

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

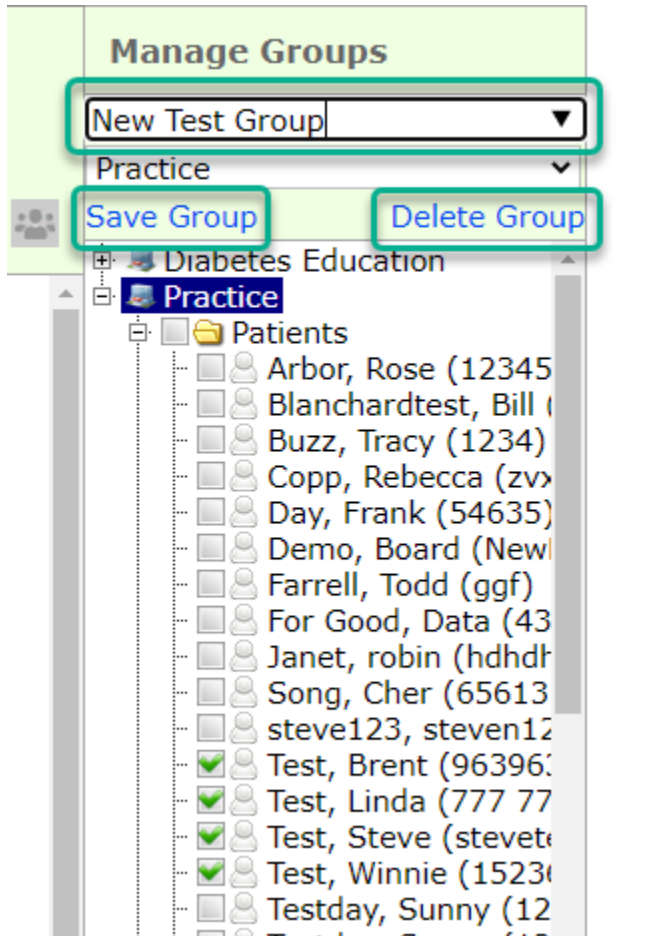
To create a Group while in the Review page of the Portal, **Click** on the **Group** icon on the main window.



The screenshot displays the 'Manage Groups' dialog box in the Second Opinion Portal. The dialog has a title bar 'Manage Groups' and a text input field containing 'New Test Group'. Below the input field is a dropdown menu currently set to 'Practice'. A 'Save Group' button is located at the bottom left of the dialog. To the right of the dialog, a green notification banner displays a save icon and the text 'Group has been saved.' The background shows a list of patients under the 'Practice' folder, with four test patients selected: 'Test, Brent (96396)', 'Test, Linda (777 7)', 'Test, Steve (steve)', and 'Test, Winnie (1523)'. The top of the interface shows a breadcrumb 'Root > Practice' and a toolbar with various icons, including a group icon highlighted with a red box.

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**.



Edit, Delete, Create New Group When Creating Appointment

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

Add Appointment
 An email will be sent to: the specialist, the patient, and specified attendees.

Specialist: Demo Demo Patient: Demo, Board (NewPatient81)
 Appointment Title: Sample Appointment Referral:
 Appointment Notification Description: Text Included on Notifications
 Appointment Date: 24/06/2020 Appointment Time: 17:00 - 17:15 PDT
 Video Meeting: None Zoom Meeting Other
 Send Notifications to Myself
 Submit Appointment

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**.

Attendees by group:

Predefined Groups **Create/Edit**

Paula's Play Group

Practice

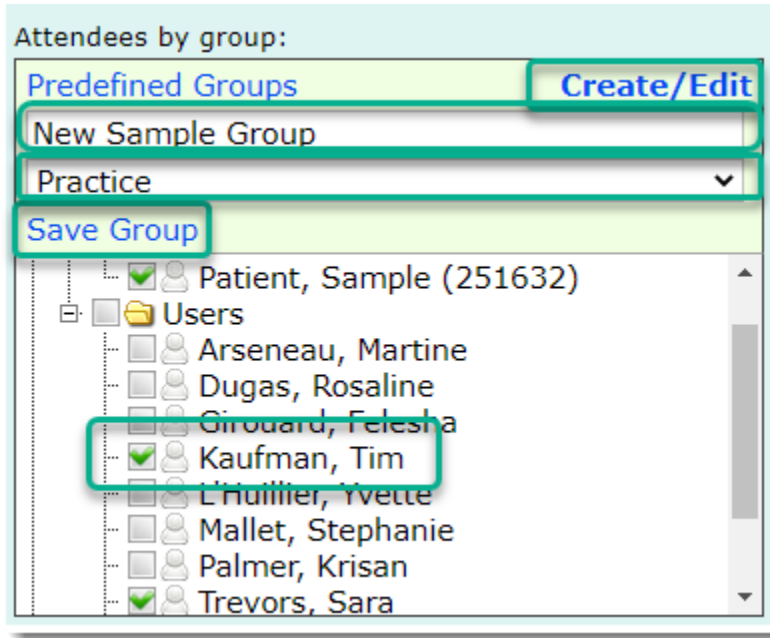
Save Group **Delete Group**

- Diabetes Education
- Practice
 - Patients
 - Blanchardtest, Bill (jhahfhfu454)
 - Buzz, Tracy (1234)
 - Copp, Rebecca (zvxcvxcv)
 - Day, Frank (54635)
 - Demo, Board (NewPatient81)
 - For Good, Data (4323434252)

Attendees by email:

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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