Scheduling – Using the Quick Appointment Link

Scheduling an Appointment for New Applicants

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

2. When the **Quick Appointments** screen opens, complete the **Search Options.**

3. The start and end date can be adjusted, but it will default to meet processing standards.

4. The search options can be filtered by:
   a. Days of week
   b. Preferred time
   c. Clinic Location

5. Under Appointment Types, Crossroads will recommend an appointment type based on the individual's status.

Note: the check in front of participant's name. Uncheck individuals that do not need appointments.

6. Click the **Search** button.

Note: This is a new family, so the only appointment type is Initial Certification. The duration of the appointment is set by Crossroads, but can be adjusted.

7. The next screen shows the available appointments. Note that all members of the family are blocked together.

8. Select the desired appointment.

9. Select the contact method.

10. Click the button marked Book.

11. The appointment was successfully scheduled and you are taken to the **Family Appointments** screen where you are able to view all appointments scheduled for this family.

Scheduling an Appointment for an Existing Participant

The process for scheduling appointments for active participants is similar. The next appointment will be scheduled at the conclusion of a current appointment after food benefit issuance.

- Access the Family record using the family search option in Family Services.
- Click on **Quick Appointments** in the Quick Links of the left side of the screen.
- The Quick Appointment Screen opens. Crossroads will suggest the appropriate appointment type.

Follow the steps above to schedule the next appointment.

1. For an existing family, you will see a greater number and variety of appointment types.

2. Make sure that the family members needing an appointment are checked. Uncheck any participants that do not need an appointment.

3. The system will suggest system defined appointments for each participant.

4. If a new appointment (state defined) is needed:
   a. Click the add button.
   b. Select the appropriate individual
   c. Select the appropriate appointment type
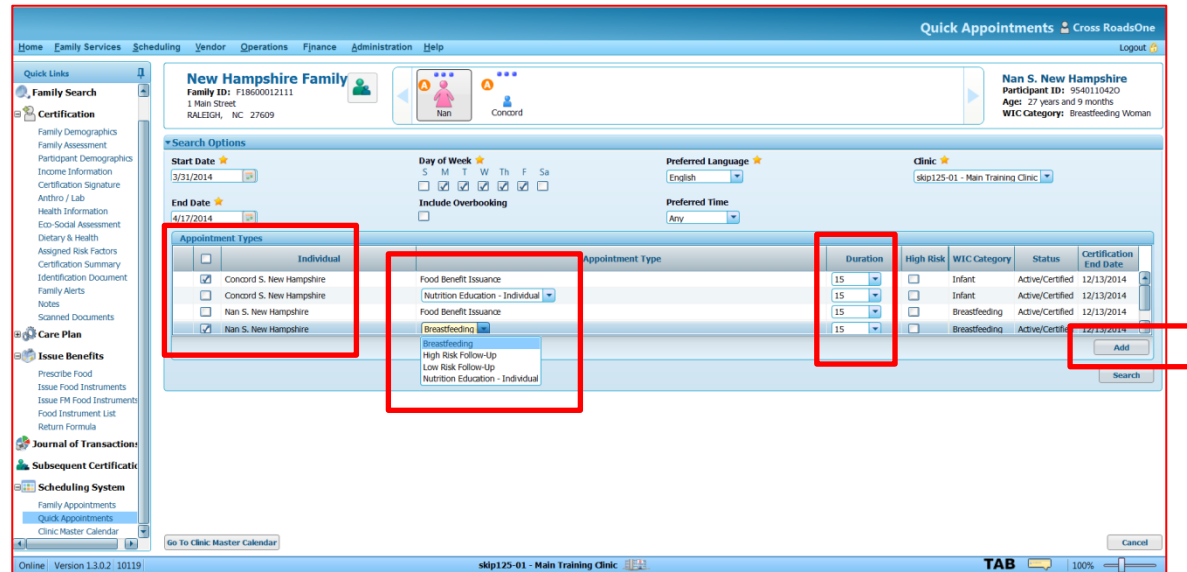
Appointment types are system defined and state defined. The state defined appointments, mid-certification assessment, high-risk follow-up, low risk follow-up, and breastfeeding will not be suggested by Crossroads. Staff will need to add these appointments using the feature discussed.

Rescheduling an Appointment for New Applicants or Existing Participants

1. Access the Family record using the family search option in Family Services.

2. Go to the Scheduling System Quick Link and click on **Family Appointments**.

3. On the Family Appointments screen, select **Reschedule**.

4. The reschedule icon can be selected using any participant.

5. The Quick Appointments Screens displays. Complete the Search Options requested by the participant.

6. Click the **Search** button.

7. Select the desired appointment.

8. Select the contact method.

9. Select the rescheduled reason.

10. Click the button marked Book.

11. The appointment was successfully scheduled and you are taken to the **Family Appointments** screen where you are able to view all appointments scheduled for this family.

Canceling an Appointment for New Applicants or Existing Participants

1. Access the Family record using the family search option in Family Services.

2. Go to the Scheduling System Quick Link and click on **Family Appointments**.

3. On the Family Appointments screen, select Cancel.

4. The Appointment Cancellation pop-up window opens. Make sure the check mark is beside the appointment(s) you want to cancel.

5. Uncheck any appointment(s) that you do not want to cancel.

6. Select the **Cancellation Reason**.

7. Click the **Cancel Appointment** button.

8. The appointment(s) was successfully cancelled and you are taken to the **Family Appointments** screen.

Scheduling a Class Using the Nutrition Education Screen

In order to schedule an individual into a class in the Crossroads System, the class must be already applied to the Master Calendar.

1. Access the **Nutrition Education** link on the Quick Links.

2. From the Nutrition Education Topics, select the appropriate topic name that corresponds with your agencies Class name.

3. Select the Method (group for a class) and the individual you need to schedule.

4. A new dialog box opens entitled Nutrition Education Schedule

5. The available Nutrition Education Class days and times are listed. Search options are near the top if needed.

6. Click schedule when the right class is selected.

7. The Nutrition Education Class scheduled is under Topic Status

8. The Nutrition Education Class is also listed under Family Appointments using the Quick Links.

Pending List

The pending list compiles a list of applicants that were scheduled for an Initial appointment outside of processing standards (10 or 20 days depending on category). Individuals remain on the pending list unless the appointment is rescheduled to a date that is within processing standards.

Adding Participants to the Pending List

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

2. When the **Quick Appointments** screen opens, complete the **Search Options.**

3. The start and end date can be adjusted, but it will default to meet processing standards.

4. If a client requests an appointment outside of processing standards, modify the dates to reflect the request

5. Click the **Search** button.

6. The next screen shows the available appointments. Note that all members of the family are blocked together.

7. Select the desired appointment.

8. Select the contact method.

9. Click the button marked Book.

10. Since the Crossroads recognizes the appointment is outside of processing standards and **Pending List Confirmation** Window opens.

11. Select Yes – to add to Pending List

12. Another Pending List Confirmation Box opens. Select Reason and Save.

13. The appointment was successfully scheduled and you are taken to the **Family Appointments** screen where you are able to view all appointments scheduled for this family.

14. The **Pending List** can be found using the top bar **Scheduling →Pending List**