No Show Management

Kansas Department of Health and Environment
Bureau of Family Health
Nutrition and WIC Services
1000 SW Jackson, Suite 220
Topeka, KS 66612-1274
www.kansaswic.org
(785) 296-1320

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Objectives

Upon completion of this module, you will be able to:

1. Document clients as no shows for appointments.
2. Print no show letters.

Policy to Review

CRT 03.07.00 Late and Missed Appointments

Note: This policy specifies that the Local Agency (LA) must notify all applicants and clients who miss their certification, midcertification, secondary nutrition education, or benefit issuance appointment.

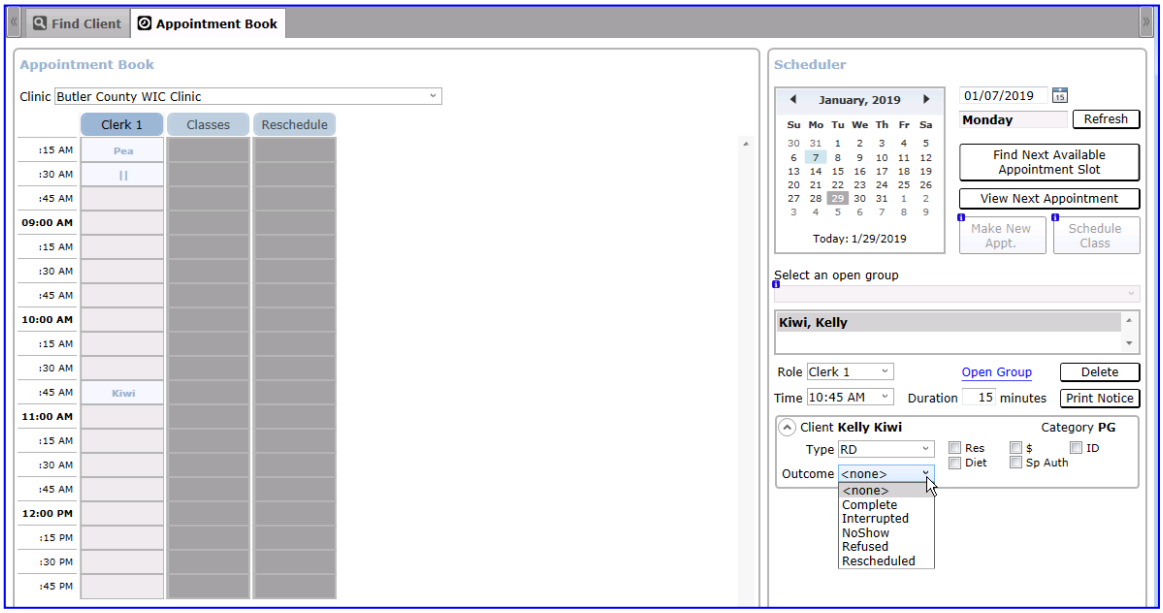
What Is No Show Management?

The No Show Management window is used to document that a client did not show up for their scheduled appointment and to print No Show Letters. It is recommended that No Show Management be completed daily, and letters sent daily, or for small clinics, at least weekly, usually the end of the week. This will allow for No Shows to be updated in the Appointment History, but save confusion and postage if clients call the next day to reschedule the missed appointment.

All clients who have not been seen for a scheduled appointment are listed for review in this window. The touch of a button updates all the client's records at one time. No Show Letters are printed from this same window. This window is concerned with appointment results only, not services (contacts) provided.

To Mark Appointment Outcomes in the Appointment Book

See client Kelly Kiwi in the sample screen shot below. Possible appointment outcomes are Complete, Interrupted, No Show, Refused, or Rescheduled. Kelly's appointment outcome is <none>. If her appointment had been completed on this date or she had been issued benefits, KWIC will automatically mark her appointment as "Complete." KWIC will **not** automatically mark appointment as "Complete" if just making a Note.



Other possible situations and outcomes include:

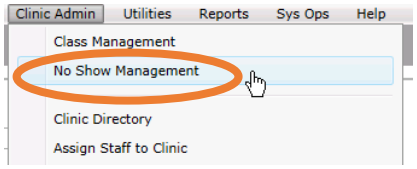
- If Kelly comes on the day of her appointment and refuses to attend the high risk appointment, but wants her benefits, the WIC clerk should mark the appointment outcome as "Refused" **before** benefits are issued.
- If Kelly calls on the day of her appointment and states she is ill and wishes to reschedule, the appointment should be marked as "Rescheduled" before a new appointment for Kelly is made.
- If Kelly comes for her high risk appointment but before it is completed, she becomes ill and has to go home, the appointment should be marked as "Interrupted."
- Appointments may be marked as "No Show" on the appointment book by WIC staff or automatically by KWIC using No Show Management, as discussed in this module.

For this module, we're going to say that Kelly did **not** come for her appointment and did not call to reschedule so we need to send her a no-show letter.

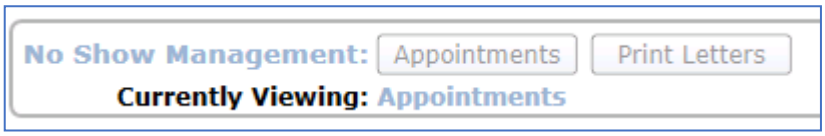
It is always a good idea to review appointments for the day using the Appointment book, before opening No Show Management. Any appointments not marked Complete, Interrupted, Refused or Rescheduled should be marked as such before opening No Show Management.

Using No Show Management to Mark Appointment Outcomes

Clinic Admin → No Show Management



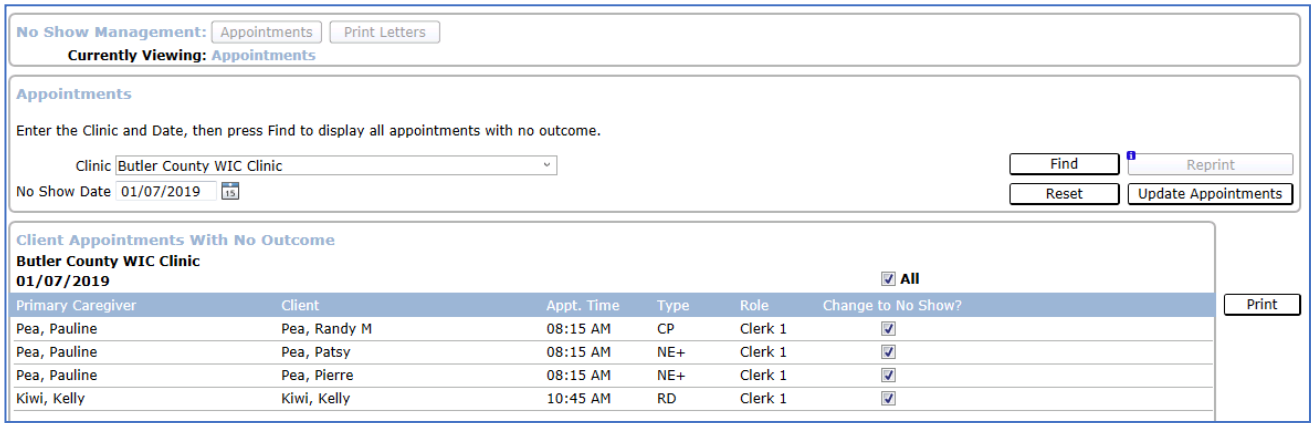
There are two buttons in No Show Management: **Appointments** and **Print Letters**.



Appointments Button

The Appointments button is used to document a No Show Outcome for any appointment without an outcome. If necessary, change the Clinic in the drop down list. Enter the No Show date you want to review. Click the **[Find]** button to show a list of all clients who were scheduled for an appointment but had no outcome for their scheduled appointment.

The screen may be blank if appointment outcomes have been documented in the Appointment Book throughout the day.



Review the names in the display list. In this example, we'll pretend that all of the names on the list should be marked No Show. If you click the **[Update Appointments]** button, the appointment outcomes will be updated to No Show.

If you are in a small clinic whose procedure is to run No Show Management only weekly, remember to repeat this process for **every** day in which you had appointments!

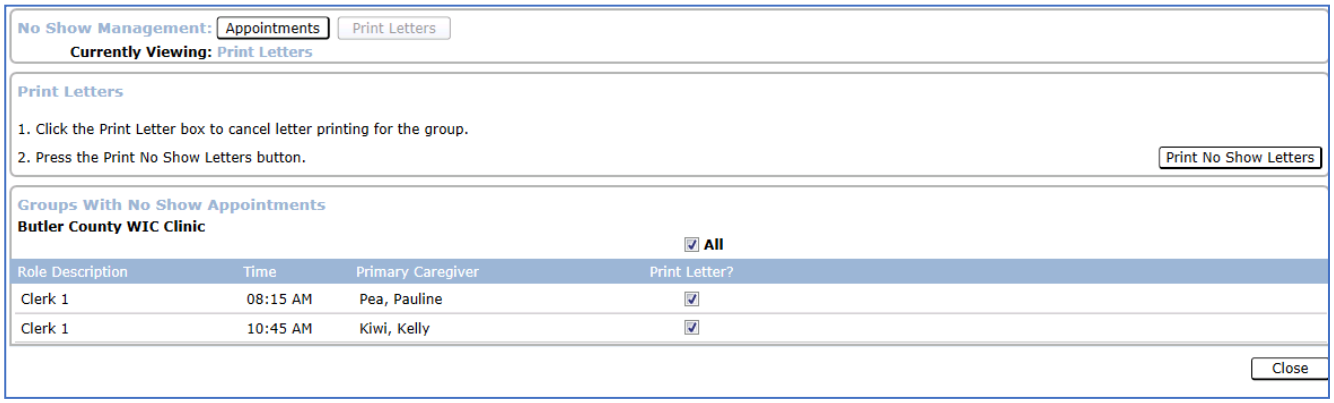
Is a client listed that shouldn't be there?
In some situations, you might find that a client's name is listed but should not be marked as a No Show. Close the No Show Management Window. Return to Find Client, select the client, and update the appointment outcome in the Appointment Book. **Save**! Only clients with no appointment outcome on the Appointment Book appear in this list. If staff manually marked a client as a No Show on the Appointment Book, they will not appear on this list. However, the client will appear on the Print Letters tab.

Tips:

- Click **[Reset]** on the Mark Appointment Outcomes tab to clear the screen and start a new search.
- Click **[Update Appointments]** before you move to the Print No Show Letters tab.
- The Caregiver's name will appear with each client name, but only one letter will be printed for each group.
- Leaving a box empty (with no X) on the Mark Appointment Outcome tab will leave the appointment without an outcome recorded.
- If a No Show is recorded by mistake, it must be corrected in the **Appointment Book**. Changing the appointment outcome in the Appointment Book updates the Appointment History with the corrected information.
- Click **[Reprint]** on the Mark Appointment Outcomes tab to reprint the No Show Letters for the selected date that had been previously printed.

Print Letters Button

After you click "Update Appointments," the KWIC System moves you to the Print Letters tab automatically. The clinic and date are the same that you chose on the Appointments tab.



To Print No Show Letters
All clients who have an appointment outcome of No Show on the selected day are displayed on the Print Letters tab. This list may vary somewhat from the list on the Appointments tab as the outcome of No Show may have already been manually set in the Appointment Book.

Review the list of clients in the display box. No Show Letters will print for all clients with an X in the **Print Letters? box**. You may remove the X by clicking in the box.

Click **[Print No Show Letters]** to print a No Show Letter addressed to each Caregiver. The letter will list all the appointments that were missed by the group on the selected day. Review the printed letters.

The No Show Letter will be printed in Spanish if the Print Letter in Spanish checkbox is selected on the Demographics tab.

Tips:

- Click **[Select All]** to check all boxes in the **Print Letter?** list with an X.
- Click **[Clear All]** to remove all X's in the **Print Letter?** list.
- A No Show Letter (NSL) contact is created for each client.
- Addresses on the letters show through a window envelope.

Although you may be tempted to return to the Appointments tab from the Print Letters tab and make changes, changes will not be recorded from the Appointments tab once the **[Update Appointment]** button is clicked.

Talk to your supervisor about the clinic routine for:

1. Who is assigned to complete No Show Management?
2. Who is the back-up if the main person is absent or busy?
3. When is it completed?
4. When are No-Show letters mailed?