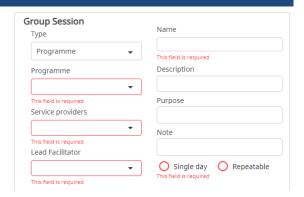
Create a Group appointment from Groups

- 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

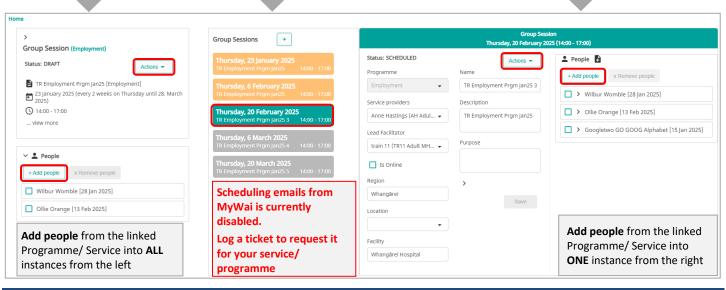
Actions > Schedule from left side, to send emails for ALL instances at once

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

From the RIGHT

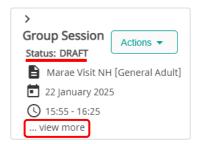
Add People to selected instance only

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

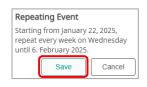


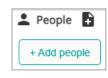
Add people from multiple Services/Programmes

Select one Service/Programme when creating the Group Session, **Save**, then **add people** from that Service/Programme. While still in **DRAFT**, click **...view more** to edit the Group Session, select a different Service/Programme and **Save**. The **Add people** button now displays people from the <u>newly selected Service/Programme</u> – add as required.









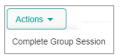
Programme-based groups allow adding people from programmes across multiple organisations, while service-based groups are limited to services from your organisation only.

While the Group Session Status is **DRAFT**, people from multiple services/programmes can still be added. If individual instances are Scheduled, people from other Services/Programmes can still be added.

When the Group Session Status displays as **Scheduled** (ie all instances are Scheduled), the Service/Programme cannot be changed, so adding people is restricted to the last Service/Programme selected.

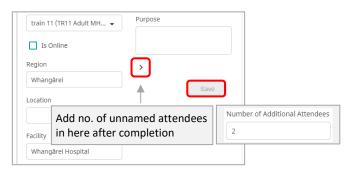
Completion

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



Record Attendance

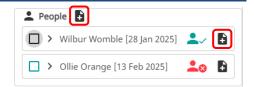
2. Select Completed Group Session, select for Mark as attended, and select for Mark as did not attend If needed, click the arrow shown, add the Number of Additional Attendees, then click Save.





Add Notes

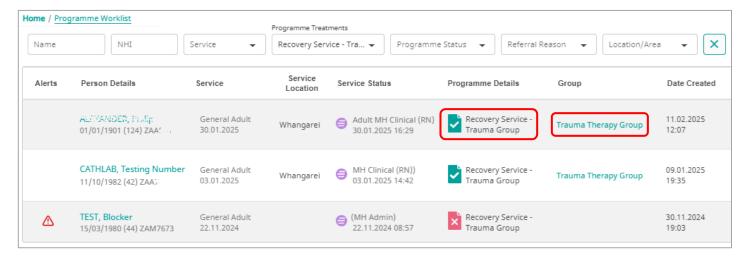
- 3. Add a **Group Note** into everyone's record from the top of the list
- 4. Add an Individual Note into one person's record from the right
- Click the Person name to expand a place to add whanau/trust others



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



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

Moving from one location to another, but staying in a Service/Programme?

A new referral is required to add the Service from a different location to MyWai. Once the referral is triaged and the Service is added to the Care Team, the previous record can be Discharged from the Service in the original location.