Contents

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:

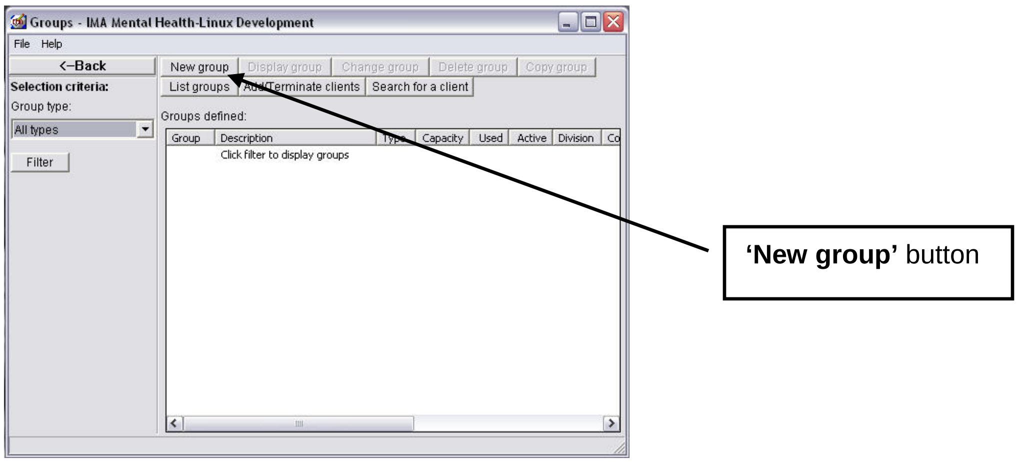
- Group name
- A short (4 character) abbreviation or nickname of the group
- Capacity or normal size of the group
- Recurring meeting time, occasional, or unscheduled
- Set roster of clients, or open for walk-ins
- Billable, or not billable
- A list of the members of the group
- The agency Division of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

Adding a Group

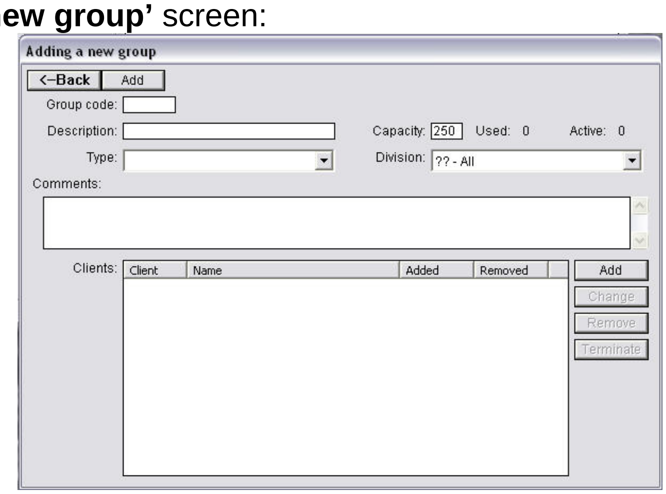
| [-] CLIENT DATABASE
| →Client groups

The **'Groups'** screen.



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

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



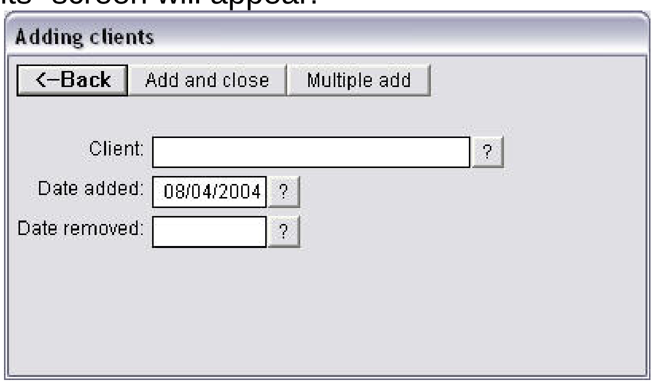
Group Code: an alphanumeric abbreviation up to 4 characters long
Description: description of the group, max 20 characters
Capacity: a numeric value no higher than 250
Type: a drop-down list of classifications from your Group Type table
Division: optional, uses divisional security is in use
Comments: optional, free form text concerning the group

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:



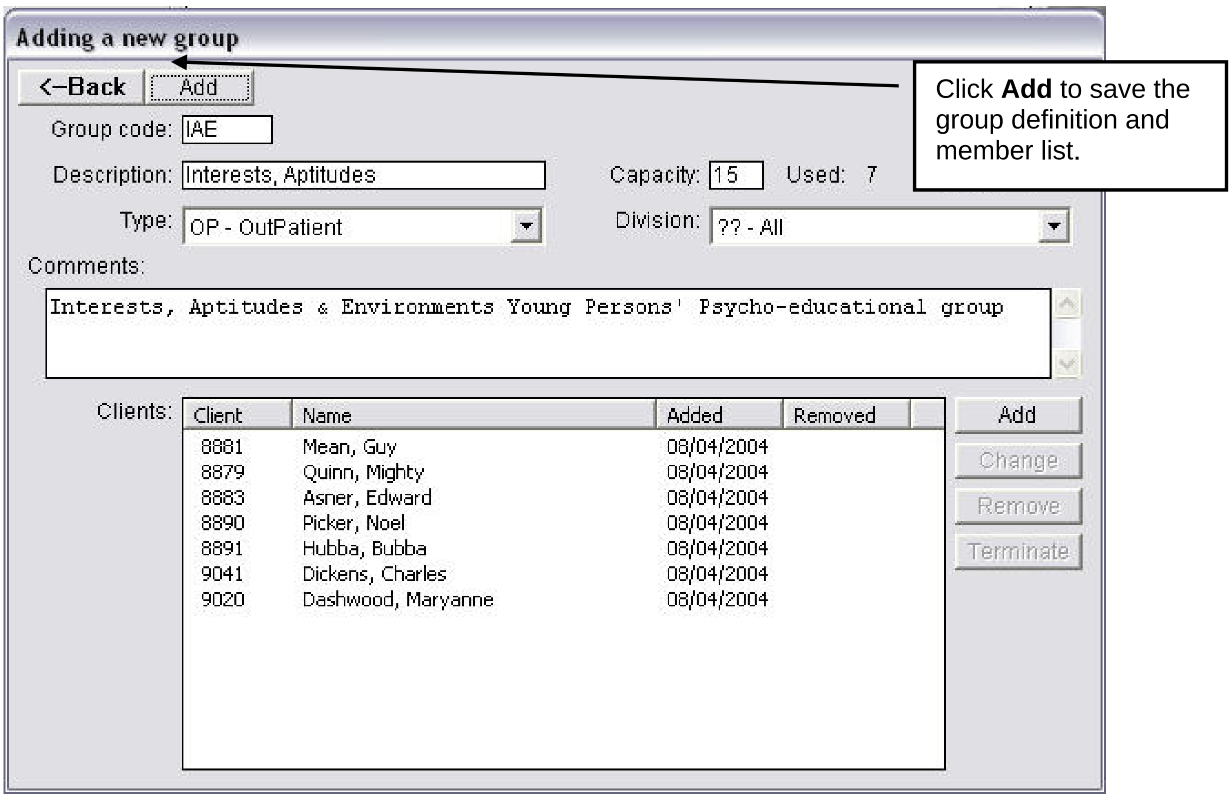
Client: The client's name, selected from the drop-down list;
Date added: will default to today's date; it can be changed.
Date removed: leave blank until the client leaves the group.

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.**'

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



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.

Managing Groups

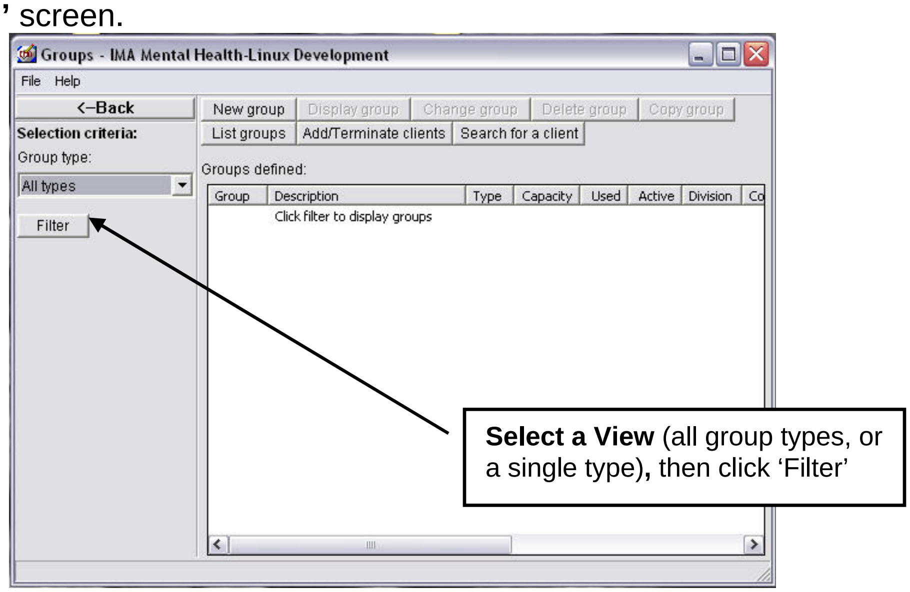
When groups have been defined and a roster of clients added to each one, use the IMA Desktop to help manage the agency's day-to-day:

- 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.

| [-] CLIENT DATABASE
| →Client groups

The '**Groups'** screen.



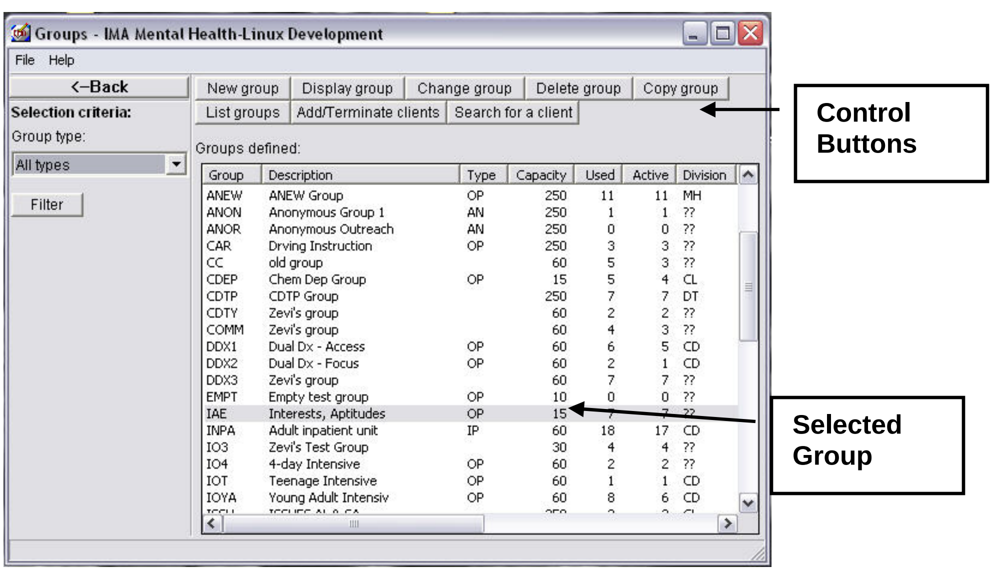
Control Buttons
At the top of the ‘**Groups’** screen:

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***)*.

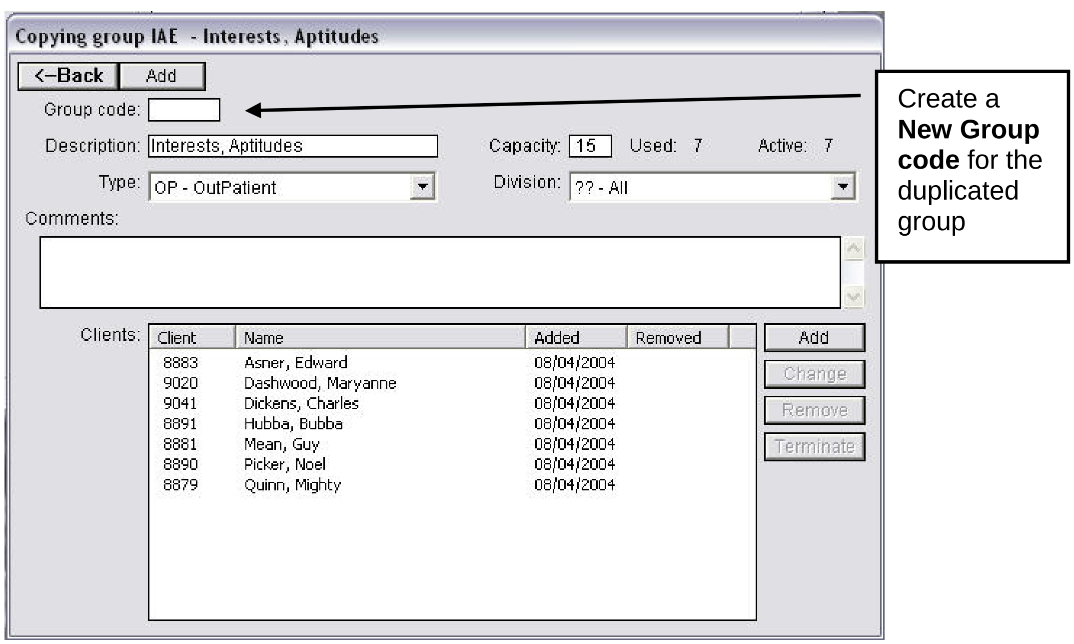
To select a group
Set a group type (or leave the default, ‘All types’).
Click ‘**Filter**’ to display a list of groups.
Highlight a specific group.
The Control Buttons for this group are now active.



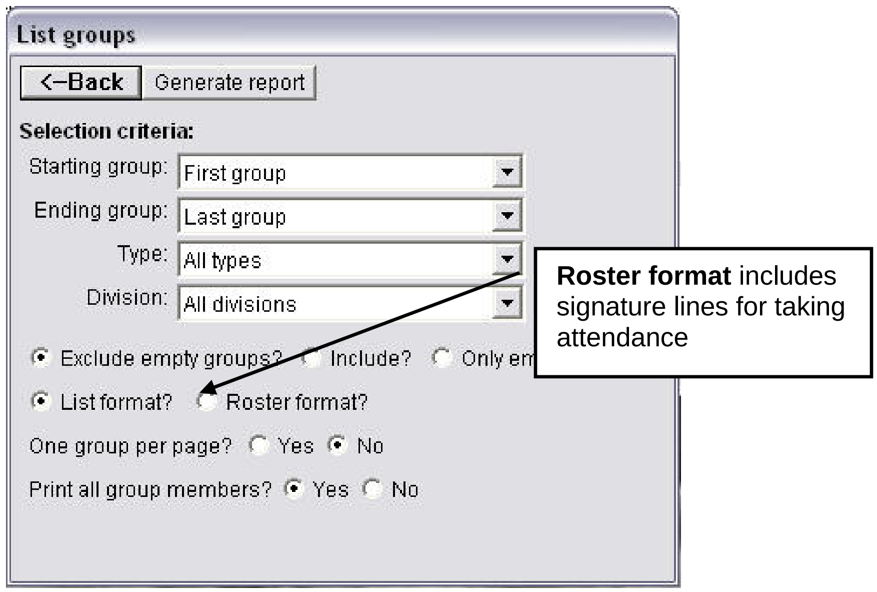
Delete group – this button irreversibly removes the selected group from agency records. Once deleted, the group and the list of its members cannot be retrieved. In addition, only a group that has no scheduled appointments can be deleted. It is not recommended that this function be used unless there is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

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

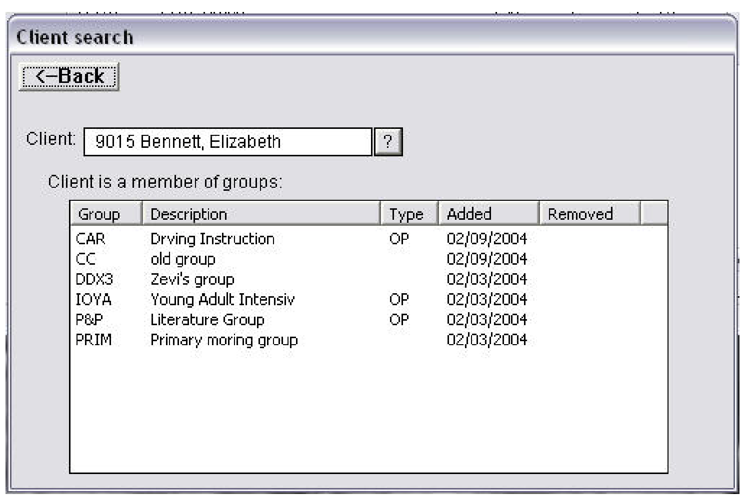
Copy group – performs the same function as '**Add group**' creating a new group by duplicating members and information of an existing group. A new Group code is needed. For example:



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.'**



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.



Managing Group Membership

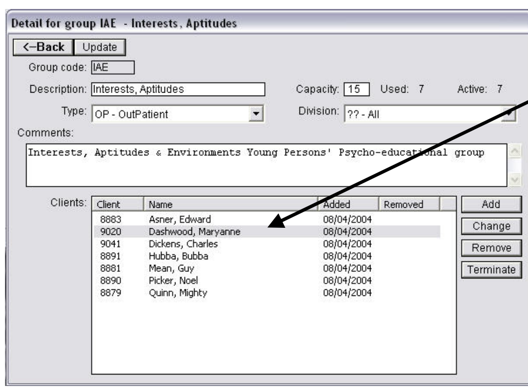
The Group Perspective – manage the member list of a group

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.

| [-] CLIENT DATABASE
| →Client groups
Highlight a group on the Groups screen
Click the '**Change group**' Control Button

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



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.

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.

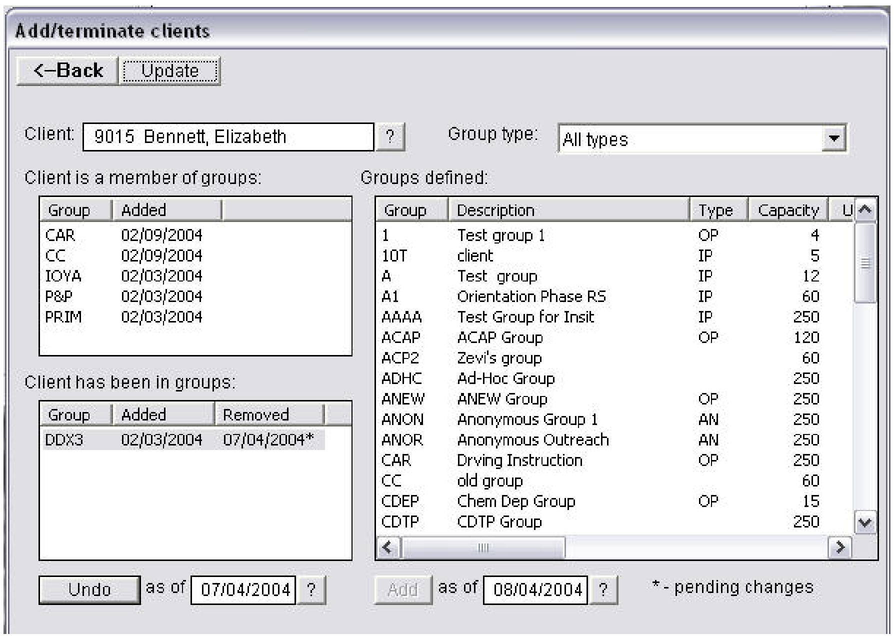
| [-] CLIENT DATABASE
| →Client groups
Then, click the '**Add/Terminate clients**' control button.
Select a client, using the **'?'** Lookup button
(Optionally, select a *Group type* to narrow the view to specific groups)

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 <u>three windows</u>:

Client is a member of groups – <u>current</u> memberships
Client has been in groups – <u>former</u> memberships
Groups defined – a list of <u>all</u> groups (or those of a certain kind)

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



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.

Reports

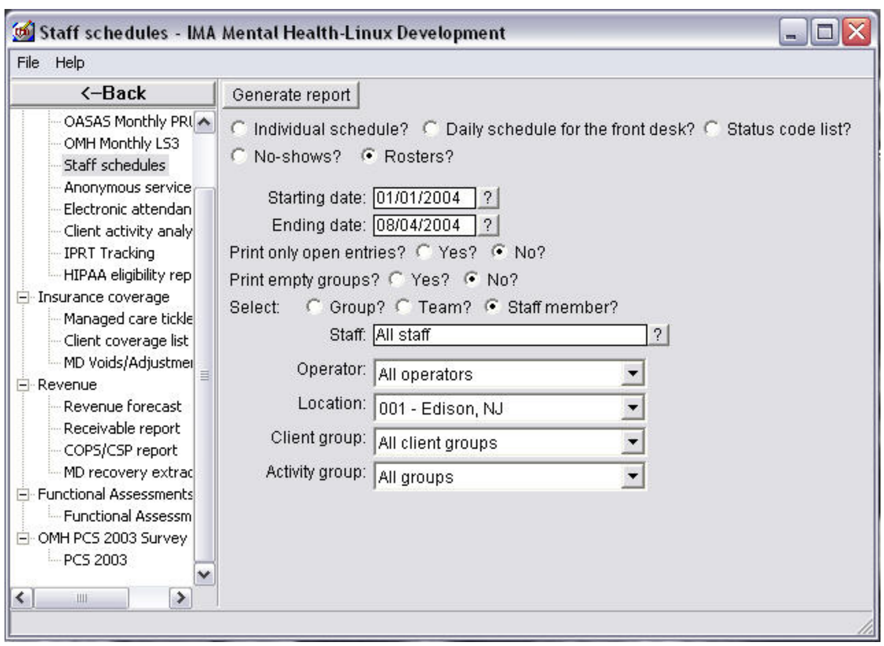
The IMA Desktop produces several reports to monitor groups, membership, scheduling, and staff productivity. Group reports are available through the IMA Desktop main portal.

| [-] 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.

Group types

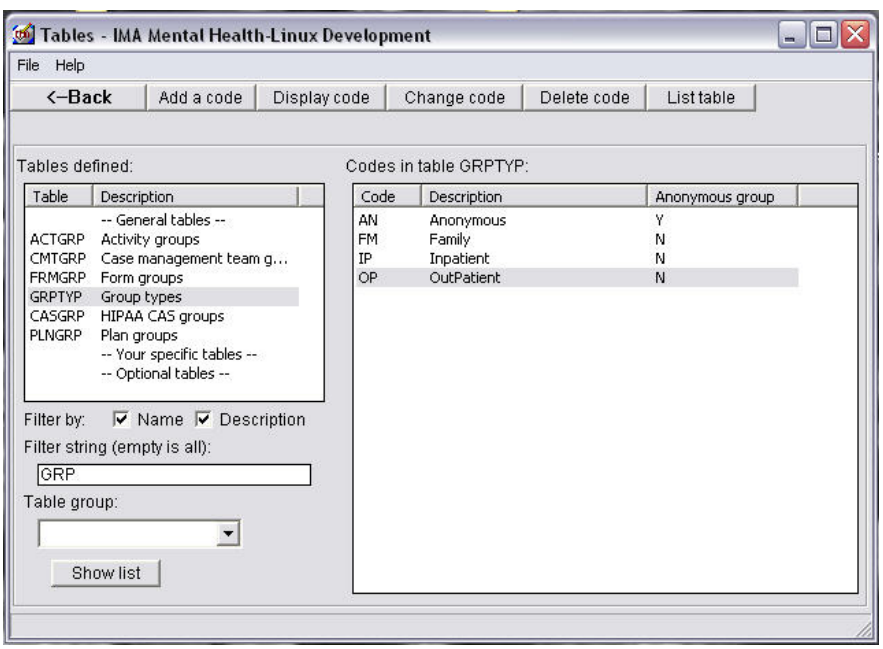
'Group types' are defined to classify the groups that are operated by the agency.
Examples of some group types:

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.