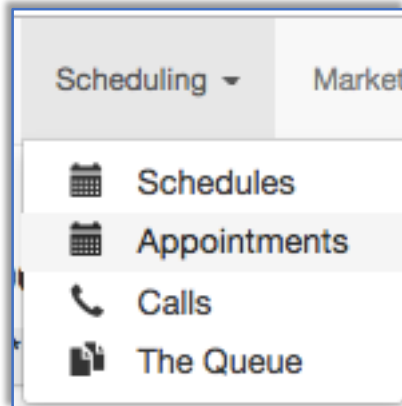# Appointments – Add an Appointment

In addition to booking an appointment from a calendar view, you can also add an appointment directly from the Appointments Page

Scheduling ▾    Market

- 📅 Schedules
- 📅 Appointments
- 📞 Calls
- 📄 The Queue

You can find the Appointments page under the "Scheduling" tab

To add a new appointment, click the green "Add Appointment" button

To find a consumer whose already been booked for an appointment, you can use the filters beneath each column header to search, then click "Update Filter" to begin your search. You can also reset your filters to go back to the full list of Appointments by clicking "Reset Filter". NOTE: This feature works across all pages in the Connector.

Show 25 entries

Search:

| First Name | Last Name | Phone | Location | Address | Assister | Date/Time | Status | Enrollment Status | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | ☐ Show Inactive Records | Update Filters  Reset Filters  Add Appointment | |
| Phelan | Oneill | 9522106863 | Jeff Mezick | 10000 Town Center Ave ... | Jeff Mezick | 2018-11-30 01:30 PM | Scheduled | | 📅 View  ☰ Edit |
| Phelan | Oneill | 9522106863 | Phelan's Enrollment Of... | 1725 Desales Street NW... | Young Invincibles | 2018-11-27 04:00 PM | Scheduled | | 📅 View  ☰ Edit |
| Phelan | Oneill | 952-210-6863 | Jeff Mezick | 10000 Town Center Ave ... | Jeff Mezick | 2018-11-26 05:00 PM | Scheduled | | 📅 View  ☰ Edit |

## Updating Appointment for [Phelan Oneill]

**Consumer First Name ***

Phelan

**Consumer Last Name ***

Oneill

**Email address**

phelan.oneill@younginvincibles.org

**Phone Number ***

9522106863

When adding an appointment, you're required to enter the following fields:
- Consumer First Name
- Consumer Last Name
- Phone Number

It is also strongly recommended that you enter the following fields:
- Zip code
- County
- Email address

You can also track the following information about consumers:
- Street Address
- City

TIP: If you put in the Zip Code, the County field will auto-populate. If the Zip Code spans multiple counties, the user will be able to select the correct one from a dropdown menu

**Zip Code**

85016

**County**

Maricopa

Each appointment requires an Appointment Slot. If you went through the Appointments page, you'll need to click the "Find an Appointment" button to search for a slot. You can also use this to reschedule consumers who have already been booked.

**Appointment Slot ***

No Appointment Slot Selected.

FIND AN APPOINTMENT

**Find an available appointment** ×

**Near ZIP Code ***

20036

**Search Within**

10

miles

**Starting on**

2018-12-12

We'll search 30 days out fr...

**Partner**

Search for partner

This search works a lot like the widget, but with more fields to search by. You can search for appointments by:

- Zip Code
- Start Date
- Organization
- Location
- Assister

You can then scroll through results to find a time for the consumer and then click "Choose" to select an appointment

Results  Search Again

**50 Results**

**Wednesday, December 12, 2018 at 05:00 PM - 06:00 PM EST**
Assister: Young Invincibles
Location: Phelan's Enrollment Offices
1725 Desales Street NW • Washington DC, 20036       Choose

**Wednesday, December 12, 2018 at 05:00 PM - 06:00 PM EST**
Assister: Young Invincibles
Location: Young Invincibles - DC office
1725 Desales Street NW • Washington DC, 20036       Choose

**Wednesday, December 12, 2018 at 06:00 PM - 07:00 PM EST**
Assister: Young Invincibles
Location: Young Invincibles - DC office
1725 Desales Street NW • Washington DC, 20036       Choose

**Thursday, December 13, 2018 at 08:00 AM - 09:00 AM EST**
Assister: Young Invincibles
Location: Young Invincibles - DC office
1725 Desales Street NW • Washington DC, 20036       Choose

CANCEL   SAVE & CONTINUE EDITING   CREATE APPOINTMENT

Click the green "Create Appointment" button to save your work,  or click the blue "Save & Continue Editing" button to continue modifying the appointment.

One of the most important things you can do after an appointment is to "update" or "close out" appointments. Check with your manager or local Connector admin for more information on the exact reporting fields that you should enter.

**Required Fields by Young Invincibles:**

There are some basic fields that we at YI use to tell the story of the Connector's success. For an appointment to be "closed out", at a basic level you need to update two fields – **Appointment Status** and **Enrollment Status.**

*Appointment Status* checks whether or not the appointment happened– did the consumer show up or not? **A successfully closed out Appointment has one of the following Appointment Statuses**:
- <u>Completed</u> – the consumer attended the appointment
- <u>Cancelled</u> - the consumer or the assister cancelled the appointment ahead of time
- <u>No Show</u> – the consumer did not show up to the appointment

*Enrollment Status* tracks the basic outcome of the appointments. The basic options are whether the consumer enrolled, renewed, did not enroll, or if the appointment was post-enrollment assistance (also known as Health Insurance Literacy). **A successfully closed out Appointment has an appointment status if the appointment is completed.**

While not strictly required, the following fields are recommended:

- <u>Email</u> (if the consumer has an email address)
- <u>Zip Code and County</u>

**Appointment_Status**

| |
|---|
| Scheduled |
| Needs to be rescheduled |
| No Show |
| Confirmed |
| ✓ Completed |
| Cancelled |

**Enrollment Status**

| |
|---|
| ✓ ---------- |
| Enrolled - Marketplace |
| Enrolled - Medicaid |
| Renewed - Marketplace |
| Renewed - Medicaid |
| Enrolled - Marketplace and Medicaid |
| Renewed - Marketplace and Medicaid |
| Did Not Enroll - Medicaid Gap |
| Did Not Enroll - Family Glitch |
| Did Not Enroll - Covered by Other Means |
| Did Not Enroll - Other |
| Post-Enrollment Assistance |