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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'.

												Juvonen, Jordyn
ô		Group Ed., AD	Group Ed., AFG	Group Ed., Aikins	Group Ed., ARE	Group Ed., AT	Group Ed., AWW	Group Ed., CdeS	Group Ed., KMC	Group Ed., NCMC	Group Ed., NorWest	Patient
o	-	0	0	0	0	0	0	0	0	0	0	
Home												No Patient
17	8:00em											•
7 Scheduler	8:15am											Group Education Sessions
	8:30am											Clinical Pharmacist
Traffic	8:45em											Counsellor —
Traffic	9.00em											A Dietitian
•	9:15am											Group Education Sessions
I	9:30em											Group Education Sessions
Patients	9:45am											KMC POD 4
•	10:00em											KMC POD 6
Ē	10:15am											Medical Resident
Documents	10:30em											
\$	10:45am											
Claims	11:00em											
	11:15am											
Ô	11:30em											
EMR	11:45am											

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.

	Fort Garry, ACCESS	NorWest, Community	River East, ACCESS	Winnipeg West, ACCESS	Patient	
- 🖶 [0	0	0	0		
					No Patient	
8:00am						_
8:15am					Education Sessions	*
8:30am					Next Appt:	0
8:45am						
9:00am						
9:15am					Prev Appt:	
9:30am				Create Appointment		
9:45am				Create Group Appointment		
10:00am				Cancel Appointment		
10:15am				Find Next Appointment		
10:30am				Jump Ahead		
10:45am				Book Day Off		
11:00am				Retrieve Details		
11:15am				Set Note		
11.20.000				OCL NOLC		

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

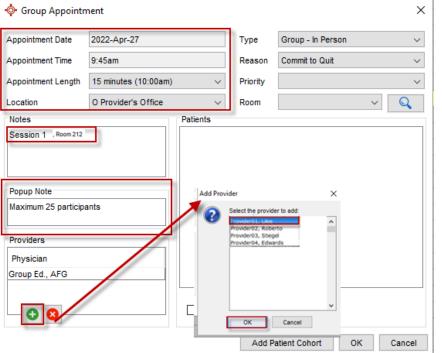
From the drop down in the 'Type'	
section select either 'Group - In Persc	<mark>n'</mark>
or 'Group – Virtual'	

Select the appropriate Reason which is based on the Education session

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

💠 Group Appointr	ment				×
Appointment Date	2022-Apr-25		Туре	Group - In Person	~
Appointment Time	8:45am		Reason	Group - In Person	^
Appointment Length	15 minutes (9:00am)	~	Priority	Group - Virtual	
Location	O Provider's Office	~	Room	Home Visit Long Visit	
Notes		Patients		Meeting	
Session 1, Room 212	2			Minor Procedure	
				New Client Initial Visit	~
Popup Note					
Providers					
Physician					
Group Ed., AFG			-		
		- 🕄 😣) ———]
• •		Single P	atient Appo	intment	
			Add F	Patient Cohort OK	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.

õ		Fort Garry, ACCESS	NorWest, Community	River East, ACCESS	Winnipeg West, ACCESS	Patient	
Home	-	0	0	1	0		
						No Patient	
7	8:00am						
Scheduler	8:15am					River East, ACCESS	-
	8:30am					Next Appt:	0 ⁰
-th	8:45am						
Traffic	9:00am						
•	9:15am					Prev Appt:	
Patients	9:30am						
Facience	9:45am						
	10:00am			Group (0 Patients) [A 0/0] Room 212			
Documents	10:15am			9:30am for 90 minutes			
_	10:30am			sister for so minutes			
\$	10:45am						
Claims	11:00am						

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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.

	Sunday (26)	Monday (27)	Tuesday (28)	Wednesday (29)	Thursday (30)
-	0	1	0	0	0
8:00am					
8:15am					
8:30am					
8:45am					
9:00am					
9:15am					
9:30am					
9:45am		Group (5 F[A 0/5]			
10:00am		Room 212		Create	Appointment
10:15am		9:30am for 90		Create	Group Appointment
10:30am				Cancel	Appointment
10:45am		Create	Appointment	Find Ne	ext Appointment
11:00am			Group Appointment	Jump A	head
11:15am		Cancel	Appointment	Book D	ay Off
11:30am		Find Net	kt Appointment	Retriev	e Details
11:45am		Jump A		Set Not	ie in the second s
12:00pm		Book D		Claim	
12:15pm			e Details	Arrived	
12:30pm		Set Not		Confirm	
12:45pm		Claim D Arrived	etails	No Sho	
1:00pm		Confirm	red	No Cha	
1:15pm		No Sho		Status	nge
1:30pm		No Cha	rge		
1:45pm		Status	•		tion Templates
2:00pm		Sugges	ion Templates	Copy A	ppointment
2:15pm		Copy A	opointment	Cut Ap	pointment
2:30pm		Cut App	ointment	📄 💼 Paste A	Appointment
2:45pm		🛱 Paste A	ppointment	Recall	Patient
3:00pm		Recall F		Appoint	tment Reminder
2.1Ep.m					

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

> Client Cancelled - Not rescheduled Client Left Without Being Seen Client Transferred or Discharged Clinic Closed due to unforeseen circumstances

Self Care Created in er

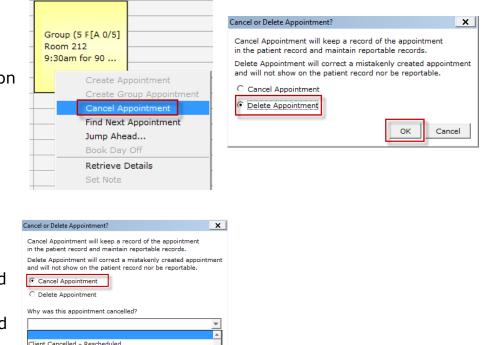
To delete a Group Education Session right click on the session from the scheduler view.

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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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.

New Patient		×
Last Name	Patient	
First Name	New	
Middle Name	F	
PHIN	11111111 МВ 👻	MHSC 123456
	MM/DD/YYYY	Address 111 Cherry Lane
HC Expiry		City Winnipeg
Birthdate	02/02/2018	Province MB, Canada
Home Phone	(204) 111-1111	
Work Phone	(204)	
Cell Phone	(204)	Fam. PhyNone
Email Address		Insurer MHSC
		Status Active 🔻
Referred By	None	Global Message
File Number		-
Office Provider	None	
	Clear (F1) Aliases	Add Cancel

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

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

	Group Appointment				
	Appointment Date	Aug 27, 2018	Туре		
	Appointment Time	9:30am	Reason		
	Appointment Length	90 minutes (11:00am)	Priority		1
	Location	Z Other Location	Room		▼ Q
	Notes	Patients			
_	rong, Andrew	00.156200			
_	rong, Andrew	99 156789			
Armst		Cancel	Patient Appointme	ent	

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

Group Appointment	t i i i i i i i i i i i i i i i i i i i				
Appointment Date	Aug 27, 2018		Туре		
Appointment Time	9:30am		Reason		
Appointment Length	90 minutes (11:00am)	Ŧ	Priority		
Location	Z Other Location	Ŧ	Room		✓ Q
Notes	P	atients			
Popup Note					
Providers					
River East, ACCESS		Single	Patient Appoin	ntment	

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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

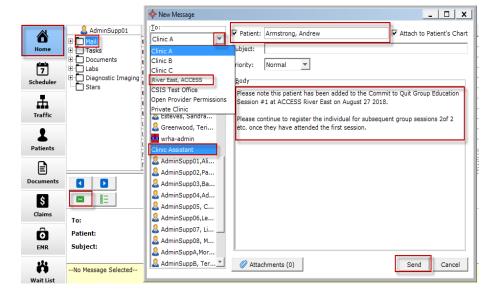
Type in your message in the Body of the mail message

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.



💠 Group Appointment	×
Appo Remove Patient	×
Appo Appo Locat	o remove 'Armstrong, Andrew' from the appointment.
Notes	Patients
Popup Note	Armstrong, Andrew Abdul, Paula Stegel, Martin Jolie, Angelina Star, Far
Providers	
River East, ACCESS	Single Patient Appointment
	Add Patient Cohort OK Cancel

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Group Appointment					×
Appointment Date	Aug 29, 2018		Туре		¥
Appointment Time	9:30am		Reason		v
Appointment Length	90 minutes (11:00an	n) 🔻	Priority		v
Location	Z Other Location	Ŧ	Room	¥	9
Notes		Patients			
Popup Note		Abdul, Paul [A] Stegel, Jolie, Angel [A] Star, Fo	Martin lina		Confirmed No Show
River East, ACCESS					
00		Single	Patient Appointment		
			Add Patient Cohor	ок	Cancel

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.

💠 Group Appointment					×
Appointment Date	Aug 29, 2018		Туре		×
Appointment Time	9:30am		Reason		v
Appointment Length	90 minutes (11:00	am) 🔻	Priority		¥
Location	Z Other Location	¥	Room		▼ Q
Notes		Patients			
Popup Note		[A] Armstro [NS] Abdul [A] Stegel, [NS] Jolie, [A] Star, Fa	Martin Angelina	Arrived Confirmed ✓ No Show	
Providers					
River East, ACCESS		Single	Patient Appoin	ntment	
			Add Patien	t Cohort Of	Cancel

As discrepancies arise please contact ESS for any questions