Scheduling

Scheduling an Appointment for New Applicants

1. After completing and saving the New Family screen for a new applicant, go to the Scheduling System and click on the **Quick Appointments** in the Quick Links.

2. When the **Quick Appointments** screen opens, complete the **Search Options** such as day of week and preferred time.

3. Under Appointment Types, Crossroads will recommend an appointment type based on the individual’s status.
   a. Note the check in front of participant’s name. If there is more than one person the family, be sure all required names are checked.

4. Click the **Search** button.

5. Crossroads will search for an appointment that meets processing standards.

**Note:** This is a new family, so the only appointment type is Initial Certification. The duration of the appointment is set by Crossroads, but can be adjusted.
6. The next screen shows the available appointments. Note that all members of the family are blocked together.

7. Select the desired appointment.

8. Select the contact method.

9. Click the box marked Book.

10. The appointment was successfully scheduled and you are taken to the Family Appointments screen where you are able to view all appointments scheduled for this family.
Scheduling an Appointment for an Existing Participant

The process for scheduling appointments for active participants is similar. Most of the time, you will schedule the next appointment at the conclusion of a current appointment such as a certification or food benefits issuance.

- If the family record is already open:
  - Go to the Scheduling System in Quick Links and click on Quick Appointments. Crossroads will recommend the appointment type.
  - Follow the steps for scheduling an applicant to schedule the next appointment.
- If the family record is not open:
  - Access the Family record using the family search option in Family Services.
  - Go to the Scheduling System and click on Quick Appointments. Crossroads will recommend the appointment type.
  - Follow the steps above to schedule the next appointment.

11. For an existing family, you will see a greater number and variety of appointment types.
12. Make sure that the family members needing an appointment are checked. There may be times when not all family members will need to be scheduled.
13. Only one appointment type needs to be selected for those family members needing appointments. In this example, the mom is scheduled for a breastfeeding appointment which will include food benefit issuance.

Note: a number of appointment types are available from the drop down box. Again, the duration can be changed.
Rescheduling an Appointment for New Applicants or Existing Participants

15. Go to the Scheduling System and click on Family Appointments.

17. Complete the Search Options such as day of week and preferred time.
18. Click the Search button.
19. Select the desired appointment.
20. Select the contact method.
21. Select the rescheduled reason.
22. Click the box marked Book.

23. The appointment was successfully scheduled and you are taken to the Family Appointments screen where you are able to view all appointments scheduled for this family.
Cancelling an Appointment for New Applicants or Existing Participants

25. Go to the Scheduling System and click on Family Appointments.

27. The Appointment Cancellation pop-up window opens. Select the Cancellation Reason.
28. Click the Cancel Appointment button.
29. The appointment was successfully cancelled and you are taken to the Family Appointments screen.