

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.

Appointment Types	Individual	Appointment Type	Duration	High Risk	WIC Category	Status	Certification End Date
<input checked="" type="checkbox"/>	Child Schedule	Initial Certification	30	<input type="checkbox"/>	Child	Applicant	
<input checked="" type="checkbox"/>	Infant Schedule	Initial Certification	30	<input type="checkbox"/>	Infant	Applicant	
<input checked="" type="checkbox"/>	Sample Schedule	Initial Certification	30	<input type="checkbox"/>	Pregnant	Applicant	

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.

Quick Appointments Cross RoadsOne

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Quick Links

New Family

Family Search

Certification

- Family Demographics
- Family Assessment
- Participant Demographics
- Income Information
- Certification Signature
- Anthro / Lab
- Health Information
- Eco-Social Assessment
- Dietary & Health
- Assigned Risk Factors
- Certification Summary
- Identification Document
- Family Alerts
- Notes
- Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

Subsequent Certification

Scheduling System

- Family Appointments
- Quick Appointments
- Clinic Master Calendar

Schedule Family

Family ID: F18600012142
123 Main
RALEIGH, NC 27609

Sample Schedule

Participant ID: NC1860000195
Age: 24 years and 2 months
WIC Category: Pregnant

Date	Time	Initial Certification	Child Schedule	Infant Schedule	Pregnant	Applicant	Actions
2/5/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule		Child	Applicant	Book
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule		Infant	Applicant	Book
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule		Pregnant	Applicant	Book
2/6/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule		Child	Applicant	Book
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule		Infant	Applicant	Book
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule		Pregnant	Applicant	Book
2/7/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule		Child	Applicant	Book
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule		Infant	Applicant	Book
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule		Pregnant	Applicant	Book
2/10/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule		Child	Applicant	Book
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule		Infant	Applicant	Book
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule		Pregnant	Applicant	Book

Contact Method Add to Communication Queue Book

Go To Clinic Master Calendar

Online Version 1.3.0.2 10119 skip125-01 - Main Training Clinic TAB 100%

Family Appointments Cross RoadsOne

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Quick Links

New Family

Family Search

Certification

- Family Demographics
- Family Assessment
- Participant Demographics
- Income Information
- Certification Signature
- Anthro / Lab
- Health Information
- Eco-Social Assessment
- Dietary & Health
- Assigned Risk Factors
- Certification Summary
- Identification Document
- Family Alerts
- Notes
- Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

Subsequent Certification

Scheduling System

- Family Appointments
- Quick Appointments
- Clinic Master Calendar

Schedule Family

Family ID: F18600012142
123 Main
RALEIGH, NC 27609

Sample Schedule

Participant ID: NC1860000195
Age: 24 years and 2 months
WIC Category: Pregnant

Family Appointments List

Appointment	Date	Participant ID	Status	Comments	Reschedule	Cancel
Child Schedule Child skip125-01 - Main Training Clinic	2/6/2014 (8:00 AM to 8:30 AM) Initial Certification	NC1860000196 Date of Birth: 3/2/2010 Age: 3 years and 11 months	Applicant Certification Period: Next Food Issuance Date:			
Infant Schedule Infant skip125-01 - Main Training Clinic	2/6/2014 (8:30 AM to 9:00 AM) Initial Certification	NC1860000197 Date of Birth: 4/1/2013 Age: 10 months	Applicant Certification Period: Next Food Issuance Date:			
Sample Schedule Pregnant skip125-01 - Main Training Clinic	2/6/2014 (9:00 AM to 9:30 AM) Initial Certification	NC1860000195 Date of Birth: 11/30/1989 Age: 24 years and 2 months	Applicant Certification Period: Next Food Issuance Date:			

Family Nutrition Education Class List

There are no nutrition education classes scheduled.

Appointment History

Status Message

Appointment(s) successfully scheduled for Schedule's family.

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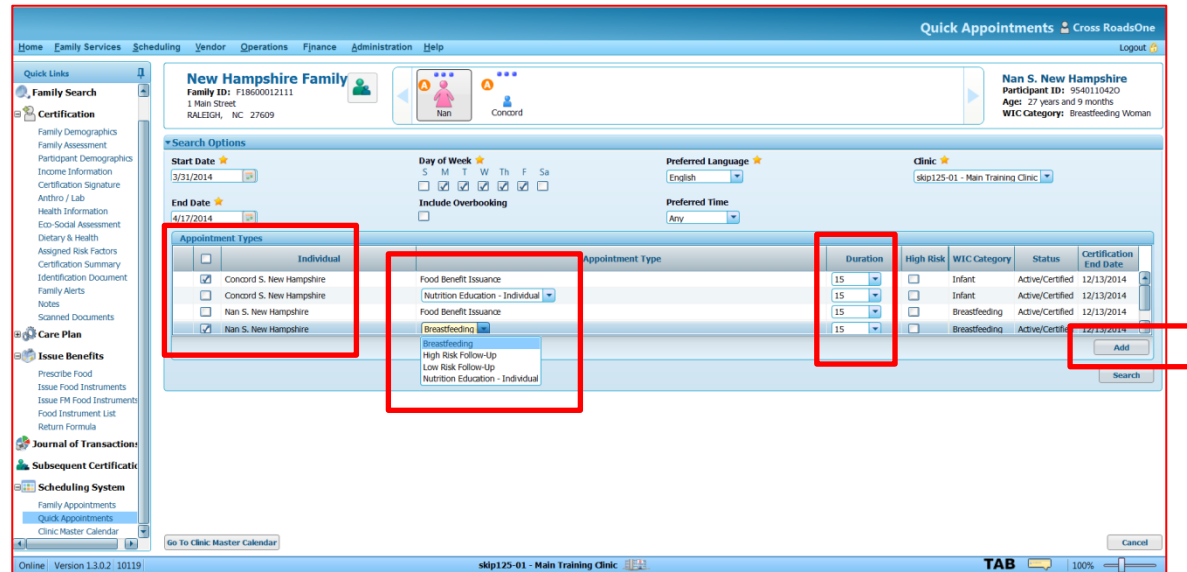
Scheduling an Appointment for an Existing Participant

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.

Family Appointments | Cross RoadsOne

Home | Family Services | Scheduling | Vendor | Operations | Finance | Administration | Help

Quick Links

- New Family
- Family Search
- Certification
 - Family Demographics
 - Family Assessment
 - Participant Demographics
 - Income Information
 - Certification Signature
 - Anthro / Lab
 - Health Information
 - Eco-Social Assessment
 - Dietary & Health
 - Assigned Risk Factors
 - Certification Summary
 - Identification Document
 - Family Alerts
 - Notes
 - Scanned Documents
- Care Plan
- Issue Benefits
- Journal of Transactions
- Subsequent Certification
- Scheduling System**
 - Family Appointments
 - Quick Appointments
 - Clinic Master Calendar

Schedule Family
Family ID: F18600012142
123 Main
RALEIGH, NC 27609

Sample Schedule
Participant ID: NC1860000195
Age: 24 years and 2 months
WIC Category: Pregnant

Participant	Appointment	Date	Time	Participant ID	Status	Comments	Reschedule	Cancel
Child	Child Schedule	2/6/2014	8:00 AM to 8:30 AM	NC1860000196	Applicant			
Infant	Infant Schedule	2/6/2014	8:30 AM to 9:00 AM	NC1860000197	Applicant			
Pregnant	Sample Schedule	2/6/2014	9:00 AM to 9:30 AM	NC1860000195	Applicant			

Family Nutrition Education Class List

There are no nutrition education classes scheduled.

Appointment History

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Quick Appointments | Cross RoadsOne

Home | Family Services | Scheduling | Vendor | Operations | Finance | Administration | Help

Quick Links

- New Family
- Family Search
- Certification
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 - Family Assessment
 - Participant Demographics
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 - Certification Signature
 - Anthro / Lab
 - Health Information
 - Eco-Social Assessment
 - Dietary & Health
 - Assigned Risk Factors
 - Certification Summary
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 - Scanned Documents
- Care Plan
- Issue Benefits
- Journal of Transactions
- Subsequent Certification
- Scheduling System
 - Family Appointments
 - Quick Appointments
 - Clinic Master Calendar

Schedule Family
Family ID: F18600012142
123 Main
RALEIGH, NC 27609

Sample Schedule
Participant ID: NC1860000195
Age: 24 years and 2 months
WIC Category: Pregnant

Search Options

Start Date: 2/4/2014
End Date: 3/4/2014

Day of Week: S M T W Th F Sa

Preferred Language: English

Preferred Time: Any

Clinic: skip125-01 - Main Training Clinic

Appointment Type	Duration	High Risk	WIC Category	Status	Certification End Date
<input checked="" type="checkbox"/> Child Schedule	30	<input type="checkbox"/>	Child	Applicant	
<input checked="" type="checkbox"/> Infant Schedule	30	<input type="checkbox"/>	Infant	Applicant	
<input checked="" type="checkbox"/> Sample Schedule	30	<input type="checkbox"/>	Pregnant	Applicant	

Search

Go To Clinic Master Calendar

Online | Version 1.3.0.2 | 10119 | skip125-01 - Main Training Clinic | TAB | 100%

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.

The screenshot shows the 'Quick Appointments' interface. At the top, there are navigation tabs: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. The main header includes 'Quick Appointments' and 'Cross RoadsOne'. Below the header, there's a 'Schedule Family' section with 'Family ID: F18600012142' and '123 Main RALEIGH, NC 27609'. There are icons for 'Sample', 'Infant', and 'Child'. To the right, a 'Sample Schedule' box shows 'Participant ID: NC1860000195', 'Age: 24 years and 2 months', and 'WIC Category: Pregnant'. The main area is a calendar grid with columns for dates and times. A red box highlights the bottom right area, containing a 'Contact Method' dropdown, a 'Reschedule Reason' dropdown, a checkbox for 'Add to Communication Queue', and a 'Book' button.

The screenshot shows the 'Family Appointments' interface. The header includes 'Family Appointments' and 'Cross RoadsOne'. The 'Schedule Family' section is the same as in the previous screenshot. Below it, there's a 'Family Appointments List' table with columns for appointment type, date, time, participant ID, date of birth, age, status, certification period, and next food issuance date. The table lists three appointments: 'Child Schedule' (2/7/2014, 8:00 AM to 8:30 AM), 'Infant Schedule' (2/7/2014, 8:30 AM to 9:00 AM), and 'Sample Schedule' (2/7/2014, 9:00 AM to 9:30 AM). Below the table is a 'Family Nutrition Education Class List' section, which is currently empty. At the bottom, there's an 'Appointment History' section. A yellow status message box at the bottom right says 'Appointment(s) successfully scheduled for Schedule's family.' The footer shows 'Online Version 1.3.0.2 10119' and 'skip125-01 - Main Training Clinic'.

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.

The screenshot displays the 'Family Appointments' interface. The left sidebar shows the 'Scheduling System' quick link circled in red. The main content area shows a table of appointments for a family. The 'Cancel' button for each appointment is also circled in red.

Appointment Type	Date	Participant ID	Status	Comments	Reschedule	Cancel
Child Schedule	2/7/2014	NC1860000196	Applicant			
Infant Schedule	2/7/2014	NC1860000197	Applicant			
Sample Schedule	2/7/2014	NC1860000195	Applicant			

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.

The screenshot shows the 'Family Appointments' interface with a confirmation dialog box titled 'Appointment Cancellation With Future Appointment(s) - Confirmation'. The dialog contains a table of appointments to be cancelled:

Select All	Family Name	Participant Name	Appointment Type	Scheduled Date	Scheduled Start Time	Scheduled End Time	Total Items: 3
<input checked="" type="checkbox"/>	Sample Schedule	Child Schedule	Initial Certification	2/7/2014	8:00 AM	8:30 AM	
<input checked="" type="checkbox"/>	Sample Schedule	Infant Schedule	Initial Certification	2/7/2014	8:30 AM	9:00 AM	
<input checked="" type="checkbox"/>	Sample Schedule	Sample Schedule	Initial Certification	2/7/2014	9:00 AM	9:30 AM	

Below the table, there is a 'Cancellation Reason' dropdown menu set to 'Transportation' and a 'Cancel Appointment(s)' button. A note states: 'Appointment(s) will be removed from pending list (if any)'.

The screenshot shows the 'Family Appointments' interface after the cancellation. The 'Family Appointments List' section displays the message: 'There are no appointments scheduled'. The 'Family Nutrition Education Class List' section displays the message: 'There are no nutrition education classes scheduled'. A yellow status message box in the bottom right corner reads: 'Status Message: Selected appointment(s) was cancelled successfully.' The interface includes a navigation menu on the left and a top navigation bar with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'.

Scheduling a Class Using the Nutrition Education Screen

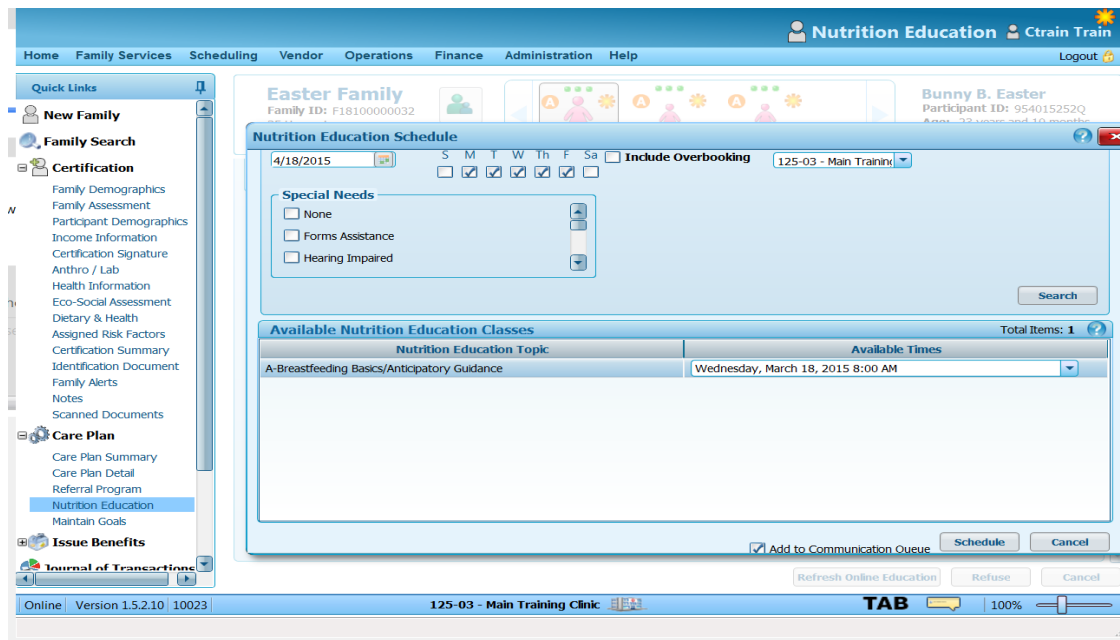
In order to schedule an individual into a class in the Crossroads System, the class must be already applied to the Master Calendar.

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.

The screenshot displays the Nutrition Education interface. The left sidebar contains navigation options: Quick Links, New Family, Family Search, Certification, Care Plan, Issue Benefits, and Journal of Transactions. The main area shows the 'Easter Family' profile with details like Family ID, address, and participant information for 'Bunny B. Easter'. Below this is a table of 'Nutrition Education Topics' with columns for Topic, Method, All, Bunny B. Easter, pink easter, and Floppy F. Bunny. The row 'A-Breastfeeding Basics/Anticipatory Guidance' is highlighted with a red box. The 'All' column has a dropdown menu, and the 'Bunny B. Easter' column has a checkbox. The bottom of the screen shows the system version '125-03 - Main Training Clinic' and the 'TAB' logo.

Topic	Method	All	Bunny B. Easter	pink easter	Floppy F. Bunny
Vitamins and Supplements		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Whole-grain Foods		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A Recipe for a Healthy Pregnancy (wichealth)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A-Breastfeeding Basics/Anticipatory Guidance		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A-Folic Acid		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A-Healthy Eating During Pregnancy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Age-appropriate Foods		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Be Healthy as your Baby Grows (wichealth)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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



Nutrition Education Ctrain Train

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Quick Links

- New Family
- Family Search
- Certification
 - Family Demographics
 - Family Assessment
 - Participant Demographics
 - Income Information
 - Certification Signature
 - Anthro / Lab
 - Health Information
 - Eco-Social Assessment
 - Dietary & Health
 - Assigned Risk Factors
 - Certification Summary
 - Identification Document
 - Family Alerts
 - Notes
 - Scanned Documents
- Care Plan
 - Care Plan Summary
 - Care Plan Detail
 - Referral Program
 - Nutrition Education
 - Maintain Goals
- Issue Benefits
- Journal of Transactions

Easter Family
 Family ID: F1810000032
 35 Hoppy Lane
 RALEIGH, NC 27609

Bunny
 pink
 Floppy Bunny

Bunny B. Easter
 Participant ID: 954015252Q
 Age: 23 years and 10 months
 WIC Category: Pregnant

A-Breastfeeding Basics/Anticipatory Guidance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A-Folic Acid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A-Healthy Eating During Pregnancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Age-appropriate Foods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Be Healthy as your Baby Grows (wichealth)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Topic Status

Search By Family Member: ALL

	Topic	Individual Name	Method	Status	Scheduled Date	Completion Date	Missed Date
✖	A-Breastfeeding Basics/Anticip	Bunny B. Easter	Group	Scheduled	3/18/2015		

Total Items: 1

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

The screenshot displays a software interface for managing family appointments. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', 'Help', and 'Logout'. The left sidebar contains a 'Quick Links' section with categories like 'Family Search', 'Certification', 'Care Plan', 'Issue Benefits', 'Journal of Transactions', 'Subsequent Certification', and 'Scheduling System'. The 'Scheduling System' category is expanded to show 'Family Appointments', 'Quick Appointments', and 'Clinic Master Calendar'. The main content area is titled 'Family Appointments' and shows details for the 'Easter Family' (Family ID: F18100000032, 35 Hoppy Lane, RALEIGH, NC 27609). Below this, there are three participant icons: 'Bunny', 'pink', and 'Floppy Bunny'. The 'Family Appointments List' section displays a message: 'There are no appointments scheduled'. Below this, a 'Family Nutrition Education Class List' section is highlighted with a red box, showing an appointment for '3/18/2015 (8:00 AM To 8:30 AM) Breastfeeding Basics/Anticipatory Guidance' for '1) Bunny B. Easter (Pregnant)'. A 'Cancel' button is visible next to the appointment. The bottom status bar shows 'Online | Version 1.5.2.10 | 10200', '125-03 - Main Training Clinic', 'TAB', and '100%'.

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.

The screenshot shows the 'Quick Appointments' interface for a family. The 'Search Options' section is highlighted with a red box, showing 'Start Date' as 5/2014 and 'End Date' as 1/3/2014. The 'Appointment Types' table lists 'Child Schedule', 'Infant Schedule', and 'Sample Schedule'. The 'Search' button is circled in red.

Appointment Type	Duration	High Risk	WIC Category	Status	Certification End Date
<input checked="" type="checkbox"/> Child Schedule	30	<input type="checkbox"/>	Child	Applicant	
<input checked="" type="checkbox"/> Infant Schedule	30	<input type="checkbox"/>	Infant	Applicant	
<input checked="" type="checkbox"/> Sample Schedule	30	<input type="checkbox"/>	Pregnant	Applicant	

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

Quick Appointments Cross RoadsOne

Home Family Services Scheduling Vendor Operations Finance Administration Help

Quick Links

New Family

Family Search

Certification

- Family Demographics
- Family Assessment
- Participant Demographics
- Income Information
- Certification Signature
- Anthro / Lab
- Health Information
- Eco-Social Assessment
- Dietary & Health
- Assigned Risk Factors
- Certification Summary
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- Family Alerts
- Notes
- Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

Subsequent Certification

Scheduling System

- Family Appointments
- Quick Appointments
- Clinic Master Calendar

Sample Schedule

Family ID: F18600012142
123 Main
RALEIGH, NC 27609

Participant ID: NC1860000195
Age: 24 years and 2 months
WIC Category: Pregnant

Date	Time	Initial Certification	Appointment Type	Member	WIC Category	Status	Actions
2/5/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule	Child	Applicant		[+]
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule	Infant	Applicant		[+]
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule	Pregnant	Applicant		[+]
2/6/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule	Child	Applicant		[+]
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule	Infant	Applicant		[+]
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule	Pregnant	Applicant		[+]
2/7/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule	Child	Applicant		[+]
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule	Infant	Applicant		[+]
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule	Pregnant	Applicant		[+]
2/20/2014	8:00 AM to 8:30 AM	Initial Certification	Child Schedule	Child	Applicant		[+]
	8:30 AM to 9:00 AM	Initial Certification	Infant Schedule	Infant	Applicant		[+]
	9:00 AM to 9:30 AM	Initial Certification	Sample Schedule	Pregnant	Applicant		[+]

Contact Method [v] Add to Communication Queue [x] Book [b] Cancel [c]

Go To Clinic Master Calendar

Online Version 1.3.0.2 10119 skip125-01 - Main Training Clinic TAB 100%

Quick Appointments Ctrain Train

Home Family Services Scheduling Vendor Operations Finance Administration Help

Quick Links

New Family

Family Search

Certification

- Family Demographics
- Family Assessment
- Participant Demographics
- Income Information
- Certification Signature
- Anthro / Lab
- Health Information
- Eco-Social Assessment
- Dietary & Health
- Assigned Risk Factors
- Certification Summary
- Identification Document
- Family Alerts
- Notes
- Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

Subsequent Certification

Scheduling System

- Family Appointments
- Quick Appointments
- Clinic Master Calendar

Tide Family

Family ID: F18100000056
103
RALEIGH, NC 27609

Participant ID: NC1810000077
Age: 29 years and 4 months
WIC Category: Pregnant

End Date: 4/6/2015 Include Overbooking [x] Preferred Time: Any

Appointment Types	Individual	Appointment Type	Duration	High Risk	WIC Category	Status	Certification End Date
[x]	Crimson Tide	Initial Certification	30	[x]	Pregnant	Applicant	

Quick Scheduling Results

Date	Time	Appointment Type	Individual	WIC Category	Status	Comments	Assets
3/23/2015	8:00 AM to 8:30 AM	Initial Certification	Crimson Tide	Pregnant	Applicant		[+]
3/24/2015	8:00 AM to 8:30 AM	Initial Certification	Crimson Tide	Pregnant	Applicant		[+]
3/25/2015	8:00 AM to 8:30 AM	Initial Certification	Crimson Tide	Pregnant	Applicant		[+]
3/26/2015	8:00 AM to 8:30 AM	Initial Certification	Crimson Tide	Pregnant	Applicant		[+]
3/27/2015	8:00 AM to 8:30 AM	Initial Certification	Crimson Tide	Pregnant	Applicant		[+]

Pending List Confirmation

The following appointment(s) fall outside processing standards. Do you wish to add them to the pending list?

1) Crimson Tide-3/23/2015

Yes [y] No [n] Cancel [c]

Contact Method [v] Reschedule Reason [v] Add to Communication Queue [x] Book [b] Cancel [c]

Go To Clinic Master Calendar

Online Version 1.5.2.10 10119 125-03 - Main Training Clinic TAB 100%



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.

The screenshot shows the 'Quick Appointments' interface for the 'Tide Family'. A 'Pending List - Confirmation' dialog box is open, displaying the appointment details: Name: Crimson Tide, Appointment Date: 3/23/2015. Below the details is a 'Reason' dropdown menu and 'Save' and 'Cancel' buttons. The background shows a table of appointment types and a 'Quick Scheduling Results' table with columns for Date, Time, Appointment Type, Individual, WIC Category, Status, Comments, and Assets. The status of the appointment is 'Pregnant' and 'Applicant'.

The screenshot shows the 'Family Appointments' interface for the 'Tide Family'. The 'Family Appointments List' is highlighted in the left sidebar. The main content area displays a table of scheduled appointments. The first appointment is for 'Crimson Tide' on '3/23/2015' (8:00 AM to 8:30 AM) for 'Initial Certification'. The participant is 'Crimson Tide', pregnant, with a birth date of 11/3/1985. The status is 'Applicant' and the certification period is 'Next Food Issuance Date:'. There are 'Comments', 'Reschedule', and 'Cancel' buttons for this appointment. Below the appointment list, there is a section for 'Family Nutrition Education Class List' which is currently empty, and sections for 'Appointment History' and 'Nutrition Education Class History'.

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

The screenshot displays a software interface with a top navigation bar containing the following items: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, Help, and Logout. The 'Scheduling' menu item is highlighted with a red box. Below the navigation bar, a sub-menu titled 'Pending List' is also highlighted with a red box. The main content area features a table with the following columns: Family ID, Family Name, Participant ID, Participant Name, Category, Date Added to Pending List, Days Remaining, Appointment Type, Appointment Date, and Special Needs. The table contains two rows of data:

Family ID	Family Name	Participant ID	Participant Name	Category	Date Added to Pending List	Days Remaining	Appointment Type	Appointment Date	Special Needs
F1810000055	Pregnant Test	NC1810000076	Pregnant Test	P	3/4/2015	8	Initial Certification	3/16/2015	
F1810000056	Crimson Tide	NC1810000077	Crimson Tide	P	3/6/2015	10	Initial Certification	3/23/2015	

At the bottom of the interface, there are buttons for 'Schedule Appointment', 'Remove From List', 'Clear List', and 'Cancel'. The status bar at the very bottom shows 'Online | Version 1.5.2.10 | 30017 | 125-03 - Main Training Clinic | TAB | 100%'.