Creating Time Slots for Appointments on the Crossroads Master Calendar

There are two methods within this one approach. The first is to create slots as staff becomes aware that a family needs an appointment (as needed). The second is to create a pre-determined number of slots in anticipation of the need (pre-determined).

Method One – As Needed
Scenario: 2/5/14 is completely booked with appointments. A family calls and wants to come in at 4:00 PM for food benefits issuance; a child and an infant need to pick up. You know your staff can accommodate the request but the calendar doesn’t have space.

Step One: Navigate to the day view of the clinic master calendar for the date the appointment is desired. You can get there through the family record Quick Links or from Scheduling on the tool bar.

Step Two: Click Create Time Slot.

Step Three: Choose a block with enough time for two FBI appointments (15x2=30 mins), 4:00 – 4:30 PM.
**Step Four:** Click Save. Availability is created.

**Step Five:** Single-click in the 4:00-4:15 time slot, and single-click in the 4:15-4:30 time slot to identify the two newly-created FBI appointments you’d like to schedule.
Step Six: Double click anywhere within the two selected slots. Then perform a family search (upper right, click magnifying glass) to find the family you would like to schedule for FBI.

![Family Search Image]

Step Seven: Click in the row of the family you wish to schedule. Choose Select.

![Select Family Image]

Step Eight: Choose the family members needing the FBI appointments from the drop down list. Choose a contact method and select Book.

![Select Members Image]

Result: You have successfully created two FBI slots and booked a family for the appointments.

![Result Image]
Method Two – Pre-determined Slots

This method might be used when an entire day has no availability but staff knows they need to add multiple slots for multiple appointment types throughout the day. It will work to add slots whether availability already exists or not. If two slots exist during a time block and another is added, there will be three. So it can be used to create a slot where none exists, or to add slots were more are needed.

No green (availability) displays on the calendar. In the example below, no appointments exist, as you see none on the left side of the calendar screen. In most cases with converted data, the calendar will be white indicating no availability, but there will be existing appointments showing on the left side. In this scenario, the clinic needs to add availability to see one of any appointment type at any time between 8:00 AM and 5:00 PM.

**Step One:** Select Create Time Slot.

![Create Time Slot](image1)

**Step Two:** choose a start time of 8:00 AM and an end time of 5:00 PM. Choose all appointment types you can schedule during the block. **Note:** If you do not want appointments at lunch, go through the process twice, using 8:00 AM to 12:00 PM and 1:00 PM to 5:00 PM on two separate actions. Likewise, to create slots during smaller blocks of time, choose the specific times of day availability is desired.

![Create Time Slot](image2)
Step Three: Click Save. The screen below shows the calendar now has availability.

Step Four: To create the ability to provide two of each appointment type concurrently, the process has to be repeated. For three slots, the process would be performed three times. The steps below show the process being repeated and the creation of 2 slots during the same time frame.