Appointments can be made as ‘all day’ appointments by selecting the ‘All day’ checkbox when scheduling an appointment.
* All day appointments are displayed at the top of the calendar and will hold this position even as the calendar scrolls down throughout the day.

**Note**: While it is an ‘all day’ appointment, it will not block out the calendar as such –appointments can still be made on that day. To ‘block out’ the day (if required), new appointment from 8.00 am to 5.00 pm with appointment type as ‘Centre Closed’. This will make it more obvious that the centre is not open on that day.

### 9. Staff member or reliever allocation

**Note:** There is a work around available forthe calendar with the ability to allocate staff members working on particular days at particular sites.

For staff member allocation at site (see Figure 3):

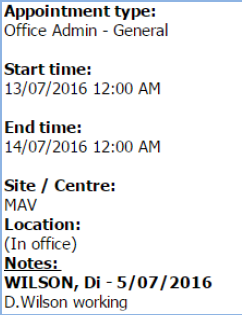
* Appointment type: Office admin – general
* All-day appointment box checked
* Notes: enter staff member’s name

For reliever allocation (see Figure 4):

* Appointment type: Leave
* All-day appointment box checked
* Notes: enter reliever’s name

See ‘[1. Staff member or reliever allocation to site on any given day](#_1._Staff_member)’.

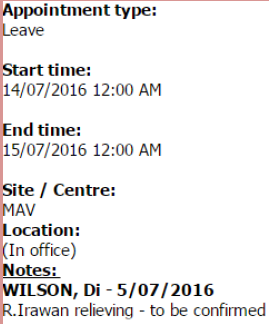
Figure 3: Example appointment summary - staff member allocation



### 10. Appointment summary

* When an appointment is selected, an ‘Appointment Summary’ will be displayed in the summary details section on the righthand side of the calendar.
* To view a newly made appointment in the appointment summary, select a blank space or select the Refresh button and then select the appointment that you wish to view.
* To go to ‘Client History’ or start an appointment, select the client name hyperlink in the appointment summary.

Figure 4: Example appointment summary – reliever allocation



### 11. Appointment icons

Icons are displayed in appointments to signify alerts:

* –Risk factor flag or alert
*  – Interpreter required
* blue at symbol - email reminder icon – Email reminder sent
* two mobile phones - SMS reminder icon – SMS reminder sent
* Notebook and pencil - important note icon – Important note.

### 12. Appointment colour panels

Appointment colour panels:

* Blue – Unconfirmed appointment
* White – Confirmed appointment
* Red –Cancelled appointment
* Purple –Out of office location.

### 13. Legend button

Appointments are colour-coded, to see what the colours mean, select ‘Legend’. See Figure 5.

### 14. ‘Hide Cancelled Appointments’ checkbox

* Hide cancelled appointments is the default – that is, the calendar hides the cancelled appointments (unless the checkbox is unticked).
* Uncheck the ‘Hide cancelled appointments’ box to show cancelled appointments in the calendar.
* A red panel in an appointment slot indicates a cancelled appointment.
* Select a cancelled appointment to view the appointment summary – displays ‘Status: Cancelled on [date] – Reason:…’ The appointment summary also displays a note with the staff member and date of cancellation.

### 15. Show Weekends checkbox

* The ‘Show Weekends’ checkbox is unticked by default – that is, the calendar hides weekends.
* Select the Show Weekends checkbox to show weekends in calendar.

Figure 5: CDIS calendar legend

|  |
| --- |
| Additional Consultation |

|  |
| --- |
| Student Supervision |

|  |
| --- |
| Home Visit |

|  |
| --- |
| 2 Week Consult |

|  |
| --- |
| 4 Week Consult |

|  |
| --- |
| 8 Week Consult |

|  |
| --- |
| 4 Month Consult |

|  |
| --- |
| 8 Month Consult |

|  |
| --- |
| 12 Month Consult |

|  |
| --- |
| 18 Month Consult |

|  |
| --- |
| 2 Year Consult |

|  |
| --- |
| 3.5 Year Consult |

|  |
| --- |
| Additional Consult |

|  |
| --- |
| Family Consultation |

|  |
| --- |
| Enhanced MCH |

|  |
| --- |
| Sleep & Settling - Outreach |

|  |
| --- |
| Telephone Consult |

|  |
| --- |
| Case Consult |

|  |
| --- |
| Enhanced |

|  |
| --- |
| Clinical Admin |

|  |
| --- |
| Office Admin - General |

|  |
| --- |
| Office Admin - Group preparation |

|  |
| --- |
| Office Admin - Reports |

|  |
| --- |
| 12 Month KAS |

|  |
| --- |
| 18 Month KAS |

|  |
| --- |
| 2 Week KAS |

|  |
| --- |
| 2 Year KAS |

|  |
| --- |
| 3.5 Year KAS |

|  |
| --- |
| 4 Month KAS |

|  |
| --- |
| 4 Week KAS |

|  |
| --- |
| 8 Month KAS |

|  |
| --- |
| 8 Week KAS |

|  |
| --- |
| Home Visit |

|  |
| --- |
| Immunisation Session |

|  |
| --- |
| New Babies |

|  |
| --- |
| Outreach |

|  |
| --- |
| Team/Staff Meeting |

|  |
| --- |
| Case Conference |

|  |
| --- |
| External Meeting |

|  |
| --- |
| Clinical Supervision |

|  |
| --- |
| Professional Development |

|  |
| --- |
| Travel |

|  |
| --- |
| Leave |

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| --- |
| Community Strengthening Activity |

|  |
| --- |
| Special Projects |

|  |
| --- |
| Group |

|  |
| --- |
| Centre Closed |

|  |
| --- |
| Lunch |

|  |
| --- |
| Consult - non CDIS client |

|  |
| --- |
| Open Session |

|  |
| --- |
| Interpreter Session |

|  |
| --- |
| Tea Break |

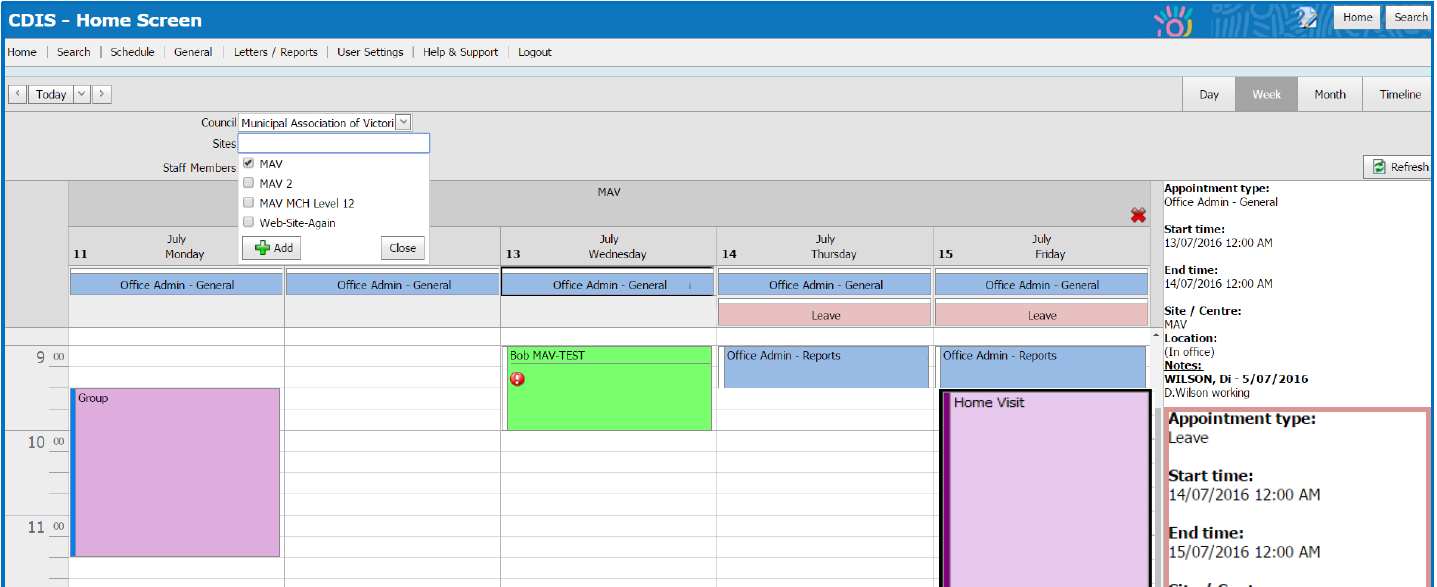
|  |
| --- |
| Public Holiday |

## Other hints and tips

* To book a Brigance or Council-funded appointment (such as six week, three month, six month), make a new client appointment with appointment type of ‘additional’. When the consultation is started, add a reason by selecting Brigance, Council-funded and so on.
* To start a new client appointment with an appointment type of ‘KAS appointment’ or ‘Additional Consult’, select hyperlink in Appointment Summary to go to Client History, then go to Clinical Activity – Consultations and select the booked appointment hyperlink.
* To start a new client appointment with appointment type of ‘Telephone Consult’, ‘Case Consult’ or ‘Clinical Admin’, select hyperlink in Appointment Summary to go to Client History, then go to Clinical Activity – Client Not Present.
* **Remember**: to exit yellow pop-up boxes, go to the end of pop-up box and select the Close button.

# CDIS calendar set-up process

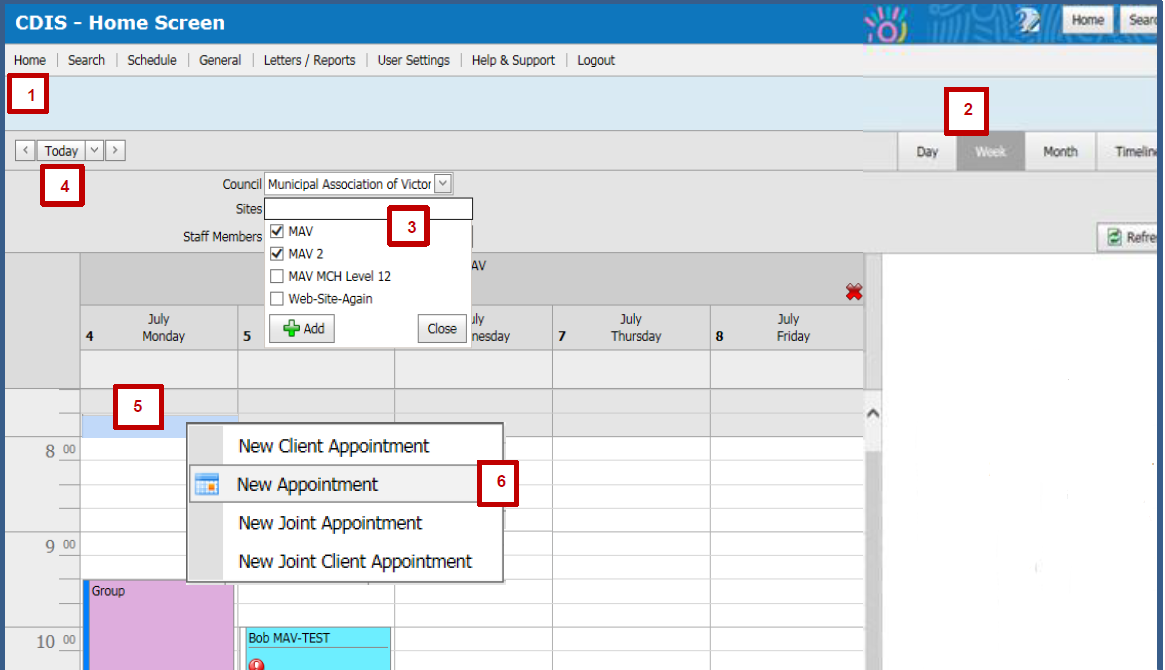
Figure 6: Calendar home screen



## Open new appointment – ‘Schedule Appointment’ window

1. Open the home screen
2. Select view type (day, week, month, timeline)
3. Council and site will auto-fill based on your user settings default
4. Select the desired date
5. Select the desired day
6. Select the appointment slot and open the context menu (right click on the appointment slot). Select ‘New Appointment’.

Figure 7: 'New appointment'



## 1. Staff member or reliever allocation to site on any given day

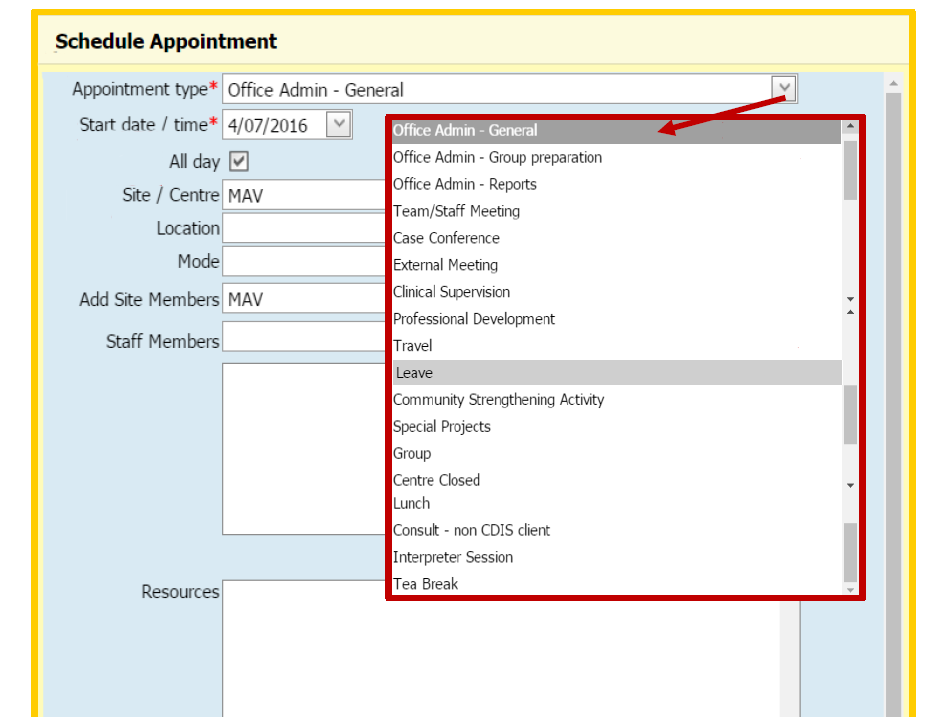
**Note:**

There is a work around available for the calendar with the ability to allocate staff members working on particular days at particular sites.

You can allocate staff the following way (this is the same as making a new appointment in CDIS Calendar).

1. Follow ‘[Open new appointment – ‘Schedule Appointment’ window](#_Open_new_appointment)’
2. Enter ‘Appointment Type’ – choose either of the following from the look-up list
   * + For staff member allocation: ‘Office Admin – General’
     + For reliever staff allocation: ‘Leave’

Figure 8: Schedule appointment (top)



1. Ensure date is correct
2. If it is an all-day appointment, select the ‘All-day appointment’ checkbox – this will remove time fields
3. Ensure ‘Site/Centre’ is correct – this is the site for appointment in the calendar
   * + This is auto-filled from your user settings
4. In ‘Important Notes’, enter the name of the staff member or reliever allocated to that site for the day – this will be displayed in the appointment summary.
5. Select box for Recurrence if required (most effective when allocating staff members or relievers to the same site) – the following parameters will then be revealed
   * + Select or enter required recurrence data
     + Select or enter end recurrence information (‘No end date’, ‘End after’ or ‘End by’)
     + Recurrent appointments can be cancelled singularly or as multiple appointments
     + Recurrent appointments can only be edited singularly and **not** as multiples
6. Select Save
   * + If you select Cancel, a pop-up box will ask ‘Are you sure?’

Figure 9: Schedule Appointment pop-up (bottom)

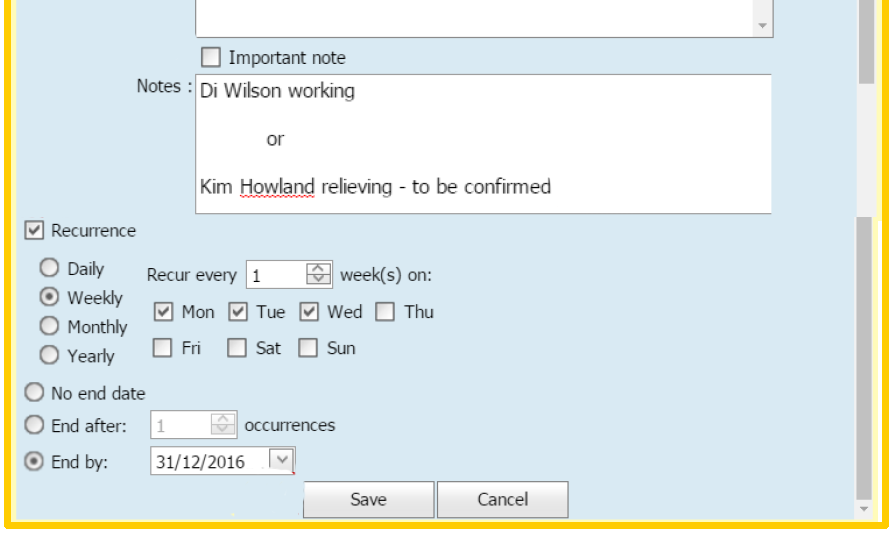
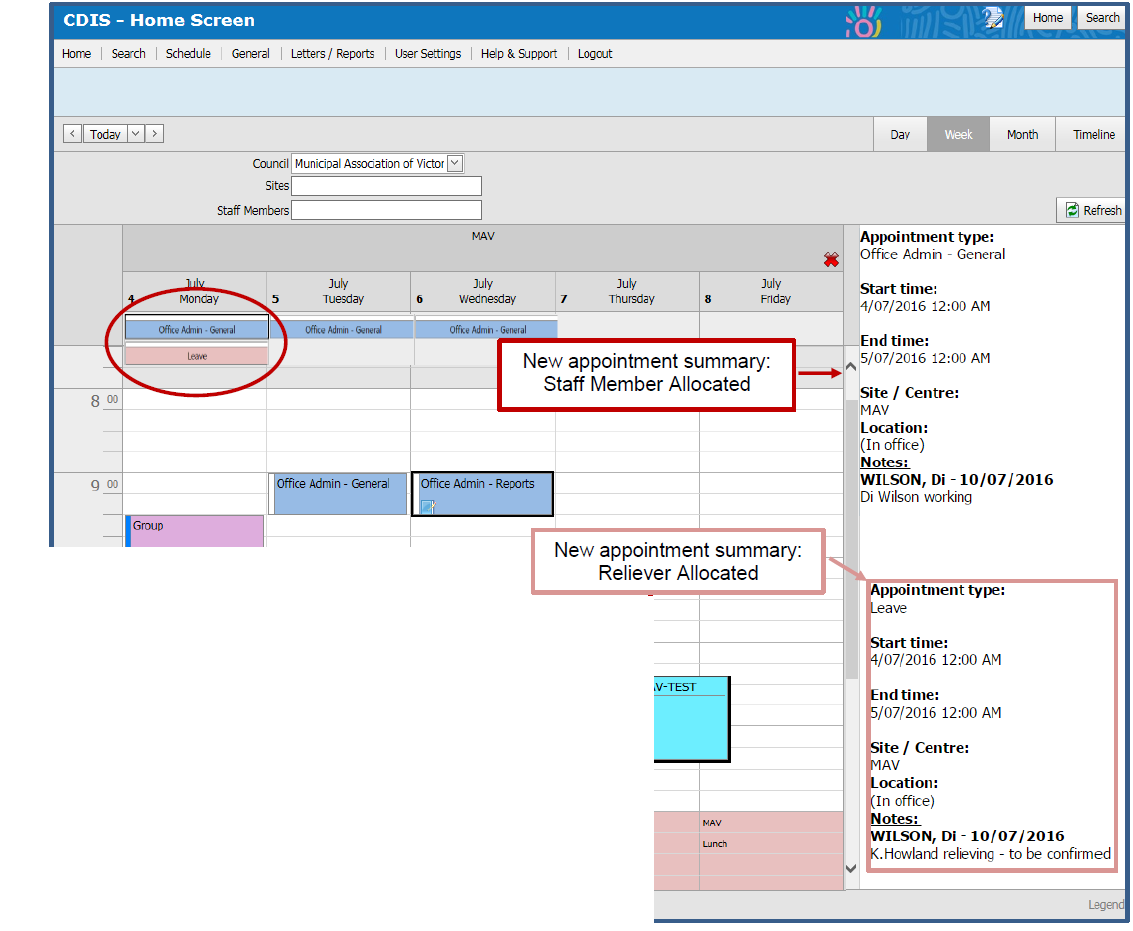


Figure 10: Completed staff member or reliever allocation



**Note**: All-day appointments are displayed at the top of the calendar.

**Additional notes:**

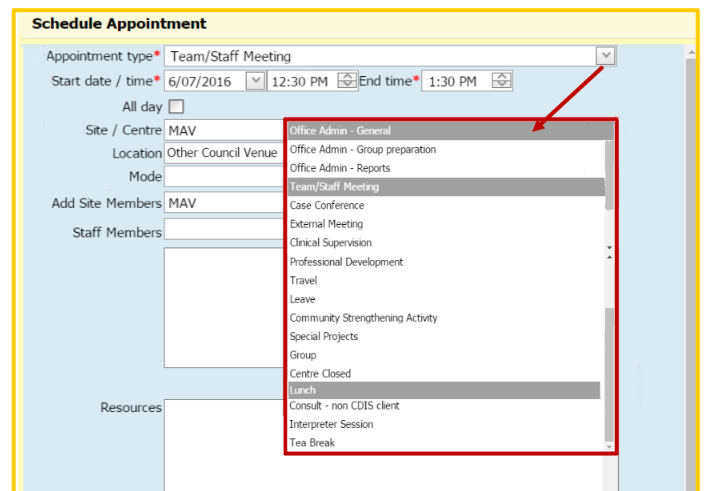
* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’
* See ‘[Hide cancelled appointments checkbox](#_14._‘Hide_Cancelled)’

## 2. Add admin, lunch and staff meetings to site calendar

This is the same as making a new appointment in the calendar

1. Follow ‘[Open new appointment – ‘Schedule Appointment’ window](#_Open_new_appointment)’.
2. Enter the appointment type – choose one of the following from the look-up list
   * + for admin: Office Admin – ‘General’
     + for team or staff meetings: ‘Team/Staff Meeting’
     + for lunch: ‘Lunch’.
3. Ensure date/time is correct – use digits or arrows to edit.
4. Ensure the site or centre is correct – this is the site for appointment in the calendar – this is auto-filled from your user settings
5. Select ‘Location’ and ‘Mode’ from look-up lists if required
   * + all venues except ‘Office/MCH Centre’ will be displayed as ‘out of office’ in the calendar

Figure 11: Schedule admin, staff or lunch meeting (top)



1. Enter notes in the free-text field – these are displayed in the appointment summary
   * + to make an ‘Important note’ – an icon is displayed on the appointment in the calendar –check the Important note box.
2. If the appointment recurs, select the Recurrence checkbox (most effective when entering admin and lunch appointments for the same site) – the following parameters will then appear:
   * + select or enter required recurrence data
     + select or enter end recurrence information (no end date, end after or end by)
     + recurrent appointments can be cancelled singularly or as multiple appointments
     + recurrent appointments can only be edited singularly and **not** as multiples.
3. Select Save
   * + if you select Cancel, a pop-up box will ask, ‘Are you sure?’

Figure 12: Schedule admin, staff or lunch meeting (bottom)

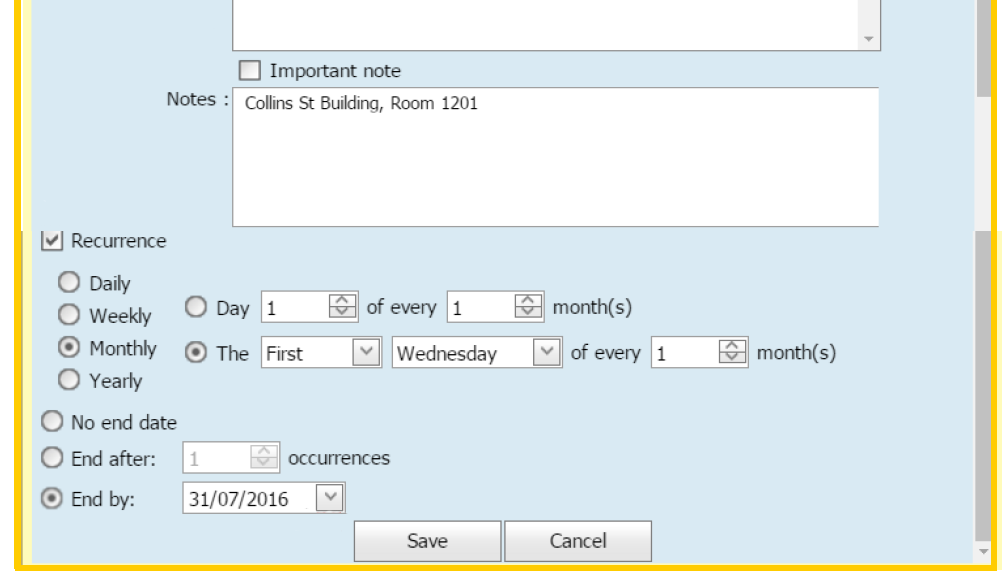
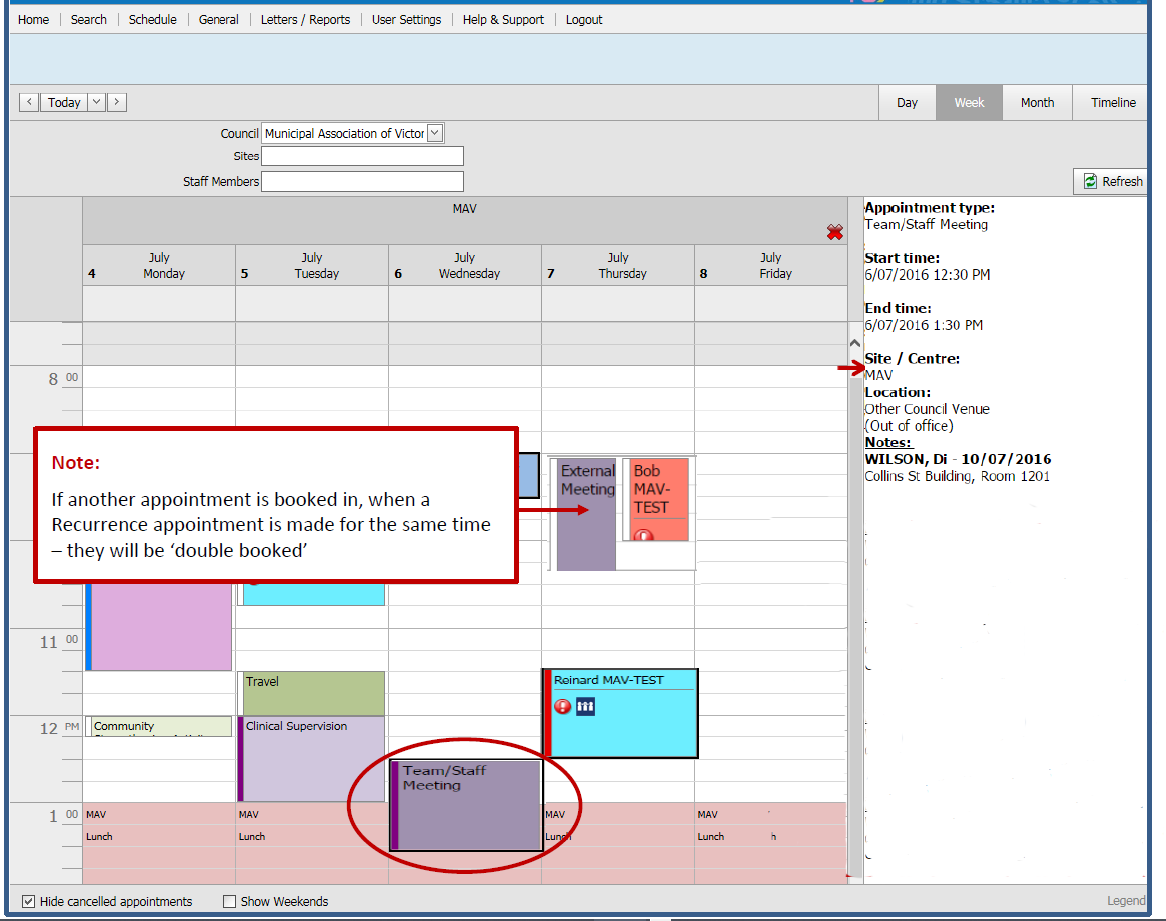


Figure 13: Completed team meeting in calendar



**Note**: If another appointment is booked when a recurrence appointment is made for the same time, they will be ‘double booked’.

**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’
* See ‘[Hide cancelled appointments checkbox](#_14._‘Hide_Cancelled)’

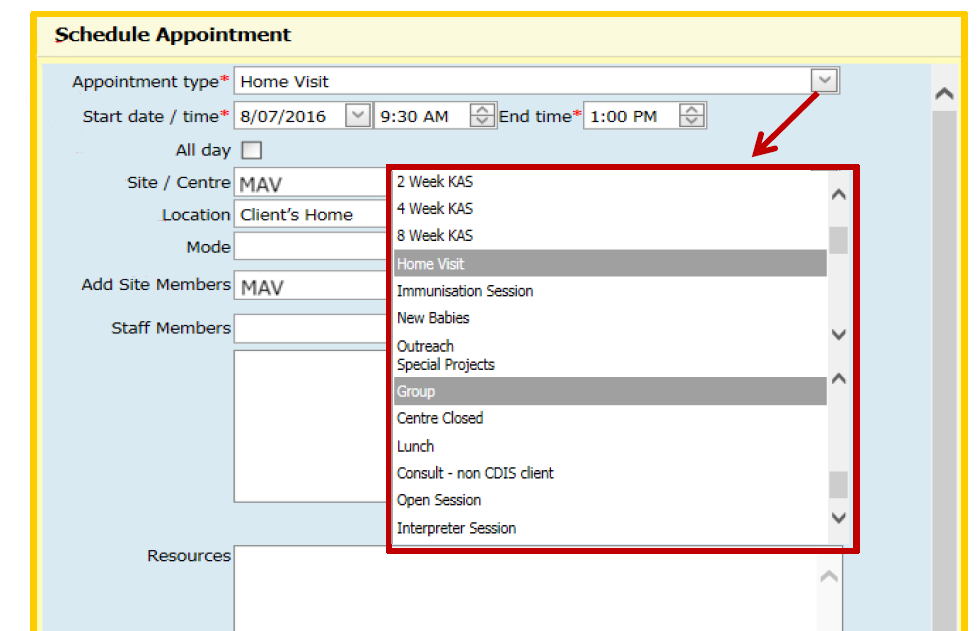
## 3. Block out time for planned non-client appointments

Blocking out time for home visits, particular appointments or groups without actually scheduling an appointment or group.

This is the same as making a new appointment in the CDIS Calendar

1. Follow ‘[Open new appointment – ‘Schedule Appointment’ window](#_Open_new_appointment)’.
2. Enter the appointment type – choose from the look-up list (such as home visit, group and so on).
3. Ensure the date and time is correct (use digits or arrows to edit).
4. Ensure the site or centre is correct – this is the site for appointment in the calendar.
   * + This is auto-filled from your user settings.
5. Select location and mode from look-up lists, if required.
   * + All venues except ‘Office/MCH Centre’ will be displayed as ‘out of office’ in the calendar.

Figure 14: Block out time for home visits or groups (top)



1. Enter notes in the free-text field – these are displayed in the appointment summary
   * + To make an ‘Important note’ – an icon is displayed on the appointment in the calendar – check the Important note box.
2. If the appointment recurs, select the Recurrence checkbox (most effective when entering admin and lunch appointments for the same site) – the following parameters will then appear:
   * + Select or enter required recurrence data
     + Select or enter end recurrence information (no end date, end after or end by)
     + Recurrent appointments can be cancelled singularly or as multiple appointments
     + Recurrent appointments can only be edited singularly and **not** as multiples.
3. Select Save
   * + If you select Cancel, a pop-up box will ask, ‘Are you sure?’

Figure 15: Block out time for home visits and groups (bottom)

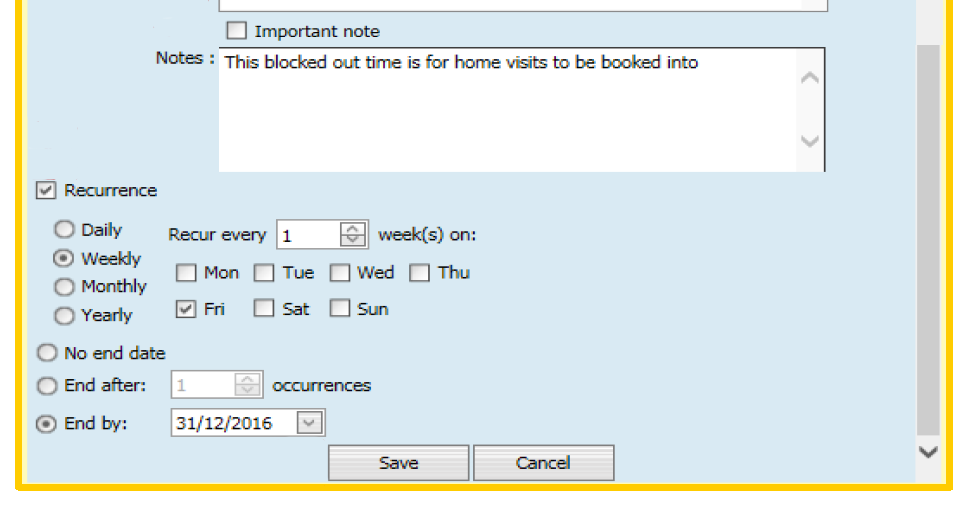
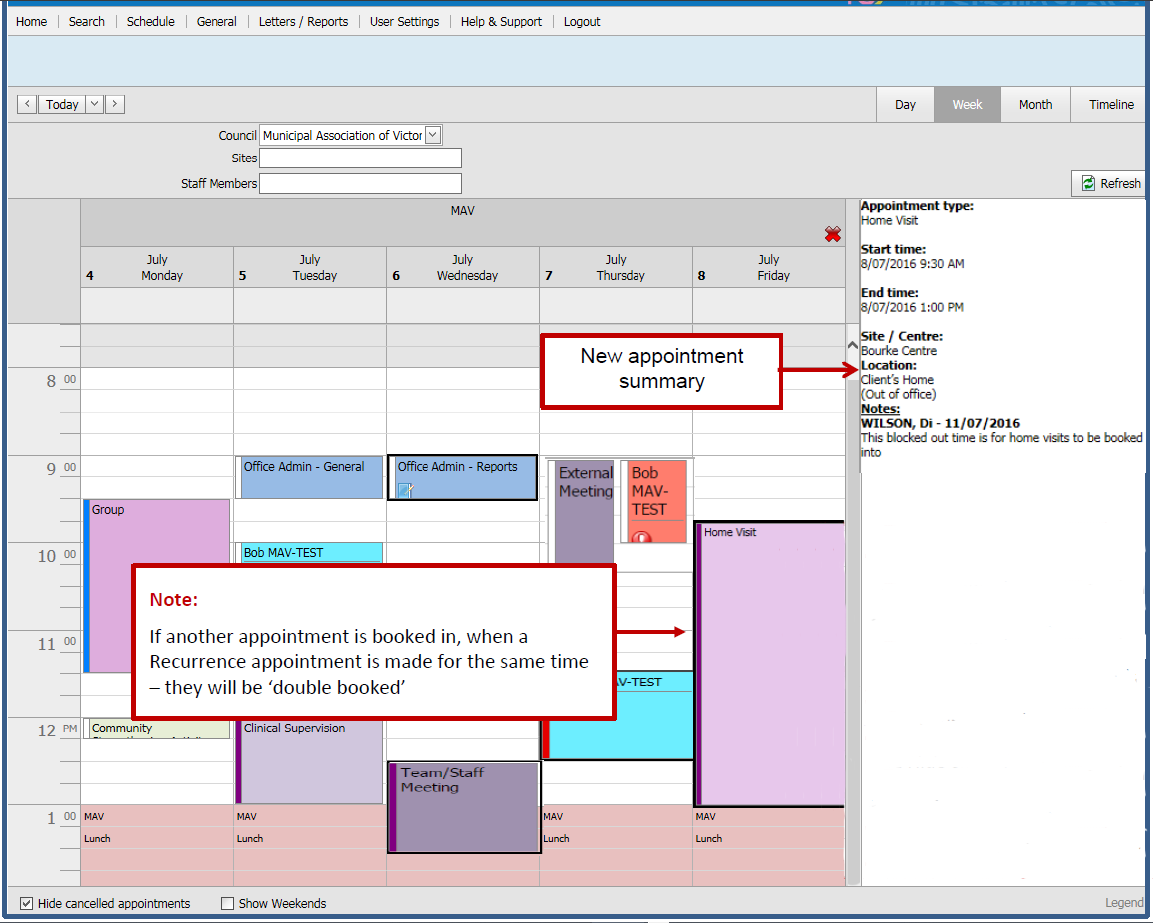


Figure 16: Completed home visit appointment to block out time in calendar



**Note**: If another appointment is booked when a recurrence appointment is made for the same time, they will be ‘double booked’.

**Additional notes:**

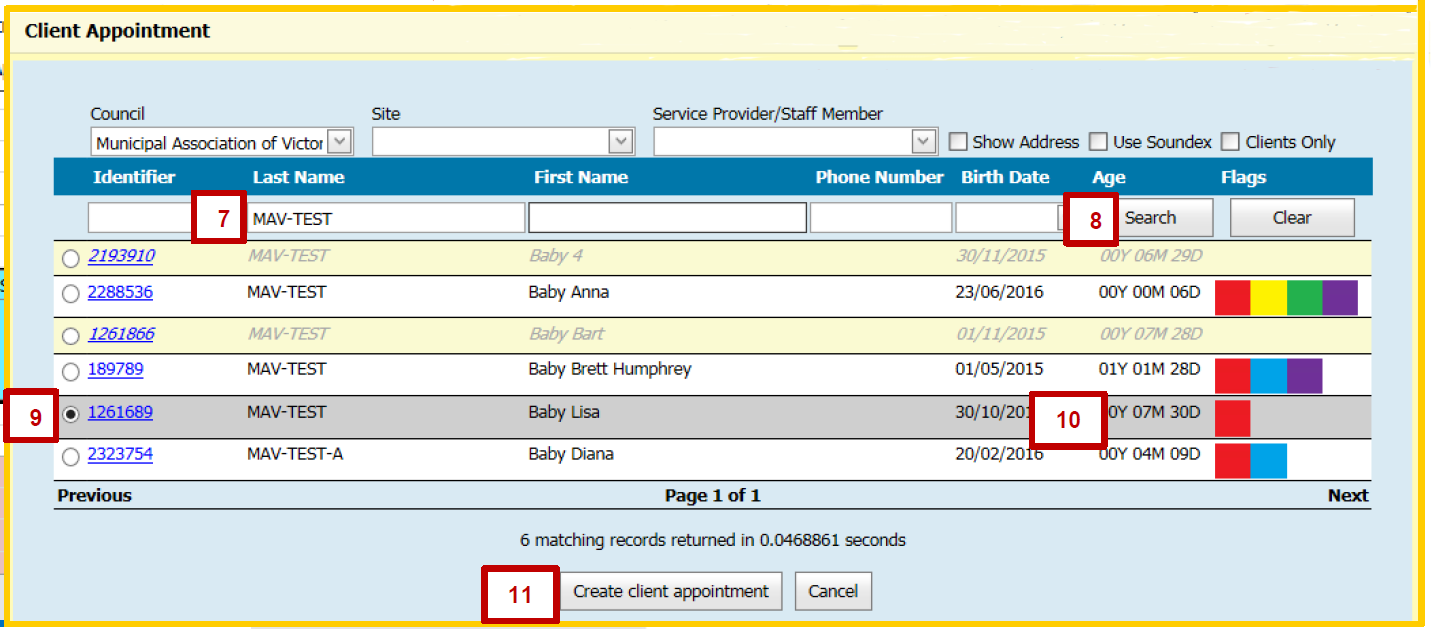
* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’

See ‘[Hide cancelled appointments checkbox](#_14._‘Hide_Cancelled)

# Make a new client appointment from the calendar

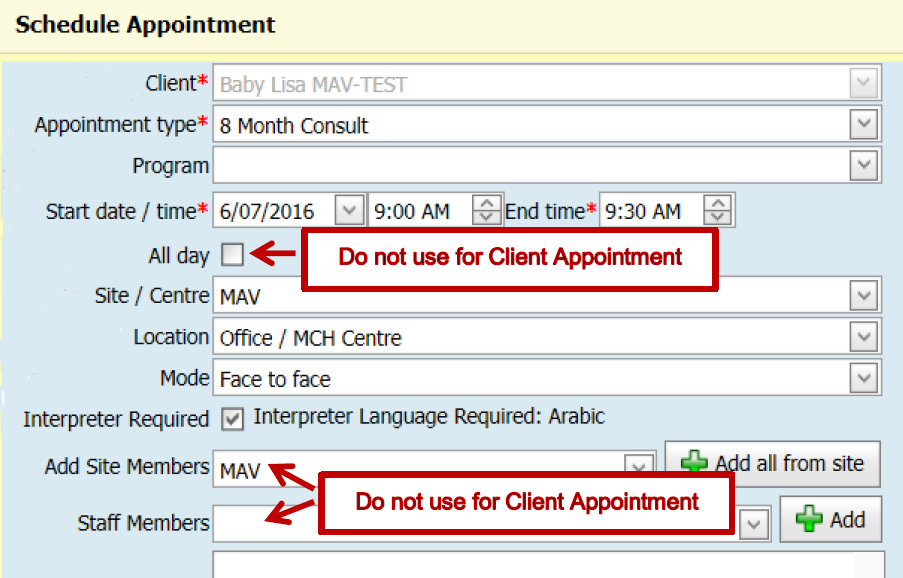
1. Open the home screen
2. Select view type (day, week, month, timeline)
3. Council and site will auto-fill based on your user settings default
   * + Only use ‘Staff Members’ and select the Add button if required
4. Select Date
5. Select desired start time
   * + To highlight the whole appointment, hold and drag cursor down to the required end time
6. Open the context menu (right click on the highlighted appointment slot) and select ‘New Client Appointment’
7. Search for the client by entering the identifier or last name
8. Select the Search button
9. Select the client from the list of search results
10. Note age to determine next KAS required
11. Select ‘Create client appointment’ button

Figure 17: Client Appointment pop-up box



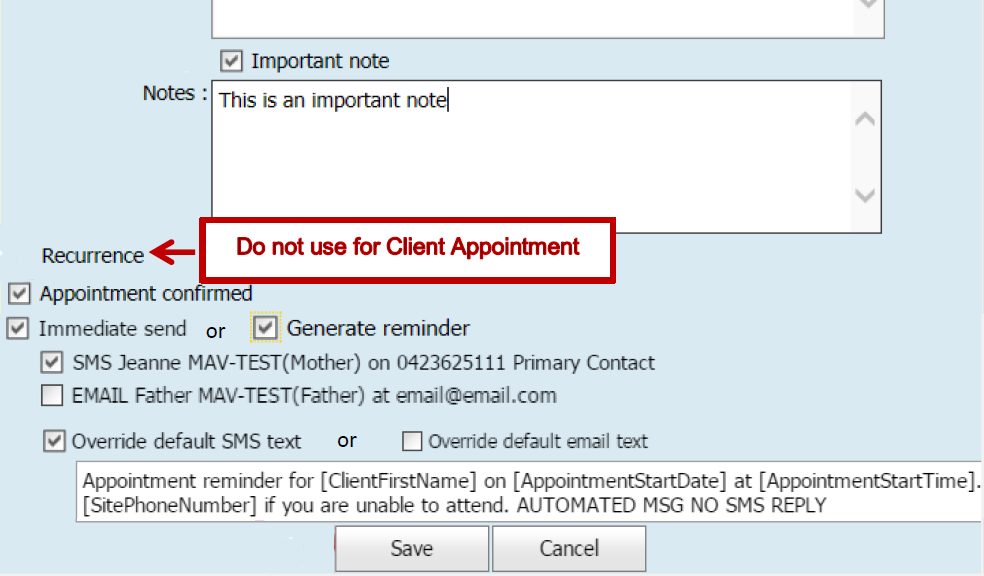
1. Ensure the client name is correct (this is auto-filled from search).
2. Select the appointment type from the look-up list.
   * + The same appointment type apart from KAS appointments can be added multiple times.
3. Ensure the date and time are correct (use digits or arrows to edit)
4. Ensure the site or centre is correct – this is the site for appointment in the calendar (this is auto-filled from your user settings)
5. Select location and mode from the look-up lists
6. The ‘Interpreter Required’ checkbox is auto-filled tick if entered in the Client Details screen
   * + This box can be unticked by selecting it again

Figure 18: Schedule 8 month consult (top)



1. Enter notes in the free-text field - these are displayed in the appointment summary
   * + To make an 'Important note' – an icon is displayed on the appointment in the calendar – check the Important note box.
2. The ‘Appointment confirmed’ checkbox is automatically checked – this is staff confirming the appointment
   * + This box can be unticked by selecting it again
3. Select the ‘Immediate send’ checkbox if the appointment is within three business days or select the ‘Generate reminder’ checkbox
   * + SMS or emails will only be sent if primary contact or contact client details are entered
     + Select the relevant checkbox to select who receives the SMS or email reminder
     + Ensure the primary contact or contact update client details are correct
     + If you need to change the default reminder text, select the ‘Override default SMS text’ or ‘Override default email text’ checkbox
     + **Important: Do not change the fields in square brackets []!**
4. Select Save
   * + If you select Cancel, a pop-up box will ask, ‘Are you sure?’

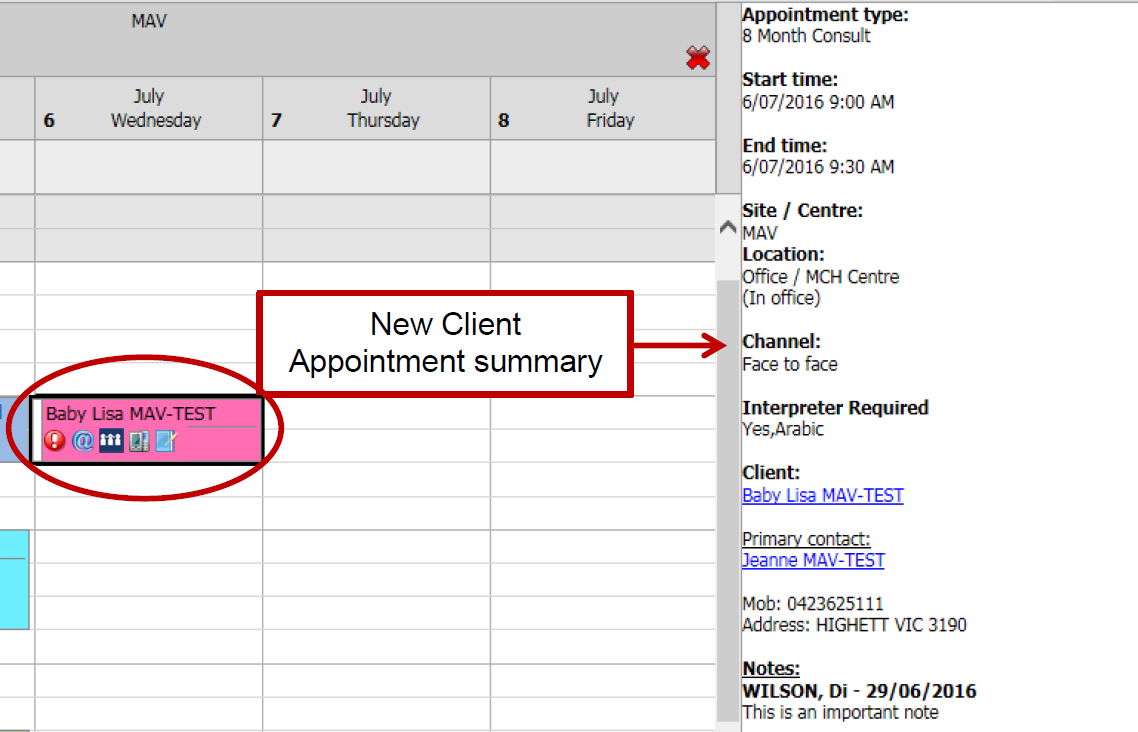
Figure 19: Schedule 8 month consult (bottom)



**Note**: For client appointments, do not use the following:

* All-day appointment checkbox – this is for non-client appointments only
* ‘Add site members’ and ‘Staff members’ – only for specific purposes
* Recurrence – for non-client appointments only

Figure 20: Completed 8 month consult



**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment icons](#_11._Appointment_icons)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’
* See ‘[Hide cancelled appointments checkbox](#_14._‘Hide_Cancelled)’

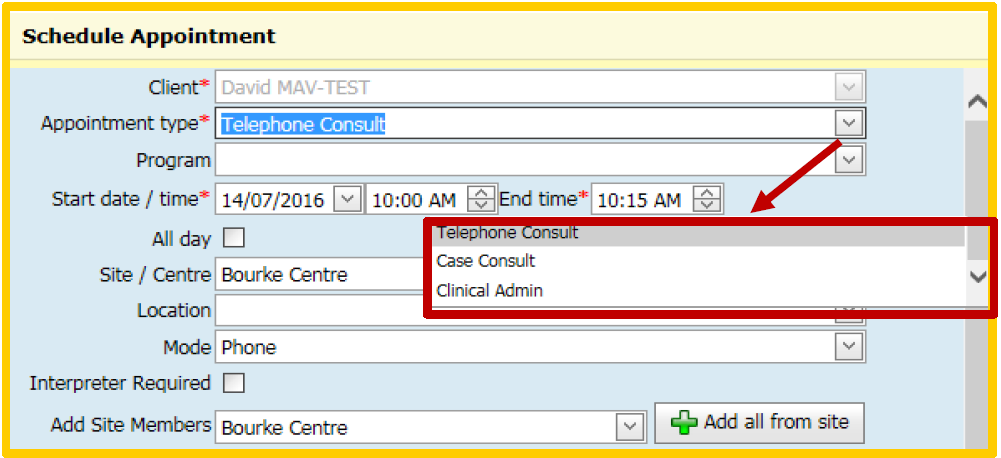
## Important note when making new client appointments

**Note**: Any appointments outside of KAS (and these) are to be made as ‘Additional Consult’ or Family Consultation.

If the appointment type is:

* Telephone consult
* Case consult
* Clinical admin

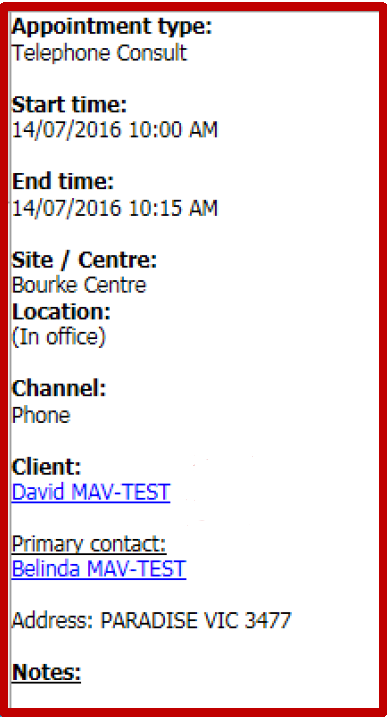
Figure 21: Schedule telephone consult



The appointment will be linked to the selected client and an appointment summary will be displayed in the calendar.

The appointment summary will contain a hyperlink to that client history.

Figure 22: Appointment summary for telephone consult



The appointment will then be displayed on the ‘Client Details – Summary Page’, under the heading ‘Future Appointments’.

Figure 23: Telephone consult under 'Future Appointments'

Close up of Futre appointments section on client details summary page with the following details:
Start date and time: 14/07/2016 10:00 AM
End time: 14/07/2016 10:15 AM
Appointment type: telephone consult
Site/Centre: Bourke Centre
Status: Accepted (Busy)

It will **not** be displayed in ‘Clinical Activity – Consultations’ as the consultation or appointment **must** be started as ‘Clinical Activity – Client Not Present’.

Figure 24: Client not present

Screenshot of Client Activity menu with 'Client not present' selected.
Screenshot of Client Not Present pop-up box. Notes field says 'Phone call to mother of David - discussed feeding issues'

**Note**: If the client is present at the consultation, then an appointment type of ‘Additional’ needs to be made instead.

## Start a client appointment from the calendar – KAS and Additional

[LEGEND REFERENCE – ADDITIONAL INFO AND ICONS IN APPOINTMENTS]

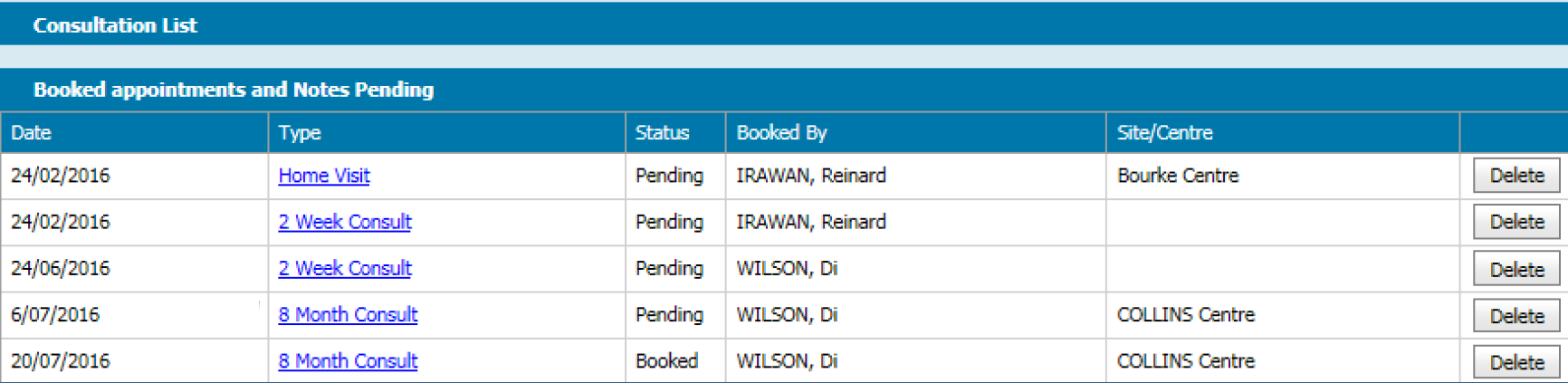
1. Select ‘Client Appointment’ to display the appointment summary in the calendar.

2. Select the client name hyperlink in the Appointment Summary – this opens ‘Client History’. (see Figure 20)

3. In ‘Client History’, select ‘Consultations’ from the Clinical Activity menu.

4. Select the appropriate Consultation hyperlink from the ‘Consultation List’ – this will open the selected consultation to be started.

Figure 25: Consultations list



**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment icons](#_11._Appointment_icons)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’
* See ‘[Hide cancelled appointments checkbox](#_14._‘Hide_Cancelled)’

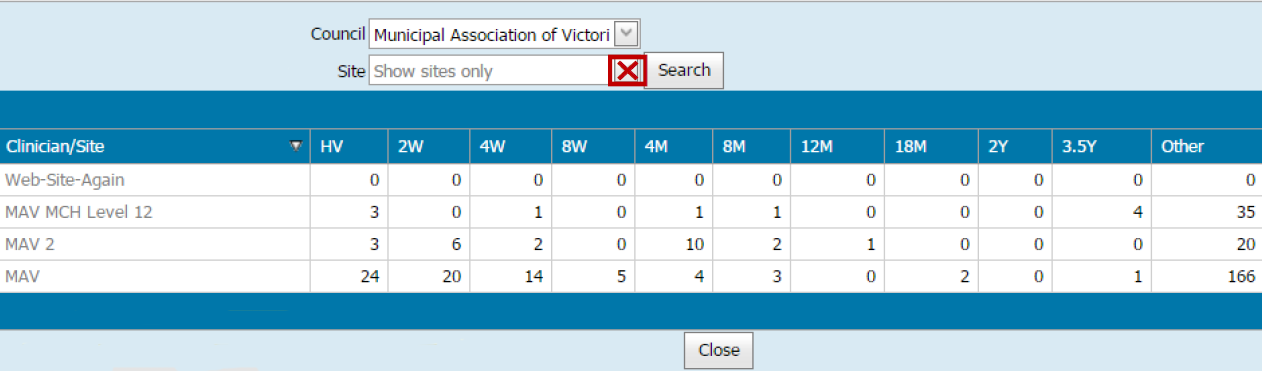
## Start a client appointment – telephone consult, case consult and clinical admin

Refer to ‘[Important note when making new client appointments](#_Important_Note_when)’

# Make a new client appointment from client history

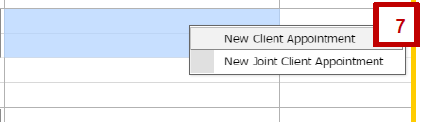
1. Open the ‘Client Details’ menu and select ‘Appointment Allocation’.
2. Council will auto-fill as in your user settings default
   * + Site: Only use ‘Show sites only’ – do not use the down arrow

Figure 26: Appointment Allocation

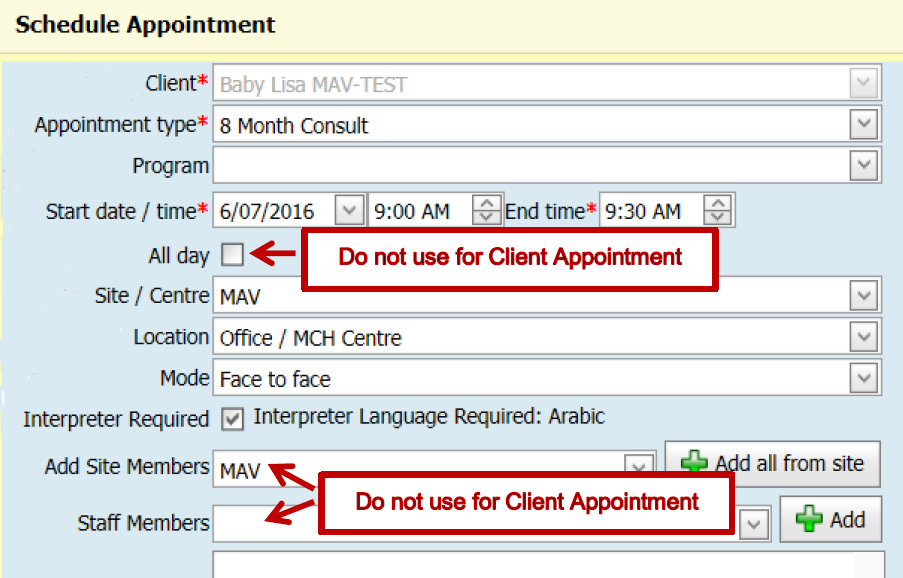


1. Select the relevant site
2. Select the date
3. Ensure that the site is correct
4. Select the desired start time
   * + To highlight the whole appointment, hold and drag cursor down to the required end time
5. Open the context menu (right click on the highlighted appointment slot) and select 'New Client Appointment'

Figure 27: Open context menu

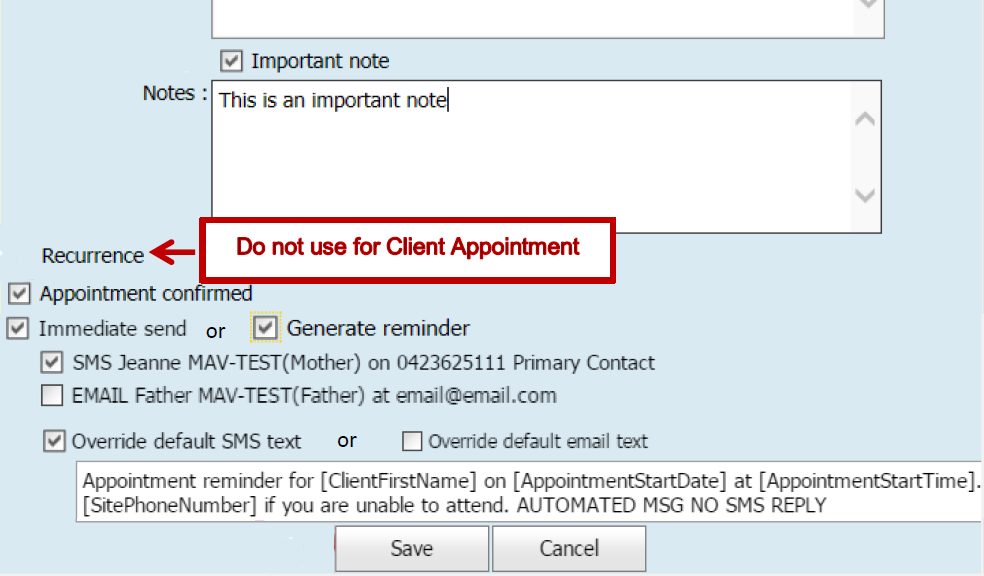


1. Ensure the client name is correct (this is auto-filled from Client History).
2. Select the appointment type from look-up list.
   * + The same appointment type for additional consultations or Family Consultations can be added multiple times.
3. Ensure the date and time are correct (use digits or arrows to edit).
4. Ensure the site or centre is correct – this is the site for appointment in the calendar.
5. Select location and mode from the look-up lists.
6. The ‘Interpreter Required’ checkbox is auto-filled tick if entered in the Client Details screen.
   * + This box can be unticked by selecting it again.
7. Figure 28: Schedule 8 month consult (top)



1. Enter notes in the free-text field - these are displayed in the appointment summary.
   * + To make an 'Important note' – an icon is displayed on the appointment in the calendar – check the Important note box.
2. The ‘Appointment confirmed’ checkbox is automatically checked – this is staff confirming the appointment.
   * + This box can be unticked by selecting it again.
3. Select the ‘Immediate send’ checkbox if the appointment is within three business days or select the ‘Generate reminder’ checkbox.
   * + SMS or emails will only be sent if primary contact or contact client details are entered.
     + Select the relevant checkbox to select who receives the SMS or email reminder.
     + Ensure the primary contact or contact update client details are correct.
     + If you need to change the default reminder text, select the ‘Override default SMS text’ or ‘Override default email text’ checkbox.
     + **Important: Do not change the fields in square brackets []!**
4. Select Save.
   * + If you select Cancel, a pop-up box will ask, ‘Are you sure?’

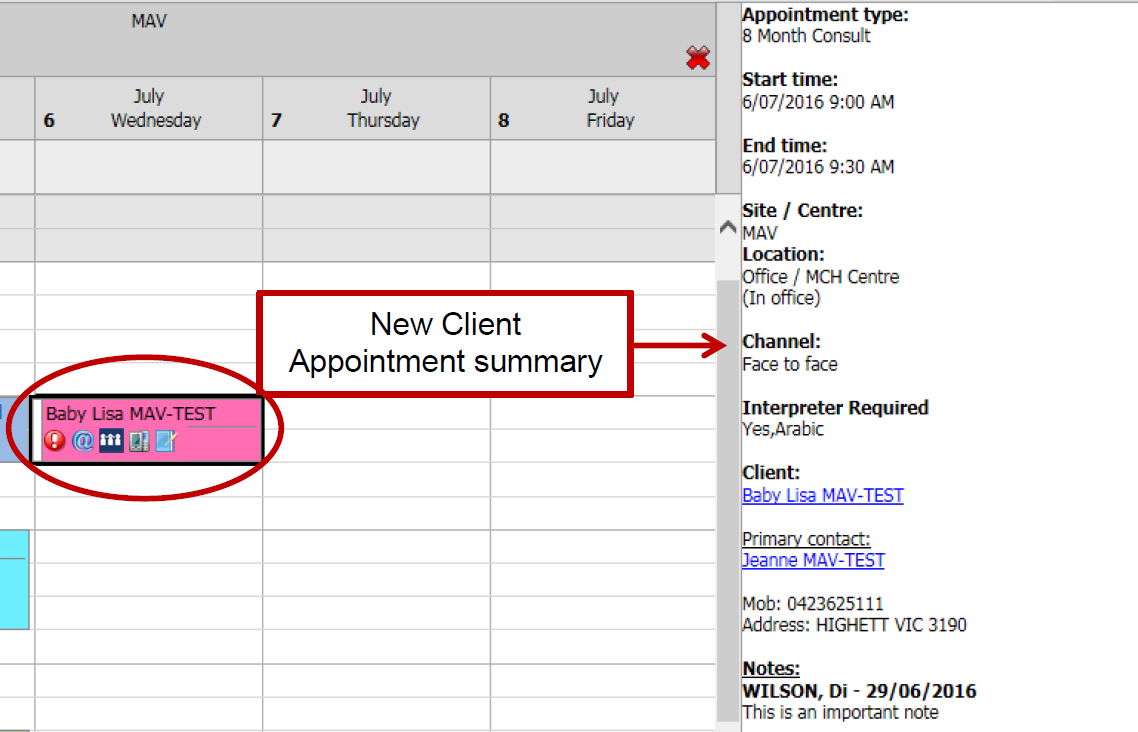
Figure 29: Schedule 8 month consult (bottom)



**Note**: For client appointments, do **not** use the following:

* All-day appointment checkbox – this is for non-client appointments only
* ‘Add site members’ and ‘Staff members’ – only for specific purposes
* Recurrence – for non-client appointments only.

Figure 30: Completed 8 month consult



**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment icons](#_11._Appointment_icons)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’
* See ‘[Hide cancelled appointments checkbox](#_14._‘Hide_Cancelled)’

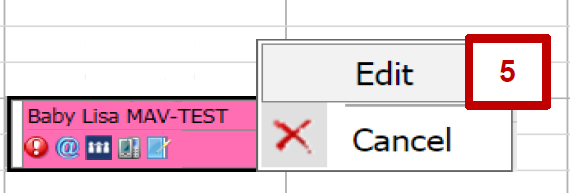
See ‘[Important Note when making New Client Appointments](#_Important_Note_when)’

# Cancel or edit a client appointment from the calendar

**Note**: Use the Edit function to edit, reschedule and **cancel** client appointments

1. Open the home screen.
2. Select view type (day, week, month or timeline).
3. Council and Site will auto-fill based on your user settings default.
   * + Only use ‘Staff Members’ and select the Add button if required.
4. Select the date.
5. Select the client appointment you wish to edit or cancel, open the context menu (right click the appointment) and select ‘Edit’.

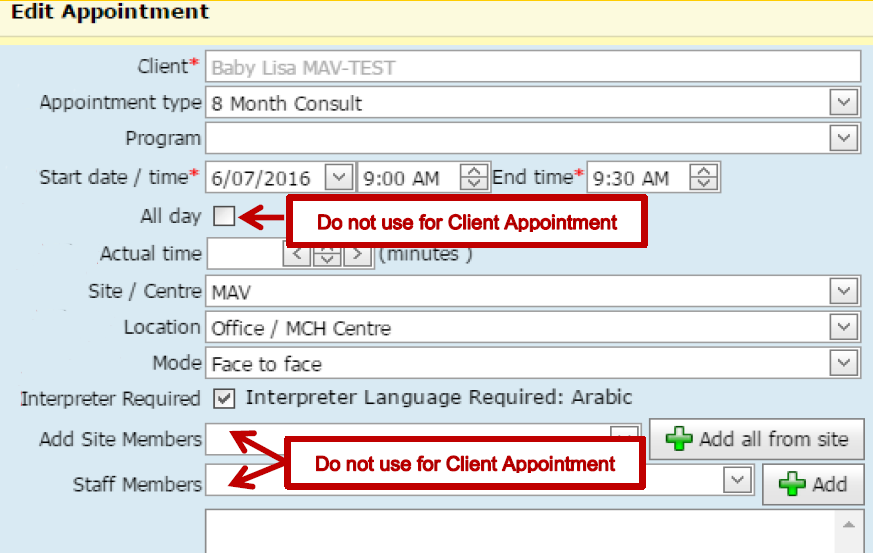
Figure 31: Edit appointment



**Note**: Cancelling client appointments is best done through this Edit function. DNA appointments must be cancelled in the the calendar. By doing DNA appointments this way, it will be automatically recorded in ‘Client History Notes’ and ‘DNA History’. If DNA is completed via ‘Client Consultation’, it will **only** be recorded in ‘DNA History’.

1. Ensure the client name is correct - this is auto-filled from search
2. Edit the appointment type from look-up list if required
   * + The same appointment type for additional consultations or Family Consultations can be added multiple times.
3. Edit date and time if required (use digits or arrows to edit)
4. Enter actual time if required (use digits or arrows to edit)
5. Ensure the site or centre is correct – this is the site for appointment in the calendar
   * + This is auto-filled from your user settings
6. Edit the location and mode from look-up lists, if required
7. The ‘Interpreter Required’ checkbox is auto-filled tick if entered in the Client Details screen.
   * + This box can be unticked by selecting it again.

Figure 32: Edit Appointment box (top)



1. Enter notes in the free-text field - these are displayed in the appointment summary.
   * + To make an 'Important note' – an icon is displayed on the appointment in the calendar – check the Important note box.
2. Select either the ‘Re-schedule’, ‘Cancel’ or ‘Data Entry Error’ radio buttons
   * + By selecting Re-schedule or Cancel, a ‘Reason’ field will appear – select one from the look-up list.
3. Select the ‘Record Did Not Attend’ checkbox – this records DNA in Client History Notes (Notes and DNA History)
   * + Select the DNA type from look-up list
     + Select Yes under Send SMS?’ or ‘Follow-up contact made? (if staff member has done this) or both
     + Comments can be added in the free-text field (such as ‘message left for family to reschedule’)
4. Appointment confirmed checkbox is automatically ticked – this is staff confirming the appointment
   * + The checkbox can be unticked by selecting it again.
5. Select the ‘Immediate send’ checkbox if the appointment is within three business days or select the ‘Generate reminder’ checkbox.
   * + SMS or emails will only be sent if primary contact or contact client details are entered.
     + Select the relevant checkbox to select who receives the SMS or email reminder.
     + Ensure the primary contact or contact update client details are correct.
     + If you need to change the default reminder text, select the ‘Override default SMS text’ or ‘Override default email text’ checkbox.
     + **Important: Do not change the fields in square brackets []!**
6. Select Save.
   * + If you select Cancel, a pop-up box will ask, ‘Are you sure?’

Figure 33: Edit appointment box (bottom)

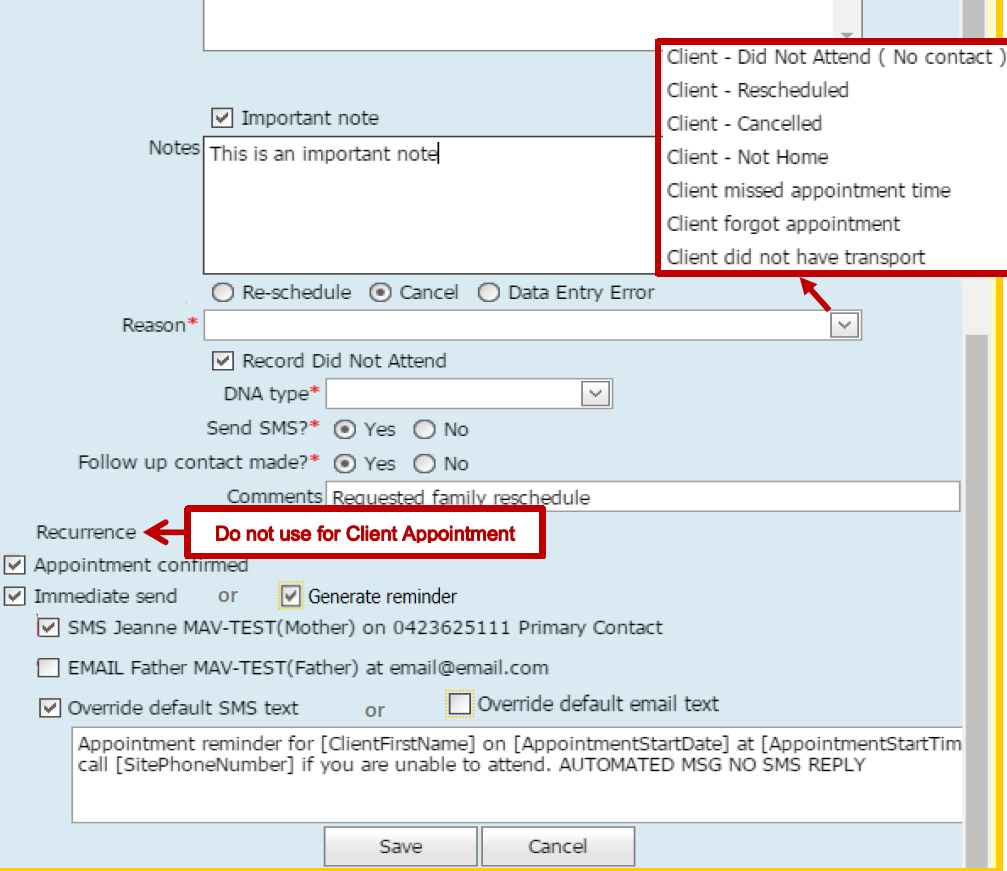
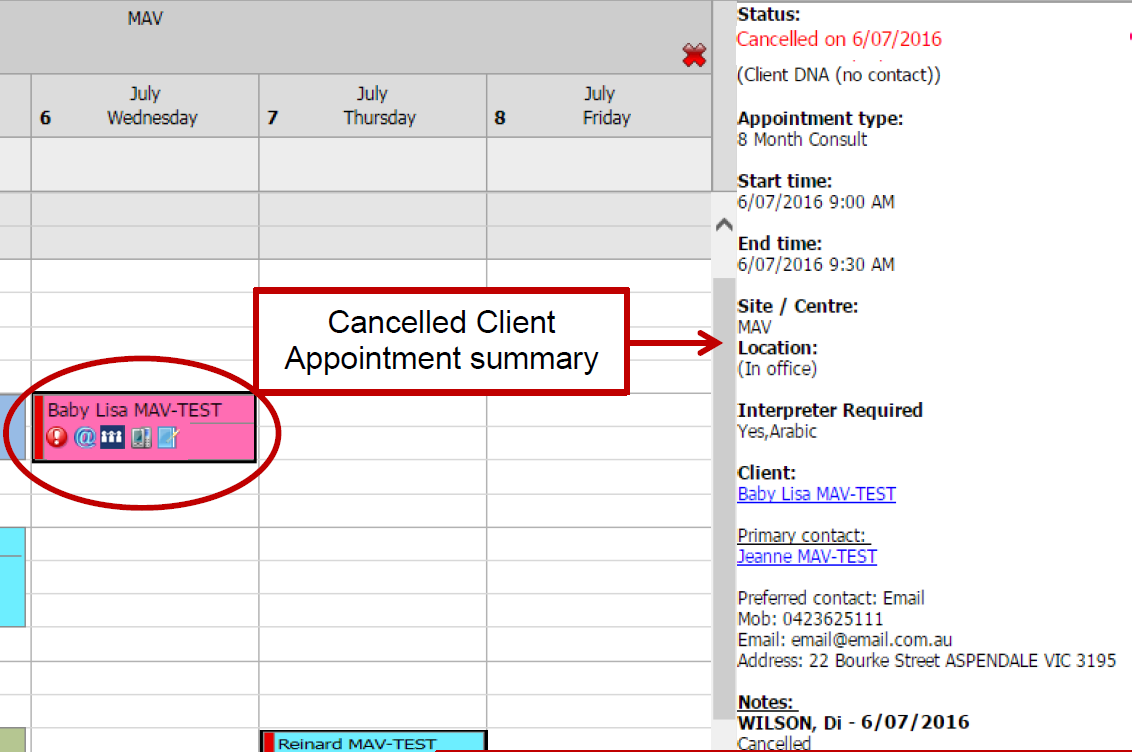


Figure 34: Appointment summary for a cancelled appointment



**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment icons](#_11._Appointment_icons)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’

### Cancelled client appointment in Client History

Figure 35: Note for cancelled client appointment in 'Notes'

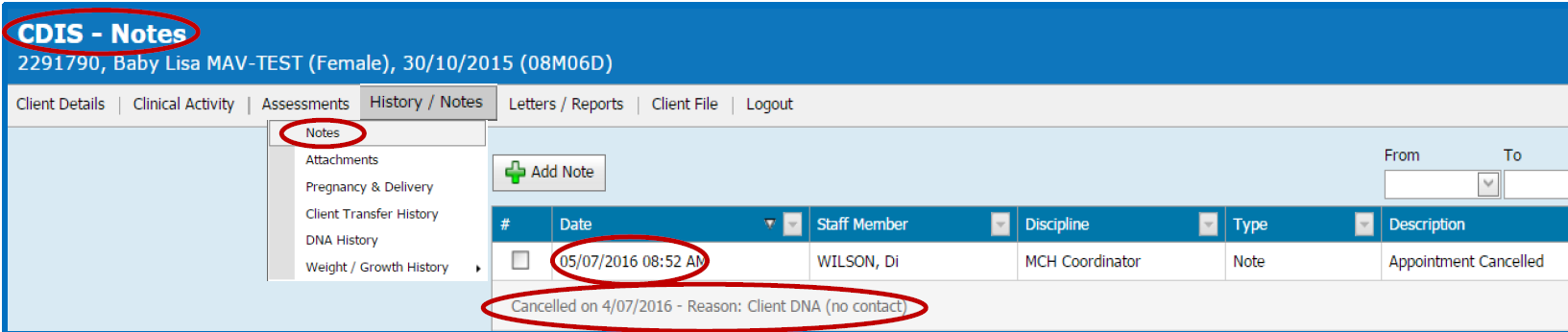
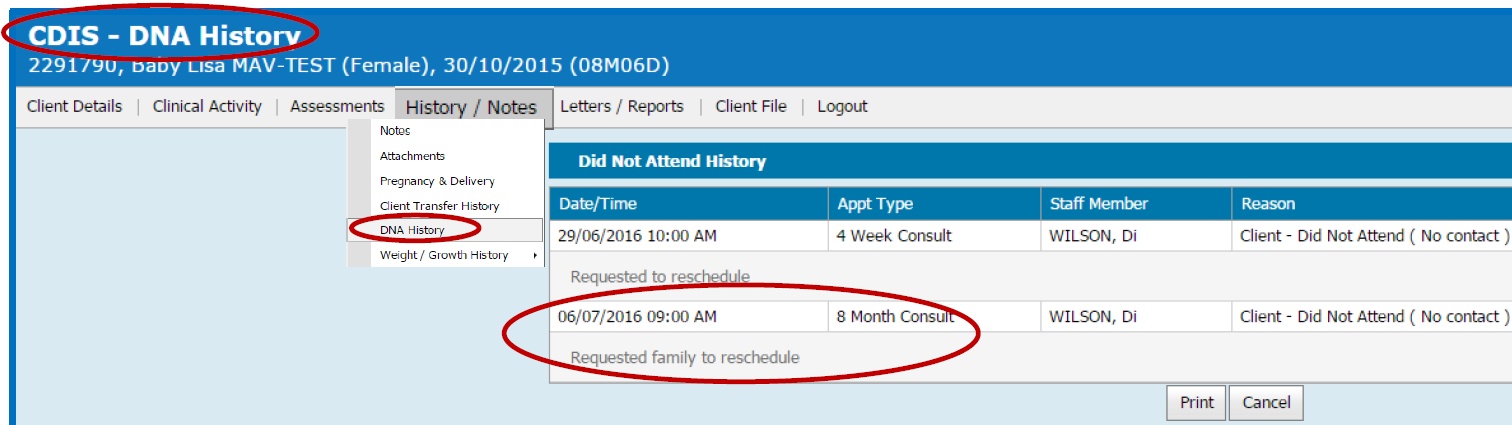


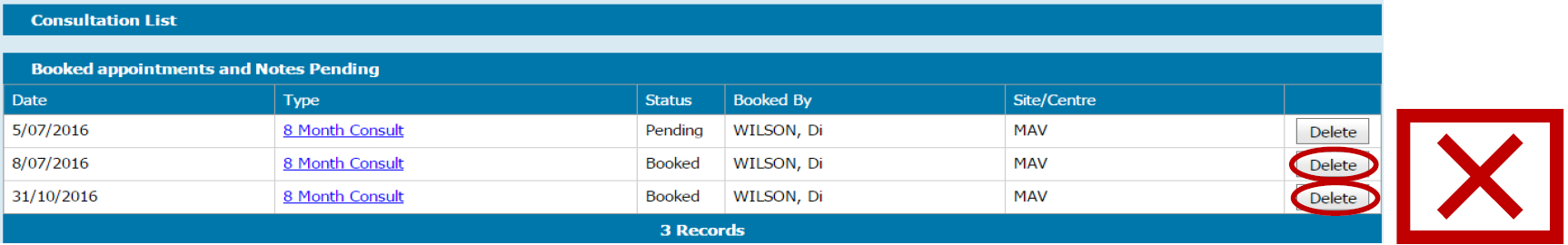
Figure 36: Cancelled appointment note in 'DNA History'



## Important note: Do not delete a client appointment from client history

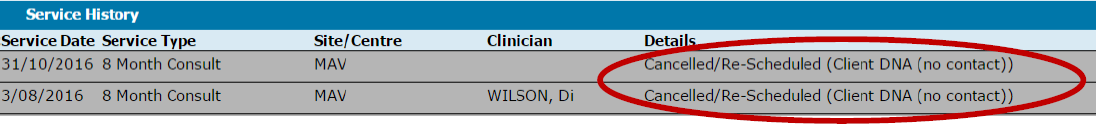
Client appointments can be viewed from Client History – open the Clinical Activity menu and select Consultation (Figure 37).

Figure 37: Consultations list with delete options (do not use!)



An option to delete an appointment is available; however, if deleted here, it will be displayed on the ‘Client Details – Summary Page’ under ‘Service History’ as ‘Cancelled/Client Re-scheduled (Client DNA (no contact)’ even if this is **not** the reason for the deleted appointment. It will **not be recorded** in ‘DNA History’ or ‘Notes’.

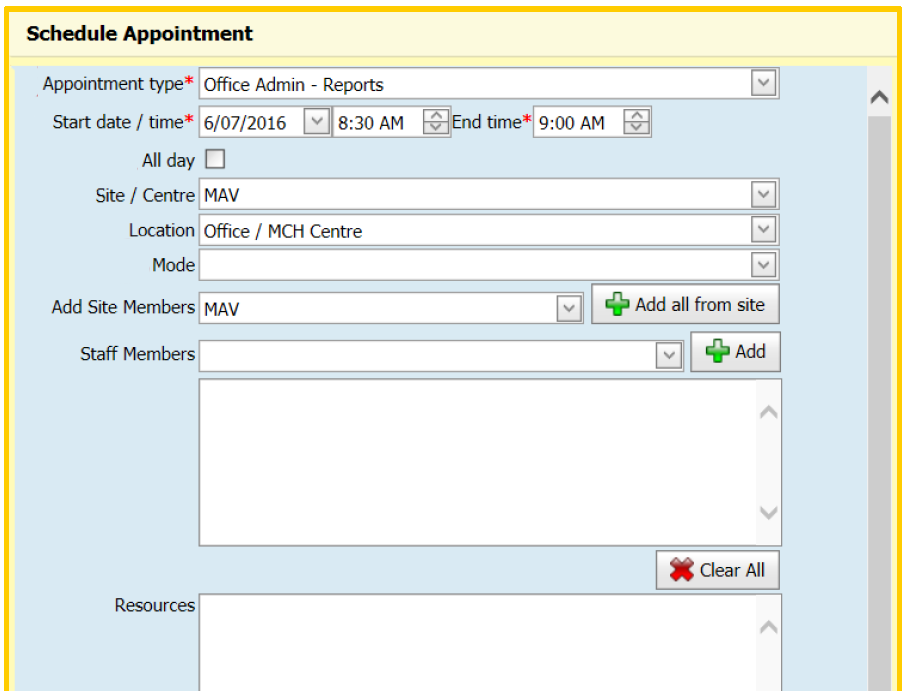
Figure 38: Service History section



# Make a new non-client appointment from the calendar

1. Follow ‘[Open new appointment – ‘Schedule Appointment’ window](#_Open_new_appointment)’
2. Enter Appointment Type –choose from the look-up list
3. Ensure the date and time are correct (use digits or arrows to edit)
4. If it is an all-day appointment, select the ‘All-day appointment’ checkbox – this will remove time fields
5. Ensure ‘Site/Centre’ is correct – this is the site for appointment in the calendar
   * + This is auto-filled from your user settings
6. Select location and mode from look-up lists, if required.

Figure 39: Schedule office admin - reports appointment (top)

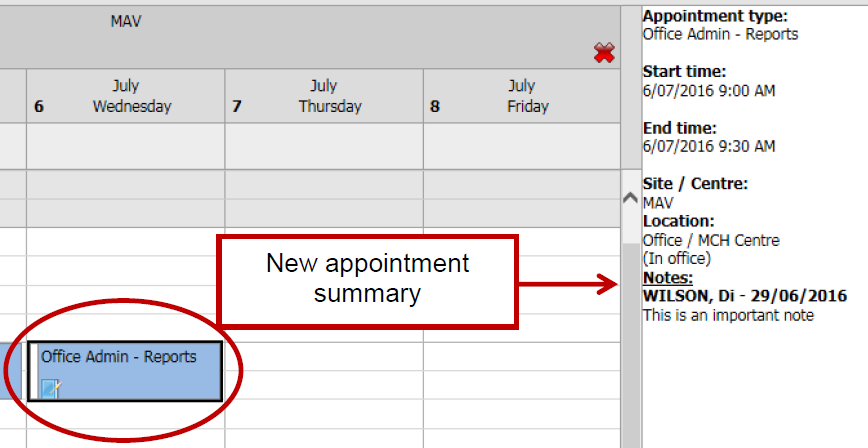


1. Enter notes in the free-text field - these are displayed in the appointment summary.
   * + To make an 'Important note' – an icon is displayed on the appointment in the calendar – check the Important note box.
2. Select box for Recurrence if required (most effective when allocating staff members or relievers to the same site) – the following parameters will then be revealed
   * + Select or enter required recurrence data
     + Select or enter end recurrence information (‘No end date’, ‘End after’ or ‘End by’)
     + Recurrent appointments can be cancelled singularly or as multiple appointments
     + Recurrent appointments can only be edited singularly and **not** as multiples.
3. Select Save.
   * + If you select Cancel, a pop-up box will ask ‘Are you sure?’

Figure 40: Schedule office admin - reports appointment (bottom)



Figure 41: Completed office admin - reports appointment in calendar



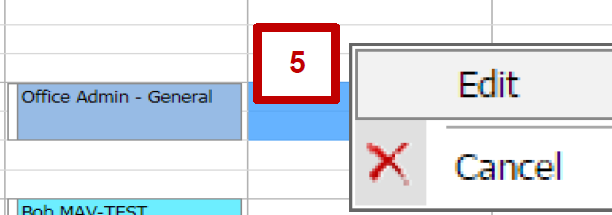
**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment icons](#_11._Appointment_icons)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’
* See ‘[Legend button](#_13._Legend_button)’

# Cancel or edit a non-client appointment from the calendar

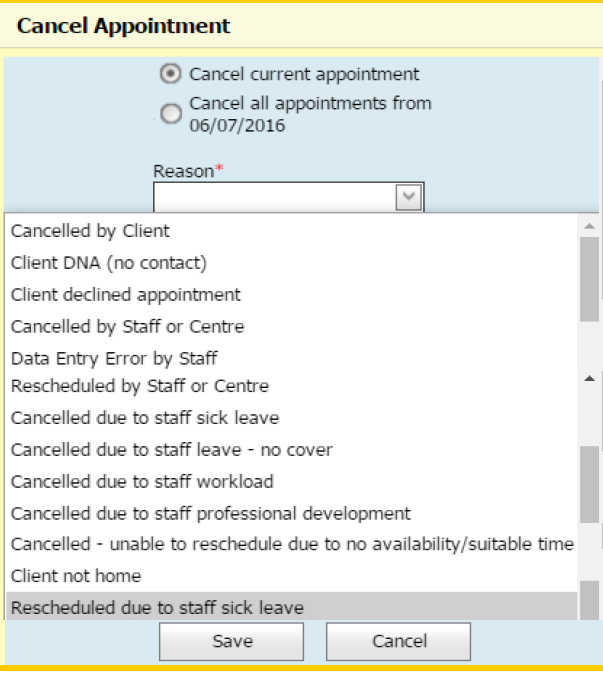
1. Open the home screen.
2. Select view type (day, week, month or timeline).
3. Council and site will auto-fill based on your user settings default.
   * + Only use ‘Staff Members’ and select the Add button if required.
4. Select the date.
5. Select the client appointment you wish to edit or cancel, open the context menu (right click the appointment) and select ‘Edit’ or ‘Cancel’.

Figure 42: Step 5 – Edit or cancel appointment



1. If selecting Cancel, select ‘Cancel current appointment’ or ‘Cancel all appointments from…’
   * + **Note**: ‘Cancel all appointments from…’ will only be an option if it is a recurrent appointment (non-client appointments only)

Figure 43: Step 6 – Cancel Appointment box



1. Select Save
   * + If you select Cancel, a pop-up box will ask, ‘Are you sure?
2. Edit Appointment Type from the look-up list if required
3. Edit date and time if required - use digits or arrows to edit
4. If it is an all-day appointment, select the ‘All-day appointment’ checkbox – this will remove time fields
5. Ensure ‘Site/Centre’ is correct – this is the site for appointment in the calendar
   * + This is auto-filled from your user settings
6. Select location and mode from look-up lists, if required.
7. Enter notes in the free-text field - these are displayed in the appointment summary.
   * + To make an 'Important note' – an icon is displayed on the appointment in the calendar – check the Important note box.
8. Select either the ‘Re-schedule’, ‘Cancel’ or ‘Data Entry Error’ radio buttons
   * + By selecting Re-schedule or Cancel, a ‘Reason’ field will appear – select one from the look-up list.
9. Select box for Recurrence if required (most effective when allocating staff members or relievers to the same site) – the following parameters will then be revealed
   * + Select or enter required recurrence data
     + Select or enter end recurrence information (‘No end date’, ‘End after’ or ‘End by’)
     + Recurrent appointments can be cancelled singularly or as multiple appointments
     + Recurrent appointments can only be edited singularly and **not** as multiples.
10. Select Save.
    * + If you select Cancel, a pop-up box will ask ‘Are you sure?’

Figure 44: Edit Appointment pop-up box

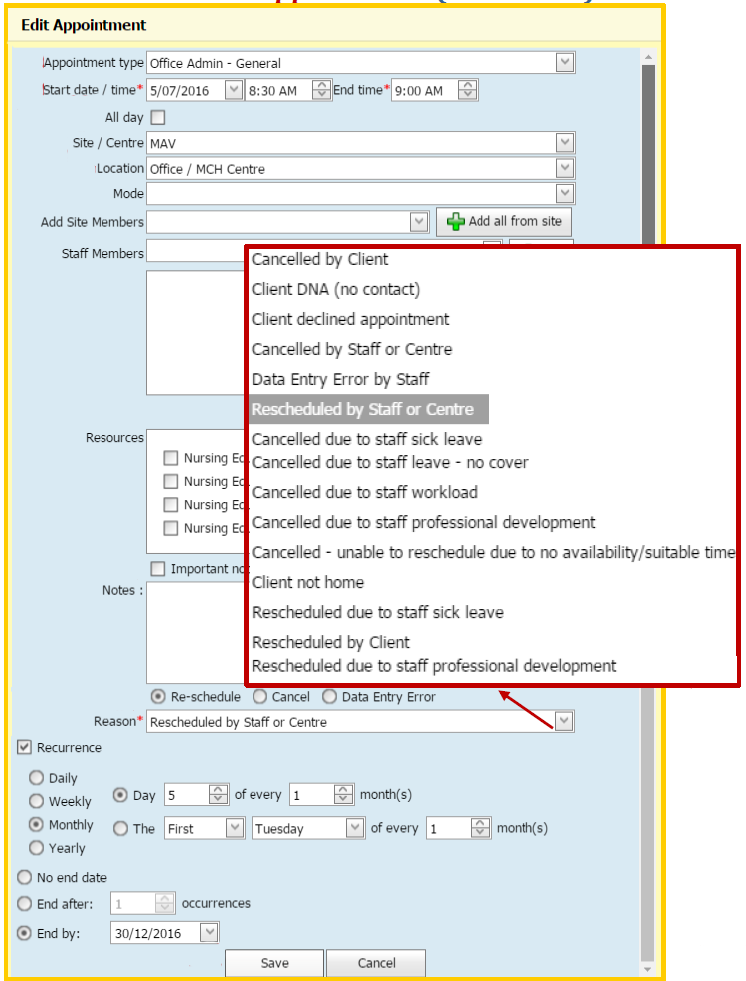
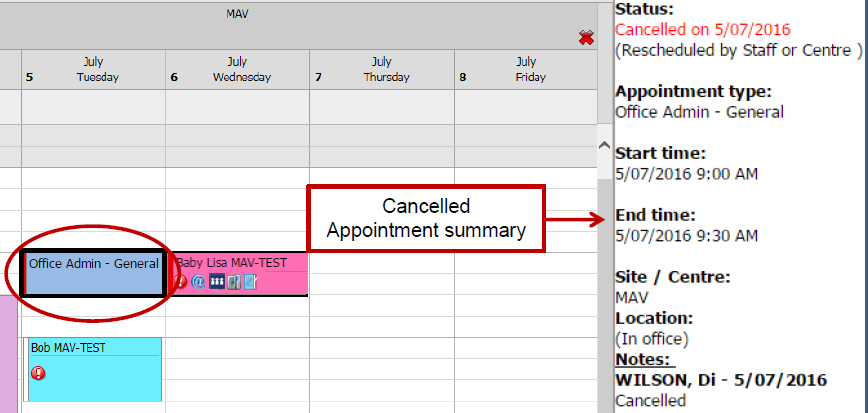


Figure 45: Completed cancelled or rescheduled appointment in calendar



**Additional notes:**

* See ‘[Appointment summary](#_10._Appointment_summary)’
* See ‘[Appointment icons](#_11._Appointment_icons)’
* See ‘[Appointment colour panels](#_12._Appointment_colour)’

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