

Appointment Scheduling

If the process below indicates that the worker should schedule an appointment with themselves, but for any reason the worker is unable to accommodate the customer with an appointment, they should email the capital leads #HS EA Capital Leads HSEACapitalLeads@countyofdane.com and they will arrange an appointment.

When emailing the leads for any appointment that needs to be scheduled please include:

- 1) Subject Line- appointment type needed and county
- 2) Body of email- The customer's name, case/RFA number, phone number, date and time preferred for the appointment, any other relevant information.

Confidential Cases Exception

- Confidential cases can only be seen by the assigned worker and supervisor. Please apply the exemption in [this document](#) if the case is confidential.

Intakes

- **Child Care (that don't include FS) paper or ACCESS applications** received in the consortium are scheduled for intake appointments by a clerical worker in the county of residence with a worker from the applicant's county of residence during their CCA/Teamwork time.
- FoodShare (with no CC) applications will be assigned out by the workload manager, and most will not **require an appointment** to be scheduled. See [this link](#) for FS apps that require an appointment.
 - For any FS application that a worker cannot process and needs an appointment scheduled:
 - If a phone number is available, or if the FTF can be done in that worker's county:
 - In Dane- schedule the appointment in XDA848, XDA744, or XDA191, XDA765
 - In partner counties- the worker should schedule the appointment with themselves during their CCA/Teamwork time.
 - If the FS application requires a FTF and is in another county-the worker should email the leads to have it scheduled.
 - If the customer lives in Dane- leads will schedule in XDA848, XDA744, or XDA191, XDA765
 - In partner counties- leads will schedule with a worker during CCA/Teamwork time.
- CC applications that include a FS request: These will be assigned out through the normal FSOD assignment **process to be called that day to meet FSOD** requirements. The FS/CC applications for all counties will be assigned round robin by Dane clerical using the FSOD tool, and the workload manager will email workers to process them during CCA/Teamwork time. CC appointments will still need to be scheduled for customers we are unable to reach.
 - In Dane- The CC appointment will be scheduled by Dane clerical using the Dane Co CC appointment process (see link above). Appointments will be in CWW Client Scheduling using -XDA848, XDA744, or XDA191, XDA765. If the customer is reached during the FSOD call, the worker can cancel the scheduled CC appointment.
 - In Partner counties- If the worker does not reach the customer during the FS interview calls, the worker will schedule the CC appointment with themselves during their CCA/Teamwork time within 5 days.

- **If a customer refuses to complete an interview on CCA and requests an appointment FTF or by phone for an intake for any program-**
- If the case resides in the worker's county:
 - In Dane- schedule the appointment in XDA848, XDA744, or XDA191, XDA765
 - For partner counties- the worker should schedule the appointment with themselves during their CCA/Teamwork time.
- If the case resides in another county, email the Capital leads to handle it at #HS EA Capital Leads_ HSEACapitalLeads@countyofdane.com The lead worker in the county of residence will schedule an appointment.
- In Dane- schedule the appointment in XDA848, XDA744, or XDA191, XDA765
- For partner counties- the lead should schedule the appointment with a worker during their CCA/Teamwork time.

Reviews

The Capital Consortium does not preschedule review appointments. When customers call in regarding a review appointment, the review should be done over the phone. If customer requests an appointment time to complete a review:

- If a customer refuses to complete an interview on CCA and requests an appointment FTF or by phone for a review for any program-
 - 1) If the case resides in the worker's county:
 - a) In Dane- schedule the appointment in XDA848, XDA744, or XDA191, XDA765
 - b) For partner counties- the worker should schedule the appointment with themselves during their CCA/Teamwork time.
 - 2) If the case resides in another county, email the Capital leads to handle it at #HS EA Capital Leads_ HSEACapitalLeads@countyofdane.com The lead worker in the county of residence will schedule an appointment.
 - a) In Dane- schedule the appointment in XDA848, XDA744, or XDA191, XDA765
 - b) For partner counties- the lead should schedule the appointment with a worker during their CCA/Teamwork time.

If the customer insists to see a caseworker FTF, but does not need an intake or renewal

The worker should try to resolve any issue the customer has over the phone to avoid FTF appointments. If they customer insists on a FTF appointment to see a worker:

- Email the Capital leads to handle it at #HS EA Capital Leads HSEACapitalLeads@countyofdane.com The lead worker in the county of residence will schedule an appointment.
 - In Dane- schedule the appointment in XDA848, XDA744, or XDA191, XDA765
 - For partner counties- the lead should schedule the appointment with a worker during their CCA/Teamwork time.