

Manage a User's Group Scheduler Appointments from Maintain Users and Group Notes

Last Modified on 03/28/2022 8:33 am EDT

About

Users can easily be added to or removed from existing groups from within Maintain Users and Group Notes. While doing that, you can also add that user to or remove them from the group's existing Scheduler appointments as long as there is an existing group appointment in the Scheduler. This helps save your staff time from having to navigate to the Scheduler to do this.



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.

Add a User to Group Scheduler Appointments from Maintain Users

1. Navigate to Maintain Users: **Navigation Menu > Maintain Users**.
2. Select an existing user from the **User** drop-down.
3. Under the Groups section, click **Add** to add the user to that group.

GROUPS	
Name	↑
Art Therapy M-F,	Remove
Demo Group	Add

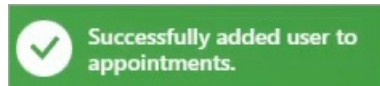
4. In the Add to Existing Group Appointments window, select the checkbox in the header to select all appointments or individually select appointments. A checkbox is displayed for a row when you hover over that row.

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 added user to appointments."



7. Make any other changes to the user profile as necessary and click the **Update User** button.

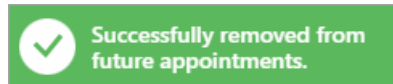
Remove a User from Group Scheduler Appointments from Maintain Users

1. Navigate to Maintain Users: **Navigation Menu > Maintain Users**.
2. Select an existing user from the **User** drop-down.

3. Under the Groups section, click **Remove** to remove the user from the group.

GROUPS	
Name	↑
Art Therapy M-F,	Remove
Demo Group	Remove



4. A pop-up is displayed, "Are you sure you want to delete this record?" Click the **Yes** button to proceed.
5. A pop-up is displayed, "Successfully remove from future appointments."



6. Make any other changes to the user profile as necessary, and click the **Update User** button.

Add a User 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 Users, add a new user to the group by searching for them and clicking the **Add** button.

 **Note:** Click the Filter  to narrow down your search by User Role.

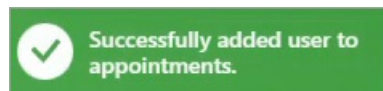
4. In the Add to Existing Group Appointments window, select the checkbox in the header to select all appointments or individually select appointments. A checkbox is displayed for a row when you hover over that row.

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

Page 1 of 1 (2 items) < 1 >

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



Remove a User 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 Users, click the **X** next to the user's name.
4. A pop-up is displayed, "Successfully removed from future appointments."

