



## Create a Group appointment from Groups

- 1) In **Group** worklist, click **Add** to create a group appointment, complete mandatory fields and **Save**
  - a) **Type** (Programme/Service, then which Programme/Service)
  - b) **Service Providers**
  - c) **Lead Facilitator**
  - d) **[Group Appointment] Name**
  - e) **Single Day/Repeatable** (add dates/pattern for repeatable)
  - f) **Save**

## Two ways to add people to Group appointments, then 'Schedule' to send emails

### From the LEFT

**Add People** to ALL instances  
**Actions > Schedule** from left side, to send emails for ALL instances at once

Select one instance to add people  
Select one instance to schedule only one

### From the RIGHT

**Add People** to selected instance only  
**Actions > Schedule** from right side, to send emails to people added to selected instance only

## Completion

1. To **Complete** one instance, select it, then from the right side, click **Actions > Complete Group Session**

## Record Attendance

2. Select Completed Group Session, select for **Mark as attended**, and select for **Mark as did not attend**

## Add Notes

3. Add a **Group Note** into everyone's record from the top of the list
4. Add an **Individual Note** into one person's record from the right
5. Click the Person name to expand a place to add whanau/trust others

## Programme Worklist

In the **Programme Worklist**, each Person's **Programme Details** and **Group** name are visible

- Click the **Programme** icon to jump to the Programme workspace, for viewing notes, events and appointments
- Click the **Group name** to jump to the Group appointment for adding group notes or individual notes

Home / Programme Worklist

Programme Treatments

Name NHI Service Recovery Service - Tra... Programme Status Referral Reason Location/Area X

Alerts	Person Details	Service	Service Location	Service Status	Programme Details	Group	Date Created
	<b>ALEXANDER, NADIA</b> 01/01/1901 (124) ZAA: ...	General Adult 30.01.2025	Whangarei	Adult MH Clinical (RN) 30.01.2025 16:29	Recovery Service - Trauma Group	<b>Trauma Therapy Group</b>	11.02.2025 12:07
	<b>CATHLAB, Testing Number</b> 11/10/1982 (42) ZAA: ...	General Adult 03.01.2025	Whangarei	MH Clinical (RN) 03.01.2025 14:42	Recovery Service - Trauma Group	Trauma Therapy Group	09.01.2025 19:35
	<b>TEST, Blocker</b> 15/03/1980 (44) ZAM7673	General Adult 22.11.2024		(MH Admin) 22.11.2024 08:57	Recovery Service - Trauma Group		30.11.2024 19:03

## Group Statistics

From the **Groups** worklist, select **Group Statistics**

Filter as required to view stats for individuals or for repeating or single day events

Stats are available for ALL groups regardless of whether they were created from a Programme or a Service, but the statistics are more meaningful and trackable when created from a Programme, eg DBT, Matrix