Create / Manage Groups

Description

The ability to create Groups of people is available within the Portal. Utilizing Groups when scheduling virtual appointments is easy and allows for consistency of attendees so no one is potentially left out of a meeting. These Groups can be made of Patients for group sessions, Users of the Portal for staff meetings or both.
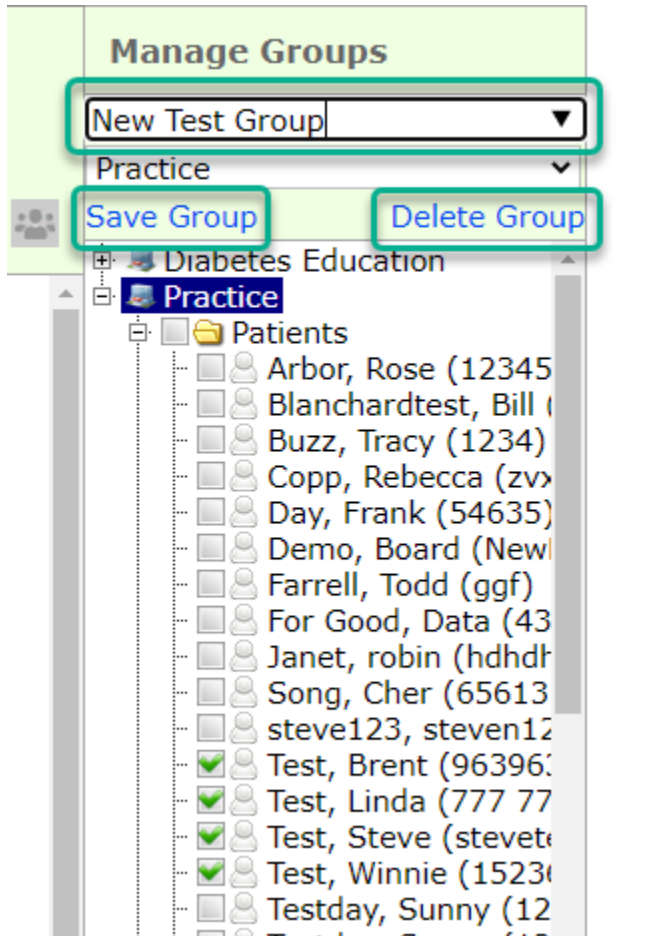
Create New Group

To create a Group while in the Review page of the Portal, **Click** on the **Group** icon on the main window.

Edit / Delete a Group

Groups can be Edited by **Selecting** the **Group** in the list, make the necessary changes then **Click Save Group** or Deleted by **Selecting** the **Group** in the list then **Click Delete Group**.

Manage Groups

| New Test Group | ▼ |

| Practice | ˅ |

Save Group   **Delete Group**

⊞ Diabetes Education
⊟ Practice
  ⊟ ☐ 📁 Patients
    ☐ Arbor, Rose (12345
    ☐ Blanchardtest, Bill (
    ☐ Buzz, Tracy (1234)
    ☐ Copp, Rebecca (zvx
    ☐ Day, Frank (54635)
    ☐ Demo, Board (Newl
    ☐ Farrell, Todd (ggf)
    ☐ For Good, Data (43
    ☐ Janet, robin (hdhdh
    ☐ Song, Cher (65613
    ☐ steve123, steven1z
    ☑ Test, Brent (96396:
    ☑ Test, Linda (777 77
    ☑ Test, Steve (stevet
    ☑ Test, Winnie (1523(
    ☐ Testday, Sunny (12

Edit, Delete, Create New Group When Creating Appointment

Groups can also be Edited, Deleted and New Groups created, all within the Add Appointment screen.

Edit / Delete Existing Group

To edit a Group, **select** the **Site** and the **Group** to be edited, when complete **Click Save Group**. To Delete a group, **select** the **Site** and the **Group** to be deleted, then **Click Delete Group**.

Create New Group

To create a new Group, **type in** the **Group Name**, the associated **Site**, choose the members of the group and **Click Save Group.**
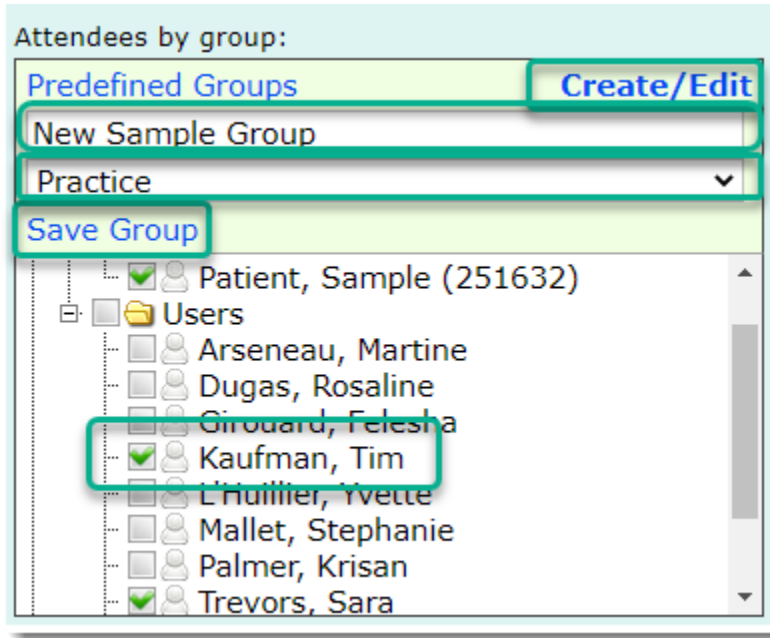
For More Information or Technical Support Give Us a Call

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