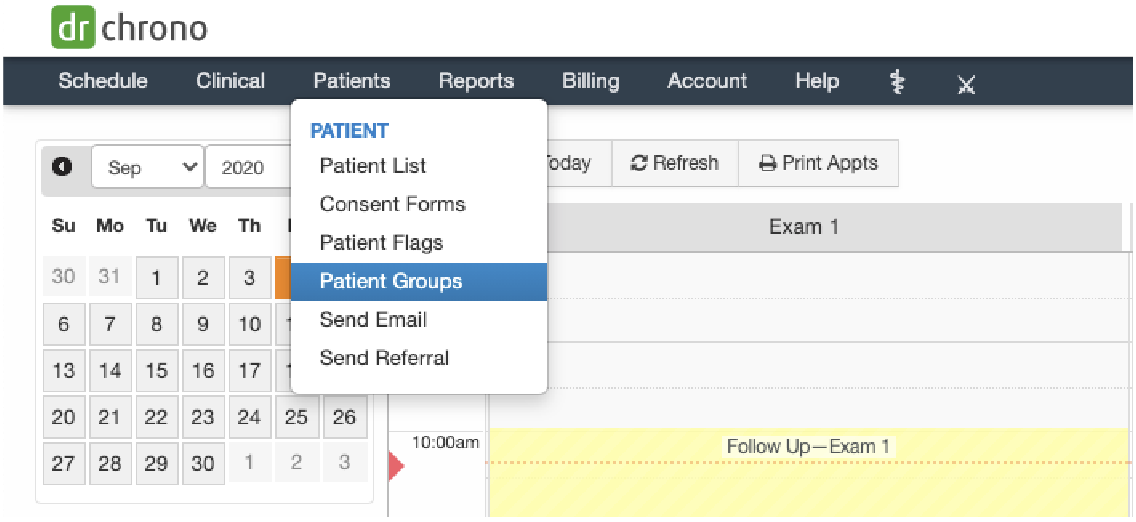
Creating and Managing Patient Groups

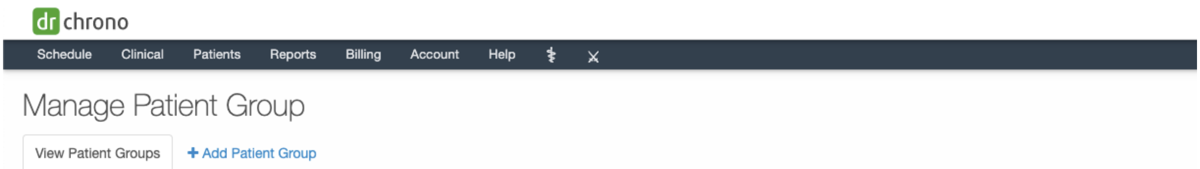
07/24/2024 1:30 pm EDT

Patient groups can help you manage your patients by giving you the ability to group them in ways that fit with the workflows of your practice.

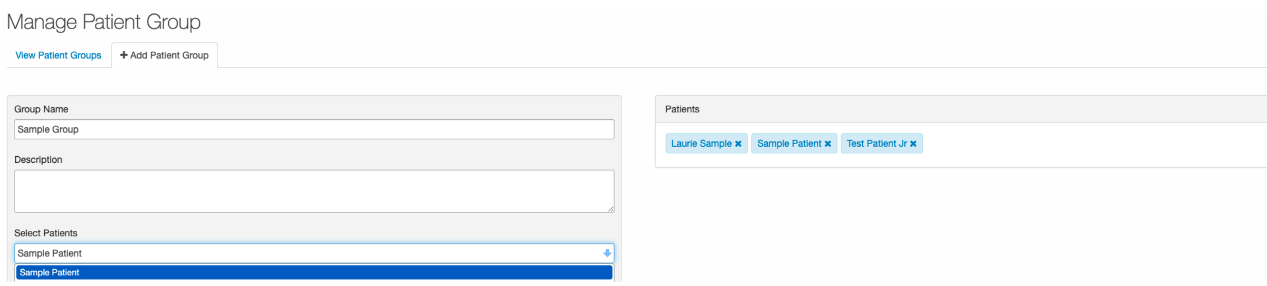
1. Go to **Patient** > **Patient Groups**.



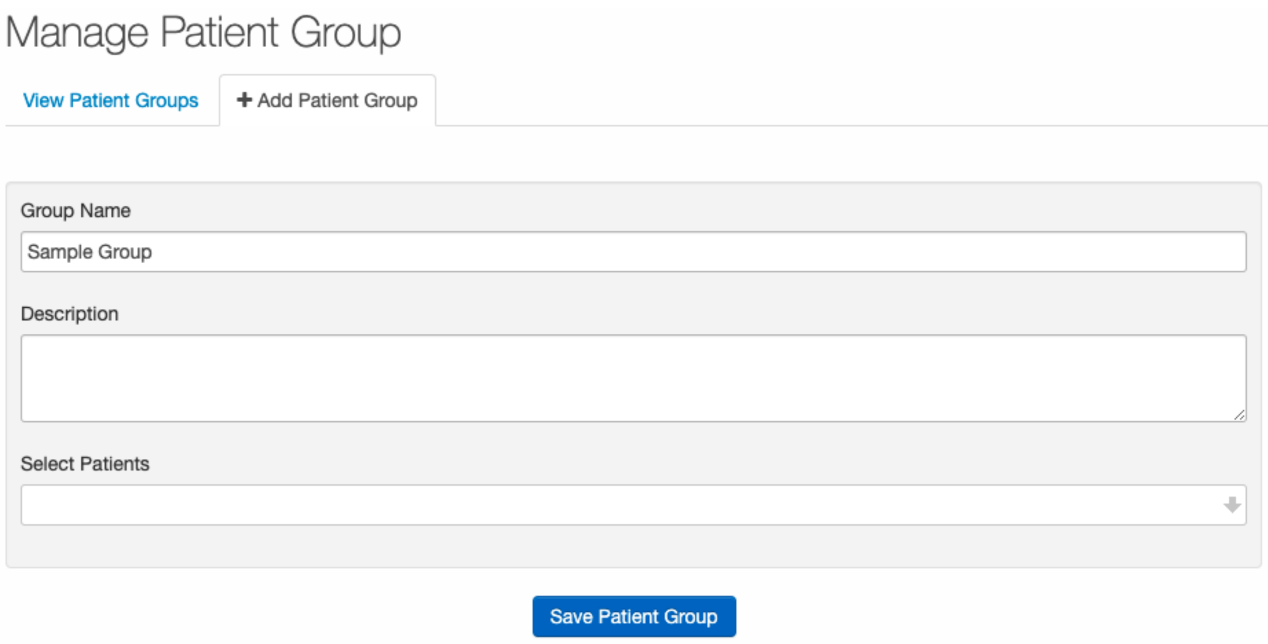
2. This will take you to your Patient Group page. To create a new Patient Group click **+ Add Patient Group.**



3. Enter the group name and group description of your new group and to add new patients to the group enter the patient name in the search bar and select the desired patient. Continue to add patients until you've added all of the patients you wish to place into the group.

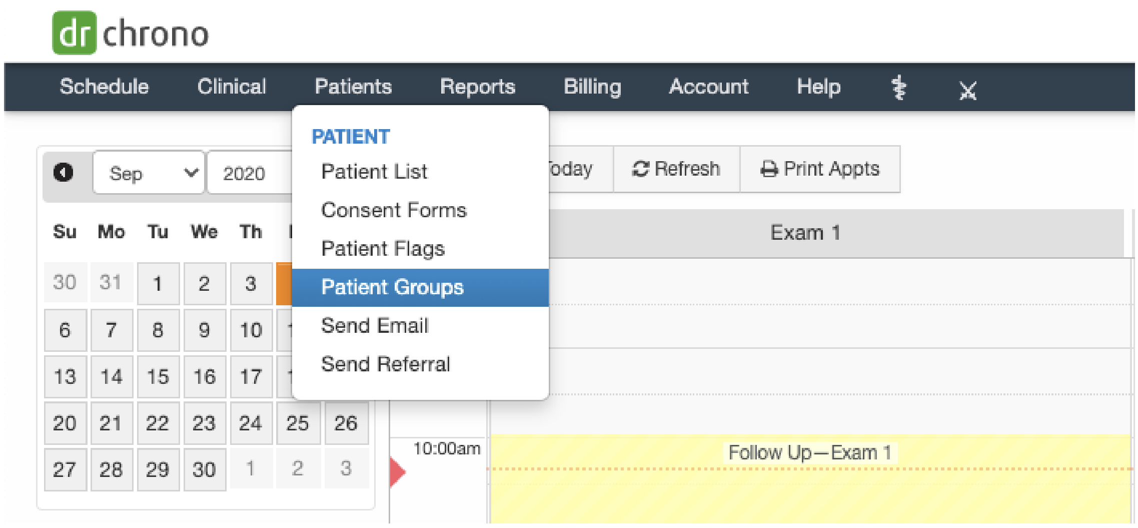


5. Click the blue **Save Patient Group** button to save your new group.

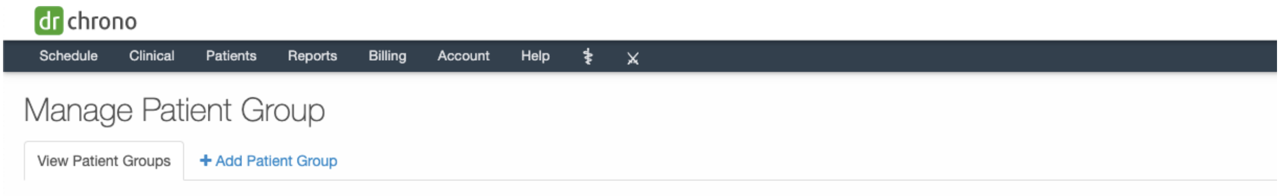


Managing a Patient Group

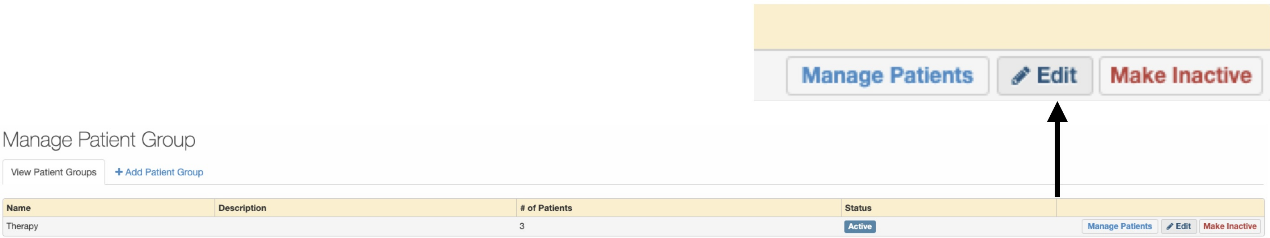
1. Go to **Patients** > **Patient Groups**



2. This will take you to your Patient Group page where you can view existing Patient Groups.



- Manage the patients within the group by clicking the **Manage Patients** button. This will allow you to bring up a more detailed view of the patients within this group.
- To edit an existing group click the **Edit** button. This will allow you to change the name, description, and add/remove patients from that group.
- To make the group inactive click the **Make Inactive** button.



You can always reactivate the group by clicking the **Make Active** button.