

Group Encounter

Group encounters will have multiple family members and possibly multiple staff. When tracking events, there is always a “primary contact”. For group encounters, you may use your agency “contact” as the primary contact and then add all of the family members in attendance at the group event.

1 To find your agency contact, go to Contact tab and search for “agency” contacts. Choose Group = “Agency” and click <Find>

The screenshot shows the 'Contact Search' form. The 'Group' dropdown menu is open, showing options: '1) Baby TALK', '2) Donor', '3) Donor Prospect', and 'Agency'. A green arrow points from the number '1' to the 'Agency' option. Another green arrow points from the 'Find' button to the right.

2 You will see the agency contact created for your agency/program. Choose that contact code.

The screenshot shows the 'Contact Search' form with the 'Group' dropdown set to 'Agency'. Below the form is a table of results. A green arrow points from the number '2' to the first row of the table.

Code	Send	Name	Company	Address	Email	Phones	Role	Group	Status	User	Updated
46	<input type="checkbox"/>	Community Childcare	Community Childcare	710 N. Clay, Jacksonville, Illinois 62651,			Agency	Agency	Active		3/5/2017
70	<input type="checkbox"/>	Community Consolidated School District 146; Bridges	Community Consolidated School District 146; Bridges	6535 N Victoria Dr., Oak Forest, Illinois 60452,			Agency	Agency	Active		3/5/2017
1	<input type="checkbox"/>	Decatur	Decatur	500 East Lake Shore Drive, Decatur, Illinois 62521,			Agency	Agency	Active		3/5/2017
73	<input type="checkbox"/>	Early Explorations/Early Explorations Too	Early Explorations/Early Explorations Too	47 N Research Drive, Edwardsville, Illinois 62025,			Agency	Agency	Active		3/5/2017
78	<input type="checkbox"/>	Early Years Program (Jacksonville)	Early Years Program (Jacksonville)	110 Walnut Ct., Jacksonville, Illinois 62650,			Agency	Agency	Active		3/5/2017
49	<input type="checkbox"/>	East Richland Elementary School	East Richland Elementary School	1001 N Holly St., Olney, Illinois 62450,			Agency	Agency	Active		3/5/2017
61	<input type="checkbox"/>	El Paso Gridley CUSD #11	El Paso Gridley CUSD #11	97 W 5th St., El Paso, Illinois 61738,			Agency	Agency	Active		3/5/2017

3 Choose “02) Group Encounter. Click <New Event>

The screenshot shows the 'Contact View' form for contact code 'DX' and contact #92883. The 'New Event' button is highlighted, and a dropdown menu is open showing options: '02) Group Encounter', '01) Personal Encounter', '02) Group Encounter', '03) Newborn Encounter', and '04) Prenatal Encounter'. A green arrow points from the number '3' to the '02) Group Encounter' option.

Group Encounter

The system will take you to this screen that tracks the general details for the event:

Field	Value
Event	A short description. Not used for reporting. Does appear on the calendar view on the Event tab.
Date	Date on which the event is planned or the date on which happened (or was supposed to have happened)
Start time/End time	Start and end time of the group encounter
Description	General notes about the group
Status	Pending or Complete. Void is only used to eliminate errors or duplication.
Open/Closed	Open for all future events Closed for all other. Note: If an event is closed, you will be unable to make changes to the associated contacts and staff. If you need to make corrections, set the status to "open", <save>, make changes, and re-set to "closed" and <save> again
Division	"Home Visiting" or appropriate division if not Prevention Initiative
Program	Choose appropriate program for your agency
Program Location	Choose appropriate program location for your agency
Activity	<p>For Home Visiting division, choose one:</p> <div style="border: 1px solid blue; padding: 5px; margin: 5px 0;"> <p>Parent/Child Group Family Fun Parent Workshop Community Outreach/Screening</p> </div> <p>For other divisions, choose one:</p> <p>Parent/Child Group Family Fun Parent Workshop Community Outreach/Screening Baby TALK Times Come Sign with Me Kindermusik Library Time GED attendance Child Education attendance Adult Education attendance High school credit attendance</p>



Click <Save>

Group Encounter

5 Now, you can add more contacts

6 More staff

Event Edit Standard Summary Print Outlook Event Details Contacts Files

Create Recurrence

Event: Read for Joy

Contact: Demonstration: Demonstration (92883) Edit Type: 02) Group Encounter

Date: 05/25/2017 (mm/dd/yyyy) Start Time: 5:00 PM

Remind me: 0 days before this event. End Time: 6:30 PM

Minutes: 90

Description:

Assigned To: Userid

Notify me if not closed by: Edit

Status: Complete Open/Closed: Closed Access: Public

Division: Home Visiting

Program: Prevention Initiative

Program Location: Library

Activity: Parent/Child Group

Available Forms/Surveys:

Copy Contacts

Copy Event

7 You will also see that you can open and create a group encounter form.

Group Encounter

Add more Contacts to Event

8 Click <Edit> next to the primary contact name or click on the <Contacts> tab on the upper right of the Event screen.

Event Edit | Standard Summary | Print | Outlook | **Event Details** | **Contacts** | Files

Event: Read for Joy

Contact: **Demonstration: Demonstration (92883)** Edit | Type: 02) Group Encounter

Date: 05/25/2017 (mm/dd/yyyy) | Start Time: 5:00 PM | End Time: 6:30 PM | Minutes: 90

Remind me: 0 days before this event.

Create Recurrence

9 Use Search to pull up list of contacts, select each participant in the group, and click <Save Checked>.

Event Edit | Print | Outlook | Event Details | **Contacts** | Files

Search Contacts | Advanced

Contact/Company/Email: smith | Find

Results:

Sarah Smith (SX)	Add >>	<input checked="" type="checkbox"/>
Sarahmy Smith (SX)	Add >>	<input checked="" type="checkbox"/>
Sarahh Smith (SX)	Add >>	<input checked="" type="checkbox"/>

Total contacts: 3

Save Checked

Read for Joy
5/25/2017 5:00 PM - 02) Group Encounter

Primary Contact

Company	First Name	Last Name	Status	Minutes
Demonstration	Demonstration	Complete	90	Delete

Repeat this to step to get all participants in the group added to the list of contacts.

Group Encounter

On the contact view, you will maintain the status for each person. Note: The primary contact status is the same status as the Event status. Once you have added and/or updated contacts, click on <Event Details> to get back to the main screen for the event.

Note: If you do not see all of the contacts you previously selected, click <Update>

Event Edit Print Outlook Event Details **Contacts** Files

Search Contacts Advanced

Contact/Company/Email

Read for Joy Reload

5/25/2017 5:00 PM - 02) Group Encounter

Primary Contact

Company	First Name	Last Name	Status	Minutes	
Demonstration	Demonstration		Complete	90	<input type="button" value="Delete"/>

Additional Contacts

<input type="checkbox"/>	Company	First Name	Last Name	Status	Minutes	
<input type="checkbox"/>		Johnny	Doe	Complete	90	<input type="button" value="Delete"/>
<input type="checkbox"/>		Jane	Doe	Complete	90	<input type="button" value="Delete"/>
<input type="checkbox"/>		Sam	Smith	Complete	90	<input type="button" value="Delete"/>
<input type="checkbox"/>		Sarah	Smith	Complete	90	<input type="button" value="Delete"/>
<input type="checkbox"/>		Sammy	Smith	Complete	90	<input type="button" value="Delete"/>

Select All 5 Contacts

Cancelled by Client

Add more Staff to Event

- 10 When you click on <More staff> (see previous event details screen), you will be able to select additional staff for the event. Use <Ctrl> key to select multiple staff.

Group Encounter

Description:

Assigned To: Userid

Additional Staff:

- Amy Malone - admin
- Amy Malone - enduser
- April Ingram
- Cindy Bardeleben
- Deb Widenhofer

Save

Description:

Assigned To: Userid Status: Cancelled by Client Minutes Payroll: Hourly

More Staff

Additional Staff	Status	Minutes	
Amy Malone - enduser	Complete	<input type="text"/>	<input type="checkbox"/>
Cindy Bardeleben	Complete	<input type="text"/>	<input type="checkbox"/>

Delete

Notify me if not closed by: [Edit](#)

Division: Home Visiting

Program: Prevention Initiative

Program Location: Library

Activity: Parent/Child Group

Available Forms/Surveys: [Create Group Encounter](#)

Save Save & New Save & Close Cancel

Copy Contacts

Coov Event

11

Finally, select <Create Group Encounter form>

Group Encounter

Group Encounter

IMPORTANT: Please click the Save Changes button below to save your entries before closing this window. You can return to complete the form later.

Save Changes

Event: 02 Group Encounter (5/25/2017)
 Contact: Demonstration , Demonstration (DX)
 Subject:
 Date: 05-26-2017
 Type: N/A
 Public: Locked Unlocked
 Autosave:

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1. Default Page

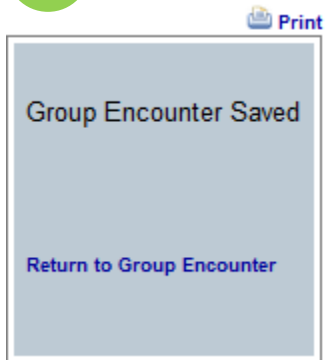
1. Description of Content or Agenda/Curriculum/ELG

2. Area of instruction

- Child growth & development, including prenatal development
- Child birth & child care
- Child safety and injury prevention
- Family structure, function, & management
- Prenatal & postnatal care for mothers and infants
- Prevention of child abuse
- Physical, mental, emotional, social, economic, and psychological aspects of interpersonal & family relationships
- Parenting skill development

12 Choose <Autosave>

13 <Save changes> when complete



You may return to Group Encounter form to edit, print the completed form, or close the tab and return to the event details and <Save>