

Manage a Client's Group Scheduler Appointments from the Group Note or Client Groups Field on a Form or Note

Last Modified on 03/28/2022 8:32 am EDT

About

You have the ability to manage Scheduler appointments for Groups directly from Group Notes or from a Form or Note that is configured with the **Client Groups** field. There must be an existing Group Appointment already created in the Scheduler for this functionality to work. This functionality helps save your staff time by no longer having them navigate to the scheduler to add or remove appointments for a given client.

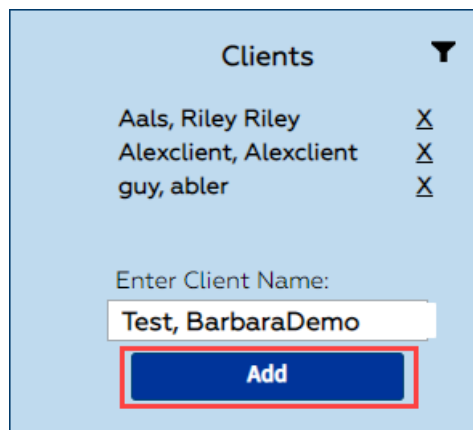


Note: In order for your Agency to utilize this functionality, you must be using the Scheduler and have the *EZScheduleLibrary* setup variable enabled. Please contact NSS Support and reference the setup variable, if you need this turned on.

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Add a Client to Group Scheduler Appointments from a Group Note

1. Navigate to Group Notes: **Main Menu > Progress Notes Menu > Group Notes**.
2. Select an existing group.
3. Under Clients, add a new client to the group by searching for them and clicking the **Add** button.



Clients	
Aals, Riley Riley	<input type="checkbox"/>
Alexclient, Alexclient	<input type="checkbox"/>
guy, abler	<input type="checkbox"/>

Enter Client Name:



Note: Click the Filter  to narrow down your search by Case Assignments, Programs, and Locations.

4. In the Add to Existing Group Appointments window, select the checkbox in the header to select all appointments or individually select appointments. A checkbox is displayed for a row when you hover over that row.

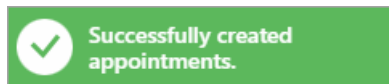
Add to Existing Group Appointments ×

<input type="checkbox"/>	Start Time	End Time	Activity	Location
<input type="checkbox"/>	1/26/2022, 11:00 AM	1/26/2022, 11:30 AM	Default	Default
<input type="checkbox"/>	2/2/2022, 11:00 AM	2/2/2022, 11:30 AM	Default	Default

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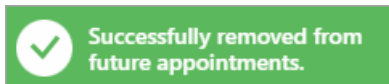
+ Add
Close

5. Click the **+ Add** button.
6. A pop-up is displayed, "Successfully created appointments."



Remove a Client from Group Scheduler Appointments from a Group Note

1. Navigate to Group Notes: **Main Menu > Progress Notes Menu > Group Notes**.
2. Select an existing group.
3. Under Clients, click the **X** next to the client's name.
4. A pop-up is displayed, "Successfully removed from future appointments."



Add a Client to Group Scheduler Appointments from a Form or Note

1. Navigate to a Form or Note that contains the field type, Client Groups.
2. Under Client Groups, click **Add** next to the group you want to add the client to.

Client Groups	
Name	↑
Art Therapy M-F,	Add
Demo Group	Add

3. In the Add to Existing Group Appointments window, select the checkbox in the header to select all appointments or individually select appointments. A checkbox is displayed for a row when you hover over that row.


Add to Existing Group Appointments ×

<input type="checkbox"/>	Start Time	End Time	Activity	Location
<input type="checkbox"/>	1/26/2022, 11:00 AM	1/26/2022, 11:30 AM	Default	Default
<input type="checkbox"/>	2/2/2022, 11:00 AM	2/2/2022, 11:30 AM	Default	Default

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+ Add
Close

4. Click the **+ Add** button.
5. A pop-up is displayed, "Successfully created appointments."

 Successfully created appointments.

6. Complete the Form or Note as you normally would to save your changes.

Remove a Client from Group Scheduler Appointments from a Form or Note

1. Navigate to a Form or Note that contains the field type, Client Groups.
2. Under Client Groups, click **Remove** next to the group you want to remove the client from.
3. A pop-up is displayed, "Are you sure you want to delete this record?" Click the **Yes** button to proceed.

Are you sure you want to delete this record?

4. A pop-up is displayed, "Successfully removed from future appointments."

 Successfully removed from future appointments.

5. Complete the Form or Note as you normally would to save your changes.
