Pre-Registration Considerations:

I found the pre-registration "tool" to be very helpful. I started using the pre-reg. 2 years ago and I feel like it made things a lot easier. The first year I used the pre-reg, I don't think there was an option for clients to pick their appointment time. It worked very similar to the distribution side of things and you would set the number of appointments you would take and the time frame that would be taken in (ie 5 appointments every 30 minutes). While this way of scheduling wasn't ideal, it still worked. One of the problems we had with that way of setting appointments was client schedule conflicts (work, meeting the school bus, dr. appt, etc.). This led us to another problem we hadn't thought of at the time…cancelations and/or reschedules. We all know that clients don't always show up when they are supposed to…appointment or not but somehow, I forgot to factor that in. I set up our appointment "timeline" and count based on how many clients we served the previous year and didn't take into consideration the no-shows/reschedules. I'll spare you the rest of details of that year, because of working with Peter through that process that year, he's made some great improvements! I just wanted to point out the fact that you *can* do pre-reg like that, but be prepared for client schedule conflicts and needing to do a lot of rescheduling.

After year one, Pre-Registration appointments were changed so that the only method was to publish a list of appointment times and let the client pick one that works for them. We still have control over what dates and times you will actually take appointments, but then the client can choose within those parameters as to when it may be a better time for them. This doesn't eliminate rescheduling, but it significantly reduces it. I have found that giving a variety of dates and times works best -some morning, some afternoons, maybe an evening and/or a weekend is helpful for those who work. In my last appointment we only took applications a couple days a week for a few hours a day…but for the entire month of October. This worked for us because it was mostly my staff who were at the computers doing the applications. This meant their entire day or week wasn't committed to angel tree. We could also see how many appointments we had for each date and time frame to see if we still needed the whole "team" to show up or not. I set up my appointment "flow rate" based on how many staff members I would have available and the time it would take them to complete the application. If I remember correctly if I had 5 staff available for applications then I would have 6 appointments every 15 minutes.

I made sure the receptionist knew how to direct people to the pre-reg. website and I also setup a computer at the front desk for those who didn't have access to an electronic device or who may need assistance in filling out the online form. We also took some pre-reg. information over the phone for those who couldn't come in or work a computer (like seniors).

The actual pre-reg. process on the client end is very simple. They enter a lot of their own basic information (HOH name, address, children's names, etc.), and all of that "carries over" to the application at their appointment time (which cuts the appointment time way down). When they complete their pre-registration. the screen displays their appointment date and time, the appointment ID#, and any other messaging you choose for them to have. I made sure to include the documents they needed to bring with them to their actual appointment.

I also would send out email reminders to the clients a couple of days before their appointment including the information about the required documents, they needed to have with them. I feel like this was very helpful for the client because they aren't always the best schedule keepers and another reminder of required documents never hurts.