

About this Manual

- This manual provides overviews and descriptions of the Group Booking routine in the Scheduling 5.6 release.
- We suggest that you use the online Help for information about responding to individual prompts, a glossary of terms, and to take advantage of the hypertext links that indicate related topics.
- This manual is current as of the date it was created. For the most up-to-date information about this application, consult the online Help.



Overview

Community-Wide Sched.	
Scheduler Desktop	
Group Booking Desktop	
Dictionaries	•
System Management	•
Reports, Letters, Forms	•
Appointment Lists	•

This allows users to create Group Appointments and quickly book many patients for a single or a series of appointments.

📅 Group Desktop - (CUS2/W24	(SKAWOVSE) - M	ERTECH				608
SPEECH THERAPY 30 MINS				Count 1	Min Max	
Date Monday October 20,	2008			Resource GROUP	E MOOI	
Time 11:00am - 11:30am				Location PHYSIC	L THERAPY	Harmon H
Date	Time	Duration	Number	Appt Type	Status	-
MON 10/20/08	1100	30	1	STCLASS30	OPEN	
TUE 10/21/08	0700	60		YOGABOMIN	OPEN	
TUE 10/21/08	1300	60	1 -	YOGA60MIN	OPEN	
WED 10/22/09	8700	111	1 1	TOCAJUNON	OPEN	
THU 10/23/08	8700	30	4 4	PTGROUP30	FIAL	
FRI 10/24/08	0700	30	4	YOGA30M0N	OPEN	
FRI 10/24/08	1400	60	2	YOGA60MIN	OPEN	Sancetin E
						List Br
						Quarter Down - Mr
						Eff Quar E
						Released Device 22
						Add to Seven and
						Gimicata Graup.
						Man Gimm
						Calical Gran 10
						Act Monday - 22
						Ehneck III.
						Consistin General 20
						distantities and
L						
		INTERNA DISTANCE	Turitari Fan	was Barrison		

The "List" view displays information from existing Group Appointments in a list format.

When you highlight an appointment from this list, more information is listed at the top of the routine. If a session is below the group minimum for patients, the text will be displayed in orange and a downward-pointing arrow will be displayed in the Number column. If the session has more patients than the group maximum, the text will be red and an upwards-facing arrow will be displayed in the Number column.



		Monday Oc	tober 20, 2	008 - Sunda	y October	26, 2008			
	MON 10/20	TUE 10/21	WED 10/22	THU 10/23	FRI 10/24	SAT 10/25	SUN 10/26		
:00a		YOGA60MIN 60 Minutes 0800 3 /	TOGAJOMIN 30 Minutes 0730 1 428	PTGROUP30 30 Minutes 0730 4 2/3	YOGA30MIN 30 Minutes 0730 4 4/8			Columbas	
1:00	STCLASS30 30 Minutes 1130 1 /							Criate Sing	
:00p		YOGA60MIN 60 Minutes 1400 1 /						Ent Group Results General Add Ta Series	
.00					YOGA60MIN 60 Minutes 1500 2 /			Week Group Cancel Sman	
								Check (h Complete Gree	P
								Harorts.	

The "Calendar" button displays information from Group Appointments in a calendar view. Information from the highlighted appointment is displayed at the top of the screen.

Each cell displays information about the group appointments. The Appointment Type is the first line, followed by the appointment duration The number on the left corresponds to the number of patients booked for this group appointment. The number on the left of the slash is the group minimum, and the number on the right is the group maximum. If there are no minimum and maximum numbers of patient defined in the Appointment Type dictionaries, only the slash will be displayed.

YOGA30MIN
30 Minutes
4 4/8

Like the list view, if a session is below the group minimum for patients, the text will be displayed in orange If the session has more patients than the group maximum, the text will be red and an upwards-facing arrow will be displayed in the Number column.



Create Group

	_	-								- All
		50	ach (Al	d Hun	Den Jun	in Pikites)			
e yo	GA30MD Series C	v voga so i lingle	MIN CLA	SS			Min 4 Max B			
P . (110)	Name			-	Start 0	Dur	Use Resour	ce I/E/G/L	1	
	GROUP R	MS			0	30				Calimitat
										100.0
				10		_			-	Crashe Graun
30					*Location					Ealer Change
				-0						Reachd Series
ency		Day	Time		Quantity	Fru	m Datu	Through Date		add To Yemes.
	MWF		0900	. 6		30/20	/08			Charlicate Group
	*									View Cryster
										Carvel Shine
	Witness	Anna Trana	min		antine :	Water of Street of Streeto		Balance	- 11	Add Menter
(MET)	0000	NOCASCAMD	20		ocauun	T KING /	unge	DOVIDENT2		Overskills
FRI	0900	YOGA30MIN	30	PT			6	ROOPRM2		Complete Oracle
MON	0900	YOGA30MIN	30	#T			G	ROUPRM2		Illiportsi -
WED	0900	YOGA30MIN	30	PT			G	ROUPRM2		
	0900	YDGA30MIN	30	PT			G	ROUPRM2		
1-14		Constant of the Constant of the		1000			1.00	POUDPM2		
	i yc ie iii io io io io io io io io io io io io	YOGA30MU W Series C GROUP R GROUP R	• YOGA30MIN YOGA30 • Ø Series O Single • GROUP RMS • GROUP RMS • O <td< td=""><td>Contribution of the second sec</td><td>Conch (Address YOGA30MIN YOGA 30 MIN CLASS B Series O Bingle GROUP RMS O MWF 0500 0 O MWF 0500 1 O</td><td>Concerning (Add Hermony) (Concerning) YOGA30MIN YOGA 30 MIN CLASS Re B Series O Bingle CRDUP RMS 0 CRD</td><td>Concertion Concertion c VOGA30MIN VOGA30MIN CLASS c ID Series O Bingle Incy Start Dur c CRDUP RMS 0 30 0 CRDUP RMS 0 30 00 CRDUP RMS 0 30 00 CRDUP RMS 0 30 00 CRDUP RMS 0 90 00 VOGA30MIN 30 90 VER 0000 VOGA30MIN 30 VER 0000 VOGA30MIN 30 VER 0000 VOGA30MIN 30</td><td>Sourch Add Hermon Conco Hotel YOGA30MIN YOGA 30 MIN CLASS Min 4 Max e IP Series O Bingle Min 4 Max c IP Series O Bingle Start Dur c GROUP RMS 0 30 a0 *Location mcy Day Time Quantity MWF 0900 0 10/20/08 Oay Time Appl Type Dur Location WED 0900 YOGA30MIN 30 PT MON 0900 YOGA30MIN 30 PT MON 0900 YOGA30MIN 30 PT</td><td>Source Color Hotes YOGA30MIN YOGA 30 MIN CLASS Min 4 re IP Series O Bingle Min 4 c IP Series O Bingle Start Dur Use Resource 1/E/C/L CROUP RMS 0 30 *Location 1 Incy Day Time Quantity From Date Through Date MWF 0900 9000 9000 POGA30MIN 30 FT Cay Time Appl Type Dur Location Time Range Resource WED 0900 YOGA30MIN 30 FT CROUPEMA2 MXH 0900 YOGA30MIN 30 FT CROUPEMA2 MXH 0900 YOGA30MIN 30 FT CROUPEMA2 MXH 0900 YOGA30MIN 30 FT CROUPEMA2</td><td>Sourch Add Hermiters Group Notes r YOGA30MIN YOGA 30 MIN CLASS Min 4 re If Series O Bingle Min 4 r GROUP RMS 0 30 0 *Location *Location mcy Day Time Quantity From Date MWF 0900 6 30/20/08 Oay Time Quantity From Date MWF 0900 9 20/20/08 Oay Time Location Time Range MWF 0900 YOGA30MIN 30 Fit 0400 YOGA30MIN 30 MXH 0900 YOGA30MIN 30</td></td<>	Contribution of the second sec	Conch (Address YOGA30MIN YOGA 30 MIN CLASS B Series O Bingle GROUP RMS O MWF 0500 0 O MWF 0500 1 O	Concerning (Add Hermony) (Concerning) YOGA30MIN YOGA 30 MIN CLASS Re B Series O Bingle CRDUP RMS 0 CRD	Concertion Concertion c VOGA30MIN VOGA30MIN CLASS c ID Series O Bingle Incy Start Dur c CRDUP RMS 0 30 0 CRDUP RMS 0 30 00 CRDUP RMS 0 30 00 CRDUP RMS 0 30 00 CRDUP RMS 0 90 00 VOGA30MIN 30 90 VER 0000 VOGA30MIN 30 VER 0000 VOGA30MIN 30 VER 0000 VOGA30MIN 30	Sourch Add Hermon Conco Hotel YOGA30MIN YOGA 30 MIN CLASS Min 4 Max e IP Series O Bingle Min 4 Max c IP Series O Bingle Start Dur c GROUP RMS 0 30 a0 *Location mcy Day Time Quantity MWF 0900 0 10/20/08 Oay Time Appl Type Dur Location WED 0900 YOGA30MIN 30 PT MON 0900 YOGA30MIN 30 PT MON 0900 YOGA30MIN 30 PT	Source Color Hotes YOGA30MIN YOGA 30 MIN CLASS Min 4 re IP Series O Bingle Min 4 c IP Series O Bingle Start Dur Use Resource 1/E/C/L CROUP RMS 0 30 *Location 1 Incy Day Time Quantity From Date Through Date MWF 0900 9000 9000 POGA30MIN 30 FT Cay Time Appl Type Dur Location Time Range Resource WED 0900 YOGA30MIN 30 FT CROUPEMA2 MXH 0900 YOGA30MIN 30 FT CROUPEMA2 MXH 0900 YOGA30MIN 30 FT CROUPEMA2 MXH 0900 YOGA30MIN 30 FT CROUPEMA2	Sourch Add Hermiters Group Notes r YOGA30MIN YOGA 30 MIN CLASS Min 4 re If Series O Bingle Min 4 r GROUP RMS 0 30 0 *Location *Location mcy Day Time Quantity From Date MWF 0900 6 30/20/08 Oay Time Quantity From Date MWF 0900 9 20/20/08 Oay Time Location Time Range MWF 0900 YOGA30MIN 30 Fit 0400 YOGA30MIN 30 MXH 0900 YOGA30MIN 30

The "Create Group" option enables a user to create a new Group Appointment. The user must select an appointment type that has the option "Available as Group Appointment?" set to Yes in the Appointment Type dictionary.

In the Search tab the user must select if the Group Appointment is part of a series of appointments, or if it is a single appointment. The values for minimum and maximum number of patients that can attend this appointment defaults from the Appointment Type Dictionary.

If the user chooses to book a series of appointments, Frequency, Day, Quantity, and From Date are required fields. The Time and Through Date fields are optional. Using these fields, the user must specify when the appointments will occur. After clicking the "Search" button, available time slots for the Group Appointments will appear, based on the specifications entered. The user may use the "Re-Find Times" button to search again for times.



					22
	(Hearth) (All	0	Ditter.		-
*Appt Type PTGROUP10 *Group Type O Series IP Series	PT GROUP 30 MINUT	85	Mer 2 Max 3		
essurce Group (Start De	Juse Resource	UE/GA.	
IOUPRMS GROUP RMS		0	20	A MINING	distantiat
					(Lin)
		W.			Created Streets
Distation 30		*Lacation			and Lenne
Alexandra and a second second	The second second	Annal Mark Theory Ph	A MANAGEMENT AND A MANAGEMENT	1000000	Analbit Towner
Earliegt Date: 10/20/08	Logy Date	AVAILABLE INTO DA	ar Provider/Handurce	Location	Add, Tr. Source.
Latest Date 10/27/98	MON 10/20/08	1130 - 1510 3	CROUPHWD	pt	District arts (down)
Earliest Time	TUE 10/21/08	0800 - 1530 3	0 GROUPRMI	PT	Vine Denkis
Latest Time	TUE 10/21/08	0700 - 1230 3	G GROUPRM2	PT .	Cashend Lines.
Listen die literations	TUE 10/21/08	1400 - 1530 3	GROUPHM2	PT	A ST SAME
Declaration Exclude	WED 10/22/08	0700 - 1530 3	GROUPRM1	PT	and the second second
Monday	WED 10/22/98	0730 - 1530 3	0 GROUPHM2	- PT	And in case of the local division of the loc
Tuesday	THU 10/23/08	0730 - 1530 3	0 GROUPRMS	PT	Contraction in And
Wednesday	THU 10/23/08	0708 - 1530 3	0 GROUPRM2	17	Common State of Common State
Thursday	FRE 10/24/08	0202 - 1330 3	0. UKUNPRMI	11	
Friday	ESK 10/24/08	0100 - 1630 3	CINCHEPHINE	PT DT	
C Saturday	MON 10/27/08	0700 - 1510 3	d GROUPPMI	PT	
C Sunday	MON 10/27/08	11700 - 1530 3	d GROUPRM2	PT .	
Date				111111	
Time					
				Const Indentical and	

If the user chooses to book a single appointment, they may enter in Earliest Date, Latest **Date, and any day exclusions. After the user clicks the "Find Times" button, available** times for the appointment populates the large grid on the right portion of the screen.

									-4.2
		(max)	(ad/ 16	ntrisis)(and here				
Dete	Day	Title		ourca	Dur	Lo	caliton	1	
10/22/	WED	0900	GRO	COPRIMIZ.	30		PT		
30/24/	06 PR2	0905	GRO	0049/42	30		PT		
-10/27/	40M 80	0900	GRO	20/09/02	30		PT		
10/29/	08 WED	0900	GRO	Obitivity	30		et.		(a)
10/33/	00 990	0000	GRO	CINHARS	30		PT	_	Committee of the local sector of the local sec
11/03/	IOD MON	0990	GRO	UPRIND	30		PT.	_	Contraction of the local division of the loc
	Patiant.		Accou	nt Num	Med Rot: Num	* Pt. Type	Sec/Age		1000.
1 11-84	CE.KARA		· NEW		M000000189	BCE.	#/26		Create Gring:
2 4048	to LEE		NEW		M000000190	BCE.	H(22		August Witchings
3 AGAT	NUMBER OF		NEW		NEW	BCP.	M/DE		and the second se
1 1000	- Constanting		100		interes.		1222		A REAL PROPERTY AND INCOME.
2									COLUMN TWO IS NOT
7									Departments, Longe
	Ballant Color		-			- Wardshield West			Street, College
	rabent bata		000		40000	susarban Age road		0.00	Carnel Group
athdate	10/16/1965			A.doress	I MEDIC TE	CH CIR WESTY	VOOD MA 02090		Add Filmer
Age/=Bex	ANA GALANTE			HOTHE IT	toon IPd-Same	498		_	Change Int
Sec. Sec. Multi	131-84-8/11			Car Bac	CTI DONT.				of Samela Inc. Inc.
				Diptrick Of	SILUDAL	1		_	Contraction of the local distance of the loc
A COLORADO			-	OTHE PD	Grie			-	Tepotol
	Auth/Faterral		100	Drata are	a Policy Number			1004	10

On the "Add Members" page, the user is able to add patients to this Group Appointment. The first box displays the dates, days of the week, times, resources used, duration, and location of the Group Appointments. In the numbered "Patient" fields, the user may pull in existing patients by searching Medical Records, or create new patients. The Group Appointment may be placed on an existing or new account number. The patient information will display on the bottom half of the page for the highlighted patient. From here users may also enter or edit alerts, allergies, view the patient's next appointments, view any Critical Care Indicators, and notes.





On the "Group Notes" page, a user may enter any notes for the Group Appointment.



Edit Group and Reschedule Series

Group Desirep - (COS2/MERCEANOV)	INTERNITION				EIII D
DGA 68 MIN CLASS ate Tuesday October 11, 2008 Inne: 07:00aw - 68:00am	(THE SHOP)	Cou Resi Loca	NECE GROUP ROOM	Max L SUPY	2
Appt Type VOGASOMIN	YOGA 80 MIN CLASS		Man Man		
Remarce Group (010 Marve		Start Dur	Use Resource	1/6/G/L	
GROUPRING GROUP RIVIS		0.0	IG GROUPRML		Creater II
*Duration 60	*Location PT		Ractid Reason		Complet Service - / P
*Earlinet Date *Latent Date Earlinet Time Latent Time	Day Date Available	Tare Dur Provide	r/Resource I	ocation	And To Reves B Datasets Guine B Union Office D
Excluste Mondary Trissibly Wednesday Thursday Foday Sandary Sandary					And Device
*Dwte 10/21/00 *Tww. 0700					
	11112 20100				

Using the "Edit Group" button, the user may decide between editing a single appointment, or if the appointment is part of a series, the user may edit the entire series. Here, the user may change appointment times, choose different resources for the appointment, or edit patient data on the Members page.

Appt Type YOGA30HDV		*Rascheide Reserv C68	
essarce Group IIII Naeve ROUPPHS GROUP HWS		Right Dar Oos Nakkarce 1/0/00 a jal onclummi	
Duration 30		*Location / PT	
Frequency B	ay Tine	Quartity Filan liabs Through liabs	Contra Group
Calls Day Time	Appt Type Dur	Location Time Kerge Reserve	Andreas an annue anne annue annnue annue annue annue annue annue annue annue a

Using the "Reschd Series" button, users may choose to move a series of appointments to new dates and times. If a user answers "Y" to the Add Existing Members required field, all existing patients will be added to the new rescheduled series.



Add to Series and Duplicate Group

OSE Type VOCA30MIN essuence Group: IIII Name	T	GA 30 MIN CLAS	Dur Use Seams	me DE/GA	
ROUPENS GROUP RMS		0	30 GROUPSHI		
Duration 30		*Location	РŢ	-	College.
Prequency Day	Tithi	Quantity	From Date	Through Date	Consta Stream July Comm Ascend Lister Add To Julyer
Data Day Tjesa Appt	Type Dur	Location	Time Bange	Banarpa	Called Disease Called Disease Add New Hole Disease Called Disease Exceptions Disease Reports

Using the "Add To Series" button, a user may choose to schedule additional appointments for an existing series.

	(Search) (Auto	· · · · · · · · · · · · · · · · · · ·	5.14	-)		
*Appt Type PTCROUP30 👻	PT GROUP 30 MDW/	res		Mar 2 Max 3		
NOUTCE GROUP (C) Nume ROLPENS GROUP RMS		Start 0	Dur	Use Resource	.1/E/G/L	Contractor
Duration 30		*Location	PT			Genete Deup Edit Deup
Earliest Date Latest Date Earliest Time Latest Time	0ay Date MON 10/30/00 Tu5 10/21/00 WED 10/22/00 THU 10/23/00	Available Time 1230 - 1530 0600 - 1530 0730 - 1530 0730 - 1530	Dut P 30 30 30 30	Toxider/Nesource GROUPRHI GROUPRHI GROUPRHI GROUPHHI GROUPHHI	Location FT FT PT PT	Anachd Seren dell In Seren Daglicate Group Steer Ding Zanati Dage
Esclude Monday Tuesday Wednesday Trumulay Friday	FRI 10/24/00 FRI 10/24/00 MON 10/27/08	0800 - 1330 1500 - 1530 0705 - 1530	30 30 30	GROUPRMI GROUPRMI GROUPRMI	рт РТ РТ	Ann Photfan Chaide Bill Company Street
Date Time						

With the "Duplicate Group" button, users may choose to duplicate a single appointment, or duplicate a series of appointments. The duplication function will duplicate patients, and account numbers from the existing Group Appointment.



View Group and Cancel Group

Resource Group Name Start Dutation Resource Overbooked 1 GROUPRWS GROUP RMS 0 30 GROUPRMS 2 5	
2 CONTRACTOR CONTRACTOR	
3	Grou
*	- Bring P
Duration 30 Location PT Date 10/24/08	Memb
Status DPDN Packty MVN Time 0700	and been a
	Pt Demogr
a second s	- And Co.
10/2020 Line creat creat creat contract Contract	ELLIN OLD
O 10/20/06 1023 ADO MT Add member(s)	Corpla
hane Account hamber	Alters
THRACE,RARA V00000000007	Contraction of the local division of the loc
ADAMA,LEE VD000000308	- Challen Re
	1
O 10/20/08 1025 ADD MT Add inwrdian(k)	

The "View Group" button allows users to view information for the Group Appointment without making any edits. This page also displays the audit trail.

				-Cancel Reaso	n i DR	8.5					
I of 2	Selected	0.00		10.0000000	115	UNDODOD					8
1 17	10300	MON	1700	CROCKPANY	0.0	Location	SCOTT	Count	. 3410	Man	
1 17	10/24/08	FRO	0730	GROUPRM2	30	PT	OPEN	2			
1020	Pate	nt	Account h	um Med Rec	Num	Pt Type	Sex/Age	-			Calville
	ADAMA,LEE		Vapooooo	321 M000000	1290	SCH RCR	M/27				A AND T
	THRACE	KARA	V00000000	320 M000000	1289	SCH RCR	F/26				Company of the
											Plain cout
											Add Group
										_	Reachd Same
											Add The Second
											Outstate direct
											Marine Channel
											Circle Group
											and the state
											Chara In
											Complete time
										_	Automation .

Using the "Cancel Group" button, users may cancel the selected group or multiple

groups. A Cancel Reason must be entered. By clicking on the plus sign in the list, a user may see the patients booked for the appointments.



Add Member



With the "Add Member" button, users may quickly add patients to a single or multiple Group Appointments. The patients currently booked for the appointment appear by clicking the plus sign in the box in bottom of the screen.

Move Member and Remove Member

			1000 / 710 Aug 11)()						
Patient	THRACE, KARA									
From Ap	pt Type you forn Reason CON	AEOHON								
									Cashdar	_
4	Dete	Day	Tirre	Dor.	Matt	Min	Nation	Status		_
2	10/21/08	TUE	1400	60	-			OPER	124409-004	
			2100		-			OT LIN	201000	
									discuted liver	16.
									100.75 per	-
Include i	Previous Open Group									-
To Appt	Турн	YOGA30M	the later					56	Carte al ana	-
									And Manda	-
~	Cipte	047	Title	D#	76.01	Mit	Mart	20/h9	Chaile, III	_
	10/32/08	WED	8790	10	1	- 4		OPEN	According to a state	
	10/24/08	Con Con	0700	30	-	14	8	OPEN	P	-
	10(34)08		0.190					OT BIT		-



The "Move Member" function button allows a user to move a patient from an

appointment they are scheduled for, into an existing Group Appointment. A Cancellation Reason must be entered for this edit.

Group Desir	top (LUSEMONTAIN	OV56) - MEDITICH							1910
Patant	ADAMALLEE							_	
*Caricallat	tion Reason CAR								100 - 1 C
1 of 6 Sale	ched.								Canada
1	Date	Day	Tates	DU/	Num	360	1431	Statue	1911
	10/20/08	MON	1100	30	1			OPEN	Constant and a 15
17	10/20/08	TLP	0700	-30	-			OPEN	EM DALA
	10/24/08	PHO	0200	30				OPEN	Ranchd Service 1
	10/24/08	FR6	1400	60				OPEN	Add Top Secret 11.
	10/24/68	FR2	0730	30	2			13PEN	Date of the Owner
								_	State Grant Law
									Gardia Annal ()
									-ball Meridenc
									Deck 10
									Complications.
									-
								_	
									1.0
				_	_	_	7		
							1	Constant and a	2 - 2 - D - 5 - 61-

The "Remove Member" button allows a user to remove a patient from an appointment without needing to edit the actual Group Appointment. When a user enters a name at the Patient field, appointments that the patient is currently scheduled for populates the lower portion of the screen. A Cancellation Reason must be entered.