California Automated Response and Engagement System (CWS-CARES)
Resource Family Application (RFA) Project

Scheduling Meetings

To be used with **Module 4: Scheduling Meetings, Logging Activities, Creating Tasks, & Searching/Printing Records** Participant Guide

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Quick Guide 4a
Version 1.0

Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Melissa Smith	Initial draft

Schedule Meetings

From the Application Overview page:

1. Click the **Activity** tab. – The **Activity** tab displays.
2. On the **Activity** tab, you will see 3 sub-tabs – **Log an Activity**, **Schedule Meeting**, and **Create a Task**. You are defaulted to the **Log an Activity** sub-tab.
3. Click the **Schedule Meeting** tab. – The **Schedule Meeting** page displays expanded.
4. Click the **Subject** field and from the dropdown list, select one of the following for the type of event:
    a. **Call**
    b. **Email**
    c. **Meeting**
    d. **Send Letter/Quote**
    e. **Other**
5. In the **Description** field, enter *the reason for the event*.
6. In the **Start** section, click the **Date** field, and enter *the date of event started*.
7. In the **Start** section, click the **Time** field, and enter *the time of event started*.
8. In the **End** section, click the **Date** field, and enter *the date of event ended*.
9. In the **End** section, click the **Time** field, and enter *the time of event ended*.
10. Leave the **Assigned To** field as assigned to you.

    NOTE: If you are scheduling an event with your applicant, and you want it to show in the Applicant Portal, you would assign this event to the applicant. Please refer to the **Quick Guide 12 – Applicant Portal Information for Workers** for more details.

11. In the **Location** field, enter *the location of the event, if applicable*.
12. Click the **Name** field, and from the dropdown list, select *the contact's name.*

    NOTE: If the contact's name does not display in the dropdown list, begin typing in their name and once it displays, select it.

13. Leave the **Related To** field as the application you are currently working on.
14. At the bottom right-hand corner of the page, click the **Save** button. – The **Schedule Meeting** sub-tab contracts.
15. In the top middle of the page, a green message box displays indicating the event was created.
16. Under the **Upcoming & Overdue** section, the event you just created displays.

    NOTE: Clicking the event link under the **Upcoming & Overdue** section, opens the **Event** page, showing details of the event.