

The IMA Desktop Implementation Guide

Client Groups

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Introduction

Schedule group meeting times, manage group membership, monitor attendance, print rosters, and perform billing. The scheduling functions apply to groups as well as individual sessions with clients integrating the front desk functions. When a group is added to the agency's calendar, the IMA Desktop will automatically create individual appointments at the scheduled time for each of the group members.

Prerequisites: Collecting information about groups

Information about each of the groups may include:

- Group name
- A short (4 character) abbreviation or nickname of the group
- Capacity or normal size of the group
- Recurring meeting time, occasional, or unscheduled
- Set roster of clients, or open for walk-ins
- Billable, or not billable
- A list of the members of the group
- The agency Division of the group (if Divisions are in use)
- The type of group

Group types

Some categories include: inpatient, outpatient, residential, or special purpose. A table called *GRPTYP* stores the categories, or *Group Types*, that apply to the agency. A later section of this guide provides instructions for working with this table.

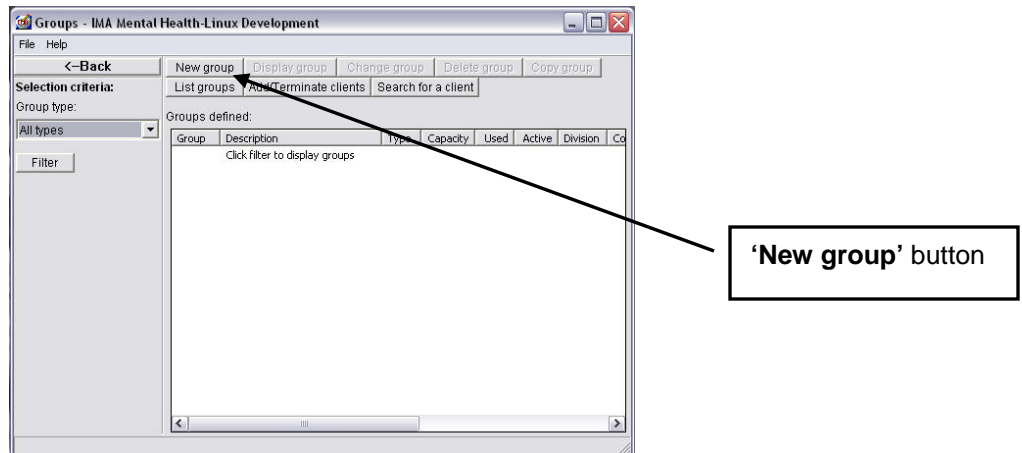
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Adding a Group

| [-] CLIENT DATABASE
| →Client groups

The **'Groups'** screen.



To Add a New Group, click the **'New group'** button on the Control Bar.

The **'Adding a new group'** screen:

Client	Name	Added	Removed
--------	------	-------	---------

Group Code: an alphanumeric abbreviation up to 4 characters long

Description: description of the group, max 20 characters

Capacity: a numeric value no higher than 250

Type: a drop-down list of classifications from your Group Type table

Division: optional, uses divisional security is in use

Comments: optional, free form text concerning the group

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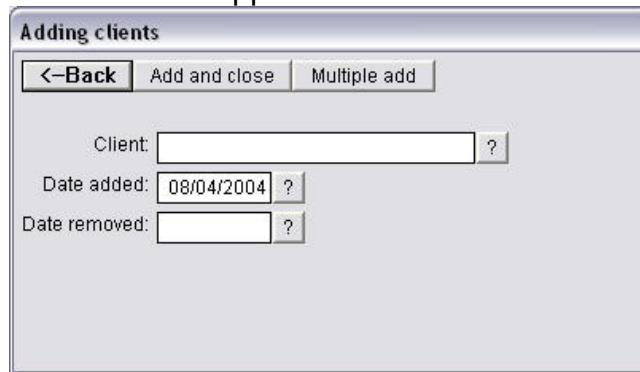
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Adding members to a group

If creating a new group, proceed to add members to the group on the 'Adding a new group' screen; with the **'Add'** button.

Add members to an existing group by selecting a group from the list and clicking **'Change group.'** Press the **'Add'** button.

The "Adding Clients" screen will appear:



Client: The client's name, selected from the drop-down list;
Date added: will default to today's date; it can be changed.
Date removed: leave blank until the client leaves the group.

Select a client using the '?' Lookup button.

Click one of the control buttons:

Add and close – add client; done.

Multiple add – add client; continue adding more.

Back - do not add client; done.

When the last client is added, click **'Add and close.'**

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Upon returning to the group screen, the recently added clients will appear in the **'Clients'** window:

Adding a new group

<-Back Add

Group code: IAE

Description: Interests, Aptitudes Capacity: 15 Used: 7

Type: OP - OutPatient Division: ?? - All

Comments:
Interests, Aptitudes & Environments Young Persons' Psycho-educational group

Clients:

Client	Name	Added	Removed
8881	Mean, Guy	08/04/2004	
8879	Quinn, Mighty	08/04/2004	
8883	Asner, Edward	08/04/2004	
8890	Picker, Noel	08/04/2004	
8891	Hubba, Bubba	08/04/2004	
9041	Dickens, Charles	08/04/2004	
9020	Dashwood, Maryanne	08/04/2004	

Add Change Remove Terminate

Click **Add** to save the group definition and member list.

Click **'Add'** to save the changes and record the new group (if adding one) and its members (if adding them).

Click **'Back'** to return without saving.

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Managing Groups

When groups have been defined and a roster of clients added to each one, use the IMA Desktop to help manage the agency's day-to-day:

- Schedule regular meetings or change the meeting time
- Add new members
- Terminate or delete members
- Update information about the group
- Print attendance rosters and reports

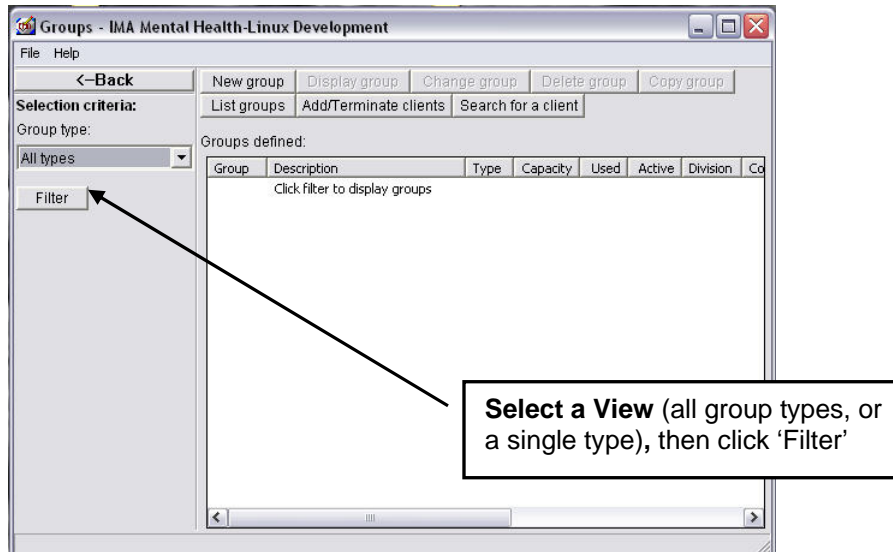
The Groups screen

Most of the group management functions are on the Groups screen with the exception of scheduling, which is done through the Calendar.

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The '**Groups**' screen.



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Control Buttons

At the top of the 'Groups' screen:

New group – create a group entry

Display group – review a selected group and its members (these details are also accessible by double-clicking the group)

Change group – update group information or change membership

Delete group – erase the selected group from your records

Copy group – create a new group, by duplicating an existing one

List groups – produce rosters and reports for any group

Add/Terminate clients – manage a client's group memberships

Search for a client – show the groups he or she belongs to

Some Control Buttons are always active, regardless of which group is selected (**New group**, **List groups**, **Add/Terminate clients**, **Search for a client**).

Other Control Buttons apply to a specific group, and only become active when a group is selected (**Display group**, **Change group**, **Copy group**).

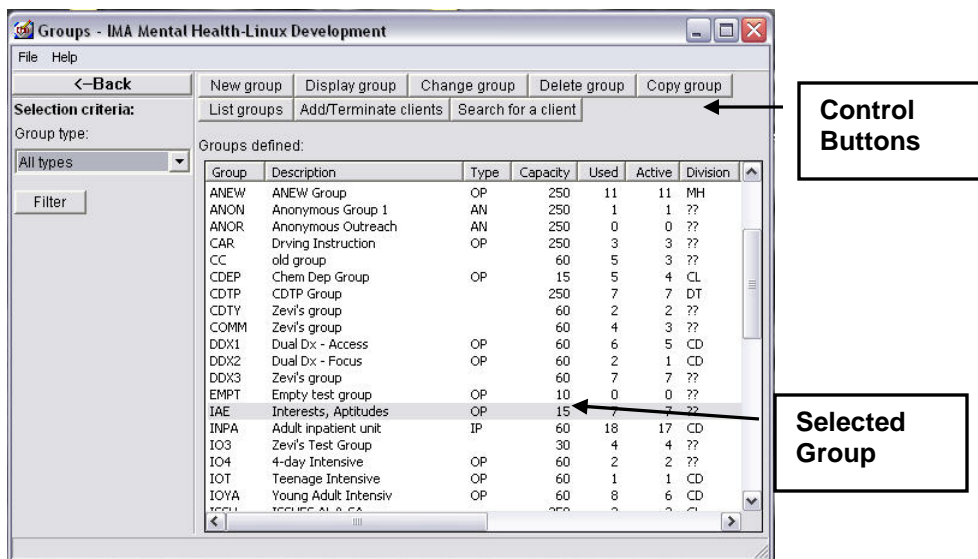
To select a group

Set a group type (or leave the default, 'All types').

Click '**Filter**' to display a list of groups.

Highlight a specific group.

The Control Buttons for this group are now active.



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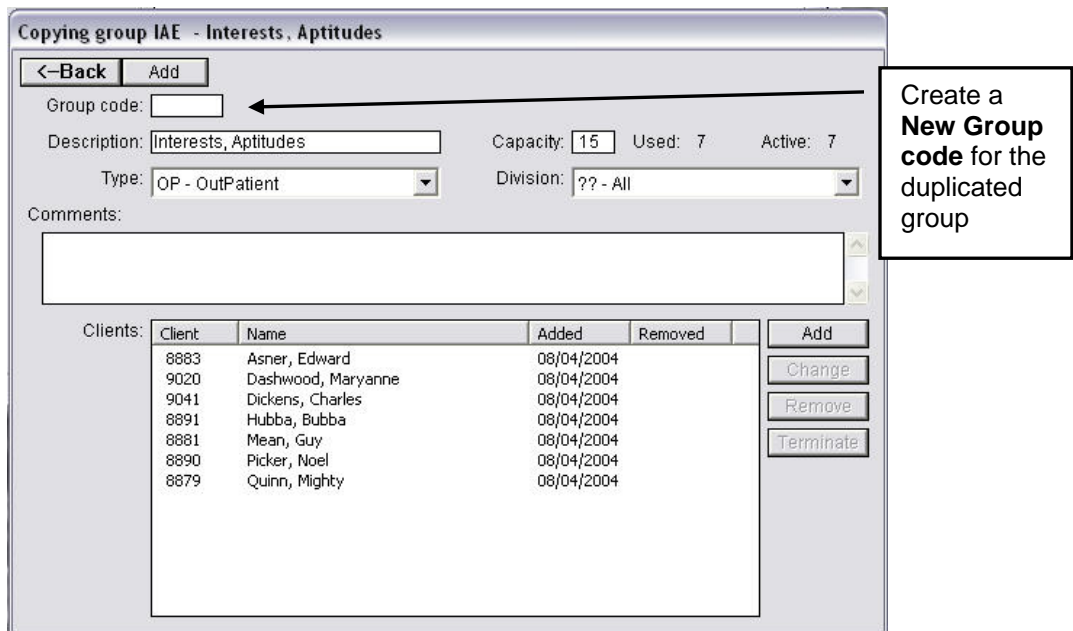
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Delete group – this button irreversibly removes the selected group from agency records. Once deleted, the group and the list of its members cannot be retrieved. In addition, only a group that has no scheduled appointments can be deleted. It is not recommended that this function be used unless there is reason to purge the group information permanently.

There is a **Yes/No** confirmation before proceeding:



Copy group – performs the same function as 'Add group' creating a new group by duplicating members and information of an existing group. A new Group code is needed. For example:



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List groups – this reporting function produces lists of groups and/or the members registered in them. It can generate rosters, list unscheduled groups, or report on membership in groups of various types. The output (print, display, or file) is controlled by the Selection criteria on the ‘**List groups**’ screen. Fill out the criteria, then click ‘**Generate report.**’

List groups

<-Back Generate report

Selection criteria:

Starting group: First group

Ending group: Last group

Type: All types

Division: All divisions

Exclude empty groups? Include? Only em...

List format? Roster format?

One group per page? Yes No

Print all group members? Yes No

Roster format includes signature lines for taking attendance

Search for a client – use this button to find a client and view a quick picture of the groups the client is (or was) in. No information can be changed as the window is for viewing only.

Client search

<-Back

Client: 9015 Bennett, Elizabeth ?

Client is a member of groups:

Group	Description	Type	Added	Removed
CAR	Driving Instruction	OP	02/09/2004	
CC	old group		02/09/2004	
DDX3	Zevi's group		02/03/2004	
IOYA	Young Adult Intensiv	OP	02/03/2004	
P&P	Literature Group	OP	02/03/2004	
PRIM	Primary moring group		02/03/2004	

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Managing Group Membership

The Group Perspective – manage the member list of a group

The Client Perspective – manage the group memberships of a specific client

1. The Group Perspective

When making several changes to the same group, select a specific one from the list and work from the **group perspective**. List members and manage multiple additions, terminations, or deletions from this view.

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Highlight a group on the Groups screen

Click the **'Change group'** Control Button

Group perspective: the **'Change group'** screen:

Detail for group IAE - Interests, Aptitudes

< Back Update

Group code: IAE

Description: Interests, Aptitudes Capacity: 15 Used: 7 Active: 7

Type: OP - OutPatient Division: ?? - All

Comments:
Interests, Aptitudes & Environments Young Persons' Psycho-educational group

Client	Name	Added	Removed	
8883	Asner, Edward	08/04/2004		
9020	Dashwood, Marianne	08/04/2004		Change
9041	Dickens, Charles	08/04/2004		Remove
8891	Hubbs, Bubba	08/04/2004		Terminate
8881	Mear, Guy	08/04/2004		
8890	Picker, Noel	08/04/2004		
8879	Quinn, Mighty	08/04/2004		

Select a client to remove, terminate or change

Click **'Add'** to register a new member, as explained previously.

or,

Select a current member, activating the Control Buttons for that client:

Change - change client's name, enrollment or termination

Remove - deletes client from group without a trace

Terminate - client stays in list, but with a termination date

Click **'Update'** to save any changes, or **'Back'** to return without saving.

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2. The Client Perspective

Manage membership in several groups at once or view the groups a client has been in, or select groups from a list that he or she could join.

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Then, click the '**Add/Terminate clients**' control button.

Select a client, using the '?' Lookup button

(Optionally, select a *Group type* to narrow the view to specific groups)

The '**Add/Terminate clients**' control button manages group memberships for a specific client, not a specific group. It does not matter which group is highlighted in the Group window as a client must first be selected.

After doing so, this view will show three windows:

Client is a member of groups – current memberships

Client has been in groups – former memberships

Groups defined – a list of all groups (or those of a certain kind)

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Client perspective: the **Add/Terminate clients** screen:

Group	Added	Removed
CAR	02/09/2004	
CC	02/09/2004	
IOYA	02/03/2004	
P&P	02/03/2004	
PRIM	02/03/2004	

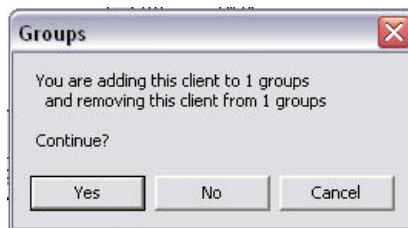
Group	Description	Type	Capacity	U
1	Test group 1	OP	4	
10T	client	IP	5	
A	Test group	IP	12	
A1	Orientation Phase R5	IP	60	
AAAA	Test Group for Inst	IP	250	
ACAP	ACAP Group	OP	120	
ACP2	Zevi's group		60	
ADHC	Ad-Hoc Group		250	
ANEW	ANEW Group	OP	250	
ANON	Anonymous Group 1	AN	250	
AMOR	Anonymous Outreach	AN	250	
CAR	Driving Instruction	OP	250	
CC	old group		60	
CDEP	Chem Dep Group	OP	15	
CDTP	CDTP Group		250	

To Add client to a group, highlight a group from the 'Groups defined' list on the right, then click the **'as of'** date button to add.

To Terminate client from a group, highlight a group from the 'Client is a member of groups' list in the upper left window, then click **'as of'** date to terminate.

Any additions and terminations made will change the display in the left two windows. When done managing the client's memberships, click **'Update'** to return.

A confirmation screen will appear, summarizing actions taken:



If **'Yes'** is chosen, the changes will go into effect.

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Reports

The IMA Desktop produces several reports to monitor groups, membership, scheduling, and staff productivity. Group reports are available through the IMA Desktop main portal.

| [-] REPORTS

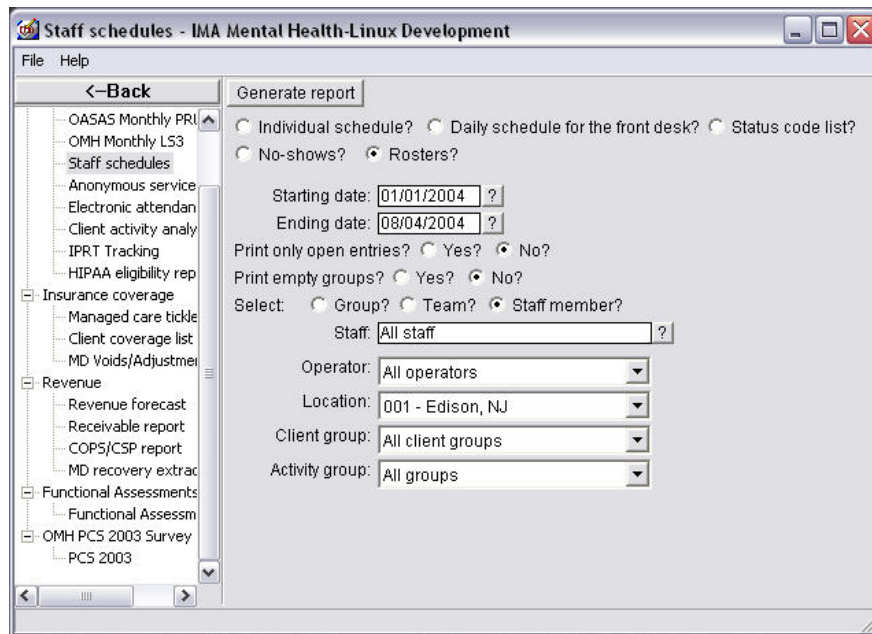
| ->End-user reports...

Then select:

| [-] Reports

| ->Staff schedules

Click the '**Rosters**' button.



Fill in the selection criteria, then click '**Generate report**'.

The criteria allow for several reporting choices, including rosters for a specific group or for all of the day's groups with a signature line for attendance tracking.

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Group types

'Group types' are defined to classify the groups that are operated by the agency.

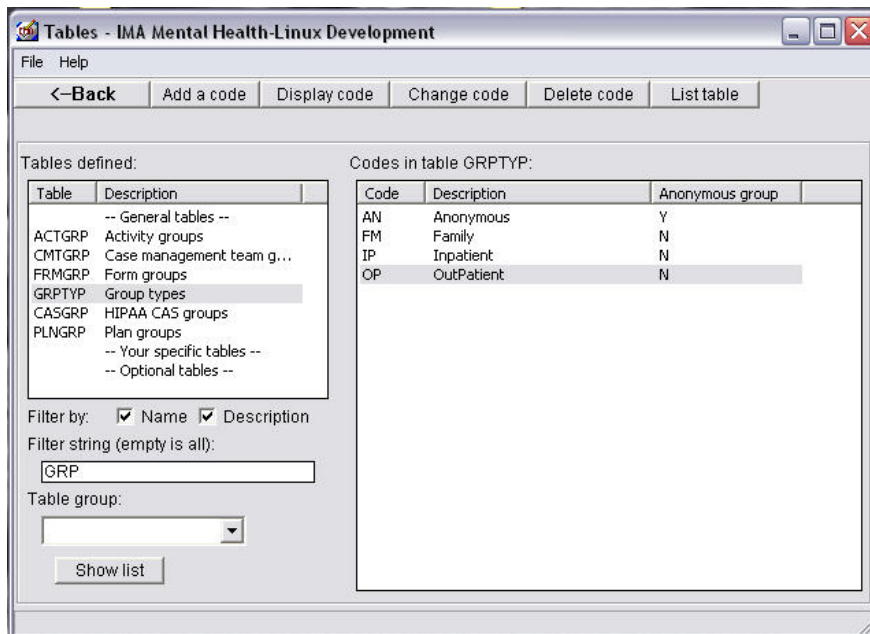
Examples of some group types:

- IP – Inpatient
- OP – Outpatient
- CD – Chemical Dependency
- FM – Family members
- AN – Anonymous

Group types are defined in the **GRPTYP** table. To add types or change this table, click:

```
| [-] SYSTEM ADMINISTRATION
|   [-] System tables
|       ->Table maintenance
```

then click 'Show list', and select **GRPTYP**.



Use the top control bar to click 'Add a code', 'Change code', 'Display code', or 'Delete code' to manage the Group Types used by the agency.