Creating and Applying an Hours of Operation Template

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

Go to Scheduling → Templates → Hours of Operation.

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

1. Select Create New (if this is not the first template).

2. Enter Template Name, Description and Hours of Operation.

3. Click Save. The name of the newly created template displays under the Day Templates option.
To Apply the new Hours of Operation Day template, go to:
Scheduling ➔ Templates ➔
Apply Templates

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

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

Creating a Nutrition Education Class Template – Day

1. From the Home screen, go to Scheduling > Templates > Nutrition Education Classes. The Nutrition Education Class Templates screen displays.

2. Select Day Templates on the left side of the screen. Day is the default.

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

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

4. Enter a template **Description**.

5. Within the **Day Specific Settings** box:
   a. Select **Education Topic**
   b. Enter **From and To** times
   c. Enter **Class Capacity**
   d. Enter **Maximum Capacity**
   e. Enter number of seats to be **Open Access**
   f. Enter **Language**
   g. Select **Assets** if applicable
   h. Select **Special Needs** if applicable

6. Click **Add**. The screen refreshes and the information displays within the **Classes** grid.

7. Repeat steps 5 and 6 to add more classes to the template.

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

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

**Creating a Nutrition Education Class Template – Week**
1. From the Home screen, go to **Scheduling > Templates > Nutrition Education Class Templates**. The Nutrition Education Class Templates screen displays.

2. Select **Week Templates** on the left side of the screen.

3. Enter **Template Name**.

4. Enter a template **Description**.

5. Within the Monday through Sunday week grid, click a specific day of the week.
6. The screen refreshes and the Specific Setting grid displays the selected day (For example – Monday Specific Settings).

7. Within the **Day Specific Settings** box:
   a. Select **Education Topic**
   b. Enter **From and To times**
   c. Enter **Class Capacity**
   d. Enter **Maximum Capacity**
   e. Enter number of seats to be **Open Access**
   f. Enter **Language**
   g. Select **Assets** if applicable
   h. Select **Special Needs** if application

8. Click **Add**. The screen refreshes and the information displays within the Classes grid.

9. Repeat steps 7 and 8 to add more classes to the day.
10. Select one of the following:
   a. Check Apply to Work Week and click Apply to apply the day settings to the rest of the work week.
   b. Check Apply to All and click Apply to apply day settings to all days (Mon-Sun).
   c. Click Apply to apply the day settings to Monday only.

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

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

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

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

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

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

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

Create a number-based appointment template

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

- Enter a **Template Name.** Template names must be unique.

- Enter a template **Description.** The description should provide instructions for applying the template (specify the days of the week or month)

- Select a **Language** from the Languages multi-select slider list box. It is recommended that all languages be selected unless there is a compelling reason for selecting one language.
Within the Appointment Types and Working Hours group box, complete the following:

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

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

- Repeat the process until all information for the pattern of appointment availability has been entered for this template.
An example of a completed template appears below.
Open Access Slots are optional. Open Access Slots are reserved and cannot be scheduled until a defined period of time before the appointment occurs. The default is set at 3 days before the appointment, but this window of time can be revised in the clinic set-up. Once the threshold is reached, the slots are opened and open access appointments can be scheduled.  See page 22 for more information about including Open Access slots in the template. The screen shots below illustrate the addition of Open Access slots.
Overbooking Slots are also optional. See page 25 for more information about including Overbooking in the template. The screen shots below illustrate the addition of Overbooking.
- **Click Save.** The template information will be saved and the template name will appear on the left side of the screen.

- The next step is to apply the template to the master calendar. See page 27 for Applying Templates.
Modifying an Existing Number-based Appointment Template

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

- Go to Scheduling → Templates → Number-based Appointment Templates.

- The Number-based Appointment Templates screen displays. Previously defined templates are listed on the left side of the screen. Click the Show All check box to display both enabled and disabled templates.
- Click on the template name and the screen will refresh to display the template details.
Note: The user may add new information to the template by entering data in required fields for From, To, Appointment Type(s) and Concurrent Slots.

- Click Add
- The screen will refresh to display the new line in the Appointment types & Working Hours Grid
- To delete a line of information from the grid, click the red X beside the line to be deleted.

- The Screen will refresh to display the updated Appointment Types & Working Hours grid.
- To revise information in one of the rows, select the line. Information specific to that line displays in the fields above the grid.

- Make the desired changes to one or more of the required fields and click Update.
• The Screen will refresh to display the updated information.

• After all desired modifications have been completed, **save** the template. The modified template must be **applied** to the master calendar in order for the changes to take effect.
Number-based Appointment Templates – Adding Open Access Slots

Adding Open Access Slots to a Number Based Appointment Template

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

1. From the Home screen, go to Scheduling > Templates > Number-based Appointment Templates.

2. To add open access to an existing template: from the list of templates on the left side of the screen, select the template to which you wish to add open access slots. Template details will populate the Appointment Types and Working Hours box.

3. To add open access slots to a new template: follow the same steps as below but enter Open Access slots as the template is being created.

**Note:** It is recommended that all open access appointments within a template be created in rows solely for the purpose of defining open access appointments, not mixed with other (non-open access) appointments.
4. Enter or select From and To times that you wish to have open access appointments.

5. Select one or more Appointment Types to be open access.

6. Select the number of Concurrent Slots (i.e., number appointments that can be scheduled at any given time during the selected time period).

7. Select the No. of Open Access Slots (i.e., the number of appointments created by this row that will be held for open access scheduling).

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

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

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

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

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

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

Adding Overbooking Slots to a Number Based Appointment Template

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

1. From the Home screen, go to Scheduling > Templates > Number-based Appointment Templates.

2. From the list of templates on the left side of the screen, select the template to which you wish to add overbooking slots.

3. To add Overbooking to a new template: follow the same steps as below but enter Overbooking slots as the template is being created.
4. Enter or select **From and To** times.

5. Enter the number of **Overbooking Slots**.

6. Select one or more **Appointment Types**.

7. Click **Add**. The screen refreshed to display the defined time slot in the **Overbooking Appointment Types and Working Hours** grid.

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

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

8. Repeat step 3-6 until all desired overbooking slots are added.

9. Click **Save**. A status message displays indicating success and the template is saved.
Apply Template Options

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

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

The following fields display with pre-selected answers:

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

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

These fields require an entry:

- **Template Type**: A variety of template types will display in the drop-down box. When applying a Number Based Appointment Slots Template, select that option.

- **Template**: Only the names of the templates that have been created for the selected template type will populate in the dropdown box. Select the template name to be applied.
- **Apply Options**: The options displaying in this dropdown box are:
  - Every Day
  - Every Selected Number of Days
  - Selected Days of the Week
  - Selected Date every Month
  - Selected Date of Selected Month

- Select the option that will meet the needs of the template you’re applying. The following guidance demonstrates how each option would apply a template to the Master Calendar.
This calendar view displays if Every Day is the chosen Apply Option.
This calendar view displays if Every Selected Number of Days is the chosen Apply Option.
This calendar view displays if Selected Days of the Week is the chosen Apply Option.
• This calendar view displays if **Selected Date Every Month** is the chosen Apply Option
- This calendar view displays if **Selected Date of Selected Month is the chosen Apply Option**. This screen shot illustrates the selected month of August. October was also selected, and is illustrated by the screen shot on the following page.
Note: This shows that October was also impacted because it was a selected month in the apply options.
Applying a Number-based Appointment Template – Preview & Apply

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

- Choose the desired Apply Option for the selected template.
- Clicking Preview button in the middle right of the screen.
- The preview calendar refreshes according to the apply option selected.
- In order to get a better view of the preview calendar, minimize the Apply Templates box by clicking the arrow/triangle. Future months can also be previewed by navigating to those months on the preview calendar.
- If the preview reveals the desired application results, click Apply.
When a template has been applied to the master calendar, a **status message** will briefly appear in the lower right corner, indicating the template was applied successfully.
Tips for applying templates

Only one template can be applied to a particular day. If you try to apply more than one template to the same day, the last template applied will cancel out the prior one. For example, if one template is applied to every Monday, 8 pm – 5 pm, and then a different template is applied to every Monday, 5pm – 7 pm, the Master Calendar will only reflect the last template applied – Monday evenings, 5 pm – 7 pm.

The bigger the template (in number of appointments and/or scope of days) the longer it will take to apply. If Crossroads returns an error message while the template is trying to apply, narrow the timeframe (from 1 year to 6 months or from 6 months to 3 months) and try it again. You may need to apply the template in stages to complete the task.

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

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

If a conflict prevents the template from applying, a message will appear stating you cannot apply the template. Information specific to the conflict will be listed at the bottom of the screen, in Conflicts by Dates window. In the example below, 3 appointments prevented this template from applying. Rescheduling these appointments to a date/time that doesn’t conflict with the new template, should resolve the problem. After the conflicting appointments have been rescheduled, this template should apply without conflicts.
In the example below, there were 52 conflicting appointments. When there are too many conflicting appointments to reschedule, apply the template using a start date after the date of the last conflicting appointment. In this example, the template won’t apply until after 5/18/15.
In the following example, the template won’t apply because it offers appointment availability outside the clinic hours of operation.

In this case, an Hours of Operation Template will need to be created and applied to the Master Calendar to accommodate appointments that fall outside the default hours of operation (8:00 am to 5:00 pm). Refer to Template Resource: Creating an “Hours Of Operation” Template. After an “Hours of Operation” template has been created and applied, this Numbers Based Appointment Template for Thursday can be applied without scheduling conflicts.
History of Applied Templates
The user can view the history of the application of all templates applied to the master calendar within the clinic.

Go to Scheduling → Templates → Apply Templates. Choose the History button on the lower right corner of the screen.
The **Apply Template History** screen will display a list and details of templates that have been applied.

The **Template Type** drop-down can be used to filter which type of template application history is returned by the search (ex., Hours of Operation, Nutrition Education Classes).

Templates can be sorted by **Template Type, Name, From Date, To Date, Applied Date, and Applied By**. In order to control how templates are sorted, click within the column header. In this example, the information is sorted by **Applied Date**.
To view more details about a particular listing, select the listing, then click the **Selected Row Details** bar.

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