

How do I assign a task to a group?

07/24/2024 3:40 pm EDT

If your practice has a group of individuals who consistently receive the same tasks simultaneously, you may create a user group with that group.

1. You will be able to add user groups through the **Staff Member** management page. To access this page, mouse over **Account** and select **Staff Members**.

The screenshot shows a dark navigation bar with 'Account' and 'Help' buttons. Below it, a list of settings categories is shown: PROVIDER SETTINGS (Account Settings, onpatient Settings, Telehealth Settings, Account Setup, Custom Fields, Copy Dashboard (Beta), API, App Directory), PRACTICE SETTINGS (Offices, Facilities, Staff Members, Staff Permissions, eRx Settings). The 'Staff Members' option is highlighted with a blue background.

2. To add a user group, select the **Groups** tab and click **+ New Group**.

The screenshot shows the 'Groups' management page. At the top, there are tabs for 'Providers', 'Staff', 'Consultants', and 'Groups'. A '+ New Group' button is visible. Below is a table with columns for Group Name, Members, and Status. The table lists three groups: Front Desk (3 members), Lab Tech (2 members), and Test Group (4 members). Each group has 'Edit' and 'Archive' buttons.

Group Name	Members	Status
Front Desk	Dr. James Smith, Jason Sample, Nick Riviera 3 members	active
Lab Tech	Jason Sample, Nick Riviera 2 members	active
Test Group	Dr. James Smith, Jason Sample, Nick Riviera and 1 more 4 members	active

3. Name your group, select the members, and **Save**.

Front Desk
✕

Members (3)

Dr. Albert Davis	Provider <input type="checkbox"/>
Dr. Albert Davis	Provider <input type="checkbox"/>
Dr. James Smith	Provider <input checked="" type="checkbox"/>
DrChrono Content	Staff <input type="checkbox"/>
Jason Sample	Staff <input type="checkbox"/>
Pasword Test	Staff <input type="checkbox"/>
Sample Doctor	Provider <input checked="" type="checkbox"/>
Sample Medical	Staff <input checked="" type="checkbox"/>

Close
Save

4. Once your user group is created, once you assign a new task, you will have the option to select your new group. When you select this group, your task will be assigned to all members of your group.

Add Task
Select template ▾
✕

Assign To*

Category

Status*

Due Date

Priority*

Note

✓ — Select one —
▾

Groups

- Front Desk
- Lab Tech
- Test Group
- Walkme Group

Users

- Dr. Albert Davis
- Dr. Albert Davis
- Dr. James Smith
- DrChrono Content
- Jason Sample