Spotlight on: appointment booking

Introduction

This Spotlight has been created to help agents and team leaders understand good practices for diary management.

Appointment booking questions

- review the Appointment Booking Tool FAQ document to identify if your query has already been raised and a resolution provided - this can be found on the Q-flow Diary Management Team Implementation Group social intranet site
- if the query is on the Appointment Booking Tool FAQ, it has been raised previously but is not showing a resolution as yet - please continue to review the Appointment Booking Tool FAQ for a response.
- any issues not logged on the Appointment Booking Tool FAQ must be raised to your Service Innovation Lead (SIL)
- your site SIL must raise the issue on the Appointment Booking Tool FAQ via the Diary Management Tool Group Group social intranet site
- a response will be sent and updated on the Appointment Booking Tool FAQ

Appointment Booking System issue escalation process

Please raise system issues via the normal incident escalation process which is:

- follow your site issues resolution process whereby you will raise the issue via your SIL.
- if your SIL cannot answer your query they will log and raise the issue via JIRA on your behalf.

System issues, for example, you are unable to access the Appointment Booking Tool - slow running or not saving.

Diaries required for new users

You must raise a JIRA ticket to arrange for a new diary to be added to a site. The following details are required:

- work coach’s name
- work coach’s staff number

- work coach’s DWP email address
- team name

Diaries that are no longer required

You must raise a JIRA ticket to arrange for the diary to be deleted centrally.

Assigning appointments

Jobcentres have a certain amount of autonomy in managing their business, for example - they may prefer to use a ‘drop in’ service where the claimant needs to bring evidence into the jobcentre without having to book an appointment.

However, some claimants may not be aware of this and will ring to book an appointment.

Jobcentres must ensure that any appointments that might be booked by a provider agent or a case manager can be booked and they must assign these appointments to at least one work coach diary.

Some key appointments are those that impact on the payment of a claim for example:

- all Initial Evidence Interviews
- First Commitment Meeting (repeat claims)
- Further Evidence Interviews, and
- new bank details

This is not a complete list.

Diaries must be enabled as well as have the availability to undertake this type of appointment.

Consequences of not assigning appointments

If an appoint is not assigned, an error message will be displayed and the user will not be able to complete the booking.

This creates additional work for Serco provider agents and generates ‘hand-offs’ to the jobcentre’s Provider Agent Contact (PAC) to book the appointment locally.

There will also be a risk to claimant payments and could delay a robust work-related discussion.

Appointments to be booked directly into the work coach diary

The following appointment types will now be booked directly into the work coach diary using the block time facility:

- New Style Employment and Support Allowance
- advanced appointments for prison leavers
- advanced claims for care leavers

The reason for blocking time must be the ‘appointment type’ being booked and include the ‘claimant’s name’.

Gaps between diary appointments

When booking appointments, agents are offered 15-minute time slots to book into.

When appointments are not booked back to back they leave space between slots in the diary.

This can lead to an accumulation of 5 minute gaps between appointments booked into agent diaries.

The 5 minute gaps are too small for appointments to be booked into and large amounts of unavailable time can accumulate in work coach diaries.

The build-up of white space impacts on:

- diary capacity
- work coach performance
- customer journeys

Suggested appointment booking advice

Work coaches can use the split-screen option to view both the booking page and diary page when booking appointments.

To split screen, press and hold the Windows logo key and then press the left or right arrow key.

Using the split screen option will show availability and help to reduce gaps between appointments.

Actions to take to manage diaries appropriately:

How to check the availability of work coach diaries

Weekly checks must be undertaken to identify the availability to book:

- initial appointments (all types)
- First Commitments Meeting
- Habitual Residency Test
- Gateway Intervention

This will allow managers to easily identify any availability issues for provider agents or Service Centres when booking these appointment types. To undertake the checks:

1. Access a claimant's account.
2. Select 'Book Appointment' on the claimant's landing page.
3. Continue the booking process for a face-to-face interview in your local jobcentre.
4. Select the appointment type for which availability is to be checked.
5. Select the next available agent. A view appears that shows the number of appointment slots that are available for the given week. This is the available slots across **all** work coaches in the different times slots shown
6. Select next week to gain a better idea around site's capacity.

How to check appropriate use of appointment types

Work coach team leaders must check that work coaches are correctly using appointment types, for example - there are multiple Work Search Review appointment types with various timings and it must be established that appropriate timings are being used.

Team leaders must also check the diary view to identify White Space and the use of appointments with different durations.

White Space is where there is availability in a work coach's diary. In order to maximise, diary appointments may need to be re-arranged to utilise these time slots.

Diaries for overtime

Sites have previously set up additional diaries to support overtime in order to reduce any excess of certain types of appointments, for example Initial Evidence Interview or First Commitment Meeting.

Using the Appointment Booking Tool segmentation means that separate diaries for overtime are no longer required.

Sites can set a new working pattern with new time segments (for example, Saturday 09:00-14:00) and assign only the required appointment types to these segments.

Segmentation of appointments within diaries

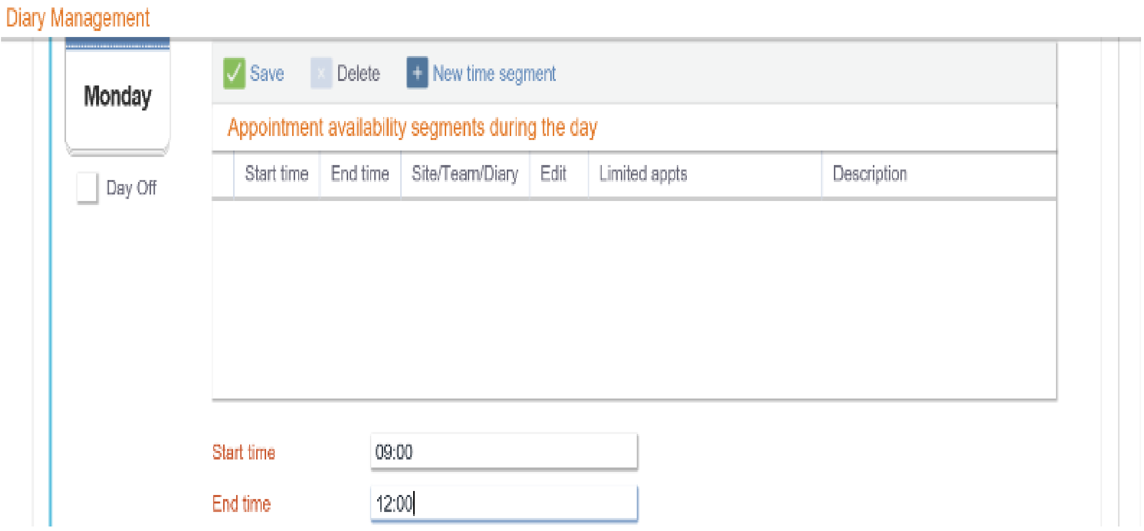
Segmentation should mean that additional diaries are no longer required, however - if you feel that segmentation doesn't meet the business need for your site, you **must** raise a JIRA ticket so that the Programme can work with you in developing a solution.

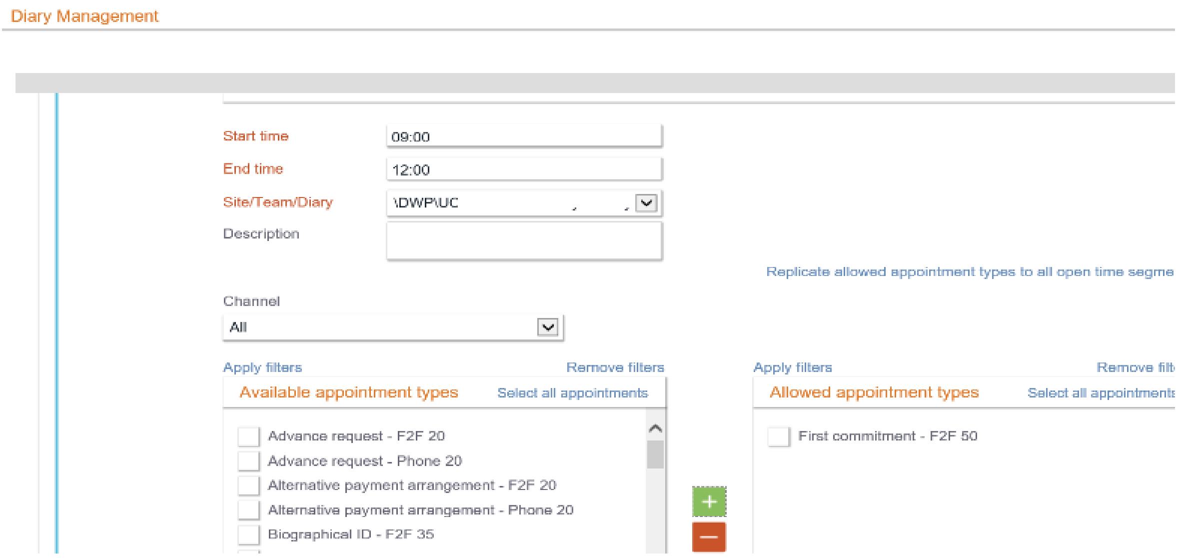
Diaries to support key appointments

Sites have set up additional diaries to ensure that certain appointments, for example - First Commitment Meetings are available during the week. An example would be an additional diary being configured to allow only First Commitments Meetings to be booked Monday – Friday 09:00 – 12:00 to be covered by 5 work coaches. When covering the additional diary, the work coaches' normal diaries are marked as unavailable.

Using segmentation means that the additional diary is no longer required.

When configuring the appointment booking tooldiaries for the 5 work coaches, rather than make their diaries as unavailable for the period they would normally have covered the additional diary, simply create a segment between 09:00-12:00 and only assign the First Commitment Meeting – Face to Face appointment.





Diary alignment IEI/First Commitments

Sites operating diary alignment can now use the segmentation.

If a site has work coaches who only conduct Initial Evidence Interviews, you can use segmentation to block out the time for the Initial Evidence Interview to enable claimants to have these completed. They can then be booked in to see another work coach for their First Commitments Meeting in a controlled manner

For example:

Segment 1: 09:00 - 09:20 - PSN Only and PSN/Evidence appointments
Segment 2: 09:20 – 10:50 - all IEIs except PSN Only and PSN/Evidence appointments
Break
Segment 3: 11:05 – 11:25 - PSN Only and PSN/Evidence appointments
Segment 4: 11:40 – 12:30 - all IEIs except PSN Only and PSN/Evidence appointments
Lunch.

This example means that the work coach conducting the First Commitments meeting has to wait just 20 minutes (currently they may have to wait 50 minutes).