[☉] How to Make a Group NE Appointment

Chapter 4: Appointment Scheduler Section: Scheduling Appointments Lesson: Special User – Group scheduling

GROUP APPOINTMENT – Four Ways:			
 Thru Group Education Classes 	2) Thru Daily Clinic Schedule	Thru Family Appointment Record	4) Thru Family Summary Screen:
Appointment Scheduler	Appointment Scheduler	Appointment Scheduler	Client Processes
•	Scheduling	•	Lookup
Scheduling	•	Scheduling	•
•	Daily Clinic Schedule	•	Family Summary
Group Maintenance	•	Family Appt Records	Screen (retrieve client using blue
Group Education	Select Clinic & Date	(retrieve client using blue folder icon)	folder icon)
Classes (retrieve class using blue folder icon)	"Display Schedule"	Select WIC ID #	Select Client
Select Group Ed Class (fill-in search criteria)	Double-click in the "Group/Class" field	Find Appt" Button	Find Appointment Button
♥ "Retrieve"	◆ Enter WIC ID #	Fill in Dates & Appt type as GE/GS	Fill in Dates and Appointment Type
•	<u>or</u>	•	"Find Appt"
Insert New Row	Fast Path Client Master	"Find Appt"	T ma 7.ppt ♣
•	& Return with Client	•	"Select Appt" (fill-in
Enter WIC ID #	[Save]	Select Class (WIC ID Autofills)	specific appt type if appt was generic)
Fast Path Client Master & Return with Client	Tab thru or use "Insert Icon" to	♣ "Book"	"BOOK" ♣
↓ [Save]	add more clients.	♦ Close	Close
[~• _]			
Tab thru, or use "Insert Icon" to add more clients.			