

MCH CDIS GROUPS PROCESS



Speedy Steps

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Contents

| | |
|--|----------|
| MCH CDIS <i>Groups</i> Process: Overview | 2 |
| Add a specific group to Group Template (ie. "Add new date")..... | 3 |
| Add facilitator(s) to a specific group | 3 |
| OPTION A: Add Client (CHILD) directly to a specific group | 3 |
| OPTION B – Step 1: Add Client (CHILD) to Group Template Waitlist..... | 4 |
| OPTION B – Step 2: Viewing Group Template Waitlist..... | 4 |
| OPTION B – Step 3: Move Client (CHILD) from Group Template Waitlist to a specific group..... | 5 |
| Sending SMS to a specific group | 5 |
| Update RSVP status | 5 |
| Editing a specific group – changing dates/times for sessions | 6 |
| Printing a specific group list | 6 |
| Recording Attendance/Outcomes | 7 |
| IMPORTANT NOTE:..... | 7 |

MCH CDIS *Groups* Process: 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

If a Group Type (ie. Template) that is required has NOT been created, contact your MCH Coordinator/Team Leader

Only use Group Templates that have already been created to add groups to

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.

Groups can be set up in advance if group dates are known, or can be set up once there is enough clients on the Group Template waitlist to warrant a group

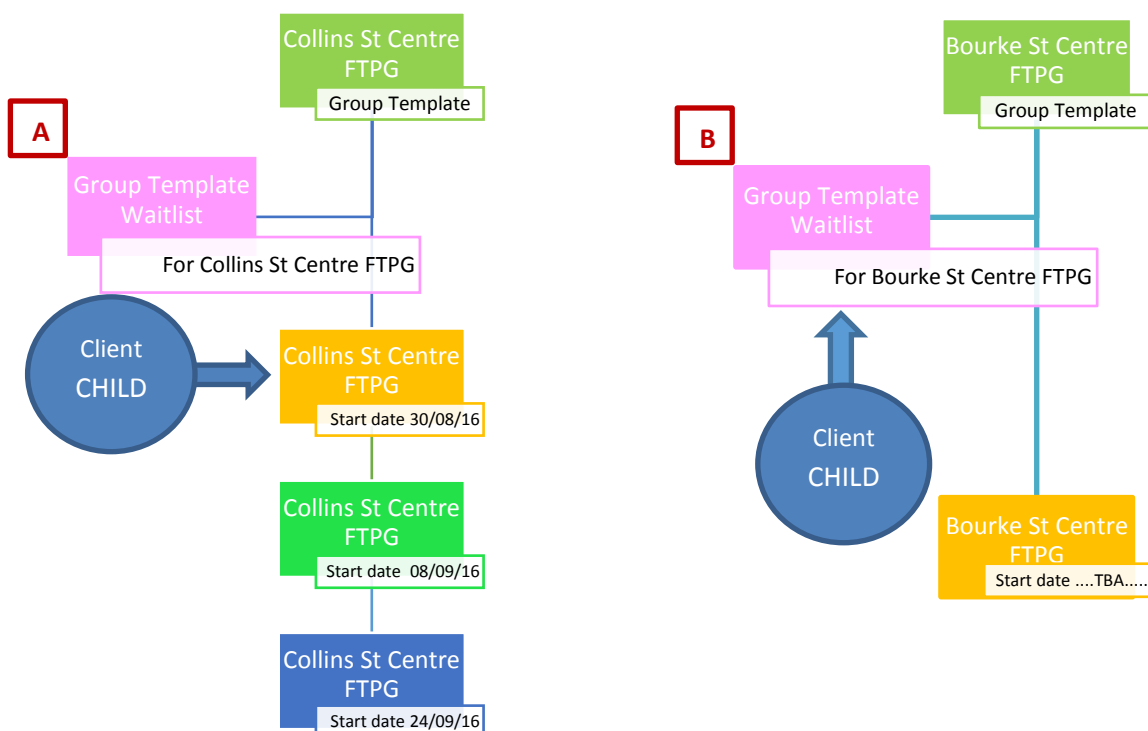
A Client (CHILD) can be:

- 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



Add a specific group to Group Template (ie. “Add new date”)

Home/Search Screen

‘Schedule’

‘Groups’

‘Group Templates’

Click on next to the name of the relevant Group Template

Click on “Add new date” button which is below the name of the relevant Group Template

“Add new start date for group” Pop-up Box:

1. Complete required data fields
2. Click on ‘Calculate Session Dates’ button
3. Edit session dates &/or times if required - use digits/arrows or click on desired date on calendar box
4. Untick box next to session, if wanting to skip a session/day/week etc
 - *Public holidays are NOT currently identified when adding session dates to a group (*upcoming change)*
 - *Ensure dates are checked prior to adding sessions and account for Public Holidays by adding an extra week/session to the group, then untick the public holiday date so it is NOT included in the group dates*
 - *Additional Session dates/times CANNOT be added AFTER the group has commenced*
 - *Session dates/times can ONLY be edited if there are no Clients already allocated in that group*
 - See [Editing a specific group](#) below

Add facilitator(s) to a specific group

Home/Search Screen

‘Schedule’

‘Groups’

‘Manage Groups’

Select the relevant Group Template (this is the Council group name) from ‘Group type’ look-up list

Click “Search”

Click on next to the start date of the relevant specific group

Add facilitator(s) – select from look-up list

Tick box for external facilitator if required & select type from look-up list

Click “confirm facilitator” button

- *“Confirm facilitator” must be clicked in order to be displayed in “Group Attendance/Outcomes”*
- *Only the facilitator(s) can enter the “Group Attendance/Outcomes”*

OPTION A: Add Client (CHILD) directly to a specific group

Client History Screen

‘Clinical Activity’

‘Book Group’

Select the relevant Group Template (this is the Council group name) from ‘Group type’ look-up list

Click “Search”

Click on next to the name of the relevant Group Template

“Group” Pop-up Box:

1. Tick “all future sessions” or individual relevant sessions
2. CHILD is ticked by default – do not untick or tick anyone else
3. Tick “Generate Reminders” if relevant
 - a. Select recipient - Primary Contact
 - b. Tick override default text if relevant [DO NOT ALTER TEXT IN BRACKETS]
 - c. “send confirmation letter to batch print” - **DO NOT USE**
4. Click on “offered”
 - *This is automatically recorded in Client (CHILD) History Notes*
5. Click “Save”
 - *ONLY add CHILD as the group ATTENDEE*

OPTION B – Step 1: Add Client (CHILD) to Group Template Waitlist

Client History Screen

'Clinical Activity'

'Book Group'

Select the relevant Group Template (this is the Council group name) from 'Group type' look-up list

Click "Add to Waitlist" button

Click "ok" - "Client added to waitlist" Confirmation

- A Client (CHILD) can be added multiple times to a waitlist, but they are only displayed once
- NOT automatically recorded in Client (CHILD) History Notes
- ONLY add CHILD as the group ATTENDEE


OPTION B – Step 2: Viewing Group Template Waitlist

Home/Search Screen

'Schedule'

'Groups'

'Group Templates' Waitlist

Click on  next to the name of the relevant Group Template

Options:

1. Print Group Waitlist
 - a. Click "Print Group Waitlist" button
 - b. Open download
 - c. Click "Print" on toolbar
 - This Printed Group List does not display the Group Template Name
2. Send Letter(s) – **DO NOT USE**
3. Send SMS
 - a. Select Client(s) you wish to SMS, by clicking tick box
 - b. Click "Send SMS" button
 - c. Click "ok" – Send SMS?
 - d. "Sms" Pop-up Box:
 - e. Select Recipient(s) – all Primary Contacts ONLY
 - f. SMS Template: Select "Group Waitlist" from look-up list
 - g. Add/edit text as required
 - [DO NOT ALTER TEXT IN BRACKETS]
 - h. Click "Send SMS"
 - SMS is automatically recorded in Client (CHILD) History: Letters/Reports -Correspondence History
 - Organisations may choose to send emails rather than SMS, however currently there is no simple way of doing this – it currently requires accessing the email address from the Client (CHILD) Primary Caregiver History
4. Remove Client(s)
 - a. Click "ok" – "Remove Clients?"
 - This is automatically recorded in the Client (CHILD) History/Notes "removed, [Group type], [start & end date of group] on [entry date]"

OPTION B – Step 3: Move Client (CHILD) from Group Template Waitlist to a specific group

Home/Search Screen


'Schedule'

'Groups'

'Manage Groups'


Select the relevant Group Template (this is the Council group name) from 'Group type' look-up list

Click "Search"

Click on  next to the start date of the relevant specific group

Click "Add Client(s) from W/L" button

"Add from Waitlist" Pop up Box:

1. Tick clients to move to specific group
 2. Click "Add to group" button
 - "Who is Attending" Pop-up box:
 - i. Tick CHILD (self) ONLY
 - ii. Click "Add to group"
- ONLY add CHILD as the group ATTENDEE.
- RSVP Status is "accepted" by default, this is automatically recorded in Client (CHILD) History Notes
- This RSVP status can be changed to "offered" by clicking  next to the Client (CHILD) name on the "Client(s) attached to this group" list; this is automatically recorded in the Client (CHILD) History/Notes

Sending SMS to a specific group

Home/Search Screen

'Schedule'

'Groups'

'Manage groups'

Select the relevant Group Template (this is the Council group name) from 'Group type' look-up list

Click "Search"

Click on  next to the start date of the relevant specific group

Select clients you wish to SMS, by clicking tick box

Click "Send SMS" button

Click "ok" – Send SMS?

"Sms" Pop-up Box:

1. Select Recipient(s) – all Primary Contacts ONLY
 2. SMS Template: Select "Manage Group" from look-up list
 3. Add/edit text as required, eg. Include commencement date/time, location & RSVP details
 - [DO NOT ALTER TEXT IN BRACKETS]
 4. Click "Send SMS"
- SMS is automatically recorded in Client (CHILD) History: Letters/Reports - Correspondence History
- Organisations may choose to send emails rather than SMS, however currently there is no simple way of doing this – it currently requires accessing the email address from the Client (CHILD) Primary Caregiver History

Update RSVP status

Home/Search Screen

'Schedule'


'Groups'

'Manage groups'

Select the relevant Group Template (this is the Council group name) from 'Group type' look-up list

Click "Search"

Click on  next to the start date of the relevant specific group

Click or  next to Client (CHILD) name to update once RSVP'd

"Edit Status" Pop-up Box:

1. Click on "offered", "accepted" or "declined"
 - This is automatically recorded in Client (CHILD) History Notes
 - If "declined" selected - Client (CHILD) is removed from the specific group list
 - A free-text field available for reason, also automatically recorded in Client (CHILD) History Notes
2. Click "Save"

Editing a specific group – changing dates/times for sessions

- *Session dates/times can ONLY be made, if there are no Clients already allocated in that group.*
 1. Client(s) need to be returned to the Group Template waitlist
 - *This is automatically recorded in the Client (CHILD) History/Notes “removed, [Group type], [start & end date of group] on [entry date]”*
 - a. Home/Search Screen
 - b. ‘Schedule’
 - c. ‘Groups’
 - d. ‘Manage Groups’
 - e. Select the relevant Group Template from ‘Group type’ look-up list
 - f. Click “Search”
 - g. Click on next to the start date of the relevant specific group
 - h. Select ALL Clients by clicking tick box
 - i. Click “Return to Waitlist” button
 - j. Click “ok” – “Return clients to Waitlist?”
 2. Alterations can then be made to the group session dates/times for that specific group
 - a. Home/Search Screen
 - b. ‘Schedule’
 - c. ‘Groups’
 - d. ‘Group Templates’
 - e. Click on next to the name of the relevant Group Template
 - f. Click on greyed out Start Date of the relevant specific group
 - g. “Edit Planned Dates for Group” Pop-up Box: Edit data fields as required
 - h. Click “Save”
 3. Return Client(s) back to that group
 - *This is automatically recorded in the Client (CHILD) History/Notes “accepted, [Council group name], [start & end date of group], on [entry date]”*
 - a. Home/Search Screen
 - b. ‘Schedule’
 - c. ‘Groups’
 - d. ‘Manage Groups’
 - e. Select the relevant Group Template from ‘Group type’ look-up list
 - f. Click “Search”
 - g. Click on next to the start date of the relevant specific group
 - h. Click “Add Client(s) from W/L” button
 - “Add from Waitlist” Pop up Box:
 - i. Select Clients by clicking tick-box, to move back to specific group
 - ii. Click “Add to group” button
 - “Who is Attending” Pop-up box:
 - i. Tick CHILD (self) ONLY
 - ii. Click “Add to group”

Printing a specific group list

Home/Search Screen

‘Schedule’

‘Groups’

‘Manage groups’

Select the relevant Group Template (this is the Council group name) from ‘Group type’ look-up list

Click “Search”

Click on next to the start date of the relevant specific group

Click “Print Clients in this group” button

Open download

Click “Print” on toolbar

➤ *This Printed Group List does not display:*

- *The Group Template Name*
- *The specific group session dates/times, location or facilitator*
- *Client Alert/Flags*

Recording Attendance/Outcomes

Home/Search Screen


'Schedule'

'Groups'


'Group Attendance / Outcomes'

Staff name is set in "View my groups" by default

Click "Refresh" button

Click on  next to the start date of the relevant specific group

The following MUST be done in this order:

1. Record DNA - Click on [Client \(CHILD\) hyperlink name](#)
 - a. Pop-up Box: Select relevant session from look-up list
 - b. Click on DNA tick box & select reason from look-up list – recorded in History Notes/DNA History
 - c. Type "DNA – [reason] [+/- comments]" in free-text field – recorded in History/Notes / Notes
For example: "DNA – cancelled. Mother phoned as Client (CHILD) unwell today."
 - d. Click "Save"
2. Click on [Client \(CHILD\) hyperlink name](#) to write individual notes within group setting if relevant
 - a. Pop-up Box: Select relevant session from look-up list
 - b. If Caregiver other than "Mother" attends – document in Child Individual Group Session Notes
"Child attended with [Father/Grandmother/Nanny etc...]"
 - c. Enter free text notes for that individual within group setting if relevant
 - d. Click "Save"
3. Tick boxes of all attendees
4. Click "Notes" to enter session notes – recorded in all Client (CHILD) attendees' History Notes
 - a. Select group topic(s) discussed from look-up list; click  after each
 - b. Document in free text field:
"All children attended with their Mother today, unless otherwise stated."
 - c. Additionally: Enter generic group comment in free text field if relevant
 - d. Click "Save"

**If Caregiver other than "Mother" attends AND/OR you have forgotten to document in Child Individual Group Session Notes prior to this step, add Progress Note in Child History stating:
"Child attended group today with [Father/Grandmother/Nanny]"
or other relevant individual notes from the group session"*

- *Recording Attendance/Outcomes MUST be completed in the specified way otherwise it will not be recorded.*
- *Only 'Facilitators' can enter Group Attendance/Outcomes. Facilitators can be changed whilst the group is in progress (ie. Not all sessions completed) but CANNOT be changed AFTER the group has finished.*
 - *It is recommended that Relievers are edited as Facilitator before the group session starts (as required), so that the Reliever can enter the Group Attendance/Outcomes.*
- *While the Group Template has an activity/topic assigned to each session, this is for planning purposes only.*
 - *On the completion of a group session, it is important to add the session topic(s) actually covered in the "Record Session Outcome" generic group Notes, as it is from here that it is automatically recorded in the Client (CHILD) attendee's History Notes.*
- *If an additional Client arrives to attend a group that was not anticipated, their invitation to the group cannot be back-dated.*
 - *In this case, add a note in the Client's History/Notes that they attended and add them to the group for future dates. After this, they will be displayed in the Attendance/Outcomes for future group sessions.*

IMPORTANT NOTE:

If a Client (CHILD) does NOT have a "Pref Contact Name" listed in the specific group list or the Group Template Waitlist – go to Client (CHILD) History, ensure "Relationship" is linked with Primary Caregiver and the Primary Caregiver is Open"