

MCH CDIS GROUPS PROCESS: INITIAL GROUP SET-UP



Speedy Steps

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MCH CDIS *GROUPS* PROCESS

Initial Group Set-up: Creating a New Group Template – An Overview

The initial group set-up (known in CDIS as “Creating a New Group Template”) is designed to be performed by specifically designated staff, such as MCH Coordinators/Team Leaders or Admin staff only

It is important to note that once a Group Template has been created, it CANNOT be deleted

Editing of Group Templates should also only be performed by specifically designated staff, such as MCH Coordinators/Team Leaders or Admin staff

Hint: if your organisation has already created Group Templates by mistake or have templates that aren't being used, it may be beneficial to edit them by changing the 'Council group name' to "DO NOT USE", make them 'inactive' and 'hide' them from the Group Template list. This is to ensure that staff do not add a new group by setting dates to these templates or adding clients to these waitlists. See [Hiding Inactive Existing Group Template](#)

Group Templates are the basic structure of a group.

Group Templates comprise of:

- Group type
- Council group name
- Target age
- Recommended group size
- Number of sessions
- Session topics planned

A waitlist is available for use for every Group Template.

Specific Groups are formed by 'Add new date' (*name changing to: 'Add a group') to that Group Template.

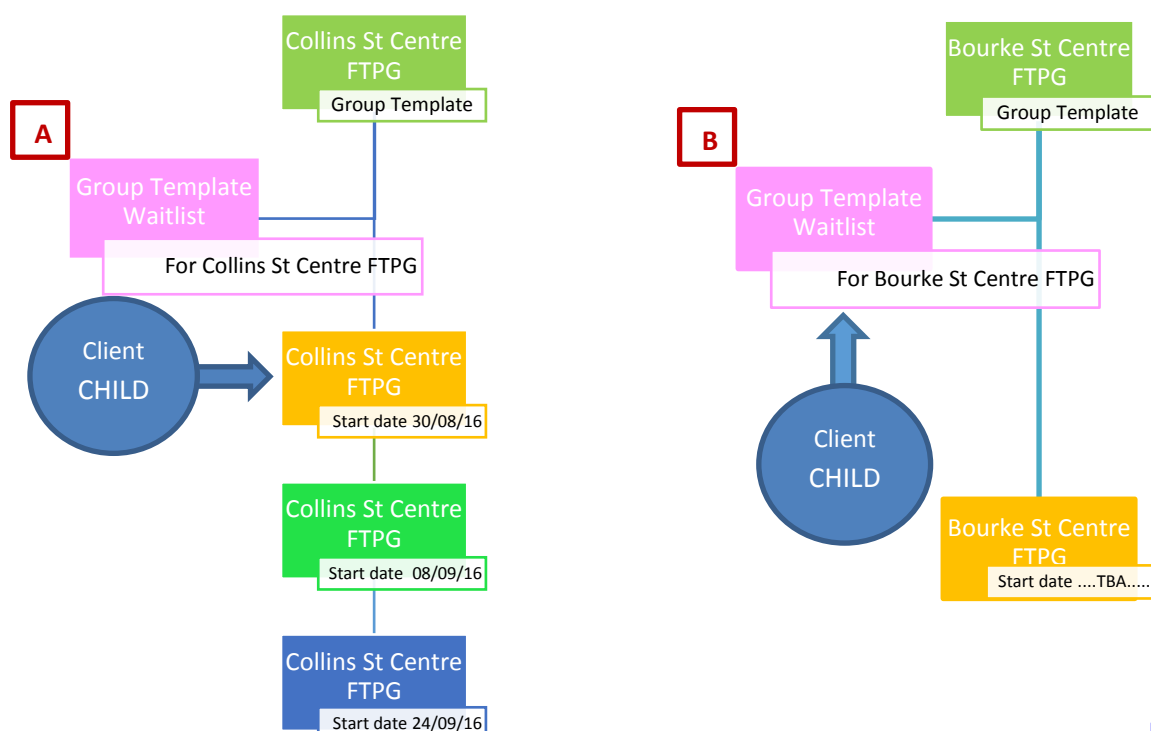
A Client (CHILD) can be:

- A. Added directly to the relevant specific group, or
- B. Added to a Group Template waitlist and then added to a specific group

For example:

If MAV is a Council and has 2 MCH Centres:

- A. Collins St MCH Centre – 3 sites/offices have planned groups, so they book Clients directly into specific groups
- B. Bourke St MCH Centre – 1 site/office places Clients onto the Group Template Waitlist. Once there are enough Clients on the Group Template Waitlist to warrant a group, a group is added to the Group Template and the Clients are moved from the waitlist to that group



Initial Group Set-up: Creating a New Group Template

Home/Search Screen

'Schedule'

'Groups'

'Group Templates'

Click 'Create new group' button

- Button name changing in future to: 'Create new Group Template'

Enter data fields (* are mandatory)

- Consider 'Council group name' (defaults to 'Group type') – rename to easily identify Group Template
- It is recommended to put MCH Centre & Group type; eg. Collins St - FTPG or Bourke St - Baby Makes 3

Select Sessions and Activity/topic, Click 'Add' after each and repeat until completed

- This is for planning purposes only – a guide for that Group Template

Click 'Save'

****All details for a Group Template can be edited, but a Group Template CANNOT be deleted****

Editing an Existing Group Template

Home/Search Screen

'Schedule'

'Groups'

'Group Templates'

Click on greyed out name of the relevant Group Template

"Edit Group" Pop-up Box: Edit data fields as required

- Consider 'Council Group Name' – uniform & easily identifiable across council
- It is recommended to put MCH Centre and Group Type; eg. Collins St (FTPG) or Bourke St (Solids)

Click "Save"

Hiding Inactive Existing Group Templates

It is recommended to edit existing Group Templates that were created by mistake or aren't being currently used:

1. Change the 'Council group name' to "DO NOT USE"
 2. Change to Inactive group, and
 3. 'Hide' them from the Group Templates list
- This will ensure that staff do not add a new group by setting dates to these Group Templates or add clients to these Group Template waitlists

Follow above process for [Editing an Existing Group Template](#)

Change name to "DO NOT USE" in Council group name*, if relevant

Go to: "System Administrator Options only" Section

Click "no" - This group is active

Click tick-box - Hide group from list

Enter "Inactive Reason" - free-text field

Click "Save"

Group Name	Target Age	Owner	Active	Min	Max	Planned
PARLE, Elizabeth	0-5m	Yes	Yes	2	4	10
MURRAY, Sue	0-3 months	Yes	Yes	6	10	6
HELPEDEK, CDES	2	Yes	Yes	2	5	2
WOOD, Carolyn	newborns	Yes	Yes	4	10	4
MURRAY, Sue	0-10 weeks	Yes	Yes	3	10	6
MURRAY, Sue	4-12 weeks	Yes	Yes	5	12	6
MURRAY, Sue	0-12 weeks	Yes	Yes	5	10	6
WILSON, Di	0-3m	Yes	Yes	1	20	3
WILSON, Di	4-weeks	Yes	Yes	6	12	3
WILSON, Di	6 weeks	Yes	Yes	6	10	6
WILSON, Di	6	Yes	Yes	6	8	2
WILSON, Di	6 weeks	Yes	Yes	6	10	6

Note:
Council "System Administrator" can still view the hidden/inactive Group Templates; however ALL other staff cannot view, use, nor add Clients to these hidden/inactive Group Templates