



DEPARTMENT OF CHILDREN  
AND FAMILIES  
Secretary Reggie Bicha  
201 East Washington Avenue, Room G200  
P.O. Box 8916  
Madison, WI 53708-8916  
Telephone: 608-266-8684  
Fax: 608-261-6972  
www.dcf.wisconsin.gov

DEPARTMENT OF HEALTH SERVICES  
Secretary Karen E. Timberlake  
1 West Wilson Street  
P.O. Box 7850  
Madison, WI 53707-7850  
Telephone: (608) 266-9622  
FAX: (608) 266-7882  
www.dhfs.wisconsin.gov

**State of Wisconsin  
Governor Jim Doyle**

**TO: Income Maintenance Supervisors  
Income Maintenance Lead Workers  
Income Maintenance Staff  
W-2 Agencies  
Workforce Development Boards  
Job Center Leads and Managers  
Training Staff  
Child Care Coordinators**

**FROM: Amy Mendel-Clemens, Section Chief  
Technical Assistance, Training & Education  
Bureau of Enrollment Management  
Division of Health Care Access and Accountability**

<b>BEM/DFS OPERATIONS MEMO</b>					
<b>No: 10-09</b>					
<b>DATE: 1/19/2010</b>					
<b>FS</b>	<input checked="" type="checkbox"/>	<b>MA</b>	<input checked="" type="checkbox"/>	<b>BC+</b>	<input checked="" type="checkbox"/>
<b>SC</b>	<input type="checkbox"/>	<b>CTS</b>	<input checked="" type="checkbox"/>	<b>FSET</b>	<input checked="" type="checkbox"/>
			<b>BC+ CORE</b>		<input checked="" type="checkbox"/>
<b>CC</b>	<input type="checkbox"/>	<b>W-2</b>	<input type="checkbox"/>	<b>EA</b>	<input type="checkbox"/>
<b>CF</b>	<input type="checkbox"/>	<b>JAL</b>	<input type="checkbox"/>	<b>JC</b>	<input type="checkbox"/>
<b>RAP</b>	<input type="checkbox"/>	<b>WIA</b>	<input type="checkbox"/>	<b>Other</b>	<input type="checkbox"/> *
<b>EP</b>					

**SUBJECT: CARES Client Scheduling Enhancement**

**CROSS REFERENCE:**

**EFFECTIVE DATE: JANUARY 25, 2010**

**PURPOSE:**

The purpose of this memo is to communicate an enhancement to the CARES Client Scheduling function scheduled for implementation on January 25, 2010.

**BACKGROUND:**

Effective January 25, 2010, agencies that use CARES Client Scheduling will see the addition of a new field to the Appointment Scheduler screen (CSAS) and a new screen, "Available Appointments" (CSAA), which has been created as a counterpart to CSAS. Screen CSAA has been developed to allow workers to more efficiently search for available appointments for a given appointment code by displaying a listing of available time slots instead of repeatedly hitting the Enter key to search for available slots as they did under the previous process.

**POLICY CHANGE:**

There are no policy changes being implemented with this system change.

**CARES/CWW CHANGES:**APPOINTMENT SCHEDULER (CSAS)

A new phone number field has been added to screen CSAS along with a navigation path (PF18) to the new screen CSAA.

```

CSAS                APPOINTMENT SCHEDULER                01/14/10 09:15
SERVICE SITE: 0111                XCT266 K CLOUGH

CLIENT NAME   : TEST                SCHEDULER
ACTIVITY CODE : IR
RFA NUM      :                CASE : 0700479503
PIN          :                PHONE NUM:
WORKER ID    : XCT266
RR/SUP UNIT  :
BEGIN DATE   : 01 14 10    BEGIN TIME : 09 15 A    APPT.LOCATION : 0111
LOCAL PRINT  :                PRINTER NUM : VDR8782P    RESCHEDULED  :
-----
                                APPOINTMENT DATA
                                APPOINTMENT DATE: 01/15/10
                                APPOINTMENT TIME: 11 00 A
                                APPOINTMENT TYPE: ES INTAKE INTERVIEW/2ND
                                WORKER/RR UNIT: XCT266
                                WORKER-UNIT NAME: KEVIN                L CLOUGH
-----
PF15:CONFIRM APPT PF16:CONFIRM APPT/ADD TO WAITING LIST PF17:DELETE PF18:CSAA
NEXT TRAN:        PARMS:

```

1. Phone Number field: If a phone number has been added for the customer on the Additional Data page for an RFA or the General Case Information page for a case, the phone number will be automatically loaded to CSAS for the following 'appointment-by-phone' activity codes:

IP - ES INTAKE INTERVIEW/PHONE for RFA  
 MP - ES INTAKE INTERVIEW/2ND PHONE for RFA  
 RP - ES ELIGIBILITY REVIEW/PHONE for Case

The phone number will be retrieved when the search for available appointments is executed by pressing the Enter key. Once the appointment is confirmed on CSAS and added to CSDS, workers can use the PF21 key on CSDS to return to CSAS to get the customer's phone number.

2. Navigation to Available Appointment screen, CSAA: A new counterpart screen to CSAS (APPOINTMENT SCHEDULER) has been developed to allow workers to more efficiently search for available appointments for a given appointment code by displaying a listing of available time slots. Under the previous process, the worker would search for available slots by repeatedly hitting the Enter key.

Under the new process, once details are entered on CSAS and the worker presses Enter, a search is made for all available appointment slots for that code on the identified worker's schedule. The first available time slot is loaded in the Appointment Data section of CSAS. But now, rather than hitting the Enter key to search for additional slots, workers can press PF18 to load the new screen CSAA which will contain a listing of matching available time slots.

In the example below, the appointment is for code IR for worker xct266. By pressing Enter the search is executed and the first available slot is returned under the Appointment Data section (01/15/10 @ 11:00 AM):

```

CSAS                APPOINTMENT SCHEDULER                01/14/10 09:15
SERVICE SITE: 0111                XCT266 K CLOUGH

CLIENT NAME   : TEST_____ SCHEDULER_____
ACTIVITY CODE : IR
RFA NUM : _____ CASE : 0700479503
PIN       : _____ PHONE NUM: _____
WORKER ID    : XCT266
RR/SUP UNIT  : _____
BEGIN DATE   : 01 14 10   BEGIN TIME   : 09 15 A   APPT.LOCATION : 0111
LOCAL PRINT  : _         PRINTER NUM   : VDR8782P   RESCHEDULED  : _
-----
                                APPOINTMENT DATA
                                APPOINTMENT DATE: 01/15/10
                                APPOINTMENT TIME: 11 00 A
                                APPOINTMENT TYPE: ES INTAKE INTERVIEW/2ND
                                WORKER/RR UNIT: XCT266

Workers can now press PF18 to access the new screen CSAA which will show a
listing of available time slots for a specific activity code.

PF15:CONFIRM APPT PF16:CONFIRM APPT/ADD TO WAITING LIST PF17:DELETE PF18:CSAA
NEXT TRAN: _____ PARMS: _____

```

### AVAILABLE APPOINTMENTS (CSAA)

If this appointment time does not work, workers can now press PF18 to access the new screen CSAA which will show a listing of available time slots for the activity code IR:

CSAA		AVAILABLE APPOINTMENTS		01/14/10 09:18	
WORKER ID: XCT266		WORKER NAME: KEVIN L CLOUGH		XCT266 K CLOUGH	
BEGIN DATE: 01 14 10		BEGIN TIME: 09 15 A		ACTIVITY CODE: IR	
SUP UNIT:					
S	APPOINTMENT	APPOINTMENT TIME	APPOINTMENT TYPE	WORKER ID	
E	DATE	--BEG-- --END--			
L					
-	01 15 10	11 00 A 12 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	01 20 10	01 00 P 02 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	01 20 10	02 00 P 03 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	01 22 10	11 00 A 12 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	01 27 10	01 00 P 02 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	01 29 10	11 00 A 12 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	02 03 10	01 00 P 02 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	02 03 10	02 00 P 03 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	02 05 10	11 00 A 12 00 P	ES INTAKE INTERVIEW/2ND	XCT266	
-	02 10 10			XCT266	
-	02 10 10			XCT266	
-	02 12 10			XCT266	
PF15 CSAS					
NEXT TRAN: _____		PARMS: _____		PAGE: 01	
				MORE...	

Once the worker identifies the desired time for the appointment, the worker can select that time slot with an S and then return to CSAS by pressing PF15.

Please note that more than one page of listings can be returned in this search.

Once the worker identifies the desired time for the appointment, the worker can select that time slot with an S and then return to CSAS by pressing PF15. CSAS will initially load with no details in the Appointment Data section. The worker needs to press Enter to load the selected time slot details in the appointment data section.

The worker can then confirm that appointment by pressing PF15 or can return to CSAA by pressing PF18 and selecting a different slot to load on CSAS.

**CONTACTS:**

BEM CARES Information & Problem Resolution Center

\*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DHS/DHCAA/BEM/KC/ME