

# Master Calendar – Navigation

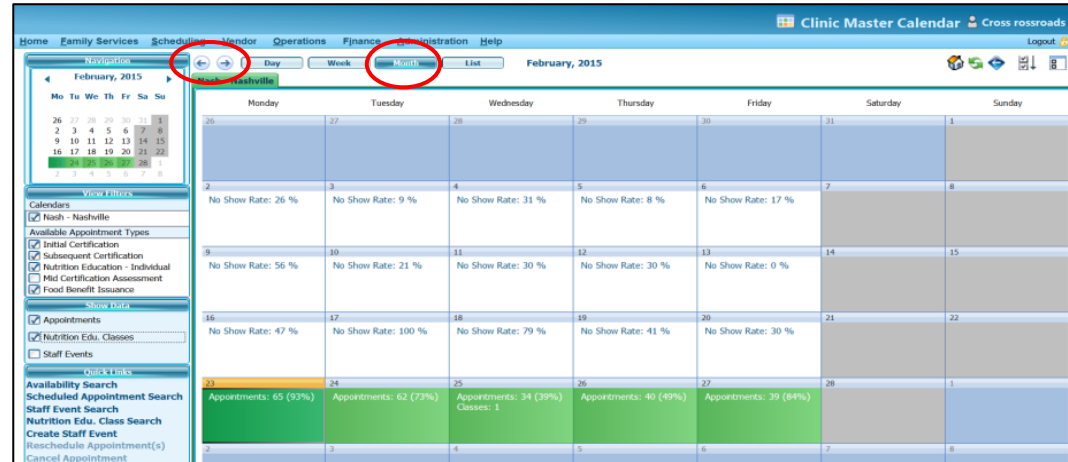
## Scheduling > Clinic Master Calendar

Use arrows to navigate: day --> week --> month.

### Month View

- Gold bar – current date
- White – no show rate – past calendar dates
- Grey – blocked time
- Green – appointment availability
  - Display number of appointments booked

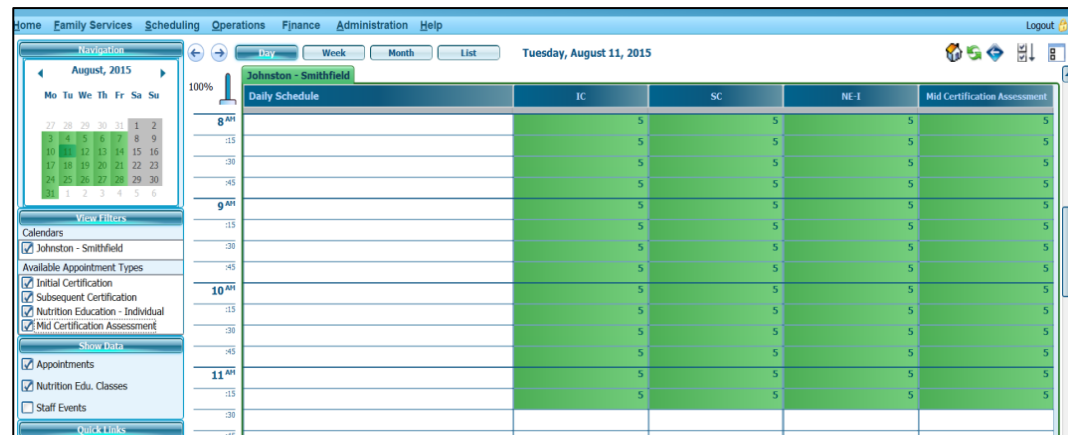
Percent of the total number of appointments for that date



### Day View

- Daily Schedule
  - Scheduled Family Appointments
- Columns
  - Appointment Types
- Rows
  - Number of concurrent slots per time period

**Note:** Number of appointments per time period decreases as appointments are scheduled



## Week View

Provides information on:

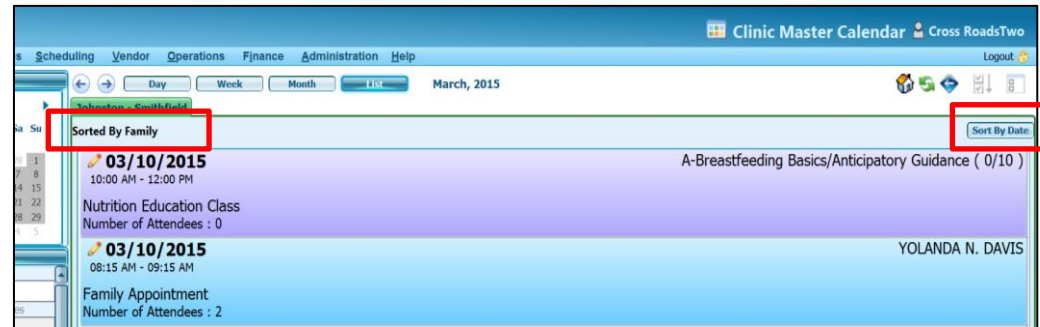
- Clinic Hours of Operation
  - Number of booked appointments per type and percent of the total number of appointments of that type
  - Nutrition Education Classes
- Topic, time, number registered/class capacity



## List View

Displays a list view of the main calendar

- Sorted by Family or Sort by Date
  - Sort by Family is the Default
- Click inside the block to view details of the appointment



## Navigation Calendar

Use the mini calendar to navigate to the desired day, month, and year

- Use the arrows to advance one month at a time
- Click the month for a list of months
- Click the year for a list of the current decade



# Master Calendar – View Filters

Select options as necessary to filter the main calendar.

- Shows local agency and clinic
- Appointment types that exist on the clinic's Master Calendar
- Check every appointment type to display entire availability on the **Day** calendar view
- Uncheck appointment types as needed to display availability for a specific appointment type

The screenshot displays the Master Calendar software interface. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Operations', 'Finance', 'Administration', and 'Help'. The main window shows the date 'Tuesday, July 07, 2015' and the view 'Day'. The 'View Filters' panel on the left is highlighted with a red box and contains the following sections:

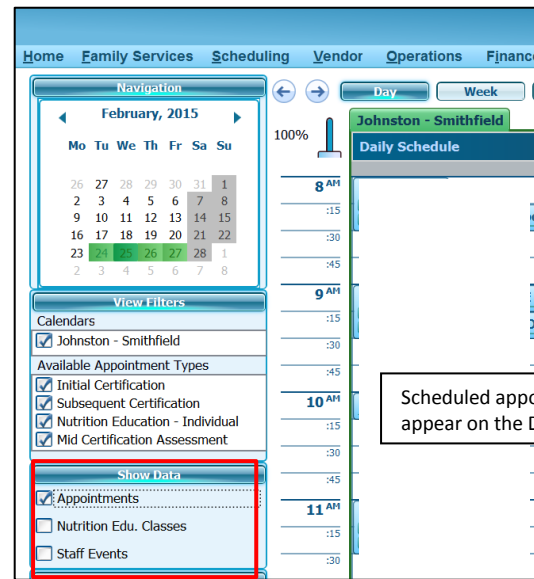
- Calendars:**  Johnston - Smithfield
- Available Appointment Types:**  Initial Certification,  Subsequent Certification,  Nutrition Education - Individual,  Mid Certification Assessment
- Appointments:**  Appointments,  Nutrition Edu. Classes,  Staff Events
- Quick Links:** Availability Search, Scheduled Appointment Search, Staff Event Search, Nutrition Edu. Class Search, Create Staff Event, Reschedule Appointment(s), Cancel Appointment, Cancel Nutrition Edu. Class

The 'Daily Schedule' grid on the right shows the following columns: 'IC', 'SC', 'NE-1', and 'Mid Certification Assessment'. The rows represent time slots from 8 AM to 1 PM. The grid shows availability for each time slot, with green cells indicating availability and white cells indicating no availability.

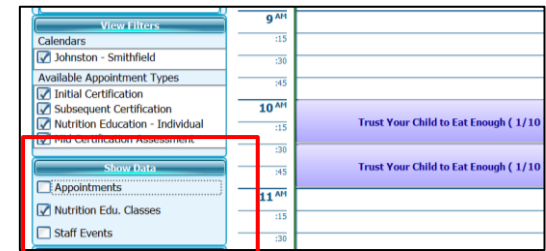
# Master Calendar – Show Data

Enables the viewing on the Day, Week, or Month Views of the selected options: appointments, nutrition educations classes and staff events. The detail will vary depending on the view you select.

- Check appointments to enable viewing of scheduled appointments
- Check nutrition education classes for a list of classes
- Check staff events to review scheduled staff events



Scheduled appointments appear on the Daily Schedule



# Master Calendar – Quick Links

## Availability Search

Identifies a selection of available appointments directly from the master calendar using defined search criteria. Allows appointment scheduling for both new and existing families.

- Click **Availability Search**
- Enter information in the options fields
  - Start Date
  - End Date
  - Day of the Week
  - Include Overbooking (if necessary)
  - Preferred Language
  - Preferred Time
  - Clinic site
- Do one of the following:
  - Enter the Family ID **or**
  - Click the magnifying glass to begin the search **or**
  - Click the Create New Family icon
  - Complete the new family screen and click Save
  - To add a new participant to the selected family ->click the **Add a New Participant** icon and complete the **Add Participant** screen
- Click the **Search** button
- Crossroads returns a selection of appointment dates and times

The screenshot displays the 'Clinic Master Calendar' interface. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main content area is titled 'Search - Appointment Availability' and contains several sections:

- Search Options:** Includes fields for Start Date (3/31/2015), End Date (4/10/2015), Day of Week (S, M, T, W, Th, F, Sa), Preferred Language (English), Preferred Time (Any), and Clinic (051-01 - Johnston - Smithfield).
- Appointment Types:** A table with columns: Family ID, Individual, Appointment Type, Duration, High Risk, WIC Category, Status, and Certification End Date. A search input field with a magnifying glass icon is highlighted in red.
- Quick Scheduling Results:** A table with columns: Family ID, Date, Time, Appointment Type, Individual, WIC Category, Status, Comment, and Assets. It shows three rows of results for family F07900000499.

On the left side, there is a sidebar with 'Navigation' (March 2015 calendar), 'View Filters' (Calendars, Available Appointment Types, Show Data), and 'Quick Links' (Availability Search, Scheduled Appointment Search, Staff Event Search, Nutrition Edu. Class Search, Create Staff Event, Hide Search Panel, Reschedule Appointment(s), Cancel Appointment, Cancel Nutrition Edu. Class, Cancel Staff Event).

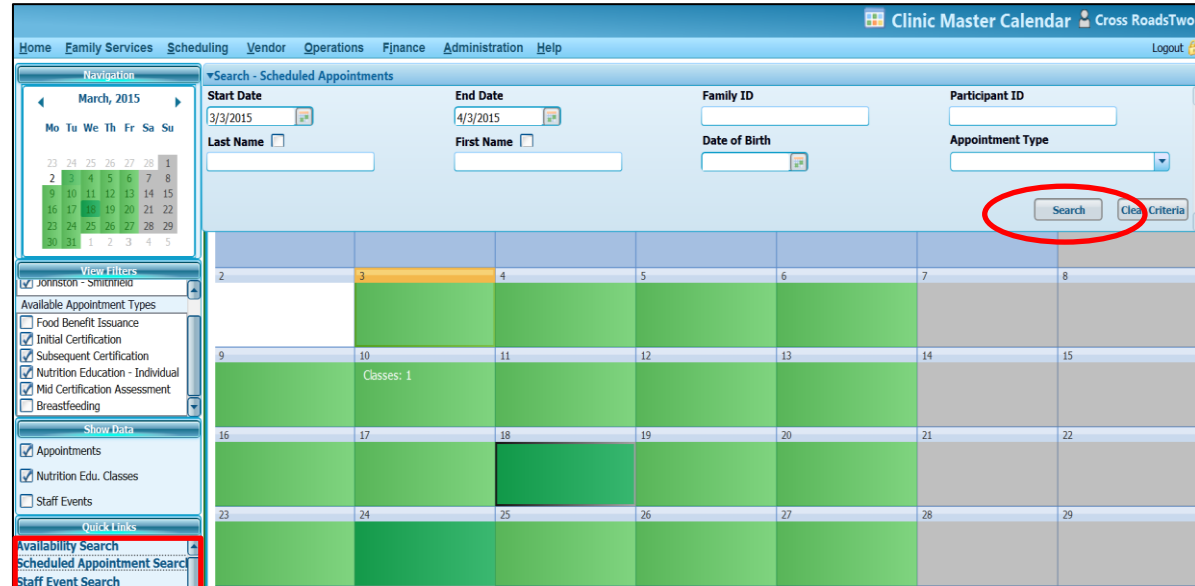
# Master Calendar – Quick Links

## Scheduled Appointment Search

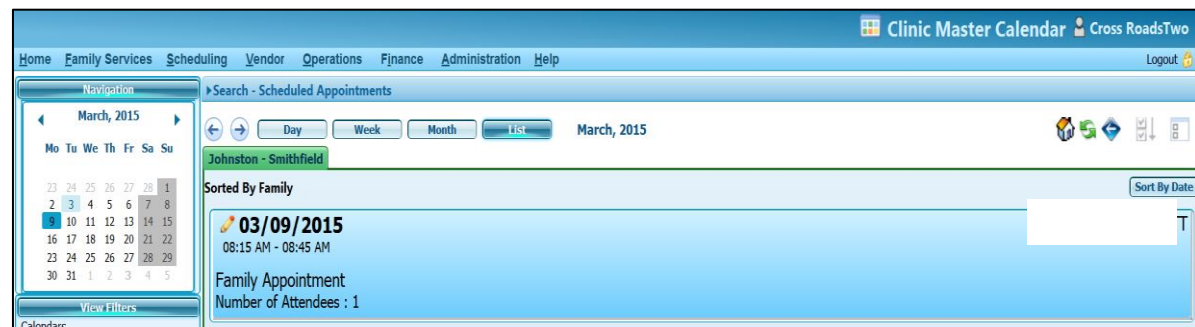
Enables a search for scheduled appointments.

- Enter the information in the data fields

- Start Date
- End Date
- Family ID
- Participant ID
- Last Name
- First Name
- Date of Birth
- Appointment type



- Click the **Search** button
- Search returns the desired information in the List View
- Click in the family appointment box for details



# Master Calendar – Quick Links

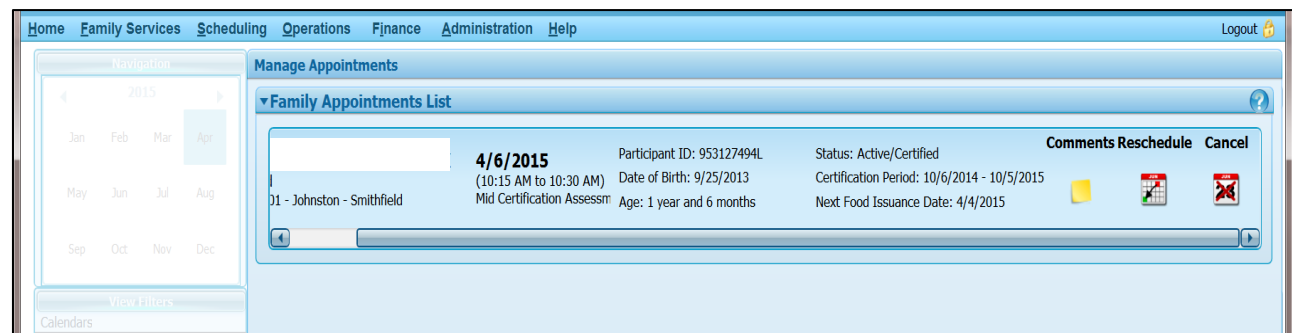
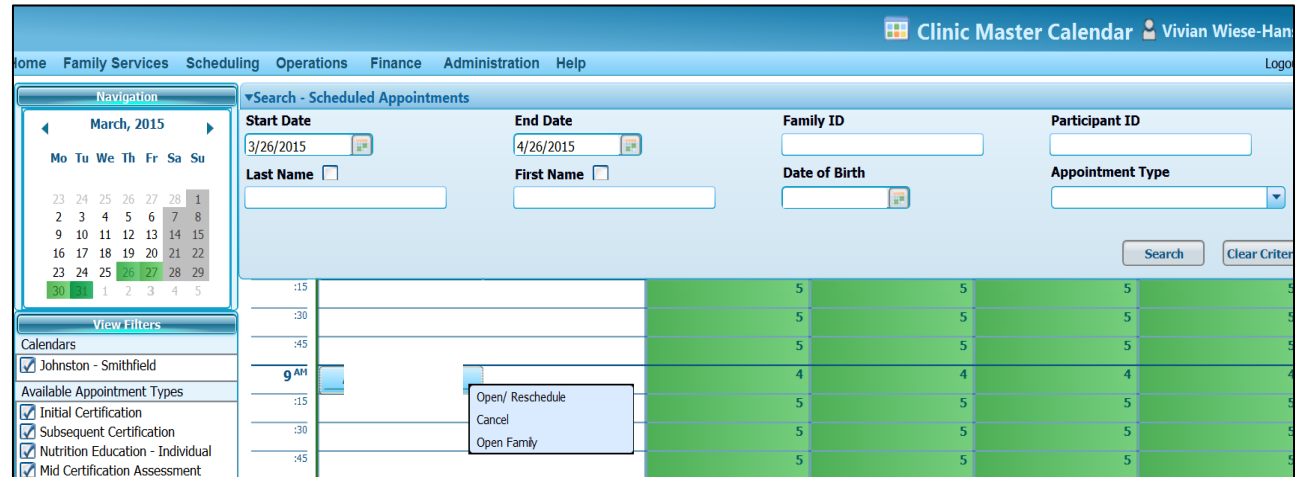
## Reschedule – Cancel - Open Family

Under Quick Links click --> Scheduled Appointment Search.

- Select the Month calendar view option
- Go to the month of the appointment
- Double click the appointment day on the Navigation Calendar
- Select the desired appointment from the Day View of the Calendar
- Right click the appointment to view options for Open/Reschedule, Cancel, or Open Family
  - Select Open/Reschedule or Cancel on the Family Appointments List to complete the desired action

**Note:** Refer to Quick Appointments for further instructions

- Select Open Family to open the record on the Family Demographics screen





# Master Calendar – Quick Links

## Nutrition Education Class Search

Enables a search for nutrition education classes.

- Under Quick Links click on **Nutrition Education Class Search**
- Enter or select the desired search criteria
  - Education Topic
  - Start Date
  - End Date
  - Day of Week
  - Overbooking (if necessary)
  - Preferred Language
  - Preferred Time
  - Clinic Location (Crossroads defaults to the log on process clinic location)
  - Select any **Special Needs** as necessary
- Click **Search**

The screenshot shows a web application interface for searching nutrition education classes. The top navigation bar includes Home, Family Services, Scheduling, Operations, Finance, Administration, and Help. The main content area is titled "Search - Nutrition Education Class".

**Search Filters:**

- Education Topic:** A-Breastfeeding Basics/Anticipa
- Start Date:** 3/18/2015
- End Date:** 4/18/2015
- Day of Week:** S, M, T, W, Th, F, Sa (M, T, W, Th, F are checked)
- Special Needs:** None, Forms Assistance, Hearing Impaired (None is selected)
- High Risk:**
- Include Overbooking:**
- Preferred Language:** English
- Preferred Time:** Any
- Clinic:** 090-01 - Union - Monr

**Navigation:** A calendar for March 2015 is shown, with the 18th and 19th highlighted.

**View Filters:**

- Calendars:** Union - Monroe (checked)
- Available Appointment Types:** Initial Certification, Subsequent Certification, Breastfeeding, Nutrition Education - Individual, Mid Certification Assessment (all checked)
- Show Data:** Appointments, Nutrition Edu. Classes (checked), Staff Events (unchecked)

**Quick Links:** Availability Search, **Scheduled Appointment Search**, Staff Event Search, **Nutrition Edu. Class Search** (highlighted with a red box), Create Staff Event.

**Search Results Table:**

9	10	11	12	13	14	15
No Show Rate: 29 %	No Show Rate: 35 %	No Show Rate: 25 %	No Show Rate: 20 %	No Show Rate: 11 %		
No Show Rate: 18 %	No Show Rate: 25 %	Appointments: 34 (100%) Classes: 2	Appointments: 68 (89%) Classes: 1	Appointments: 20 (70%)		
Appointments: 68 (88%) Classes: 1	Appointments: 66 (99%) Classes: 1	Appointments: 53 (91%) Classes: 1	Appointments: 52 (87%) Classes: 1	Appointments: 13 (61%)		
Appointments: 53 (86%)	Appointments: 49 (100%)					



- The screen refreshes returning the first available in the Day View
- Use the hover feature to view class details and attendees
- Click the Week or Month and the search returns availability in that time period

The screenshot displays a software interface for scheduling. At the top, there is a navigation menu with options: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, Help, and Logout. Below this is a search bar containing 'Nutrition Education Class' and view options for Day, Week, Month, and List. The current date is Thursday, June 05, 2014. On the left, a calendar for June 2014 shows the 5th as the selected day. Below the calendar are 'View Filters' for Calendars (Main Training Clinic checked) and Appointment Types. A 'Show Data' section includes checkboxes for Appointments, Nutrition Edu. Classes (checked), and Staff Events. A 'Quick Links' section provides various search and management options. The main area shows a 'Daily Schedule' for the 'Main Training Clinic' from 7 AM to 11 AM. Several appointments are listed, each titled 'A-Breastfeeding Basics/Anticipatory Guidance ( 0/5 )'. A red circle highlights a tooltip for the 9 AM appointment, which contains the following details:

Details	
Title	: A-Breastfeeding Basics/Anticipatory Guidance ( 0/5 )
Description	: A-Breastfeeding Basics/Anticipatory Guidance
Location	: Main Training Clinic
Start Time	: 8:00 AM
End Time	: 8:30 AM
Attendees	:

# Master Calendar – Quick Links

## Add and Remove Attendees to Nutrition Education Classes

Participants can be added or removed to a nutrition education class using the Master Calendar.

### To Add an Attendee

- On the Day View click in desired class
- Type Family ID in the Add Attendee box
- Click the magnifying glass to search
- The Attendee auto populates in the Attendance box above
- Click **Save**

### OR

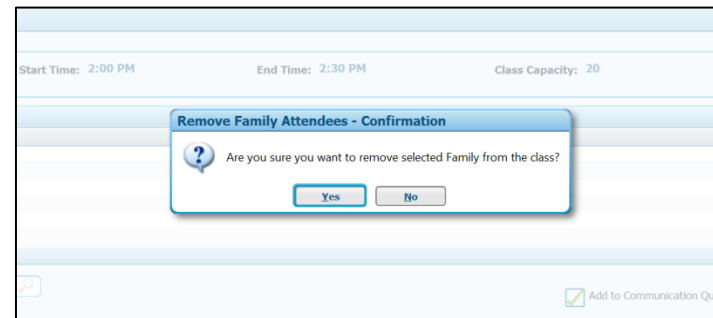
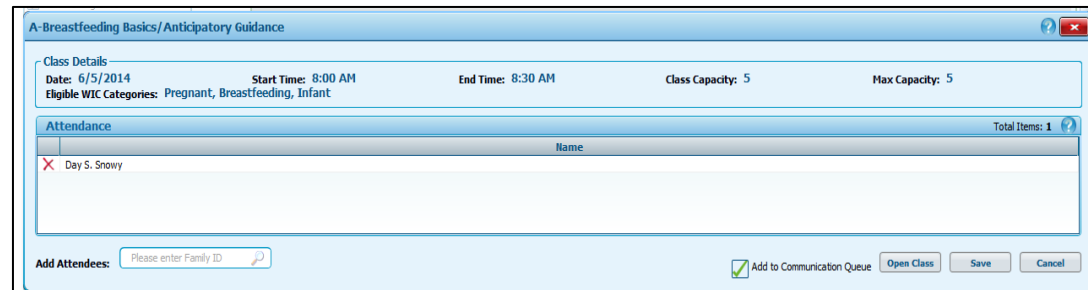
- Click the magnifying glass to conduct a search
- The Select Family/Search Criteria screen displays
- Enter the search criteria
- Click **Search**
- Highlight the desired participant
- Click **Select**
- You are returned to the Nutrition Education Class screen
- The selected participant is added to the Attendance box

The screenshot displays a software window titled "Main Training Clinic" with a sub-header "A-Breastfeeding Basics/Anticipatory Guidance". The "Class Details" section includes: Date: 6/5/2014, Start Time: 8:00 AM, End Time: 8:30 AM, Class Capacity: 5, and Max Capacity: 5. Eligible WIC Categories are listed as Pregnant, Breastfeeding, Infant. Below this is an "Attendance" table with a header "Name" and a "Total Items: 0" indicator. At the bottom, there is an "Add Attendees:" section with a text input field containing "Please enter Family ID" and a magnifying glass icon. To the right of this section are checkboxes for "Add to Communication Queue" (checked), and buttons for "Open Class", "Save", and "Cancel". A red rectangle highlights the "Add Attendees:" input field.

# Master Calendar – Quick Links

## To Remove a Participant from a Nutrition Education Class

- Click on the desired class
- Click the **Delete** (red X) to remove the attendee
- Answer the question to confirm removing participant from the class



# Master Calendar – Quick Links

## Mark a Nutrition Education Class Participant as Attended and Issue Benefits

Enables staff to print Food Instruments while participants are attending class.

- Search for the desired Nutrition Education class
- On the month view, click the calendar day of the desired class (screen refreshes to the Day view)
- Double-click the class – the **Nutrition Education Class** screen displays
- Click **Open Class**
- The **Attendance** box is updated showing new columns – mark attendance, issue benefits, modify issuance frequency and preview checks
- Select the **Attended** check box for each participant attending the class
- Select the **Issue** check box for each participant/family that is to receive benefits
- Click **Preview Checks** for each participant and preview their benefits prior to issuance
- The **Check Distribution Preview** screen displays
- Click **Cancel** to return to the

A-Breastfeeding Basics/Anticipatory Guidance

Class Details  
Date: 6/5/2014 Start Time: 4:30 PM End Time: 5:00 PM Class Capacity: 5 Max Capacity: 5  
Eligible WIC Categories: Pregnant, Breastfeeding, Infant

Attendance Total Items: 1

<input type="checkbox"/> Attended	<input checked="" type="checkbox"/> Issue	Name	Issuance Frequency	Preview Checks
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Selena S. Spearment	2 Month(s)	Preview Checks

Add Attendees:

Check Distribution Preview Total Items: 10

FDTS	LDTS
7/2/2014	8/1/2014
7/2/2014	8/1/2014
7/2/2014	8/1/2014
7/2/2014	8/1/2014
6/5/2014	7/1/2014
6/5/2014	7/1/2014
7/2/2014	8/1/2014
7/2/2014	8/1/2014
7/2/2014	8/1/2014

**Nutrition Education Class** screen

**Master Calendar – Quick Links**

## To Process Class Attendance

- Click **Save and Issue**
- A status message displays indicating success
- You are returned to the Day calendar view

**A-Breastfeeding Basics/Anticipatory Guidance**

**Class Details**  
Date: 6/5/2014    Start Time: 4:30 PM    End Time: 5:00 PM    Class Capacity: 5    Max Capacity: 5  
Eligible WIC Categories: Pregnant, Breastfeeding, Infant

**Attendance**    Total Items: 1

<input type="checkbox"/> Attended	<input checked="" type="checkbox"/> Issue	Name	Issuance Frequency	Preview Checks
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Selena S. Spearmint	2 Month(s)	<a href="#">Preview Checks</a>

**Add Attendees:**

# Master Calendar – Quick Links

## Issue Benefits to Nutrition Education Class Participants

Participants issued benefits are added to the **Delayed Signature** screen.

Home -> Family Services -> Delayed Signature for Food Issuance

- The **Delayed Signature** screen displays
- Select **Edit** button for the individual signing for the benefits
- Have the participant sign the signature pad
- Click **Save**
- The **Open Class** button has changed to **Close Class**
  - The **Close Class** button closes the class and changes the status of the class to **Completed**
  - **Once clicked, attendance is recorded and no additional actions can be performed**
- A status of **Completed** displays if all participants scheduled are marked as having attended or the class is completed and closed

The screenshot displays a software interface for managing a class titled "A-Breastfeeding Basics/Anticipatory Guidance". The interface includes a calendar view at the top left, a class details section, an attendance table, and a bottom section with buttons for "Close Class", "Save and Issue", and "Cancel".

**Class Details:**  
Date: 6/5/2014    Start Time: 4:30 PM    End Time: 5:00 PM    Class Capacity: 5    Max Capacity: 5  
Eligible WIC Categories: Pregnant, Breastfeeding, Infant

**Attendance Table:** Total Items: 1

Attended	Issue	Name	Issuance Frequency	Preview Checks
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Selena S. Spearmint	2 Month(s)	<a href="#">Preview Checks</a>

**Buttons:** Add Attendees (Please enter Family ID), **Close Class** (highlighted), Save and Issue, Cancel



# Master Calendar – Quick Links

## Cancel a Nutrition Education Class

- Search for the desired **Nutrition Education Class**
- On the month view, double click the calendar day that includes the class
- Screen refreshes to the **Day** calendar view and displays the class
- **All clients currently scheduled for the class must be rescheduled before the class can be cancelled.** There are two ways to cancel the class

### Option 1

- Under **Quick Links**, click **Cancel Nutrition Education Class**
- Click **Yes** on the confirmation screen
- Review the Day view on the calendar and note the class is no longer listed

### Option 2

- Right click on the class and select cancel
- A confirmation screen displays asking if you are sure you want to cancel the class
- Click **Yes**
- Review the **Day** view on the calendar and note that the class is no longer listed

The screenshot shows a software interface for managing a calendar. At the top, there is a navigation menu with options: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. A search bar is present, containing the text 'Search - Nutrition Education Class'. Below the search bar, there are tabs for 'Day', 'Week', 'Month', and 'List', with 'Day' selected. The date 'Thursday, June 05, 2014' is displayed. The main area shows a 'Daily Schedule' for 'Main Training Clinic'. The schedule is a vertical timeline with time slots from 7 AM to 1 PM. The 7 AM slot is highlighted in green and contains the text 'A-Breastfeeding Basics/Anticipatory Guidance ( 1/5 )'. Other time slots (8 AM, 9 AM, 10 AM, 11 AM, 12 PM, 1 PM) are highlighted in purple and contain the text 'A-Breastfeeding Basics/Anticipatory Guidance ( 0/5 )'. On the left side, there is a 'Navigation' panel with a calendar for June 2014. Below the calendar are sections for 'View Filters' (Calendars: Main Training Clinic checked; Available Appointment Types), 'Show Data' (Appointments, Nutrition Edu. Classes checked, Staff Events), and 'Quick Links' (Availability Search, Scheduled Appointment Search, Staff Event Search, Nutrition Edu. Class Search, Create Staff Event, Hide Search Panel, Reschedule Appointment(s), Cancel Appointment, Cancel Nutrition Edu. Class, Cancel Staff Event, Create Time Slot). The 'Cancel Nutrition Edu. Class' option is highlighted with a red box. At the bottom of the navigation panel is a 'Color Legend'.

# Master Calendar – Scheduling Appointments from the Master Calendar

Home->Scheduling->Clinic Master Calendar

This feature allows the user to schedule appointments from the day view of the Master Calendar by selecting available slots and selecting participants/families to be scheduled within those slots.

- For a single appointment, click in the desired time period of the appointment type.
- For multiple appointments of different types, select times that are continuous and that are in the columns of the desired appointment types.
- For multiple appointments of the same type, click continuous times in the same column.

**Note:** Take care not to select multiple concurrent appointments for family members. Instead schedule family members' appointments back-to-back, if possible.

	IC	SC	NE-1	Mid Certification Assessment
8:00 AM 8:30 AM	3	3	3	3
8:30 AM 9:00 AM	4	4	4	4
9:00 AM 9:30 AM	4	4	4	4
	4	4	4	4
	4	4	4	4
	4	4	4	4
	4	4	4	4
	2	2	2	2

	IC	SC	NE-1	Mid Certification Assessment
9:15 AM 9:45 AM	3	3	3	3
9:45 AM 10:15 AM	6	6	6	6
10:15 AM 10:45 AM	3	3	3	3
	6	6	6	6
	6	6	6	6
	6	6	6	6
	6	6	6	6
	6	6	6	6
	6	6	6	6
	6	6	6	6

**Search Options.** After selecting the time slots for the appointments, take one of the following actions to schedule participants in the selected appointments.

- Double click in any of the selected time slots to open **Quick Scheduling Results**
- Enter the Family ID and click the magnifying glass
- Under **Individual**, select the correct family member from the drop down that corresponds to the appropriate appointment type

**OR**

- If Family ID is unknown, click the magnifying glass
- Complete the **Search Criteria**-> click **Search**
- Highlight the desired family and click **Select**
- Under **Individual** select the family member from the drop down that corresponds to the appropriate appointment type

**OR**

- For a new family – click the add new family icon
- Complete the **New Family** screen and click **Save**
- Under **Individual** select the family member from the drop down that corresponds to the appropriate appointment type

### **Final Steps**

- Enter the Contact Method from the drop down
- Click **Book**
- Leave the check mark for **Add to Communication Queue**
  - The person is added to Notifications if the appointment is missed

**Note:** Crossroads will not allow an individual to be scheduled for a type of appointment that is not appropriate

Example: A child who is within her/his certification period cannot be scheduled for an Initial Certification appointment

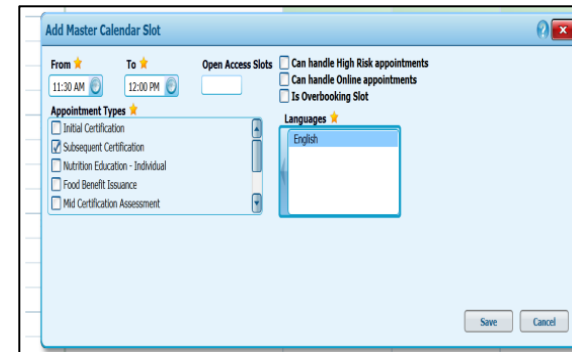
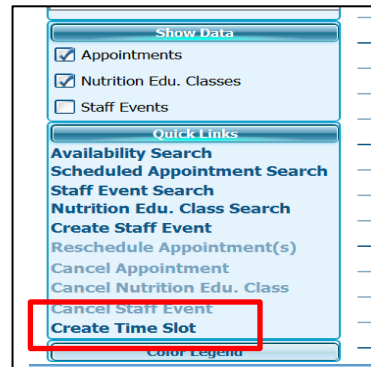




# Master Calendar – Create Time Slot

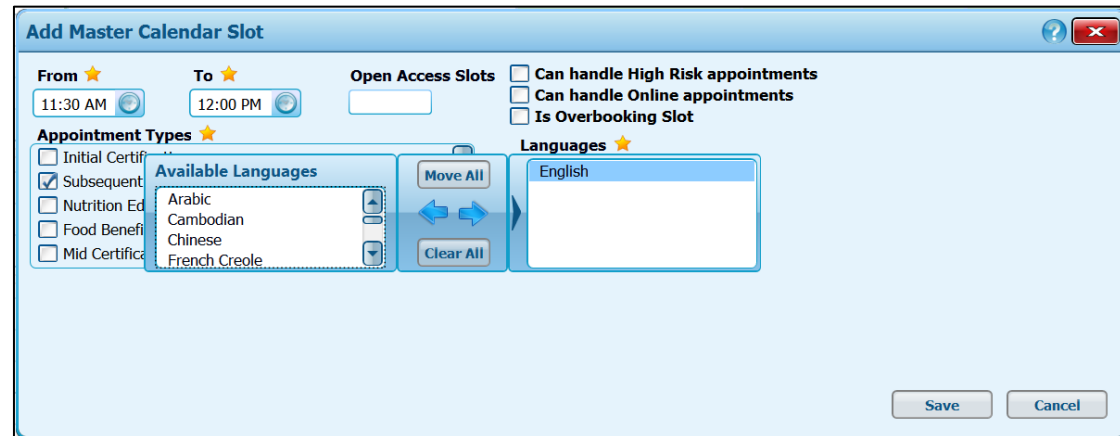
One appointment slot can be added at a time where no availability exists or availability can be increased where it currently exists

- Click **Create Time Slot**
- Fill in the required information on Add Master Calendar Slot
  - From and To times
  - Open access slot
  - Appointment Types
  - Can handle high risk appointments
  - Can handle online appointments
  - Is Overbooking Slot
  - Languages



## Selecting Language(s)

- English is the default.
- Click the arrow that opens the slider offering a selection of languages.
- Select (highlight) the desired languages from the **Available Languages** box.
- Click the right arrow to move the selected languages into the box .
- Click the Move All box if appointments can accommodate all languages.
- Click **Save**.



- The screen refreshes in the Day View showing the added time slots.
- Crossroads shows the added availability created.
- Repeat the process to add additional slots.

Clinic Master Calendar

Thursday, March 26, 2015

Johnston - Smithfield

Daily Schedule

	IC	SC	NE-1	Mid Certification
8 AM	6	6	6	6
8:15	6	6	6	6
8:30	6	6	6	6
8:45	6	6	6	6
9 AM	3	3	3	3
9:15	6	6	6	6
9:30	6	6	6	6
9:45	6	6	6	6
10 AM	3	3	3	3
10:15	6	6	6	6
10:30	6	6	6	6
10:45	6	6	6	6
11 AM	5	5	5	5
11:15	6	6	6	6
11:30				
11:45				
12 PM				
12:15				
12:30				
12:45				
1 PM				
1:15				
1:30	3	3	3	3
1:45	4	4	4	4
2 PM	3	3	3	3

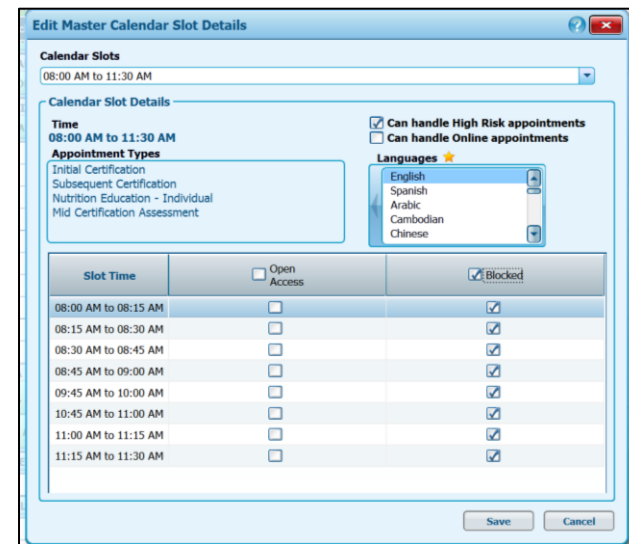
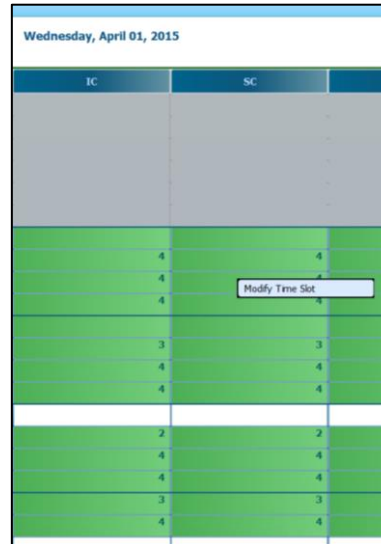


# Master Calendar – Modify a Time Slot

Use this feature to Block an appointment time(s), create open access slots, or change an open access slot to a regular slot.

## Block Appointment Time(s)

- Right click in the desired time period.
- Click in the **Modify Time Slot** box.
- In the **Edit Master Calendar Slot Details**.
- Check selected time(s) **OR**
- Check **Blocked** to checkmark all time slots.
- Click **Save**.
- Time slots selected will be reduced by one concurrent slot.



# Master Calendar – Modify a Time Slot

## Open Access

Allows the user to provide one open access slot for selected or all of the times listed.

- Right click in the desired time period.
- Click in the **Modify Time Slot** box.
- Check the times needed **OR**
- Check the **Open Access** box for all time slots.
- Pale Green indicates Open access slot(s) have been added.

**Edit Master Calendar Slot Details**

**Calendar Slots**  
08:00 AM to 11:30 AM

**Calendar Slot Details**

**Time**  
08:00 AM to 11:30 AM

**Appointment Types**  
Initial Certification  
Subsequent Certification  
Nutrition Education - Individual  
Mid Certification Assessment

**Can handle High Risk app**   
**Can handle Online appoin**

**Languages**   
English  
Spanish  
Arabic  
Cambodian  
Chinese

Slot Time	<input checked="" type="checkbox"/> Open Access	<input type="checkbox"/> Blocked
08:00 AM to 08:15 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
08:15 AM to 08:30 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
08:30 AM to 08:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
08:45 AM to 09:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
09:15 AM to 09:30 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
09:30 AM to 09:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
09:45 AM to 10:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10:00 AM to 10:15 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10:15 AM to 10:30 AM	<input type="checkbox"/>	<input type="checkbox"/>

Save

Home Family Services Scheduling Vendor Operations Finance Administration Help

Navigation: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, Help

View: Week, Month, List Thursday, March 26, 2015

March, 2015

Time	Johnston - Smithfield	IC
Daily Schedule		0
10 <sup>AM</sup>	DAYANA S ALLYN HE Susana Ca	3
		6
		6
		6
11 <sup>AM</sup>	ZIMBA R E	5
		6
		6
12 <sup>PM</sup>		6
		6
1 <sup>PM</sup>		6
		6
		6
	ELIZABET TIFFANY E	3
	LEXI R VAL	4

# Master Calendar – Modify a Time Slot

## Change Open Access Slot

- Right click in the desired time period.
- Click in the **Modify Time Slot** box.
- Uncheck the desired time slot(s).
- Click **Save**.
- Open Access slots are changed to regular slots.

The screenshot shows the 'Edit Master Calendar Slot Details' window for the 11:30 AM to 12:30 PM slot. The 'Open Access' checkbox is checked, and a red box highlights this checkbox and the 'Blocked' checkbox.

Slot Time	<input checked="" type="checkbox"/> Open Access	<input type="checkbox"/> Blocked
11:30 AM to 11:45 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11:45 AM to 12:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12:00 PM to 12:15 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12:15 PM to 12:30 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the 'Edit Master Calendar Slot Details' window for the 11:30 AM to 12:30 PM slot. The 'Open Access' checkbox is unchecked, and a red box highlights this checkbox and the 'Blocked' checkbox.

Slot Time	<input type="checkbox"/> Open Access	<input type="checkbox"/> Blocked
11:30 AM to 11:45 AM	<input type="checkbox"/>	<input type="checkbox"/>
11:45 AM to 12:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
12:00 PM to 12:15 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12:15 PM to 12:30 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The screenshot shows a calendar grid with a red box highlighting a specific time slot. The grid has a blue header row and several rows of green cells. The red box is positioned over the bottom-most row of the green cells.

# Master Calendar – Modify a Time Slot

## Color Legend

Provides a definition for the color display.

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The screenshot displays a software interface with two main sections. The top section, titled 'Quick Links', contains a list of actions: Availability Search, Scheduled Appointment Search, Staff Event Search, Nutrition Edu. Class Search, Create Staff Event, Reschedule Appointment(s), Cancel Appointment, Cancel Nutrition Edu. Class, Cancel Staff Event, and Create Time Slot. The bottom section, titled 'Color Legend', is enclosed in a red border and lists seven time slot types with their corresponding color swatches: Available Time (green), Appointment (cyan), Class (purple), Staff Event (orange), Overbooking Slot (yellow-green), Open Access Slot (light green), and Blocked Time (grey).

Color Legend
Available Time
Appointment
Class
Staff Event
Overbooking Slot
Open Access Slot
Blocked Time

# Master Calendar – Staff Events

## Display of Staff Events on the Master Calendar

1. Navigate to the Master Calendar.
2. Under Show Data, check the box next to Staff Events. This will allow staff events to show on the calendar. If the staff events box is checked, staff events will show up on the calendar in every view: day, week, month, and list.
3. Shown on this page is the month view with only Staff Events selected for viewing in Show Data.

**Note:** The number beside Events in the day box on the month view indicates the number of staff events scheduled on that day.

The screenshot displays the 'Clinic Master Calendar' interface for 'Alamance - Burlington' in April 2015. The navigation menu includes Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. The main calendar view shows a grid of days from Monday to Sunday. The 'Show Data' section on the left has 'Staff Events' checked. A red circle highlights the number '1' next to 'Events: 1' on Friday, April 24th. The interface also includes a 'View Filters' section with 'Alamance - Burlington' selected, and a 'Color Legend' at the bottom.

Home Family Services Scheduling Vendor Operations Finance Administration Help

Navigation: April 2015

Alamance - Burlington

Monday Apr 20th	Tuesday Apr 21st	Wednesday Apr 22nd	Thursday Apr 23rd	Friday Apr 24th
Hours of Operation 8:00 AM - 6:30 PM	Hours of Operation 8:00 AM - 5:00 PM	Hours of Operation 8:00 AM - 5:00 PM	Hours of Operation 8:00 AM - 5:00 PM	Hours of Operation 8:00 AM - 5:00 PM
Appointments - IC - 0 (0%) - SC - 0 (0%) - NE-I - 0 (0%)	Appointments - IC - 0 (0%) - SC - 0 (0%) - NE-I - 0 (0%)	Appointments - IC - 0 (0%) - SC - 0 (0%) - NE-I - 0 (0%)	Appointments - IC - 0 (0%) - SC - 0 (0%) - NE-I - 0 (0%)	Appointments - IC - 0 (0%) - SC - 0 (0%) - NE-I - 0 (0%) <b>Staff Events</b> - Staff Meeting 3:00 PM - 4:30 PM

4. Shown on this page are week, day, and list view of the staff events on the calendar.

**Note:** Hovering over the event on the day view will allow details of the staff event to display.

Initial Certification Assessment  
High Risk Follow-up  
Breastfeeding

1 PM

2 PM

3 PM

4 PM

Staff Meeting

Details

Title : Staff Meeting  
Description : All WIC Staff  
Location : Administration Conference Room  
Start Time : 3:00 PM  
End Time : 4:30 PM  
Attendees :  
Kathy Griffin  
Julie Hurt  
Nicole Alston  
Rebecca Robertson

Home Family Services Scheduling Vendor Operations Finance Administration Help

Navigation: April 2015

Alamance - Burlington

Sorted By Family

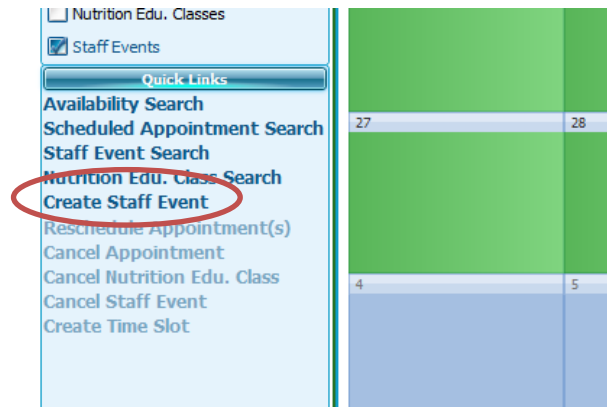
04/24/2015  
03:00 PM - 04:30 PM  
Staff Event  
Number of Attendees : 4

# Master Calendar – Staff Events

Creating Staff Events on the Master Calendar



1. Navigate to the Master Calendar.
  2. Under Quick Links, select Create Staff Event.
  3. The Staff Event Details screen displays.
  4. Enter a Title for the event.
  5. Enter or select the event Date. It defaults to the current date.
  6. Enter or select Start and End Times. Duration will display upon entry of Start and End Times.
- Note:** Staff Events can be scheduled outside of the clinic's hours of operation.
7. Enter a Description (optional).
  8. Enter Location (if set up in assets) or Other Location (if not set up in assets).



 A screenshot of the 'Staff Event Details' form. The form contains the following fields and sections:
 

- Title** (required): A text input field.
- Date** (required): A date picker showing 4/1/2015.
- Start Time** (required): A time picker.
- End Time** (required): A time picker.
- Duration**: A text input field that becomes active after start and end times are entered.
- Description**: A large text area for optional details.
- Location** (required): A dropdown menu.
- Other Location** (required): A text input field, with 'OR' between the two location options.
- Capacity** (required): A text input field.
- Maximum Capacity** (required): A text input field.
- Assets**: A large empty box with a right-pointing arrow, used for selecting assets.
- Assigned WIC Staff** (required): A large empty box with a plus sign, used for assigning staff.

 At the bottom right, there are 'Save' and 'Cancel' buttons.

9. Enter Capacity.
10. Enter Maximum Capacity. It defaults to equal Capacity.
11. Select Assets if assets are set up and needed (optional).
12. Click the Add (green +) button to add staff to the event. The WIC Staff Search screen displays.
13. Enter or select one or more of the following search criteria:
  - a. State
  - b. Local Agency
  - c. Clinic
  - d. Last Name
  - e. First Name

**Note:** When logged in at clinic level, the Clinic is the auto- selected location and cannot be changed. Users with assigned roles in the clinic will appear as a result of the search.

14. Click Search. The screen refreshes to display the search results. See next page.



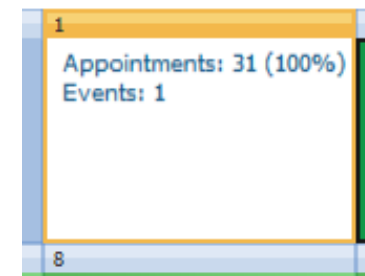
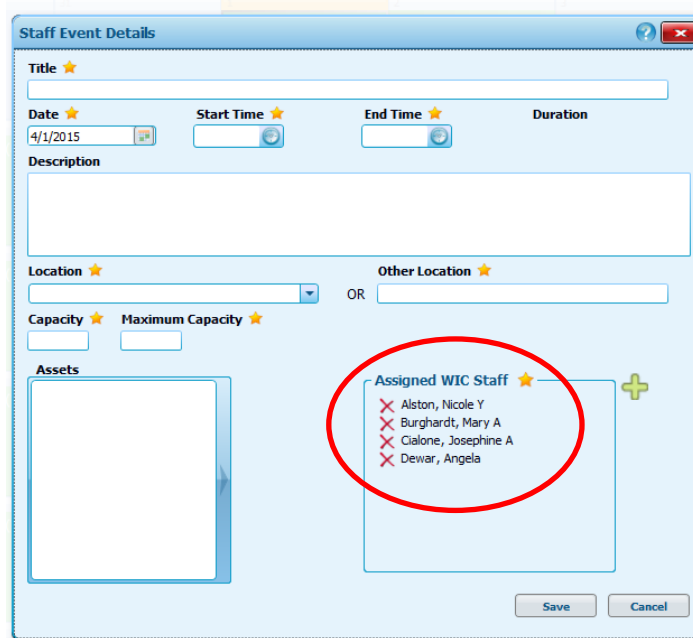
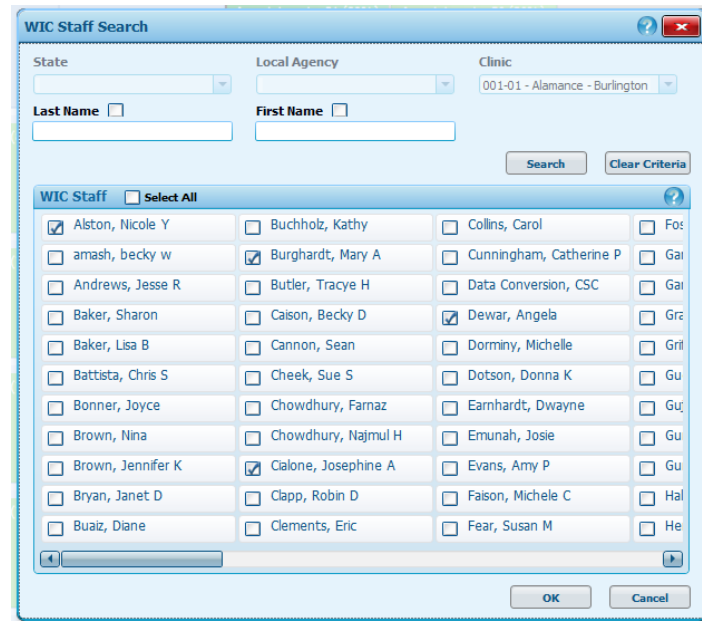
15. Select one or more staff members to add to the staff event.

**Note:** If search is narrowed using the last and/or first name fields, adding multiple staff to the staff event will require searching and adding in multiple steps.

16. Click OK. You are returned to the Staff Event Details screen and the previously selected staff members display within the Assigned WIC Staff group box.

17. Click Save. A status message displays indicating success and you are returned to the Clinic Master Calendar.

18. The event shows on the Master Calendar.



# Master Calendar – Staff Events

## Searching for Staff Events on the Master Calendar

1. Navigate to the Master Calendar.
2. Under Quick Links, select Staff Event Search.

**Note:** Staff Event Search can be conducted even if Staff Events are not selected in the Show Data area.

The screenshot displays the Master Calendar interface for March 2015. The top navigation bar includes links for Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. The main content area is titled "Search - Staff Events" and features a navigation pane on the left and a calendar grid on the right.

**Navigation Pane:**

- Navigation:** Shows a calendar for March 2015 with the 31st highlighted in green.
- View Filters:**
  - Calendars:  Alamance - Burlington
  - Available Appointment Types:
    - Initial Certification
    - Subsequent Certification
    - Nutrition Education - Individual
    - Mid Certification Assessment
    - High Risk Follow-up
    - Reschedule
- Show Data:**
  - Appointments
  - Nutrition Edu. Classes
  - Staff Events
- Quick Links:**
  - Availability Search
  - Scheduled Appointment Search
  - Staff Event Search** (highlighted with a red circle)
  - Nutrition Edu. Class Search
  - Create Staff Event
  - Hide Search Panel
  - Reschedule Appointment(s)
  - Cancel Appointment
  - Cancel Nutrition Edu. Class

**Calendar Grid:**

Monday	Tuesday	Wednesday	Thursday	Friday
23	24	25	26	27
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31	1	2	3

3. The Search- Staff Events panel displays.
4. Enter or select Start Date.
5. Enter or select End Date.
6. Enter Title. Check the box next to Title for an exact title match search.

**Note:** Start and End dates are auto populated.

**Note:** If nothing is entered in the search parameters, a broad search will be executed and results returned.

7. Click Search. The screen refreshes and displays the results of the search in a list view.
8. For details of a staff event in the results list, click within the yellow shaded area of the desired event. Location and attendees are displayed.

Search - Staff Events

Start Date: 3/31/2015    End Date: 4/30/2015    Title:

Search    Clear Criteria

Search - Staff Events

← → Day Week Month List March, 2015

Alamance - Burlington

Sorted By Family Sort By Date

<p> <b>04/24/2015</b> 07:45 AM - 08:15 AM</p> <p>Staff Event Number of Attendees : 1</p>	Birthday Breakfast
<p> <b>04/24/2015</b> 03:00 PM - 04:30 PM</p> <p>Staff Event Number of Attendees : 4</p>	Staff Meeting
<p> <b>05/22/2015</b> 07:45 AM - 08:15 AM</p> <p>Staff Event Number of Attendees : 4</p>	Birthday Breakfast

Staff Event  
Number of Attendees : 1

**04/24/2015**  
03:00 PM - 04:30 PM

Staff Event  
Location: WIC Classroom

<p><b>Attendees</b></p> <p>Griffin, Kathy Hurt, Julie Alston, Nicole Robertson, Rebecca</p>	<p><b>Resources</b></p> <p>Kathy Griffin Julie Hurt Nicole Alston Rebecca Robertson</p>
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**05/22/2015**  
07:45 AM - 08:15 AM

Birthday Breakfast

# Master Calendar – Staff Events

## Modifying Staff Events

1. Navigate to the Master Calendar.
2. Perform a Staff Event Search as described on previous pages.
3. When results display, click the pencil icon beside the staff event you wish to modify.

The screenshot displays the 'Search - Staff Events' window for 'Alamance - Burlington'. The interface includes navigation buttons for 'Day', 'Week', 'Month', and 'List', along with a date filter set to 'March, 2015'. The results are sorted by family and listed as follows:

Date	Time	Event Name	Attendees
04/24/2015	07:45 AM - 08:15 AM	Birthday Breakfast	1
04/24/2015	03:00 PM - 04:30 PM	Staff Meeting	4
05/22/2015	07:45 AM - 08:15 AM	Birthday Breakfast	4



4. The Staff Event Details window opens.
5. The user can modify the event by adding, deleting, or changing information in the fields.

The screenshot shows a 'Staff Event Details' window with the following fields and values:

- Title:** Staff Meeting
- Date:** 4/24/2015
- Start Time:** 3:00 PM
- End Time:** 4:30 PM
- Duration:** 1 hours 30 minutes
- Description:** All WIC Staff
- Location:** (empty dropdown)
- Other Location:** WIC Classroom
- Capacity:** 20
- Maximum Capacity:** 20
- Assets:** (empty box)
- Assigned WIC Staff:**
  - X Alston, Nicole Y
  - X Griffin, Kathy W
  - X Hurt, Julie A
  - X Robertson, Rebecca R

Buttons for 'Save' and 'Cancel' are located at the bottom right of the window.

6. Save changes or Cancel to exit the screen without modifying the staff event.

**Note:** In the example shown, the Other Location was modified and saved.

The screenshot shows a 'Staff Event Details' window with the following fields:

- Title:** Staff Meeting
- Date:** 4/24/2015
- Start Time:** 3:00 PM
- End Time:** 4:30 PM
- Duration:** 1 hours 30 minutes
- Description:** All WIC Staff
- Location:** (Dropdown menu)
- Other Location:** Administration Conference Room (circled in red)
- Capacity:** 20
- Maximum Capacity:** 20
- Assets:** (Empty box)
- Assigned WIC Staff:** Alston, Nicole Y; Griffin, Kathy W; Hurt, Julie A; Robertson, Rebecca R

Buttons for 'Save' and 'Cancel' are at the bottom right.

7. A subsequent Staff Event Search shows that modification was successful; location was changed.

The screenshot shows a search result for a staff event on 04/24/2015 from 03:00 PM to 04:30 PM. The event is titled 'Staff Event' and the location is 'Administration Conference Room' (circled in red). The attendees listed are Griffin, Kathy; Hurt, Julie; Alston, Nicole; and Robertson, Rebecca.