

APPENDIX A

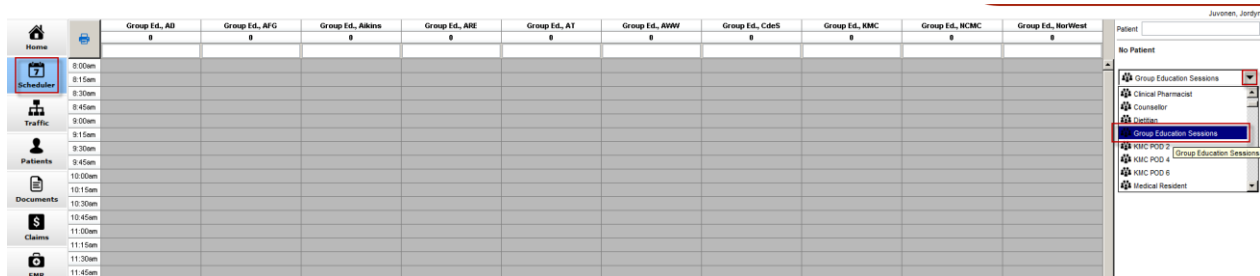
Creating, Booking and Managing Group Education Session Appointments

Last updated: April 27, 2022

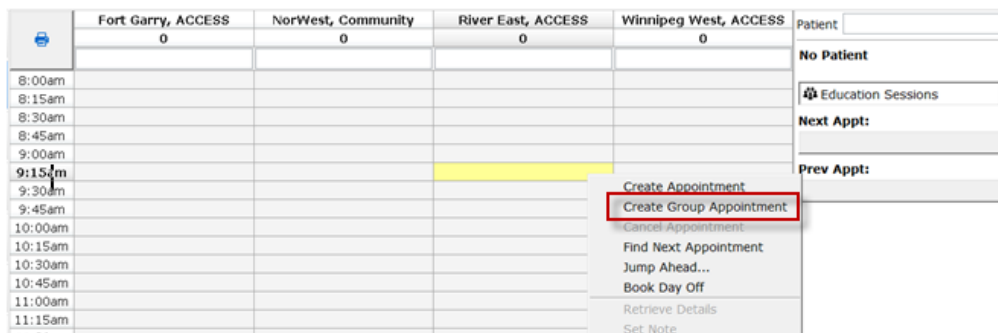
Creating Group Appointments

All patients booked for group appointments require the 'Group Education Program Tracker' to be initiated on their file. For steps on this form please refer to **APPENDIX C**

From the scheduler view; select the drop down box and select 'Education Sessions'.



Right click on the date and time of the Group Education Session in the template of the site holding the Group Education Session. Select 'Create Group Appointment' from the list of options.



A 'Group Appointment' box will appear with the date and time you have selected.

From the drop down in the 'Type' section select either 'Group - In Person' or 'Group - Virtual'

Select the appropriate Reason which is based on the Education session

Within the Notes field identify the session number i.e. 'Session 1'

A screenshot of the 'Group Appointment' form. The form has fields for Appointment Date (2022-Apr-25), Appointment Time (8:45am), Appointment Length (15 minutes (9:00am)), Location (O Provider's Office), Type (Group - In Person), Reason (Group - In Person), Priority (Long Visit), Room (Meeting), and Notes (Session 1, Room 212). There is also a Patients field with a list of patients. The form includes buttons for 'Add Patient Cohort', 'OK', and 'Cancel'.

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Adjust the length of the Group Education Session as needed by selecting from the drop down 'Appointment Length'.

Select 'Z Other Location' in the drop down for 'Location'.

In the 'Notes' section you can free text any pertinent information as needed. No spaces are to be held for home clinic / team patients versus external. ***Please note all text within this section will be visible from the scheduler view, and pulled into the patient's chart.***

Within the 'Popup Note' field identify the maximum number of participants for the session

If known, add the facilitator(s) to the 'Providers' section. Click the green plus, and select from the list of options. Then click the OK button which appears on the 'Add provider' box.

Click OK to add the Group Appointment

Your Group Education Session appointment should now look similar to the one below from the scheduler view.

Home		Fort Garry, ACCESS	NorWest, Community	River East, ACCESS	Winnipeg West, ACCESS	Patient
		0	0	1	0	
Scheduler	8:00am					No Patient
	8:15am					River East, ACCESS
	8:30am					Next Appt:
	8:45am					
	9:00am					Prev Appt:
	9:15am					
	9:30am					
	9:45am					
	10:00am					
	10:15am					
	10:30am					
	10:45am					
	11:00am					

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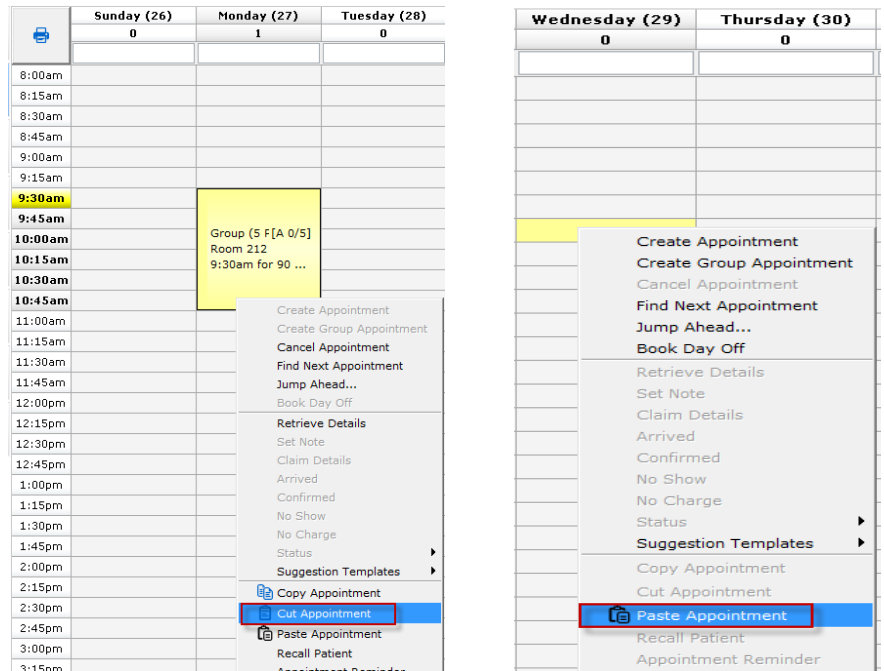
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To move a Group Education Session to a different date; right click on the appointment from the scheduler view.

Select 'Cut', right click on the new date and select 'Paste'.

Notice your Group Education Session will now appear on the new date.



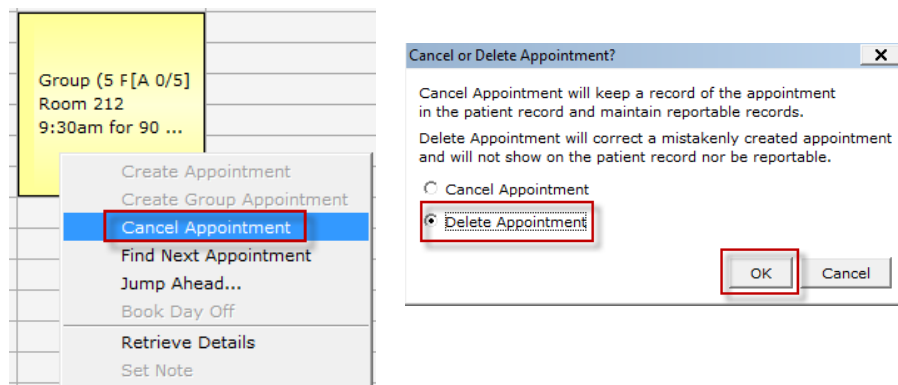
If booking the same Session for multiple dates selecting 'Copy' will allow users to paste multiple sessions.

To delete a Group Education Session right click on the session from the scheduler view.

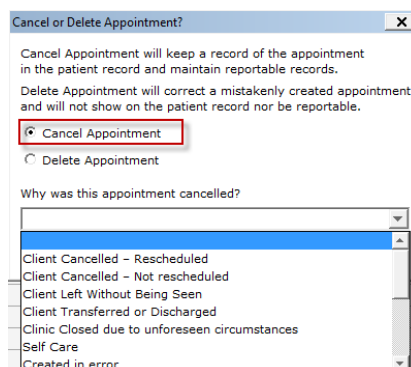
Select 'Cancel Appointment'

Select Delete Appointment

Select OK



If wanting to show the canceled appointment on patient charts; select 'Cancel Appointment' and choose reason for cancelation



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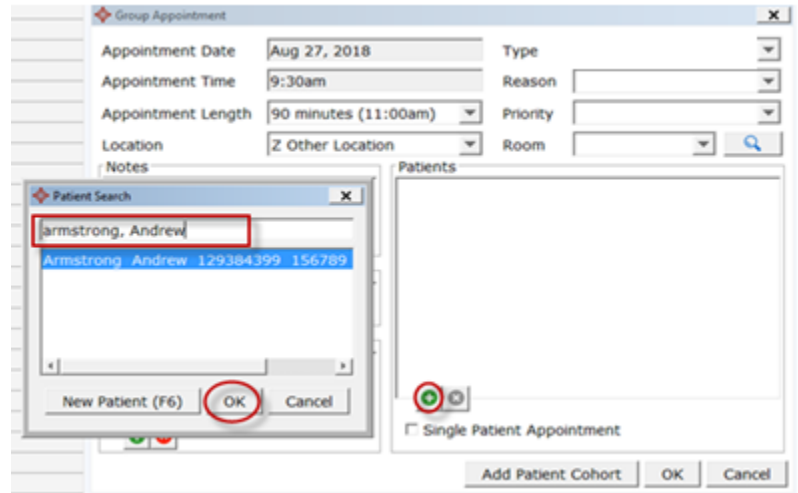
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Booking & Managing Group Appointments

Double click on the Group Education Session. To add patients, select the green plus sign located in the bottom left hand corner of the 'Patients' box.

For Pre-existing patient:

Search for the patient in the search box using at least 3 client identifiers (i.e., first & last name and PHIN) highlight the patient and select OK.

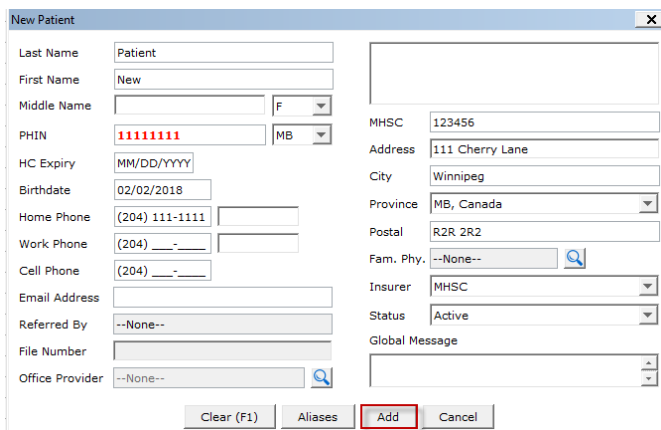


For New Patient to be added to the EMR for Group only:

From the scheduler view Select F6 on keyboard, a 'New Patient' window will appear

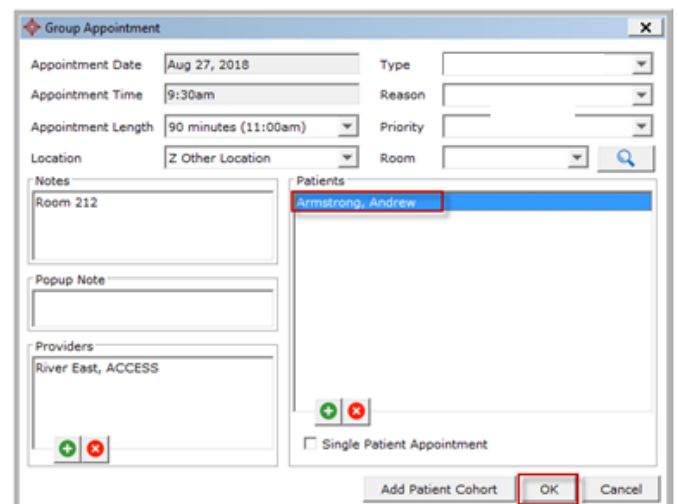
Add in demographics of attendee and Select 'Add'

Follow the above 'Pre-existing patient' steps to add this patient into the Group Education Session



Notice the patient selected will now appear in the 'Patients' section.

To save this patient into the Group Education Session select OK.



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IMPORTANT NOTE WHEN REGISTERING AN INDIVIDUAL TO ANOTHER HOST SITE: If the individual is being booked from another Office, as a courtesy, the Admin Staff / Clinician from the other office can group “**Mail Message**” the Host Site Admin Staff to advise “Individual X has been registered for [Group Session: Commit to Quit (C2Q)| Chronic Obstructive Pulmonary Disease (COPD)| Craving Change] provided by your team/site.

From the Home section select the 'Mail' inbox

Select the Green envelope to create a new mail message

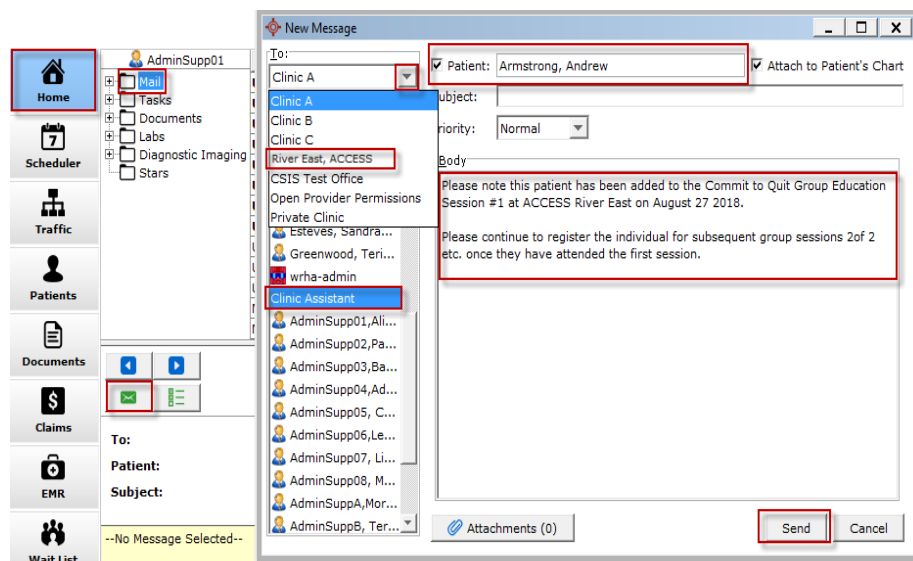
Attach the patient whom will be joining the host site

Select the appropriate office the mail message should be sent to

Select the staff your mail message is intended for

Type in your message in the Body of the mail message

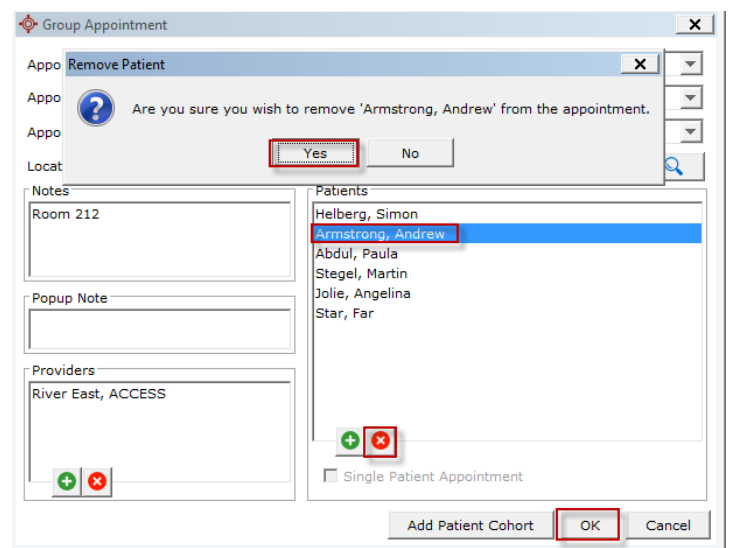
Press 'Send'



To remove patients from a Group Education Session highlight the patient and click the red X button.

A remove patient window will appear, select Yes to remove.

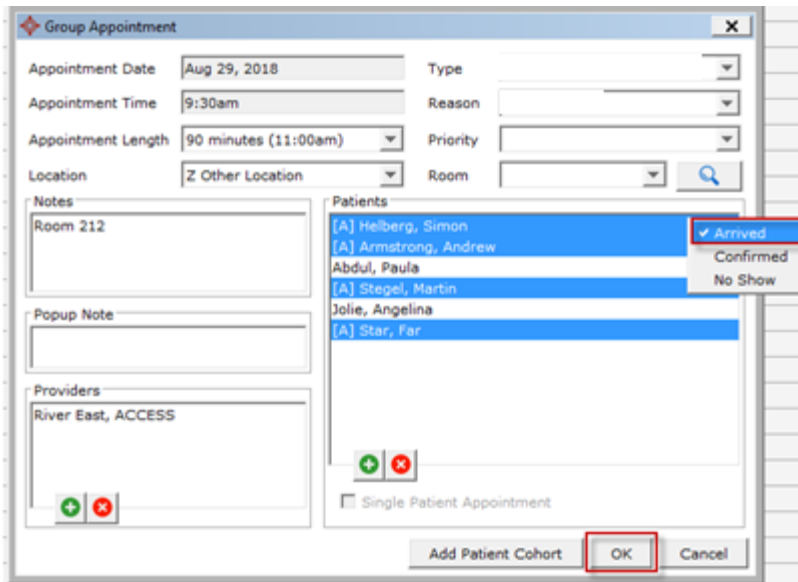
To save the changes, select OK.



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The screenshot shows the 'Group Appointment' window. The 'Appointment Date' is 'Aug 29, 2018', 'Appointment Time' is '9:30am', and 'Appointment Length' is '90 minutes (11:00am)'. The 'Location' is 'Z Other Location'. The 'Notes' field contains 'Room 212'. The 'Providers' field contains 'River East, ACCESS'. The 'Patients' list includes: [A] Helberg, Simon; [A] Armstrong, Andrew; Abdul, Paula; [A] Stegel, Martin; Jolie, Angelina; and [A] Star, Far. The 'Arrived' status is selected for all patients in the list. The 'OK' button is highlighted with a red box.

Arriving attendees:

Open the Group Education Session by double clicking.

Select the attendees while holding the Ctrl key on your keyboard.

Right click on one of the highlighted attendees and select 'Arrived'

Notice [A] will appear next to all showing they arrived for the session.

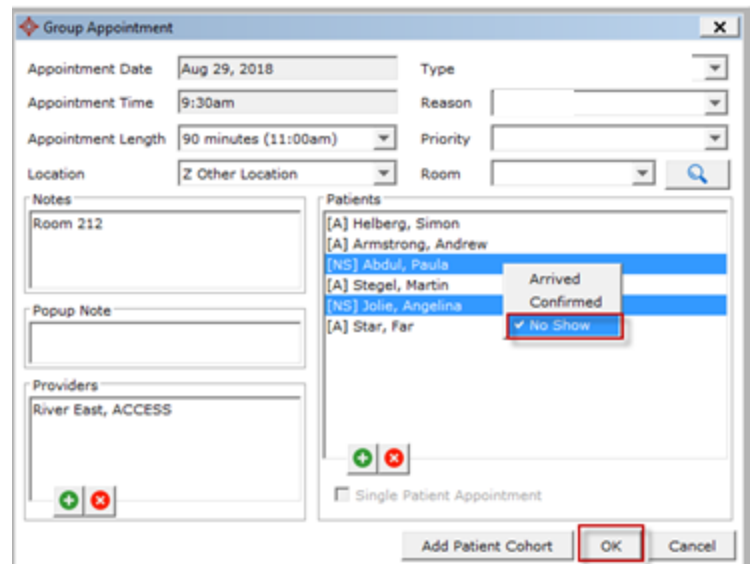
No Shows:

Open the Group Education Session by double clicking.

Select the attendees while holding the Ctrl key on your keyboard.

Right click on one of the highlighted attendees and select 'No Show'.

Notice [NS] will appear next to all showing who No showed for the session.



The screenshot shows the 'Group Appointment' window. The 'Appointment Date' is 'Aug 29, 2018', 'Appointment Time' is '9:30am', and 'Appointment Length' is '90 minutes (11:00am)'. The 'Location' is 'Z Other Location'. The 'Notes' field contains 'Room 212'. The 'Providers' field contains 'River East, ACCESS'. The 'Patients' list includes: [A] Helberg, Simon; [A] Armstrong, Andrew; [NS] Abdul, Paula; [A] Stegel, Martin; [NS] Jolie, Angelina; and [A] Star, Far. The 'No Show' status is selected for Abdul, Paula and Jolie, Angelina. The 'OK' button is highlighted with a red box.

As discrepancies arise please contact ESS for any questions