

National Jewish IS / UX : Quitline Replacement

Appointment Scheduling

Goals

- 1 - Prominently display the purpose of the call for the Coach/CSR
- 2 - Give the user the ability to set next appointment w/ best callback date/time in mind

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Change Log

- 11/18/2010 - created
- 12/03/2010 - removed timezone references & preferred time highlighting
- 12/06/2010 - updated annotations per latest conversation
- 12/10/2010 - Added additional pages/scenarios, added link to Time Zone Conversions
- 3/18/2011 - Updated MCC panel per REQ review; removed link to "keep existing" from p.3, updated source for Preferred Time/Date (pulling from PT record vs. last referral)

To Do

Questions

First Inbound Call

Current date for this scenario is: 11/11/2010

Jimmy John has been thinking about quitting for a long time, and finally makes decides he's ready. Rather than grabbing a cig after dinner. Jimmy calls Quitline (6:40pm). During his first call, he's able to complete the referral, intake & first coaching call.

While Jimmy is still on the phone the coach schedules his next appointment (based on the inbound call selection, the appointment type dropdown defaults to "Scheduled").

The coach asks Jimmy if he'd like to schedule his next appointment for the same day/time the next week. Jimmy agrees. Coach selects next Thursday from the mini-calendar; then selects 6:40pm.

First Call // Scheduling Next Appointment

Participant Dashboard Header [Client Name]

No Current Appointment / [Schedule](#)

Schedule Appointment

Appointments Displayed in MT Time Zone Conversion

Participant Prefers: Any day // Anytime

Appt Type: Scheduled

November 2010

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30
31					

Friday, Nov 12 Saturday, Nov 13 Sunday, Nov 14

7:00	7:20	7:40	7:00	7:20	7:40	7:00	7:20	7:40
8:00	8:20	8:40	8:00	8:20	8:40	8:00	8:20	8:40
9:00	9:20	9:40	9:00	9:20	9:40	9:00	9:20	9:40
10:00	10:20	10:40	10:00	10:20	10:40	10:00	10:20	10:40
11:00	11:20	11:40	11:00	11:20	11:40	11:00	11:20	11:40
12:00	12:20	12:40	12:00	12:20	12:40	12:00	12:20	12:40
1:00	1:20	1:40	1:00	1:20	1:40	1:00	1:20	1:40
2:00	2:20	2:40	2:00	2:20	2:40	2:00	2:20	2:40
3:00	3:20	3:40	3:00	3:20	3:40	3:00	3:20	3:40
				6:40			6:40	
7:00	7:20	7:40	7:00	7:20	7:40	7:00	7:20	7:40

Schedule Appointment

1. Current Appointment Display // (detailed later in this document)
2. Schedule Appointment button // button displayed in MCC allows the user to access to schedule appointment module
3. Timezone notification // text display; phase 1 only includes MT display; please display as HTML text on image with alt="Mountain time";
4. Appointment type // defaults based on previous context (need to define - see suggestions below); user may change appointment type if needed (used to set priority when exported on callback list)
5. Keep current appt option // allows the user to return to the previous view without affecting the current appointment (REMOVED; user will be required to make a selection from MCC - 3/18/2011 (AT/KKP))
6. Monthly calendar // highlights current date, allows user to navigate to next/previous months or to select a specific month from the calendar; selecting a day from the calendar updates the daily schedule listing at left
7. Current day
8. Participant contact day/time preference // displays the participant's preferred callback day(s) & times as saved to ; the participant preferences is just a text display for the coach's reference; please display as "[day of week] // [time of day]"
9. Daily schedule // displays the current day +1 by default followed by the next two days,
10. Appointment slots // displays all appointment times published for the date displayed; slots that are no longer available will be disabled; the user may click any available slot to schedule the next appointment; the user's selection will be displayed in the current appointment display (in the left sidebar)
11. Time Zone Conversion link // opens time-zone conversion image in new window

Suggestions for system selecting appt. type:

1. If inbound call, appt type = "Scheduled"
2. If contact log submission is "Reset", appt type = "Reset"
3. If contact log submission is "Reschedule", appt type = "Scheduled"
4. If user clicks "Schedule appt" from Referral form, appt type = "Referral"
5. Else... appt type = "Scheduled"

Next Appointment Displayed in sidebar

Participant Dashboard Header [Client Name]

Current Appointment [Edit](#)

Nov **18** Scheduled / 6:40 pm
Nov 18, 2010
Reset Count = 0

Schedule Appointment [Time Zone Conversion](#)

Appointments Displayed in MT Participant Prefers: Any day // Anytime

Appt Type ▼

November 2010

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30
31					

Thursday, Nov 18			Friday, Nov 19			Saturday, Nov 20		
7:00	7:20	7:40	7:00	7:20	7:40	7:00	7:20	7:40
8:00	8:20	8:40	8:00	8:20	8:40	8:00	8:20	8:40
9:00	9:20	9:40	9:00	9:20	9:40	9:00	9:20	9:40
10:00	10:20	10:40	10:00	10:20	10:40	10:00	10:20	10:40
11:00	11:20	11:40	11:00	11:20	11:40	11:00	11:20	11:40
12:00	12:20	12:40	12:00	12:20	12:40	12:00	12:20	12:40
1:00	1:20	1:40	1:00	1:20	1:40	1:00	1:20	1:40
2:00	2:20	2:40	2:00	2:20	2:40	2:00	2:20	2:40
3:00	3:20	3:40	3:00	3:20	3:40	3:00	3:20	3:40
4:00	4:20	4:40	4:00	4:20	4:40	4:00	4:20	4:40
5:00	5:20	5:40	5:00	5:20	5:40	5:00	5:20	5:40
6:00	6:20	6:40	6:00	6:20	6:40	6:00	6:20	6:40
7:00	7:20	7:40	7:00	7:20	7:40	7:00	7:20	7:40

Schedule Appointment

1. Current Appointment //
2. Selected Appointment // highlighted on click; highlight persists until a new appointment is selected

2nd Coaching Call

Current Date: 11/18/2010 (6:45pm)

CSR calls Jimmy for his 6:40 pm coaching call.

Jimmy answers & is ready to talk to a coach, and is transferred to a coach.

The coach searches for Jimmy by DOB, first & last name. Selects his name from the search results, and selects "Incoming call" from the participant preview. Upon opening his profile & viewing the current appointment display, the coach knows this is Jimmy's 2nd coaching call.

Current Appointment Detail

Participant Dashboard Header

Current Appointment [Edit](#)

Nov **Scheduled / 6:40 pm**
18 Nov 18, 2010
 Reset Count = 0

Current Appointment [Edit](#)

Nov **Scheduled / 6:40 pm**
18 Nov 18, 2010
 Reset Count = 0

(Event History here)

1. Current Appointment display // current appointment is displayed for inbound/outbound/customer service for any participant that has an appointment; if no appointment has been scheduled, please display "No current appointment" and link to schedule
2. Appointment Date (HTML text styled to look like calendar page)
3. Type of appointment // appointment types include scheduled, reset & fax referral
4. Appointment time
5. Edit // allows the user to reschedule current appointment or set new appointment
6. Appointment Date (in text) // includes abbreviated month, date & year
7. Call count // if appointment type is scheduled, display number of coaching calls (i.e if the user has had one coaching call, the appointment please display "Coaching call = 2"; if user was not reached, please display "Reset =1"

Unreachable for 2nd Coaching

Current Date: 11/18/2010 (6:45pm)

CSR calls Jimmy for his 6:40 pm coaching call, but is unable to reach him at any of the provided contact numbers.

CSR is taken to the Appointment Scheduling screen where she sets a reset appointment for Jimmy.

Scheduling a Reset

Participant Dashboard Header [Client Name]

Current Appointment [Edit](#)

Nov **18** **Scheduled** / 6:40 pm
Nov 18, 2010
Coach Call = 2

Contact Log

Home
Left voicemail

Mobile
Not in-service

Work
333-333-1234 ex 104

Left Message with Person ▼

1 [Reset Appt](#)

1. Reset Appointment button // onClick appt module is displayed with "Reset" as the selected appointment type (see following page); please see wf_contactLog_unified.pdf for additional Contact Log views)

FUTURE: continue to discuss allowing the system to automatically set the next appointment based on the participant's preferred contact days/times; need additional discussion around managing call flow

Scheduling a Reset

Participant Dashboard Header [Client Name]

Current Appointment Edit

Nov **18** **Scheduled / 6:40 pm**
Nov 18, 2010
Reset Count = 0

Schedule Appointment

Time Zone Conversion

Appointments Displayed in MT

Appt Type ▼

November 2010

<	1	2	3	4	5	6	>
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	31				

Participant Prefers: Any day // Anytime

Friday, Nov 12	Saturday, Nov 13	Sunday, Nov 14						
7:00	7:20	7:40	7:00	7:20	7:40	7:00	7:20	7:40
8:00	8:20	8:40	8:00	8:20	8:40	8:00	8:20	8:40
9:00	9:20	9:40	9:00	9:20	9:40	9:00	9:20	9:40
10:00	10:20	10:40	10:00	10:20	10:40	10:00	10:20	10:40
11:00	11:20	11:40	11:00	11:20	11:40	11:00	11:20	11:40
12:00	12:20	12:40	12:00	12:20	12:40	12:00	12:20	12:40
1:00	1:20	1:40	1:00	1:20	1:40	1:00	1:20	1:40
2:00	2:20	2:40	2:00	2:20	2:40	2:00	2:20	2:40
3:00	3:20	3:40	3:00	3:20	3:40	3:00	3:20	3:40
	6:40			6:40			6:40	
7:00	7:20	7:40	7:00	7:20	7:40	7:00	7:20	7:40

Contact Log

Home
Left voicemail

Mobile
Not in-service

Work
333-333-1234 ex 104

Left Message with Person ▼

Close Profile

1. Close profile // returns the user to a reset view of Participant search
2. Appt Type //

Current Appointment (additional views)

New participant / no current appt.

No Current Appointment / [Schedule](#)

1

Upcoming Appointments by type

Current Appointment		Edit
Nov	Scheduled / 6:40 pm	
18	Nov 18, 2010	
	Reset Count = 0	

Current Appointment		Edit
Nov	Reset / 6:40 pm	
18	Nov 18, 2010	
	Reset Count = 1	

Current Appointment		Edit
Nov	Fax Referral / 6:40 pm	
18	Nov 18, 2010	
	Fax Reset Count = 1	

Past Appointment - same as current (no difference in how the CSR/coach handles them)

Current Appointment		Edit
Nov	Scheduled / 6:40 pm	
1	Nov 1, 2010	
	Reset Count = 0	

1. Schedule // open Appointment Scheduling view
2. Appointment type // displays scheduled, fax referral or reset as the appointment type
3. Reset Count
4. Edit // same functionality as "Schedule" above
5. Fax Reset count // need to talk to Dave about fax resets b/c they have a different call back schedule