

Creating and Applying an Hours of Operation Template

This resource explains the process of defining clinic hours of operation that are outside the default hours of operation (8 AM – 5 PM). If an agency plans to offer appointments outside the default hours of operation, an Hours of Operation Template must be created and applied to the master calendar to define the customized hours. It is important to note that all templates are created and maintained at the clinic level.

Go to **Scheduling** → **Templates**
→ **Hours of Operation**.

- **The Hours of Operation Template screen displays.**
- Previously defined Hours of Operation templates are listed on the left side of the screen, if any exist.
- **Click the Show All check box** to display both enabled and disabled templates.

The screenshot shows a web application interface for 'Hours of Operation Templates'. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Operations', 'Finance', 'Administration', and 'Help'. The main content area is titled 'Hours of Operation - Day Template' and contains several input fields: 'Template Name', 'Description', and 'Hours of Operation' (with 'From' and 'To' sub-fields). A 'Default Hours of Operation' section shows '8:00 AM - 5:00 PM'. On the left side, there are tabs for 'Day Templates' and 'Week Templates', each with a 'Show All' checkbox. At the bottom right, there are 'Save' and 'Cancel' buttons.

To Create an Hours of Operation Day template by Day

1. Select **Create New** (if this is not the first template).
2. Enter **Template Name**, **Description** and **Hours of Operation**.
3. Click **Save**. The name of the newly created template displays under the Day Templates option.

Hours of Operation Templates Cross roads Logout

Home Family Services Scheduling Vendor Operations Finance Administration Help

Day Templates Show All

Thursday hours of operation

Hours of Operation - Day Template Enabled

Template Name Thursday hours of operation

Description Apply this template for extended hours to every Thursday.

Hours of Operation

	From	To
	8:00 AM	7:00 PM

Default Hours of Operation 8:00 AM - 5:00 PM

Week Templates Show All

Create New Save Cancel

To Apply the new Hours of Operation Day template, go to **Scheduling → Templates → Apply Templates**

1. Enter desired **Start Date** and **End Date**
2. **Template Type** is Hours of Operation
3. Select the Hours of Operation template name which appears in the drop-down box for **Template**
4. Select the appropriate **Apply Option**
5. Choose the desired **Exception Rules** from the drop-downs
6. Click **Apply**

Apply Templates Cross roads Logout

Home Family Services Scheduling Vendor Operations Finance Administration Help

Apply Templates

Start Date 3/4/2015 End Date 12/31/2015

Template Type Hours of Operation Template Thursday hours of operation

Apply Options Selected Days of the Week: Mon, Tue, Wed, Thu, Fri, Sat, Sun. On: Every Month.

Exception Rule: If the selected date(s) falls on a Holiday: Do Not Apply. If the selected date(s) falls on a non working day: Do Not Apply.

Selected Day Template Details: Working Hours - 8:00 AM to 7:00 PM

Preview Clear

History Apply Cancel

Nutrition Education Class Templates

Nutrition Education Classes are added to the clinic master calendar by creating and applying templates.

Creating a Nutrition Education Class Template – Day

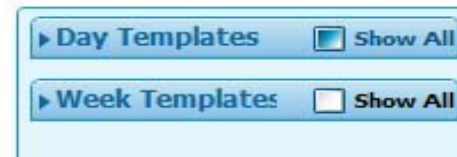
1. From the Home screen, go to **Scheduling > Templates > Nutrition Education Classes**. The Nutrition Education Class Templates screen displays.
2. Select **Day Templates** on the left side of the screen. Day is the default.

Note: Previously defined templates will show on the left side of the screen. Click the Show All box to display both enabled and disabled templates.

Note: Only one Nutrition Education Class template can be applied to a day, so every class taught on the day that the template will be applied must be contained in one template.

The screenshot shows a web-based application interface for creating a "Nutrition Education Class - Day Template". The interface includes a navigation menu at the top with options like Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. A left sidebar contains a tree view with "Day Templates" selected, showing sub-items "1st Thursday" and "3rd Thursday", and a "Show All" checkbox. The main content area is titled "Nutrition Education Class - Day Template" and contains several input fields and sections:

- Template Name**: A text input field.
- Description**: A larger text input area.
- Day Specific Settings**: A section with a star icon containing:
 - Education Topic**: A dropdown menu.
 - From** and **To**: Date selection fields.
 - Class Capacity**, **Maximum Capacity**, and **Open Access**: Numerical input fields.
 - Language**: A dropdown menu set to "English".
 - High Risk** and **Available for Online Booking**: Checkboxes.
- Assets** and **Special Needs**: Two empty rectangular boxes for image uploads.
- Buttons**: "Add" and "Clear" buttons.
- Classes Table**: A table with columns: Education Topic, From, To, Class Capacity, Open Access, Maximum Capacity, High Risk, Language. The table is currently empty, and the total item count is 0.
- Bottom Buttons**: "Save" and "Cancel" buttons.



3. Enter **Template Name**.
4. Enter a template **Description**.
5. Within the **Day Specific Settings** box:
 - a. Select **Education Topic**
 - b. Enter **From and To** times
 - c. Enter **Class Capacity**
 - d. Enter **Maximum Capacity**
 - e. Enter number of seats to be **Open Access**
 - f. Enter **Language**
 - g. Select **Assets** if applicable
 - h. Select **Special Needs** if applicable
6. Click **Add**. The screen refreshes and the information displays within the Classes grid.
7. Repeat steps 5 and 6 to add more classes to the template.
8. Click **Save**. A status message appears indicating success and the template is added to the list of templates. Click **Create New** to continue adding templates.

Note: Existing class templates can be modified by altering the information contained in the fields completed when creating class templates.

The screenshot shows the 'Nutrition Education Class - Day Template' form. The 'Education Topic' dropdown menu is highlighted with a red box, and a red arrow points to a zoomed-in view of the dropdown options.

-
- A-Breastfeeding Basics/Anticipatory Guidance
 - A-Folic Acid
 - A-Healthy Eating During Pregnancy
 - A-Immunizations
 - A-Tobacco, Alcohol and Illegal Drugs
 - Age-appropriate Foods
 - Age-appropriate Portions
 - Breastfeeding Peer Counselor Program
 - Breastfeeding: Exclusivity and Duration
 - Breastfeeding: Maternal Diet
 - Breastfeeding: Milk Expression
 - Breastfeeding: Positioning
 - Breastfeeding: Problems and Barriers
 - Breastfeeding: Returning to Work or School
 - Eating Well on a Budget
 - EFNEP
 - Family Meals
 - Fast Food Choices

Classes									Total Items: 1
	Education Topic	From	To	Class Capacity	Open Access	Maximum Capacity	High Risk	Language	
X	Family Meals	1:00 PM	1:30 PM	12	0	12	No	English	

Status Message
 Nutrition Education Class Template - New Template was saved successfully.

Day Templates
 1st Thursday
 3rd Thursday
 New Template

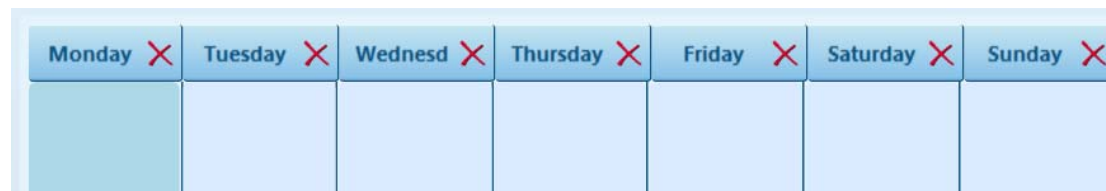
Create New **Save** **Cancel**

Creating a Nutrition Education Class Template – Week

1. From the Home screen, go to **Scheduling > Templates > Nutrition Education Class Templates**. The Nutrition Education Class Templates screen displays.
2. Select **Week Templates** on the left side of the screen.
3. Enter **Template Name**.
4. Enter a template **Description**.
5. Within the Monday through Sunday week grid, click a specific day of the week.



The screenshot shows the 'Nutrition Education Class - Week Template' form. At the top, there is a navigation bar with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main form has a left sidebar with 'Day Templates' and 'Week Templates' (selected). The main area contains a 'Template Name' field with 'New Week Class Template' and a 'Description' field with 'Apply to every week'. Below these is a grid with columns for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday', each with a red 'X' icon. At the bottom right, there are 'Save' and 'Cancel' buttons.



6. The screen refreshes and the Specific Setting grid displays the selected day (For example – Monday Specific Settings).
7. Within the **Day Specific Settings** box:
 - a. Select **Education Topic**
 - b. Enter **From and To** times
 - c. Enter **Class Capacity**
 - d. Enter **Maximum Capacity**
 - e. Enter number of seats to be **Open Access**
 - f. Enter **Language**
 - g. Select **Assets** if applicable
 - h. Select **Special Needs** if application
8. Click **Add**. The screen refreshes and the information displays within the Classes grid.
9. Repeat steps 7 and 8 to add more classes to the day.

Nutrition Education Class - Week Template

Template Name ★
New Week Class Template

Description
Apply to every week

Monday - Specific Settings

Day Specific Settings ★

Education Topic ★
General Low-risk Top

From ★
2:00 PM

To ★
2:30 PM

Class Capacity ★
12

Maximum Capacity ★
12

Open Access
0

High Risk

Available for Online Booking

Language ★
English

Assets

Special Needs

Classes Total Items: 2

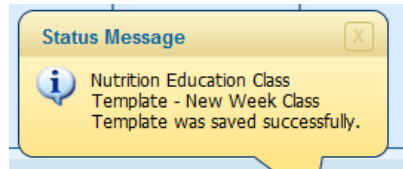
	Education Topic	From	To	Class Capacity	Open Access	Maximum Capacity	High Ri	Le
✗	Family Meals	10:00 AM	10:30 AM	12	0	12	No	E
✗	General Low-risk Topic	2:00 PM	2:30 PM	12	0	12	No	E

Apply To Work Week
 Apply To All

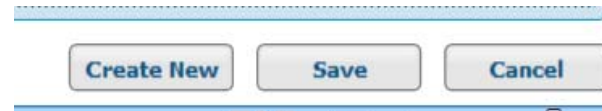
Classes Total Items: 2

	Education Topic	From	To	Class Capacity	Open Access	Maximum Capacity	High Risk	Language
✗	Family Meals	10:00 AM	10:30 AM	12	0	12	No	English
✗	General Low-risk Topic	2:00 PM	2:30 PM	12	0	12	No	English

10. Select one of the following:
- Check **Apply to Work Week** and click **Apply** to apply the day settings to the rest of the work week.
 - Check **Apply to All** and click **Apply** to apply day settings to all days (Mon-Sun).
 - Click **Apply** to apply the day settings to Monday only.



11. Click **Save**. A status message appears indicating success and the template is added to the list of templates. Click **Create New** to continue adding templates.



Note: Select specific day of the week to modify information for the selected day. Click on the red X by a day to remove the hours previously defined for that day.

Monday X	Tuesday X	Wednesday X	Thursday X	Friday X
Family Meals Family Meals 10:00 AM - 10:30 AM (12)	Family Meals Family Meals 10:00 AM - 10:30 AM (12)	Family Meals Family Meals 10:00 AM - 10:30 AM (12)	Family Meals Family Meals 10:00 AM - 10:30 AM (12)	Family Meals Family Meals 10:00 AM - 10:30 AM (12)
General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)	General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)	General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)	General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)	General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)

Monday X	Tuesday X	Wednesday X	Thursday X	Friday X
Family Meals Family Meals 10:00 AM - 10:30 AM (12)		Family Meals Family Meals 10:00 AM - 10:30 AM (12)		Family Meals Family Meals 10:00 AM - 10:30 AM (12)
General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)		General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)		General Low-risk Topic General Low-risk Topic 2:00 PM - 2:30 PM (12)

Note: If a day's settings are applied to work week but are actually only needed for Monday, Wednesday, and Friday, the user can delete the settings for Tuesday and Thursday. This approach saves some time.

Nutrition Education Topic List

Below is a list of the nutrition education topics available in Crossroads. Not all topics are available to all participant categories. An asterisk indicates a required topic.

Age-appropriate foods	Healthy snacks
Age-appropriate portions	High maternal weight gain
Breastfeeding basics and anticipatory guidance (*)	High-fiber foods
Breastfeeding: Returning to work or school	Immunizations (*)
Breastfeeding: Exclusivity and duration	Infant feeding
Breastfeeding: Maternal diet	Iron-rich foods
Breastfeeding: Milk expression	Lead poisoning
Breastfeeding: Positioning	Low-fat dairy
Breastfeeding: Problems and barriers	Low-fat foods
Breastfeeding Peer Counselor Program	MyPlate Food Guide
Eating well on a budget	Physical activity
Family meals	Pica
Fast food choices	Picky eaters
Feeding cues	Potentially harmful food
Fluoride	Pregnancy-related conditions
Folic Acid (*)	Preparing for a healthy pregnancy
Food safety	Recommended weight gain in pregnancy
Formula preparation	Second-hand smoke
Fruits and vegetables	Smart drink choices
General low-risk topic	Television viewing/screen time
Growth and development	Tobacco, alcohol and illegal drugs (*)
Healthcare provider diagnosed medical conditions	Trust your child to eat enough
Healthcare provider prescribed diets	Vegetarian/Vegan diets
Healthy cooking	Vitamin D
Healthy eating during pregnancy (*)	Vitamins and supplements
Healthy eating habits for children	Wean to a cup
Healthy gums and teeth	Whole-grain foods

Creating a Number-based Appointment Template

This resource explains the process of creating a number-based appointment template. Number-based templates establish appointment availability on the clinic master calendar, where concurrent slots for appointment types are created. The use of concurrent slots allows clinics to schedule based on the number of simultaneous (or concurrent) appointments of a given appointment type.

Note: All templates are created and maintained at the clinic level

Create a number-based appointment template

From the **Home** screen, go to **Scheduling** → **Templates** → **Number-based Appointment Templates**. The **Number-based Appointment Templates** screen displays.

- Enter a **Template Name**.
Template names must be unique.
- Enter a template **Description**.
The description should provide instructions for applying the template (specify the days of the week or month)
- Select a **Language** from the Languages multi-select slider list box. It is recommended that all languages be selected unless there is a compelling reason for selecting one language.

The screenshot shows the 'Number-based Appointment Templates' web application interface. The interface is titled 'Number-based Appointment Templates' and includes a navigation menu with options like Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. The main content area is divided into several sections: 'Template Name' (text input), 'Description' (text area), 'Languages' (multi-select slider), 'Appointment Types & Working Hours' (with 'From', 'To', 'Concurrent Slots', and 'No. of Open Access Slots' fields), and 'Overbooking Appointment Types & Working Hours' (with 'From', 'To', and 'Overbooking Slots' fields). Both the 'Appointment Types' and 'Overbooking Appointment Types' sections include a list of appointment types with checkboxes: Initial Certification, Subsequent Certification, Nutrition Education - Individual, Food Benefit Issuance, and Mid Certification Assessment. Below these sections are two tables: one for 'Appointment Types' with columns for Appointment Type, From, To, Open Access, and Concurrent Slots; and another for 'Overbooking Appointment Types' with columns for Appointment Type, From, To, and Overbooking Slots. The interface also features 'Add' and 'Clear' buttons for both tables, and 'Save' and 'Cancel' buttons at the bottom right.

Within the Appointment Types and Working Hours group box, complete the following:

- Enter or select the **From** time. This time specifies the time that appointments will begin.
- Enter or select the **To** time. This time specifies the time that appointments will end, not the start time of the last appointment.
- Select one or more **Appointment Types**. Selecting two or more appointment types at the same time will link them together in the template (with a shared “from” and “to” timeframe and concurrent slot number). As an appointment is booked for one appointment type, availability will be reduced for the other appointment types linked to it.
- Enter the number of **Concurrent Slots**. Concurrent Slots denotes how many simultaneous appointments can be scheduled for the identified appointment type(s) within each time slot. The Concurrent Slots selection may apply to one specific appointment type, or it may apply to a set of appointment types if they’re linked together in the template.

Click **Add**. The screen refreshes and displays the appointment information just entered within the **Appointment Types and Working Hours** grid.

Number Based - Day Template

Template Name ★
Monday thru Thursday

Can handle High Risk appointments
Can handle Online appointments

Description
Apply this template to every Monday, Tuesday, Wednesday & Thursday.

Languages ★
English
Spanish
Arabic
Cambodian
Chinese

Appointment Types & Working Hours ★

From ★ 8:15 AM To ★ 4:45 PM Concurrent Slots ★ 1

Appointment Types ★
 Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

No. of Open Access Slots

Add Clear

Appointment Type	From	To	Open Access	Concurrent Slots

Number Based - Day Template

Template Name ★
Monday thru Thursday

Can handle High Risk appointments
Can handle Online appointments

Description
Apply this template to every Monday, Tuesday, Wednesday & Thursday.

Languages ★
English
Spanish
Arabic
Cambodian
Chinese

Appointment Types & Working Hours ★

From ★ To ★ Concurrent Slots ★

Appointment Types ★
 Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

No. of Open Access Slots

Add Clear

Appointment Type	From	To	Open Access	Concurrent Slots
✗ Food Benefit Issuance	8:15 AM	4:45 PM		1

- Repeat the process until all information for the pattern of appointment availability has been entered for this template.

- An example of a completed template appears below.

Vendor Operations Finance Administration Help

Number Based - Day Template

Template Name ★
Monday thru Thursday

Description
Apply this template to every Monday, Tuesday, Wednesday & Thursday.

Can handle High Risk appointments
 Can handle Online appointments

Languages ★

- English
- Spanish
- Arabic
- Cambodian
- Chinese

Appointment Types & Working Hours ★

From ★ **To** ★

Appointment Types ★

- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment
- High Risk Follow-up

Concurrent Slots ★

No. of Open Access Slots

	Appointment Type	From	To	Open Access	Concurrent Slots
✗	Food Benefit Issuance Initial Certification	8:15 AM	4:45 PM		1
✗	Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
✗	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
✗	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

Open Access Slots are optional. Open Access Slots are reserved and cannot be scheduled until a defined period of time before the appointment occurs. The default is set at 3 days before the appointment, but this window of time can be revised in the clinic set-up. Once the threshold is reached, the slots are opened and open access appointments can be scheduled. See page 22 for more information about including Open Access slots in the template. The screen shots below illustrate the addition of Open Access slots.

Appointment Types & Working Hours

From: 2:30 PM To: 4:30 PM Concurrent Slots: 1

Appointment Types:

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

No. of Open Access Slots: 4

Add **Clear**

	Appointment Type	From	To	Open Access	Concurrent Slots
X	Food Benefit Issuance	8:15 AM	4:45 PM		1
X	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
X	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
X	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

Appointment Types & Working Hours

From: To: Concurrent Slots:

Appointment Types:

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

No. of Open Access Slots:

Add **Clear**

	Appointment Type	From	To	Open Access	Concurrent Slots
X	Food Benefit Issuance	8:15 AM	4:45 PM		1
X	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
X	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
X	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3
X	Initial Certification Subsequent Certification	2:30 PM	4:30 PM	4	1

Overbooking Slots are also optional. See page 25 for more information about including Overbooking in the template. The screen shots below illustrate the addition of Overbooking.

Appointment Types & Working Hours

From: [] To: [] Concurrent Slots: []

Appointment Types:

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

No. of Open Access Slots: []

Add Clear

	Appointment Type	From	To	Open Access	Concurrent Slots
X	Food Benefit Issuance	8:15 AM	4:45 PM		1
	Initial Certification				
X	Subsequent Certification				
X	Nutrition Education - Individual	8:15 AM	11:30 AM		3
	Mid Certification Assessment				
	Initial Certification				
X	Subsequent Certification	11:30 AM	1:00 PM		1
	Nutrition Education - Individual				
	Mid Certification Assessment				
X	Initial Certification	1:00 PM	4:30 PM		3
	Subsequent Certification				
	Nutrition Education - Individual				
	Mid Certification Assessment				
X	Initial Certification	2:30 PM	4:30 PM	4	1
	Subsequent Certification				

Overbooking Appointment Types & Working Hours

From: 8:30 AM To: 10:30 AM Overbooking Slots: 3

Appointment Types:

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

Add Clear

	Appointment Type	From	To	Overbooking Slots

Appointment Types & Working Hours

From: [] To: [] Concurrent Slots: []

Appointment Types:

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

No. of Open Access Slots: []

Add Clear

	Appointment Type	From	To	Open Access	Concurrent Slots
X	Food Benefit Issuance	8:15 AM	4:45 PM		1
	Initial Certification				
X	Subsequent Certification				
X	Nutrition Education - Individual	8:15 AM	11:30 AM		3
	Mid Certification Assessment				
	Initial Certification				
X	Subsequent Certification	11:30 AM	1:00 PM		1
	Nutrition Education - Individual				
	Mid Certification Assessment				
X	Initial Certification	1:00 PM	4:30 PM		3
	Subsequent Certification				
	Nutrition Education - Individual				
	Mid Certification Assessment				
X	Initial Certification	2:30 PM	4:30 PM	4	1
	Subsequent Certification				

Overbooking Appointment Types & Working Hours

From: [] To: [] Overbooking Slots: []

Appointment Types:

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

Add Clear

	Appointment Type	From	To	Overbooking Slots
	Initial Certification			
X	Subsequent Certification	8:30 AM	10:30 AM	3
	Nutrition Education - Individual			
	Mid Certification Assessment			

- **Click Save.** The template information will be saved and the template name will appear on the left side of the screen

Number-based Appointment Templates CSC Data Conversion

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Day Templates Show All

Monday thru Thursday

Number Based - Day Template Enabled

Template Name ★
Monday thru Thursday

Can handle High Risk appointments
 Can handle Online appointments

Description
Apply to every Monday, Tuesday, Wednesday & Thursday

Languages ★
English
Spanish
Arabic
Cambodian
Chinese

Appointment Types & Working Hours ★

From ★ **To** ★ **Concurrent Slots** ★

Appointment Types ★

Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

No. of Open Access Slots

	Appointment Type	From	To	Open Access	Concurrent Slots
×	Food Benefit Issuance	8:15 AM	4:45 PM		1
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3
×	Initial Certification Subsequent Certification	2:30 PM	4:30 PM	4	1

Overbooking Appointment Types & Working Hours ★

From ★ **To** ★ **Overbooking Slots** ★

Appointment Types ★

Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

	Appointment Type	From	To	Overbooking Slots
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:30 AM	10:30 AM	3

- The next step is to apply the template to the master calendar. See page 27 for Applying Templates.

Modifying an Existing Number-based Appointment Template

Modifications can be made to a Number-based Appointment template in a variety of ways

- Go to **Scheduling** → **Templates** → **Number-based Appointment Templates**.
- The **Number-based Appointment Templates** screen displays. Previously defined templates are listed on the left side of the screen. Click the **Show All check box** to display both enabled and disabled templates.

The screenshot displays the 'Number-based Appointment Templates' web application interface. The 'Scheduling' menu item is circled in red. The interface shows a form for editing a 'Monday to Friday Template'. The form includes fields for Template Name, Description, Languages, Appointment Types & Working Hours, and Overbooking Appointment Types & Working Hours. There are also 'Add' and 'Clear' buttons for each section and a 'Show All' checkbox in the left sidebar.

Appointment Type	From	To	Open Access	Concurrent Slots
------------------	------	----	-------------	------------------

Appointment Type	From	To	Overbooking Slots
------------------	------	----	-------------------

- Click on the template name and the screen will refresh to display the template details.

Number-based Appointment Templates Cross roads

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Day Templates Show All

Monday to Friday Template

Number Based - Day Template Enabled

Template Name

Description

Can handle High Risk appointments

Can handle Online appointments

Languages

Appointment Types & Working Hours

From To Concurrent Slots

Appointment Types Initial Certification Subsequent Certification Nutrition Education - Individual Food Benefit Issuance Mid Certification Assessment

No. of Open Access Slots

Add Clear

Appointment Type	From	To	Open Access	Concurrent Slots
<input checked="" type="checkbox"/> Initial Certification <input checked="" type="checkbox"/> Subsequent Certification <input checked="" type="checkbox"/> Nutrition Education - Individual <input checked="" type="checkbox"/> Mid Certification Assessment	8:15 AM	11:30 AM		3
<input checked="" type="checkbox"/> Food Benefit Issuance	8:15 AM	11:30 AM		2
<input checked="" type="checkbox"/> Initial Certification <input checked="" type="checkbox"/> Subsequent Certification <input checked="" type="checkbox"/> Nutrition Education - Individual <input checked="" type="checkbox"/> Mid Certification Assessment	1:00 PM	4:30 PM		3
<input checked="" type="checkbox"/> Food Benefit Issuance	1:00 PM	4:30 PM		2

Overbooking Appointment Types & Working Hours

From To Overbooking Slots

Appointment Types Initial Certification Subsequent Certification Nutrition Education - Individual Food Benefit Issuance Mid Certification Assessment

Add Clear

Appointment Type	From	To	Overbooking Slots
------------------	------	----	-------------------

Week Templates Show All

Create New Save Cancel

Note: The user may add new information to the template by entering data in required fields for From, To, Appointment Type(s) and Concurrent Slots.

- Click **Add**
- The screen will refresh to display the new line in the Appointment types & Working Hours Grid

Appointment Types & Working Hours

From To

Concurrent Slots

No. of Open Access Slots

Appointment Types

- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment
- High Risk Follow-up

Add **Clear**

Appointment Type	From	To	Open Access	Concurrent Slots
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
Food Benefit Issuance	8:15 AM	11:30 AM		2
Food Benefit Issuance	11:30 AM	1:00 PM		2
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

Appointment Types & Working Hours

From To

Concurrent Slots

No. of Open Access Slots

Appointment Types

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

Add **Clear**

Appointment Type	From	To	Open Access	Concurrent Slots
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
Food Benefit Issuance	8:15 AM	11:30 AM		2
Food Benefit Issuance	11:30 AM	1:00 PM		2
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

- To delete a line of information from the grid, click the red X beside the line to be deleted.
- The Screen will refresh to display the updated Appointment Types & Working Hours grid

Appointment Types & working hours

From To

Concurrent Slots

No. of Open Access Slots

Appointment Types

Initial Certification

Subsequent Certification

Nutrition Education - Individual

Food Benefit Issuance

Mid Certification Assessment

	Appointment Type	From	To	Open Access	Concurrent Slots
<input type="checkbox"/>	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
<input checked="" type="checkbox"/>	Food Benefit Issuance	8:15 AM	11:30 AM		2
<input checked="" type="checkbox"/>	Food Benefit Issuance	11:30 AM	1:00 PM		2
<input checked="" type="checkbox"/>	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
<input checked="" type="checkbox"/>	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

	Appointment Type	From	To	Open Access	Concurrent Slots
<input checked="" type="checkbox"/>	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
<input checked="" type="checkbox"/>	Food Benefit Issuance	11:30 AM	1:00 PM		2
<input checked="" type="checkbox"/>	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
<input checked="" type="checkbox"/>	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

- To revise information in one of the rows, select the line. Information specific to that line displays in the fields above the grid.

Appointment Types & Working Hours ★

From ★ 11:30 AM To ★ 1:00 PM Concurrent Slots ★ 2

Appointment Types ★

Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

No. of Open Access Slots

Update Clear

Appointment Type	From	To	Open Access	Concurrent Slots
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
Food Benefit Issuance	11:30 AM	1:00 PM		2
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

- Make the desired changes to one or more of the required fields and click Update.

Appointment Types & Working Hours ★

From ★ 8:15 AM To ★ 4:30 PM Concurrent Slots ★ 1

Appointment Types ★

Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

No. of Open Access Slots

Update Clear

Appointment Type	From	To	Open Access	Concurrent Slots
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
Food Benefit Issuance	11:30 AM	1:00 PM		2
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3

- The Screen will refresh to display the updated information.

- After all desired modifications have been completed, **save** the template. The modified template must be **applied** it to the master calendar in order for the changes to take effect.

Appointment Types & Working Hours ★


From ★ To ★ Concurrent Slots ★

No. of Open Access Slots

Appointment Types ★

Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment

	Appointment Type	From	To	Open Access	Concurrent Slots
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:15 AM	11:30 AM		3
×	Food Benefit Issuance	8:15 AM	4:30 PM		1
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	11:30 AM	1:00 PM		1
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:00 PM	4:30 PM		3



Number-based Appointment Templates – Adding Open Access Slots

Adding Open Access Slots to a Number Based Appointment Template

Designating a number of slots as Open Access allows appointments to be reserved until a defined number of days before the appointments occur. The number of days is defined as a set up activity. The default open access window in Crossroads is 3 days. This may have been changed in some clinics.

1. From the Home screen, go to **Scheduling > Templates > Number-based Appointment Templates**.
2. To add open access to an existing template: from the list of templates on the left side of the screen, select the template to which you wish to add open access slots. Template details will populate the **Appointment Types and Working Hours** box.
3. To add open access slots to a new template: follow the same steps as below but enter Open Access slots as the template is being created.

Note: It is recommended that all open access appointments within a template be created in rows solely for the purpose of defining open access appointments, not mixed with other (non-open access) appointments.

The screenshot shows the 'Number-based Appointment Templates' interface. The main form is titled 'Number Based - Day Template'. It includes fields for 'Template Name', 'Description', and 'Languages'. There are checkboxes for 'Can handle High Risk appointments' and 'Can handle Online appointments'. The 'Appointment Types & Working Hours' section is highlighted, showing a 'From' and 'To' time range, a 'Concurrent Slots' field, and a 'No. of Open Access Slots' field (highlighted with a red box). Below this is a table with columns for 'Appointment Type', 'From', 'To', 'Open Access', and 'Concurrent Slots'. The 'Overbooking Appointment Types & Working Hours' section is also visible, with similar fields for 'From', 'To', and 'Overbooking Slots'. The interface includes a 'Save' button and a 'Cancel' button at the bottom right.

4. Enter or select **From and To** times that you wish to have open access appointments.
5. Select one or more **Appointment Types** to be open access.
6. Select the number of **Concurrent Slots** (i.e., number appointments that can be scheduled at any given time during the selected time period).
7. Select the **No. of Open Access Slots** (i.e., the number of appointments created by this row that will be held for open access scheduling).

Example: If you wish to have two back-to-back open access appointments for initial or subsequent certification between 8:00 and 9:00, the number of concurrent slots required is 1 (1 appointment occurring concurrently) and the number of open access slots would be 2 (2 30 min appts in 1 hour).

8. Click **Add**.

Number Based - Day Template Enabled

Template Name ★
Typical Thursday

Description
Apply this template to every Thursday clinic.

Can handle High Risk appointments
 Can handle Online appointments

Languages ★

- English
- Spanish
- Arabic
- Cambodian
- Chinese

Appointment Types & Working Hours ★

From ★ 4:00 PM **To** ★ 5:00 PM

Appointment Types ★

- Initial Certification
- Subsequent Certification
- Nutrition Education - Individual
- Food Benefit Issuance
- Mid Certification Assessment

Concurrent Slots ★
1

No. of Open Access Slots
2

	Appointment Type	From	To	Open Access	Concurrent Slots
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:00 AM	11:30 AM		6
×	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:30 PM	4:00 PM		5

9. The screen refreshes to display the defined time slot in the **Appointment Types and Working Hours** grid with the number of Open Access slots and number of Concurrent Slots defined with the row.

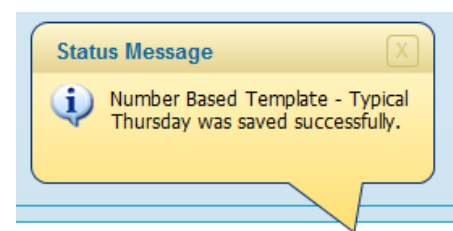
Note: Whether an Appointment Type is eligible for Open Access is defined during the setup process.

10. To add additional open access appointments, repeat steps 3-8 until all desired open access slots are added.

11. Click **Save**. A status message displays indicating success and the template is saved.

Note: When creating a template with this feature, the following choices are recommended: Select 1 concurrent slot and choose a number of Open Access slots that will fit the selected time frame for the selected appointment type(s). For example, the number of Open Access slots would be 4 if the selected appointment types were 30 minute appointments and selected timeframes were from 2:30 To 4:30 (spanning 2 hours).

	Appointment Type	From	To	Open Access	Concurrent Slots
✗	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:00 AM	11:30 AM		6
✗	Initial Certification Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	1:30 PM	4:00 PM		5
✗	Initial Certification Subsequent Certification	4:00 PM	5:00 PM	2	1



Number-based Appointment Templates – Adding Overbooking

Adding Overbooking Slots to a Number Based Appointment Template

Overbooking increases the number of slots available during the selected block of time for the appointment types selected. Overbooking slots have a distinct appearance on the master calendar. Users must conscientiously choose to search for overbooking slots when searching for appointments using Quick Appointments.

1. From the Home screen, go to **Scheduling > Templates > Number-based Appointment Templates**.
2. From the list of templates on the left side of the screen, select the template to which you wish to add overbooking slots.
3. To add **Overbooking** to a new template: follow the same steps as below but enter Overbooking slots as the template is being created.

Number-based Appointment Templates Cross roads

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Number Based - Day Template

Day Templates Show All
1st Mon, 2nd and 4th Thursday
Corrected Clinic Template - 2 CP
Wednesday Template

Template Name Can handle High Risk appointments
Can handle Online appointments

Description Languages
English

Appointment Types & Working Hours
From To Concurrent Slots
Appointment Types
 Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment
No. of Open Access Slots
Add Clear

Overbooking Appointment Types & Working Hours
From To Overbooking Slots
Appointment Types
 Initial Certification
 Subsequent Certification
 Nutrition Education - Individual
 Food Benefit Issuance
 Mid Certification Assessment
Add Clear

Appointment Type	From	To	Open Access	Concurrent Slots
------------------	------	----	-------------	------------------

Appointment Type	From	To	Overbooking Slots
------------------	------	----	-------------------

Save Cancel

4. Enter or select **From and To** times.
5. Enter the number of **Overbooking Slots**.
6. Select one or more **Appointment Types**.
7. Click **Add**. The screen refreshed to display the defined time slot in the **Overbooking Appointment Types and Working Hours** grid.

Note: The list of Appointment Type selections for Overbooking may be limited. Whether or not an Appointment Type is eligible for Overbooking is defined during the setup process.

Note: Overbooking To and From hours must be within the hours defined within the Appointment Types and Working Hours.

8. Repeat step 3-6 until all desired overbooking slots are added.
9. Click **Save**. A status message displays indicating success and the template is saved.

	Appointment Type	From	To	Overbooking Slots
✗	Subsequent Certification Nutrition Education - Individual Mid Certification Assessment	8:30 AM	9:30 AM	2

Apply Template Options

This resource explains the process of applying a scheduling template (Hours of Operation, Nutrition Education Class, or Number-Based Appointments) to the master calendar.

From the **Home** screen, go to **Scheduling** → **Templates** → **Apply Templates**. The **Apply Templates** screen displays.

The following fields display with pre-selected answers:

- The **Day** and **Week** buttons in the top left corner signify Day templates or Week templates. The system has auto-selected Day.
- The **Start Date** defaults to the current system date plus one day. The **End Date** defaults to 30 days beyond the Start Date. Change these dates to apply the template to the desired timeframe.
- The field titled, “**If the selected date(s) falls on a Holiday**,” defaults to “Do Not Apply.” Holidays refers to those dates identified in your clinic set-up as Holidays observed by your agency.
 - If Do Not Apply is selected, the template will not be applied to Holidays.
 - If Apply to Next Working Day is selected, the template will be applied to the next working day following the Holiday
 - If Apply to Previous Working Day is selected, the template will be applied to the previous working day prior to the Holiday
 - If Apply is selected, the template will be applied to Holidays.

The screenshot shows the 'Apply Templates' interface. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main header is 'Apply Templates' with a user profile icon and 'Cross roads' and a 'Logout' link. Below the header, there are buttons for 'Day' and 'Week'. The form contains the following fields:

- Start Date**: 2/26/2015
- End Date**: 3/26/2015
- Template Type**: [Dropdown]
- Template**: [Dropdown]
- Apply Options**: [Text input]
- Exception Rule**:
 - If the selected date(s) falls on a Holiday**: Do Not Apply
 - If the selected date(s) falls on a non working day**: Do Not Apply

Buttons for 'Preview' and 'Clear' are located to the right of the form. Below the form is a calendar grid with dates 2 through 8. The date 25 is highlighted in yellow. At the bottom right, there are buttons for 'History', 'Apply', and 'Cancel'.

- The field titled, “If the selected date(s) falls on a non-working day”, defaults to “Do not Apply”. Non-working days, usually Saturdays and Sundays, are identified as non-working days in the clinic set-up.

- If Do Not Apply is selected, the template will not be applied to a non-working day.
- If Apply to Next Working Day is selected, the template will be applied to the next working day following a non-working day.
- If Apply to Previous Working Day is selected, the template will be applied to the previous working day prior to a non-working day
- If Apply is selected, the template will be applied to non-working days.

These fields require an entry:

- **Template Type:** A variety of template types will display in the drop-down box. When applying a Number Based Appointment Slots Template, select that option.
- **Template:** Only the names of the templates that have been created for the selected template type will populate in the dropdown box. Select the template name to be applied.

The screenshot shows the 'Apply Templates' interface. At the top, there is a navigation bar with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main title is 'Apply Templates' with a 'Cross roads' logo and a 'Logout' link. Below the title, there are several input fields: 'Start Date' (2/26/2015), 'End Date' (3/26/2015), 'Template Type', 'Template', 'Apply Options', and 'Exception Rule'. The 'Exception Rule' section has two dropdown menus, both set to 'Do Not Apply'. Below the form is a calendar grid showing dates from 2 to 28. The date 25 is highlighted in orange. At the bottom right, there are buttons for 'History', 'Apply', and 'Cancel'.

- **Apply Options:** The options displaying in this dropdown box are:
 - Every Day
 - Every Selected Number of Days
 - Selected Days of the Week
 - Selected Date every Month
 - Selected Date of Selected Month
- Select the option that will meet the needs of the template you're applying. The following guidance demonstrates how each option would apply a template to the Master Calendar.

The screenshot shows the 'Apply Templates' interface with the following details:

- Navigation:** Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, Help
- Page Header:** Apply Templates, Cross roads, Logout
- Form Fields:**
 - Start Date: 3/10/2015
 - End Date: 4/10/2015
 - Template Type: Number Based Appointment
 - Template: 1st & 3rd Fridays
 - Apply Options: (Highlighted dropdown menu)
 - Exception Rule: If the selected date(s) falls on a Holiday (Do Not Apply), If the selected date(s) falls on a non working day (Do Not Apply)
- Selected Day Template Details:**
 - Appointment Types & Working Hours:
 - 8:15 AM to 4:45 PM (Concurrent - 1) Food Benefit Issuance
 - 8:15 AM to 12:00 PM (Concurrent - 4) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up
 - 12:00 PM to 2:00 PM (Concurrent - 2) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up
 - 2:00 PM to 4:45 PM (Concurrent - 4) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up
- Calendar:** A grid showing dates from 10 to 5. The dates 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31 are visible. The dates 14, 15, 21, 22, 28, 29 are shaded grey, and the dates 1, 2, 3, 4, 5 are shaded blue.

Apply Options ★

Every Day ▼

- This calendar view displays if **Every Day** is the chosen **Apply Option**

Apply Templates

Day Month

Shenandoah Valley Medical System

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Apply Options ★

Every Selected Number of Days

Every Day(s).

- This calendar view displays if **Every Selected Number of Days** is the chosen **Apply Option**

Apply Templates

8/1/2012

Shenandoah Valley Medical System

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Apply Options ★

Selected Days of the Week ▾

On

First	Second	Mon	Tue
Third	Fourth	Wed	Thu
Fifth	Last	Fri	Sat
Every		Sun	

Every Month.

- This calendar view displays if **Selected Days of the Week** is the chosen **Apply Option**

Apply Templates

Day Month 8/1/2012

Shenandoah Valley Medical System

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

- This calendar view displays if **Selected Date Every Month** is the chosen **Apply Option**

Apply Options ★

Selected Date Every Month ▼

1	2	3	4	5	6	7
8	9	10	11	12	13	14
On 15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

of Every Month.

Apply Templates 8/1/2012

Shenandoah Valley Medical System

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

History Apply Cancel

- This calendar view displays if **Selected Date of Selected Month is the chosen Apply Option**. This screen shot illustrates the selected month of August. October was also selected, and is illustrated by the screen shot on the following page.

Apply Options ★

Selected Date of Selected Month ▼

1	2	3	4	5	6	7	Jan	Feb	Mar	Apr
8	9	10	11	12	13	14	May	Jun	Jul	Aug
On 15	16	17	18	19	20	21	Sep	Oct	Nov	Dec
22	23	24	25	26	27	28				
29	30	31								

Apply Templates 8/1/2012

Shenandoah Valley Medical System

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Note: This shows that October was also impacted because it was a selected month in the apply options.

Apply Templates

← → Day Month 10/1/2012

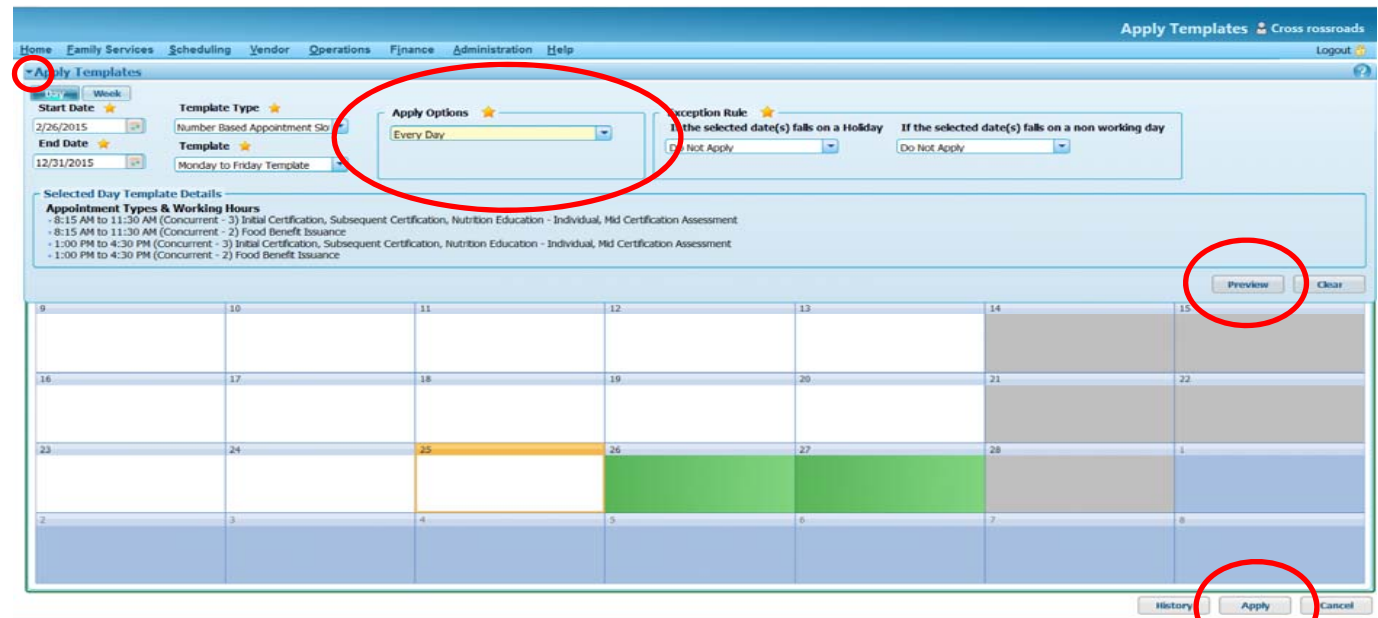
Shenandoah Valley Medical System

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10 Columbus Day	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Applying a Number-based Appointment Template – Preview & Apply

The user can view the effects of a template on the master calendar before it is applied to the master calendar.

- Choose the desired **Apply Option** for the selected template.
- Clicking **Preview** button in the middle right of the screen.
- The preview calendar refreshes according to the apply option selected.
- In order to get a better view of the preview calendar, minimize the **Apply Templates** box by clicking the arrow/triangle. Future months can also be previewed by navigating to those months on the preview calendar.
- If the preview reveals the desired application results, click **Apply**.



- When a template has been applied to the master calendar, a **status message** will briefly appear in the lower right corner, indicating the template was applied successfully.

The screenshot displays the 'Apply Templates' interface. At the top, there is a navigation bar with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main area is titled 'Apply Templates' and contains several sections:

- Start Date:** 3/4/2015
- End Date:** 4/4/2015
- Template Type:** Number Based Appointment Slot
- Template:** Monday, Wednesday template
- Apply Options:** Selected Days of the Week (Mon, Wed), Every Month.
- Exception Rule:** If the selected date(s) falls on a Holiday (Do Not Apply), If the selected date(s) falls on a non working day (Do Not Apply).
- Selected Day Template Details:** Appointment Types & Working Hours:
 - 8:30 AM to 12:00 PM (Concurrent - 2, OA - 6) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment
 - 8:30 AM to 12:00 PM (Concurrent - 1, OA - 6) Food Benefit Issuance
 - 1:00 PM to 4:30 PM (Concurrent - 2) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment
 - 1:00 PM to 4:45 PM (Concurrent - 1) Food Benefit Issuance

The calendar grid shows dates from 16 to 22. A status message is displayed in the lower right corner, circled in red:

Status Message
Number Based Appointment Slots Template (Monday, Wednesday template) was applied successfully 3/14/2015

Buttons for 'History', 'Apply', and 'Cancel' are visible at the bottom.

Tips for applying templates

Only one template can be applied to a particular day. If you try to apply more than one template to the same day, the last template applied will cancel out the prior one. For example, if one template is applied to every Monday, 8 pm – 5 pm, and then a different template is applied to every Monday, 5pm – 7 pm, the Master Calendar will only reflect the last template applied – Monday evenings, 5 pm – 7 pm. The bigger the template (in number of appointments and/or scope of days) the longer it will take to apply. If Crossroads returns an error message while the template is trying to apply, narrow the timeframe (from 1 year to 6 months or from 6 months to 3 months) and try it again. You may need to apply the template in stages to complete the task.

Follow these steps to verify the Master Calendar displays the features of the applied template

- From the tool bar, select **Scheduling > Clinic Master Calendar**. It will display the current month.
- Navigate to the month of the Start Date for the applied template. Confirm that appointment types being used by the clinic exist in the **available appointment types** list in the filters on the left side. Make sure all of the appointment types used in your template are checked. Otherwise, the day view of the calendar will not display these appointment types.
- Select Appointments and Nutrition Education Classes (if applicable) in the **Show Data** filter on the left side.
- Confirm that the Month view of the calendar has **green** dates where appointment templates have been applied, classes on dates when class templates have created classes, and are **grayed** on closed days such as holidays and weekends.
- After confirming the Month view, select the Day view using the button on the top of the page. Ensure that appropriate filters are checked on the left side of the page.
- View the current day appointments concurrent slots and classes (if applicable). Confirm that times when appointments start and end for the day agree with the template. Confirm that hours outside the hours of operation are grayed.
- View a few other days using the day view to confirm that the calendar has been created as expected.

Applying Templates: Dealing with Conflicts

If a conflict prevents the template from applying, a message will appear stating you cannot apply the template. Information specific to the conflict will be listed at the bottom of the screen, in Conflicts by Dates window. In the example below, 3 appointments prevented this template from applying. Rescheduling these appointments to a date/time that doesn't conflict with the new template, should resolve the problem. After the conflicting appointments have been rescheduled, this template should apply without conflicts.

The screenshot shows the 'Apply Templates' interface for 'Cross roads'. A red circle highlights a 'Validation Summary: 1' error message that reads: 'Conflicts exist. You cannot apply the selected template. Please reschedule/cancel conflicted items in order to apply this template successfully.' Below the error message, a calendar grid shows dates from 16 to 5. A 'Conflicts By Dates' table at the bottom lists three conflicts:

Date	Conflicting Item	Conflicting Start Time	Conflicting End Time	Conflict Descriptions
4/10/2015	Appointment	7:30 AM	7:45 AM	Typical Friday template modifies appointment availability which conflicts with existing Appointment: Nutrition Education - Individual from 7:30 AM to 7:45 AM.
4/16/2015	Appointment	7:45 AM	8:00 AM	Typical Friday template modifies appointment availability which conflicts with existing Appointment: Nutrition Education - Individual from 7:45 AM to 8:00 AM.
5/1/2015	Appointment	7:30 AM	7:45 AM	Typical Friday template modifies appointment availability which conflicts with existing Appointment: Nutrition Education - Individual from 7:30 AM to 7:45 AM.

In the example below, there were 52 conflicting appointments. When there are too many conflicting appointments to reschedule, apply the template using a start date after the date of the last conflicting appointment. In this example, the template won't apply until after 5/18/15.

Apply Templates Cross roads

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Apply Templates

Day Week

Start Date Template Type

End Date Template

Apply Options

Selected Days of the Week: Mon Tue Wed Thu Fri Sat Sun

On: First Second Third Fourth Fifth Last Every Month.

Do Not Apply Do Not Apply

Validation Summary: 1

Conflicts exist. You cannot apply the selected template. Please reschedule/ cancel conflicted items in order to apply this template successfully.

Selected Day Template Details

Appointment Types & Working Hours

- 8:00 AM to 12:00 PM (Concurrent - 1) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment
- 8:00 AM to 12:00 PM (Concurrent - 1) Food Benefit Issuance
- 1:30 PM to 4:30 PM (Concurrent - 1) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment

Preview Clear

23	24	25	26	27	28	29
30	31	1	2	3	4	5

Conflicts By Dates

Date	Conflicting Item	Conflicting Start Time	Conflicting End Time	Conflict Descriptions
5/4/2015	Appointment	1:45 PM	2:00 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 1:45 PM to 2:00 PM.
5/4/2015	Appointment	2:00 PM	2:15 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 2:00 PM to 2:15 PM.
5/4/2015	Appointment	2:15 PM	2:30 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 2:15 PM to 2:30 PM.
5/4/2015	Appointment	2:30 PM	2:45 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 2:30 PM to 2:45 PM.
5/4/2015	Appointment	2:45 PM	3:00 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 2:45 PM to 3:00 PM.
5/4/2015	Appointment	3:00 PM	3:15 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 3:00 PM to 3:15 PM.
5/4/2015	Appointment	3:15 PM	3:30 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 3:15 PM to 3:30 PM.
5/11/2015	Appointment	1:30 PM	1:45 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 1:30 PM to 1:45 PM.
5/11/2015	Appointment	1:45 PM	2:00 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 1:45 PM to 2:00 PM.
5/11/2015	Appointment	4:00 PM	4:15 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 4:00 PM to 4:15 PM.
5/11/2015	Appointment	2:00 PM	2:15 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 2:00 PM to 2:15 PM.
5/18/2015	Appointment	1:30 PM	1:45 PM	Monday template modifies appointment type availability which conflicts with existing appointment: Food Benefit Issuance from 1:30 PM to 1:45 PM.

History Apply Cancel

In the following example, the template won't apply because it offers appointment availability outside the clinic hours of operation.

Validation Summary: 1

- Conflicts exist. You cannot apply the selected template. Please reschedule/cancel conflicted items in order to apply this template successfully.

Selected Day Template Details

Appointment Types & Working Hours

- 8:15 AM to 10:15 AM (Concurrent - 3) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up
- 8:15 AM to 6:45 PM (Concurrent - 1) Food Benefit Issuance
- 2:00 PM to 4:45 PM (Concurrent - 6) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up
- 4:45 PM to 6:45 PM (Concurrent - 4) High Risk Follow-up, Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment
- 10:15 AM to 12:00 PM (Concurrent - 6) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up
- 12:00 PM to 2:00 PM (Concurrent - 3) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment, High Risk Follow-up

Date	Conflicting Item	Conflicting Start Time	Conflicting End Time	Conflict Descriptions
3/5/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/5/2015	Clinic Hours of Op	4:45 PM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/12/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/12/2015	Clinic Hours of Op	4:45 PM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/19/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/19/2015	Clinic Hours of Op	4:45 PM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/26/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
3/26/2015	Clinic Hours of Op	4:45 PM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
4/2/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
4/2/2015	Clinic Hours of Op	4:45 PM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
4/9/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
4/9/2015	Clinic Hours of Op	4:45 PM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.
4/16/2015	Clinic Hours of Op	8:15 AM	6:45 PM	Thursday template is trying to set a time that is outside of Clinic hours of operation.

In this case, an Hours of Operation Template will need to be created and applied to the Master Calendar to accommodate appointments that fall outside the default hours of operation (8:00 am to 5:00 pm). Refer to Template Resource: Creating an “Hours Of Operation” Template. After an “Hours of Operation” template has been created and applied, this Numbers Based Appointment Template for Thursday can be applied without scheduling conflicts.

History of Applied Templates

The user can view the history of the application of all templates applied to the master calendar within the clinic.

Go to **Scheduling** → **Templates** → **Apply Templates**. Choose the **History** button on the lower right corner of the screen.

The screenshot shows the 'Apply Templates' application window. At the top, there is a navigation bar with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The 'Scheduling' menu is active. Below the navigation bar, the 'Apply Templates' window is displayed. It has a 'Day' and 'Week' view selector. The 'Start Date' is set to 3/10/2015 and the 'End Date' is 4/10/2015. There are dropdown menus for 'Template Type' and 'Template'. The 'Apply Options' section is empty. The 'Exception Rule' section has two dropdown menus: 'If the selected date(s) falls on a Holiday' and 'If the selected date(s) falls on a non working day', both set to 'Do Not Apply'. There are 'Preview' and 'Clear' buttons. The main area is a calendar grid with dates from 2 to 31. The 'History' button in the bottom right corner is circled in red.

- The **Apply Template History** screen will display a list and details of templates that have been applied.
- The **Template Type** drop-down can be used to filter which type of template application history is returned by the search (ex., Hours of Operation, Nutrition Education Classes).
- Templates can be sorted by **Template Type, Name, From Date, To Date, Applied Date,** and **Applied By.** In order to control how templates are sorted, click within the column header. In this example, the information is sorted by Applied Date

Apply Template History Cross roads Logout

Home Family Services Scheduling Vendor Operations Finance Administration Help

History

Template Type Filter

Template Type:

Template Type	Applied Template Name	From Date	To Date	Applied Date	Applied By
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	1/1/2016	12/31/2016	8/15/2014 5:43:22 PM	kwgrffin
Number Based Appointment Slots	3rd Friday Template	1/1/2016	12/31/2016	8/15/2014 5:42:54 PM	kwgrffin
Number Based Appointment Slots	Mon-Thur Template	1/1/2016	12/31/2016	8/15/2014 5:40:00 PM	kwgrffin
Number Based Appointment Slots	Mon-Thur Template	1/1/2015	12/31/2015	8/15/2014 5:39:00 PM	kwgrffin
Number Based Appointment Slots	3rd Friday Template	1/1/2015	12/31/2015	8/15/2014 5:35:31 PM	kwgrffin
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	1/1/2015	12/31/2015	8/15/2014 5:35:13 PM	kwgrffin
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	9/2/2014	12/31/2014	5/29/2014 1:40:19 PM	vwiese-harsen
Number Based Appointment Slots	3rd Friday Template	9/2/2014	12/31/2014	5/29/2014 1:38:18 PM	vwiese-harsen
Number Based Appointment Slots	3rd Friday Template	8/4/2014	8/29/2014	5/29/2014 1:37:32 PM	vwiese-harsen
Number Based Appointment Slots	3rd Friday Template	7/7/2014	7/31/2014	5/29/2014 1:36:46 PM	vwiese-harsen
Number Based Appointment Slots	Mon-Thur Template	9/8/2014	12/31/2014	5/29/2014 1:32:58 PM	vwiese-harsen
Number Based Appointment Slots	3rd Friday Template	9/19/2014	9/19/2014	5/29/2014 1:28:58 PM	vwiese-harsen
Number Based Appointment Slots	Mon-Thur Template	9/8/2014	12/31/2014	5/29/2014 1:26:31 PM	vwiese-harsen
Number Based Appointment Slots	Mon-Thur Template	5/28/2014	12/31/2014	5/27/2014 10:21:03 AM	vwiese-harsen
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	5/28/2014	12/26/2014	5/27/2014 9:27:17 AM	vwiese-harsen
Number Based Appointment Slots	3rd Friday Template	6/20/2014	6/20/2014	5/26/2014 9:53:19 PM	kwgrffin
Number Based Appointment Slots	3rd Friday Template	7/11/2014	7/11/2014	5/26/2014 9:52:40 PM	kwgrffin
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	5/27/2014	12/31/2014	5/24/2014 2:38:25 PM	amorfbell
Number Based Appointment Slots	Mon-Thur Template	5/27/2014	12/31/2014	5/24/2014 2:30:09 PM	amorfbell
Number Based Appointment Slots	3rd Friday Template	8/1/2014	12/31/2014	5/24/2014 2:26:21 PM	amorfbell
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	5/27/2014	12/31/2014	5/24/2014 2:23:37 PM	amorfbell

Selected Row Details

Cancel

- To view more details about a particular listing, select the listing, then click the **Selected Row Details** bar.

Note: The **Applied Template Details** will include details of the template as it existed on the date on which it was applied. Modifications may have occurred since the date of application being viewed.

Apply Template History Cross roads

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

History

Template Type Filter

Template Type:

Template Type	Applied Template Name	From Date	To Date	Applied Date	Applied By
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	1/1/2016	12/31/2016	8/15/2014 5:43:22 PM	kwgriffin
Number Based Appointment Slots	3rd Friday Template	1/1/2016	12/31/2016	8/15/2014 5:42:54 PM	kwgriffin
Number Based Appointment Slots	Mon-Thur Template	1/1/2016	12/31/2016	8/15/2014 5:40:45 PM	kwgriffin
Number Based Appointment Slots	Mon-Thur Template	1/1/2015	12/31/2015	8/15/2014 5:39:00 PM	kwgriffin
Number Based Appointment Slots	3rd Friday Template	1/1/2015	12/31/2015	8/15/2014 5:35:31 PM	kwgriffin
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	1/1/2015	12/31/2015	8/15/2014 5:35:13 PM	kwgriffin
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	9/2/2014	12/31/2014	5/29/2014 1:40:19 PM	vwiese-hansen
Number Based Appointment Slots	3rd Friday Template	9/2/2014	12/31/2014	5/29/2014 1:38:18 PM	vwiese-hansen
Number Based Appointment Slots	3rd Friday Template	8/4/2014	8/29/2014	5/29/2014 1:37:32 PM	vwiese-hansen
Number Based Appointment Slots	3rd Friday Template	7/7/2014	7/31/2014	5/29/2014 1:36:46 PM	vwiese-hansen
Number Based Appointment Slots	Mon-Thur Template	9/8/2014	12/31/2014	5/29/2014 1:32:58 PM	vwiese-hansen
Number Based Appointment Slots	3rd Friday Template	9/19/2014	9/19/2014	5/29/2014 1:28:58 PM	vwiese-hansen
Number Based Appointment Slots	Mon-Thur Template	9/8/2014	12/31/2014	5/29/2014 1:26:31 PM	vwiese-hansen
Number Based Appointment Slots	Mon-Thur Template	5/28/2014	12/31/2014	5/27/2014 10:21:01 AM	vwiese-hansen
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	5/28/2014	12/26/2014	5/27/2014 9:27:17 AM	vwiese-hansen
Number Based Appointment Slots	3rd Friday Template	6/20/2014	6/20/2014	5/26/2014 9:53:19 PM	kwgriffin
Number Based Appointment Slots	3rd Friday Template	7/11/2014	7/11/2014	5/26/2014 9:52:40 PM	kwgriffin
Number Based Appointment Slots	1st, 2nd, 4th, and 5th Friday Template	5/27/2014	12/31/2014	5/24/2014 2:38:25 PM	amorite11
Number Based Appointment Slots	Mon-Thur Template	5/27/2014	12/31/2014	5/24/2014 2:30:09 PM	amorite11
Number Based Appointment Slots	3rd Friday Template	8/11/2014	12/31/2014	5/24/2014 2:26:21 PM	amorite11

Total Items: 21

Applied Dates: 9/8/2014, 9/9/2014, 9/10/2014, 9/11/2014, 9/15/2014, 9/16/2014, 9/17/2014, 9/18/2014, 9/22/2014, 9/23/2014, 9/24/2014

Apply Options: Selected Days of the Week: On Monday, Tuesday, Wednesday, Thursday of First, Second, Third, Fourth, Fifth, Last

Applied Template Details: 8:15 AM to 11:30 AM (Concurrent - 2) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment 1:00 PM to 4:30 PM (Concurrent - 2) Initial Certification, Subsequent Certification, Nutrition Education - Individual, Mid Certification Assessment

Holiday Exception Option: Do Not Apply

Non Working Day Exception Option: Do Not Apply

Selected Row Details