Master Calendar – Navigation
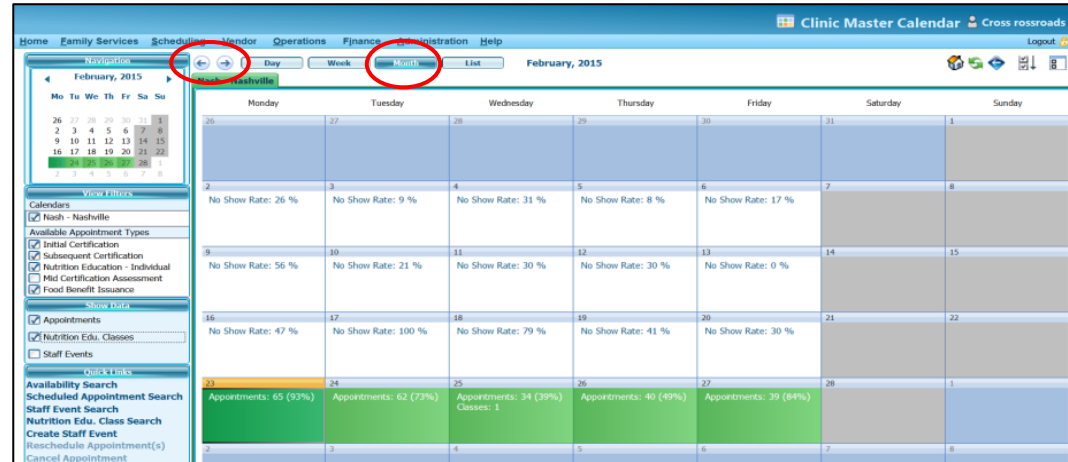
Scheduling> Clinic Master Calendar

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
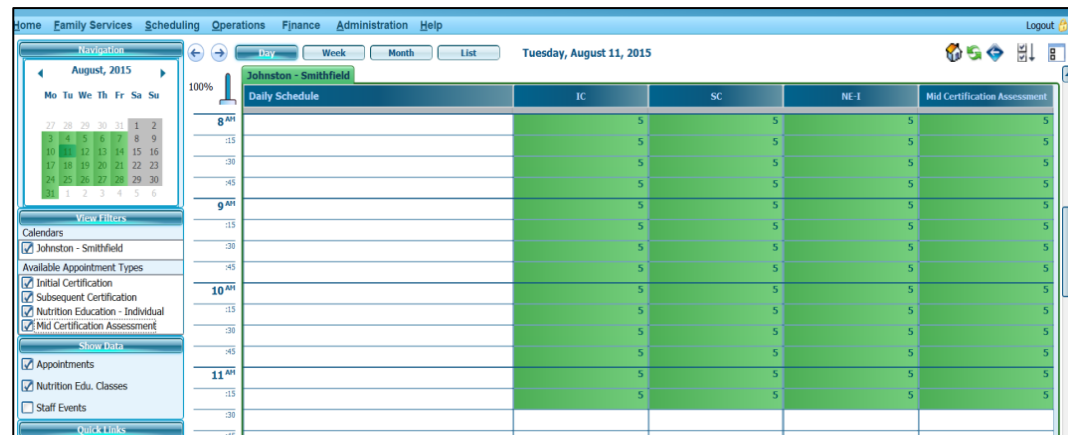 - Display number of appointments booked

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
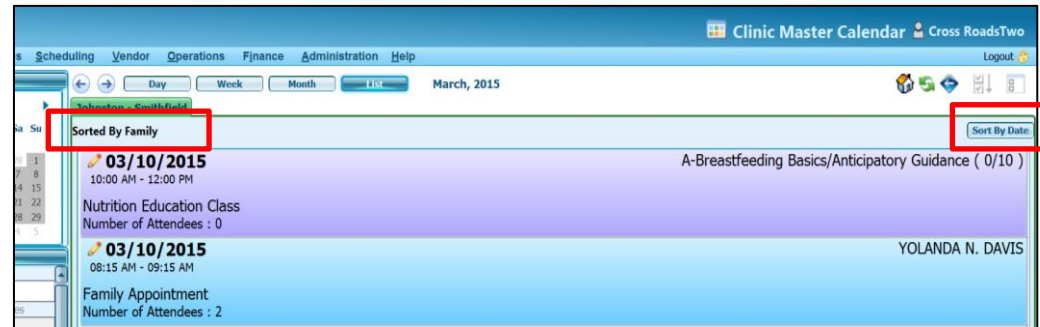
Navigation Calendar

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

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
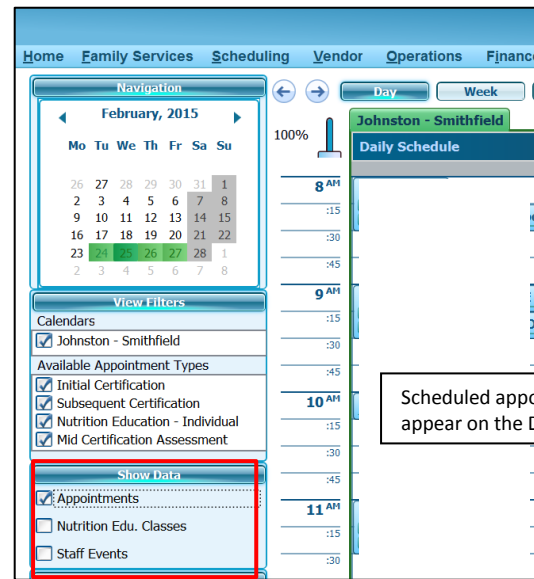
Scheduled appointments appear on the Daily Schedule
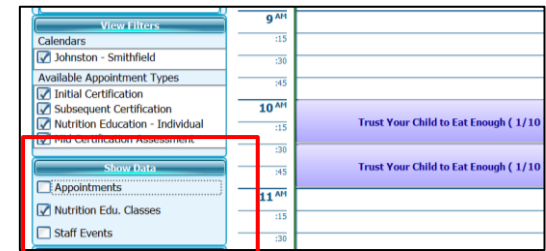
Master Calendar – Quick Links

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
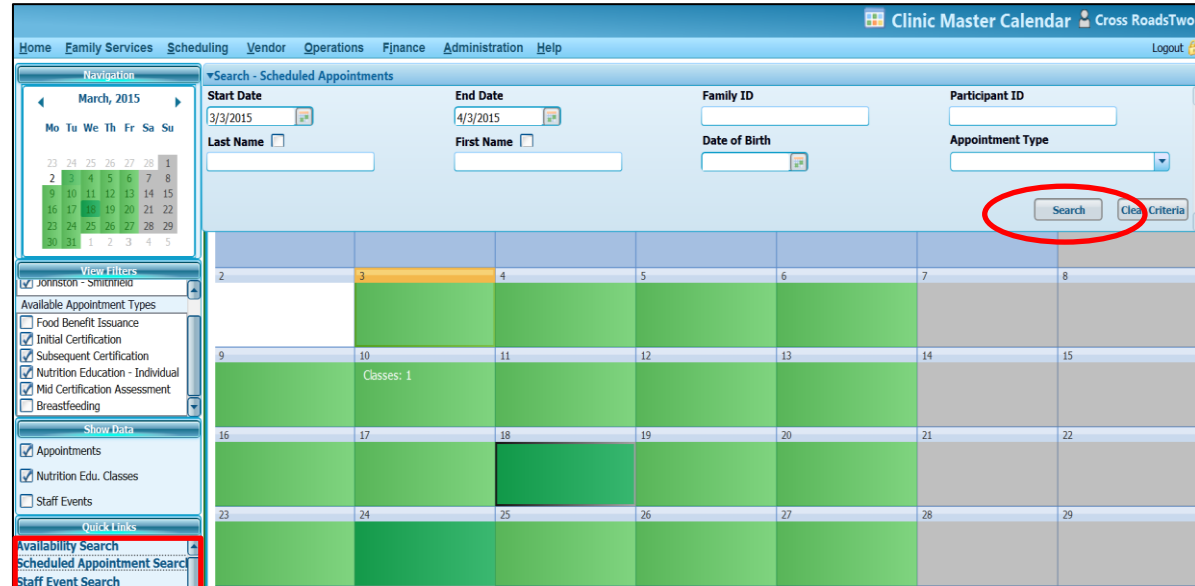- Crossroads returns a selection of appointment dates and times

Master Calendar – Quick Links
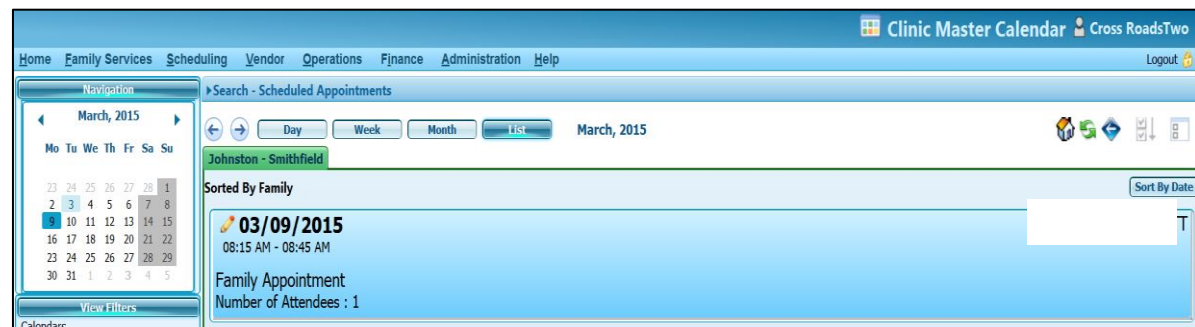
Scheduled Appointment Search

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
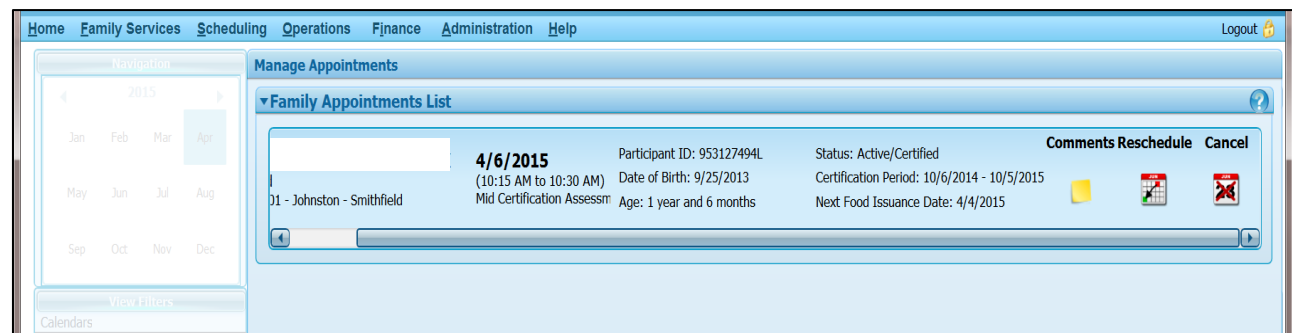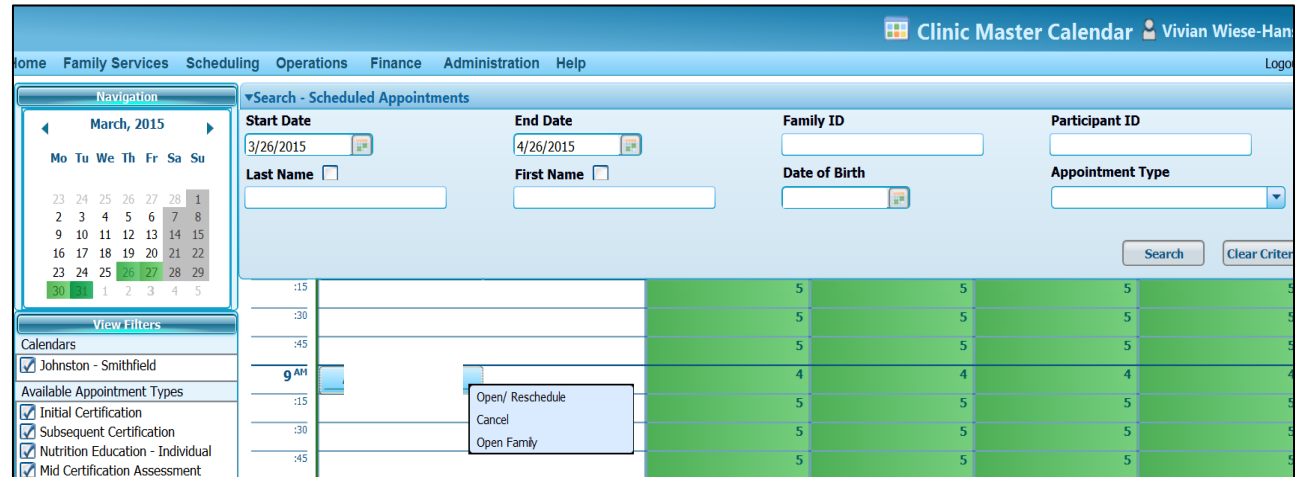
Master Calendar – Quick Links

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 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

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

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
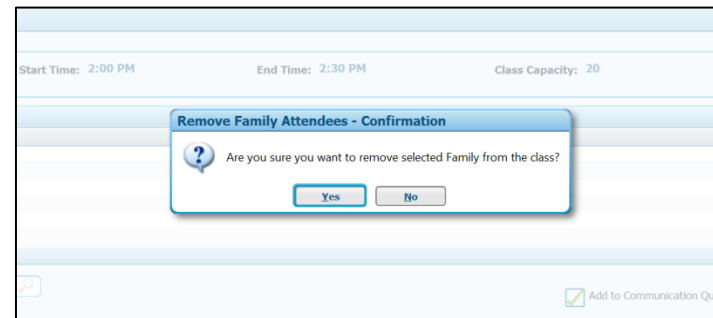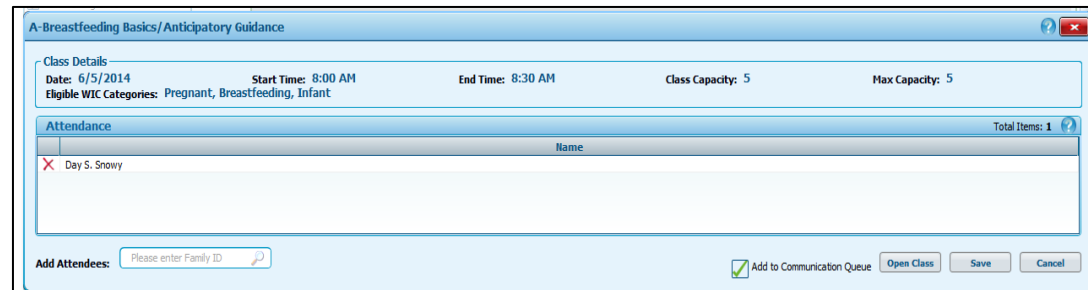
Master Calendar – Quick Links

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

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

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

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- 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

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

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.

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

Expanding Appointment Time

Example: When only one 15 minute appointment slot is available, the end time of that slot is set. The end time cannot be expanded even if the following time slot has more than one concurrent slot available. If an appointment is needed that exceeds 15 minutes, the user can expand the beginning time if more than one concurrent slot is available in the previous time period.

- It is not recommended to expand one time period to accommodate two persons. Instead make two individual appointments.
- Expanding the appointment time is appropriate when the CPA indictates more time is needed for a particular client.

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

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- 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
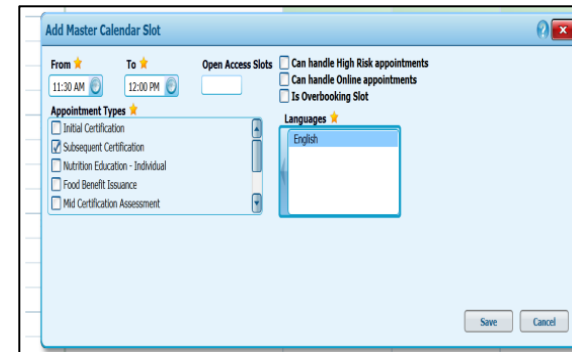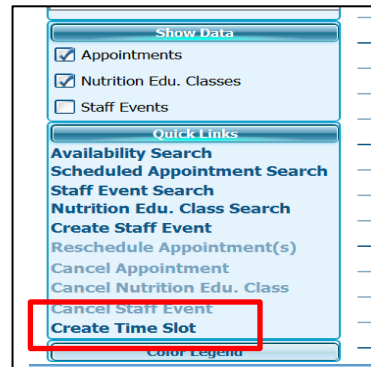
Selecting Language(s)

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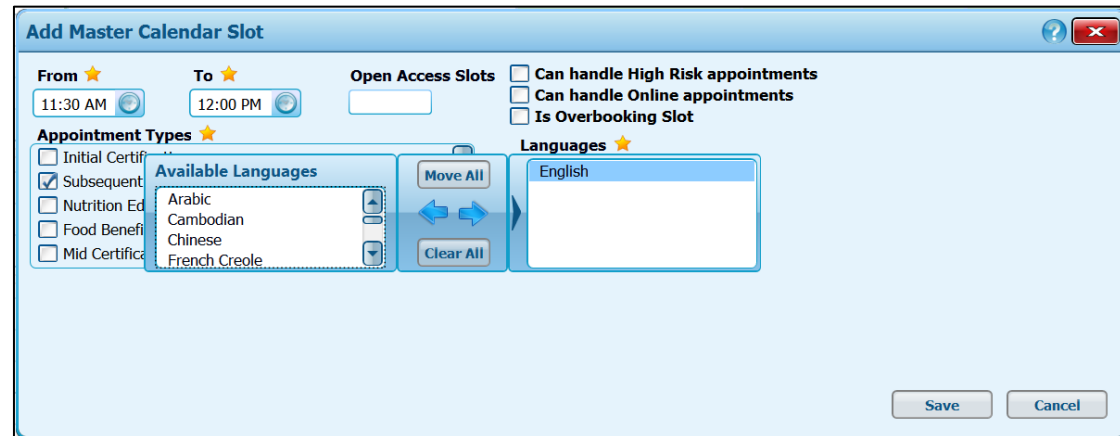
- The screen refreshes in the Day View showing the added time slots.
- Crossroads shows the added availability created.
- Repeat the process to add additional slots.

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.
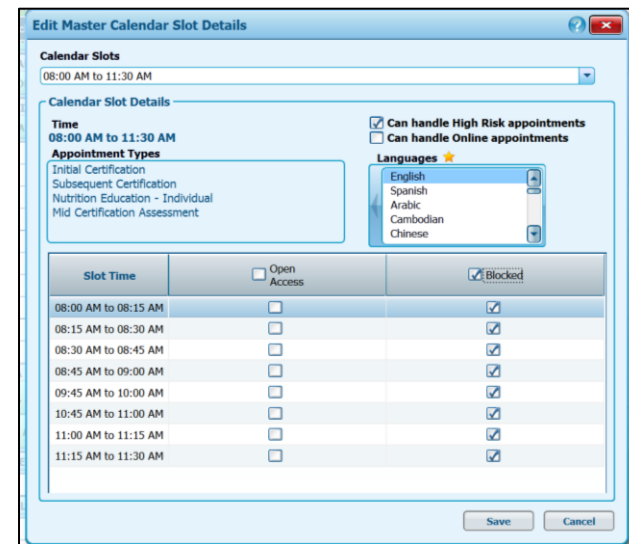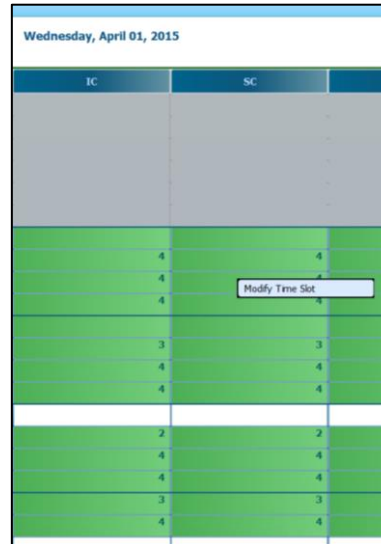
Master Calendar – Modify a Time Slot

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.

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.

Master Calendar – Modify a Time Slot

Color Legend

Provides a definition for the color display.

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.

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.

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).

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.
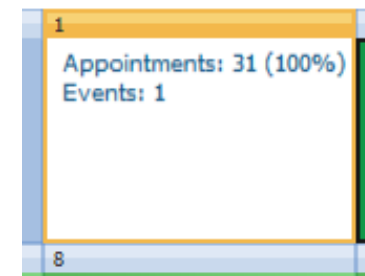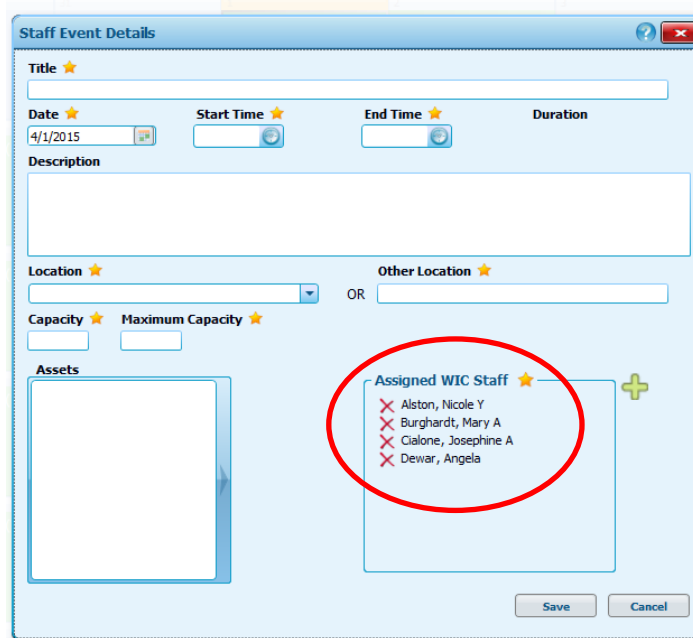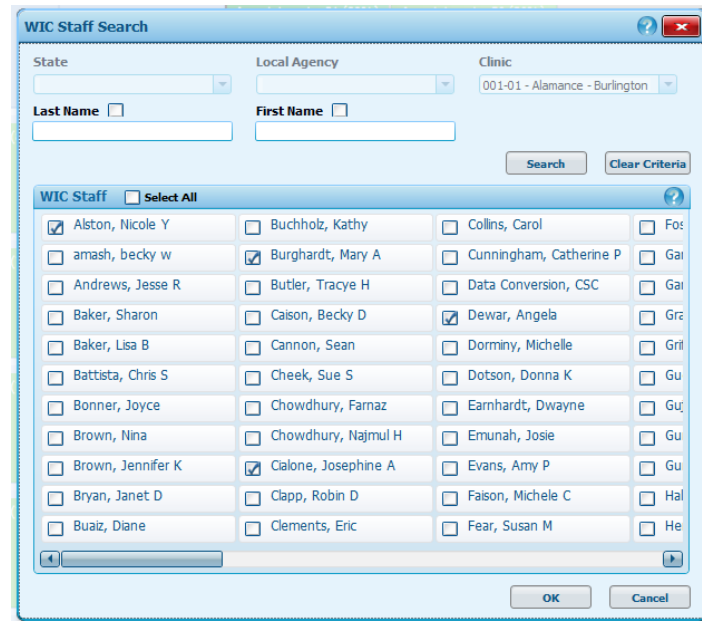
Master Calendar – Staff Events

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.

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	End Date	Title ☐
3/31/2015	4/30/2015	

Search   Clear Criteria

▶ Search - Staff Events

← →   Day   Week   Month   List   March, 2015

Alamance - Burlington

Sorted By Family   Sort By Date

✎ **04/24/2015**   Birthday Breakfast
07:45 AM - 08:15 AM
Staff Event
Number of Attendees : 1

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

✎ **05/22/2015**   Birthday Breakfast
07:45 AM - 08:15 AM
Staff Event
Number of Attendees : 4

Staff Event
Number of Attendees : 1

✎ **04/24/2015**   Staff Meeting
03:00 PM - 04:30 PM
Staff Event
Location: WIC Classroom

┌ **Attendees** ─────
Griffin, Kathy
Hurt, Julie
Alston, Nicole
Robertson, Rebecca

┌ **Resources** ─────
Kathy Griffin
Julie Hurt
Nicole Alston
Rebecca Robertson

✎ **05/22/2015**   Birthday Breakfast
07:45 AM - 08:15 AM

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.

4. The Staff Event Details window opens.

5. The user can modify the event by adding, deleting, or changing information in the fields.

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.

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