Qtrac Glossary/Crosswalk

Term	Definition as it relates to Qtrac scheduling:
Qtrac	The statewide scheduling system.
Station	Your user virtual workplace to serve customers within the Qtrac system, like an assigned cubicle. Only one logged in user can use a station at a time, so if someone is using a station, no other logged in user can use that station. Your station is automatically turn off (to 'NO'). You must turn your station on (to 'YES') to see data.

Tabs:

Term	Definition as it relates to Qtrac scheduling:
Queue Management	This tab is the designated space to see which customer is checked-in and available, to start and end the appointment, call the customer, etc.
Appointment Check In	This tab is where you can check in on behalf of the customer. You must enter the confirmation number of the customer. To do this, go to Appointment Calendar, agenda tab, right click on the appointment and click 'copy confirmation number'.
Appointment Calendar	This tab is your local office's appointment availability calendar. You can sort your 'data' (aka customer appointments) by view of day/week/month. Once edited, if you are staying on this page, there is a refresh button that must be clicked to see new or edited appointments. If you are not staying on this page, the system will update itself.
Training	This tab is the link to the Workforce Professionals Center, where resources are stored for your learning.

Queue Management:

Term	Definition as it relates to Qtrac scheduling:
Time in	This refers to the time that the customer checked in for their appointment
Grouping	This refers to the service categories (Populated from registration form)
Name	The customer's name (Populated from registration form)
Phone	The customer's phone number (Populated from registration form)
Email	The customer's email (Populated from registration form)
Veteran?	This column displays the customer's Veteran Status (Populated from registration form)
Special accom?	This column displays any special accommodations that the customer has told us about (Populated from the registration form)
Referral?	This column displays the answer to 'How did you hear about us?' (Populated from registration form)

Appt type	This column displays how the customer wants to be served (i.e. phone, Webex, etc.) (Populated from registration form)
Service	This column displays the actual service being provided. It is the sub-category service selection (which is the 'visit details' question from the registration form). These sub-categories vary from office to office
Assigned staff	This column displays a free text field available for staff to enter in the name of themselves or another staff member. The individual placed into this field can be edited, changed, or removed at any time. The field will also populate with a staff member's name if they are added into the free text field called 'For Staff Use' on the registration form.
Serving	This column shows if a customer appointment is in progress.
Appt time	This column displays the time of the appointment.
SMS	This column shows if text message(s) exist between parties.
Notes	This column displays a free text field where you can add a note or find a previously added note.
More	This function displays a drop-down menu where you can find additional functionality: Call, Edit, SMS, Requeue, Prioritize, Transfer, and Delete.
Call	This option is where you can start a service. It doesn't actually "call" the customer but sends an SMS to the customer telling them that it's their turn and someone will be right with them. It also gives them the link to the meeting at that time. The system does not have the capability to actually "call" anyone. Once you select call, you are the 'assigned staff' and must reach out via their selected method.
Edit	This option is where you can edit any information in the customers 'ticket' aka appointment, which is the information provided during appointment scheduling.
SMS	This option is where you can send additional SMS messages.
Requeue	This option will send the customer back into the virtual line (a certain number of spaces defined by your office).
Prioritize	This option will bring the customer to the front of the line (this is helpful when giving veterans priority of service).
Transfer	This option is available when a customer needs a different service besides the ones you can provide, or for customers who have been scheduled for the wrong service.
Delete	This option is available to delete an appointment.

Appointment Check In:

Term	Definition as it relates to Qtrac scheduling:
Confirmation number	If checking in for the customer, the number is visible on the appointment calendar tab. The customer also has their confirmation via communication method chosen.

Appointment Calendar:

Term	Definition as it relates to Qtrac scheduling:
Region	Refers to the Workforce Development Area that you are currently assigned to.

Branch	Refers to the local office that you are assigned to.
Choose Service	Displays where you can select an option from the dropdown menu to only view a specific service (similar to sorting).
Day	Refers to the calendar view of the day selected.
Work week	Refers to Monday through Friday.
Week	Refers to the full week, Sunday through Saturday.
Month	Refers to the month.
Agenda	Refers to the list view of the appointment calendar tab. This list auto populates and shows the appointments. In this, you can right click on an appointment and view the options: copy confirmation number, copy full description, edit appointment and delete appointment.
Timeline	Displays an additional hourly view by the day selected.
Event	Refers to the appointment and the customer's information, as entered in the registration form.
Edit	Displays where you can edit any information in the customers 'ticket', which is the information provided during appointment scheduling.
For Staff Use	On the Appointment details, this is where you enter your name to assign the appointment to yourself. To do this, go to Appointment Calendar, agenda tab, right click on the appointment and click 'edit appointment'. (Note: you cannot populate this field when scheduling the appointment. You must edit an existing appointment to get this option.)

Booking an appointment:

Term	Definition as it relates to Qtrac scheduling:
Service selection	Refers to the list of service categories that a customer is able to choose from.
Visit detail (on registration form)/service type (in queue management dashboard)	Refers to the subcategory to the service selection (i.e. Intro to WorkSource – learn how WS can help you).