

# OakTree Practice Management: Managed Groups

This module will enable you to create your groups of clients to be pulled into group notes. You can create your group name and add/edit clients. The [Manage Group] button is located under the Clinical module.

## Finding [Manage Groups] button

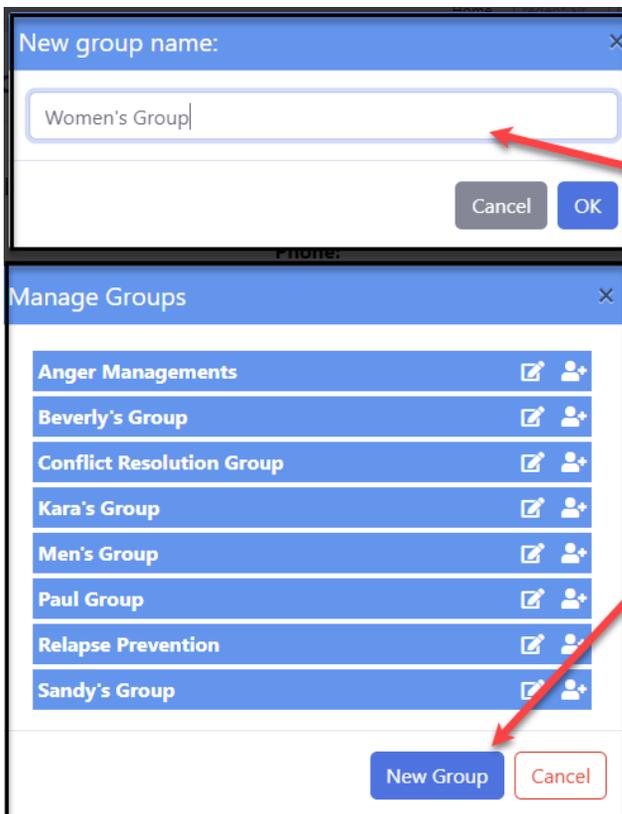
You will find the [Manage Groups] button in under the Clinical module.

The screenshot shows the OakTree Practice Management interface. The top ribbon contains navigation options: Home, Credentials, Clinical (highlighted with a red circle and arrow labeled '1'), Appointments, Calendar, Reports, Profile, and Settings. The left sidebar lists navigation options: Home, My Caseload, Add Client, My Workflow, Demographics, Client Communications, and Assessments. The main content area is titled 'My Caseload' and includes a search bar, a 'Please Select Client Below:' section with fields for DOB, Email, Age, and Phone, and a row of buttons: Add Client, Manage Groups (highlighted with a red circle and arrow labeled '2'), Diagnosis, and Import AccuCare Clients. A 'Show All Clients' toggle and a search box are also present. A 'Manage Groups' dialog box is open, showing a list of existing groups: Anger Management, Beverly's Group, Conflict Resolution Group, Kara's Group, Men's Group, Paul Group, Relapse Prevention, and Sandy's Group. Each group has an edit icon and a plus icon. At the bottom of the dialog box are 'New Group' and 'Cancel' buttons. A red circle and arrow labeled '3' points to the dialog box.

1. Go to the Clinical module found on the ribbon
2. Click the [Manage Groups] button
3. This opens the Manage Group dialog box

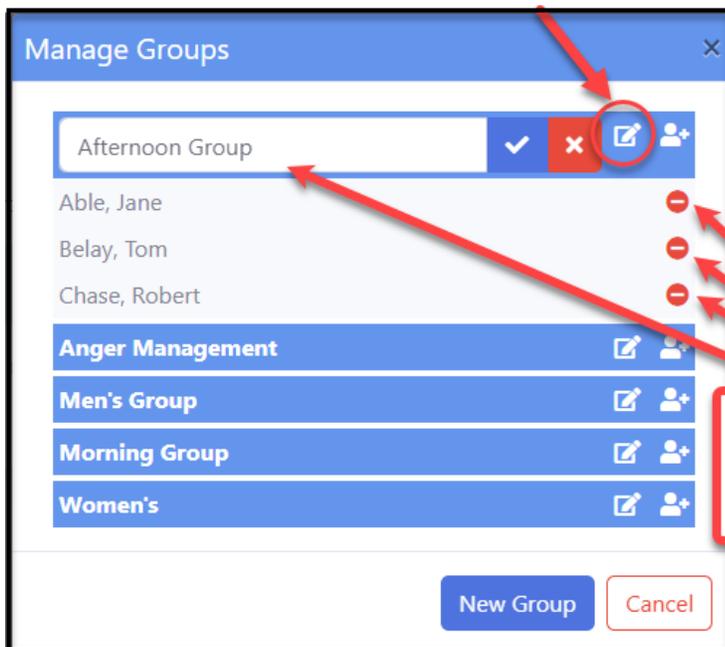
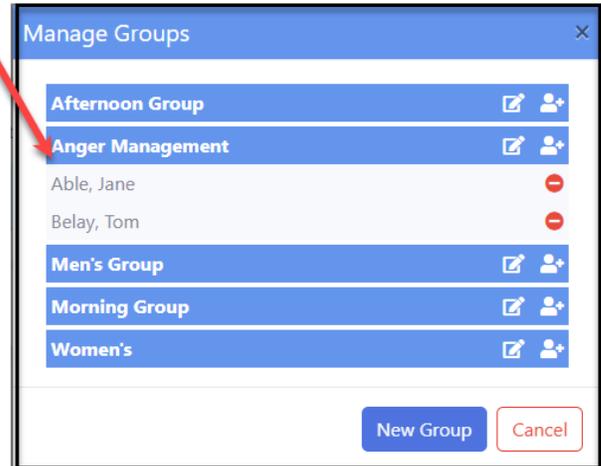
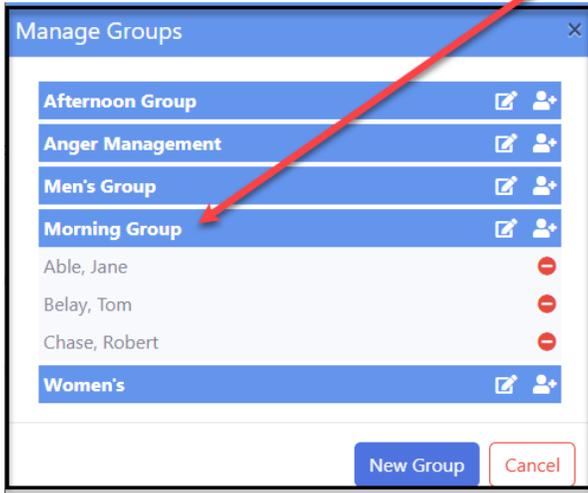
## Adding and Editing Groups

1. Create a new group
2. List of group names
3. Edit icon  edits group name and displays clients
4. Person Icon  adds clients to the group



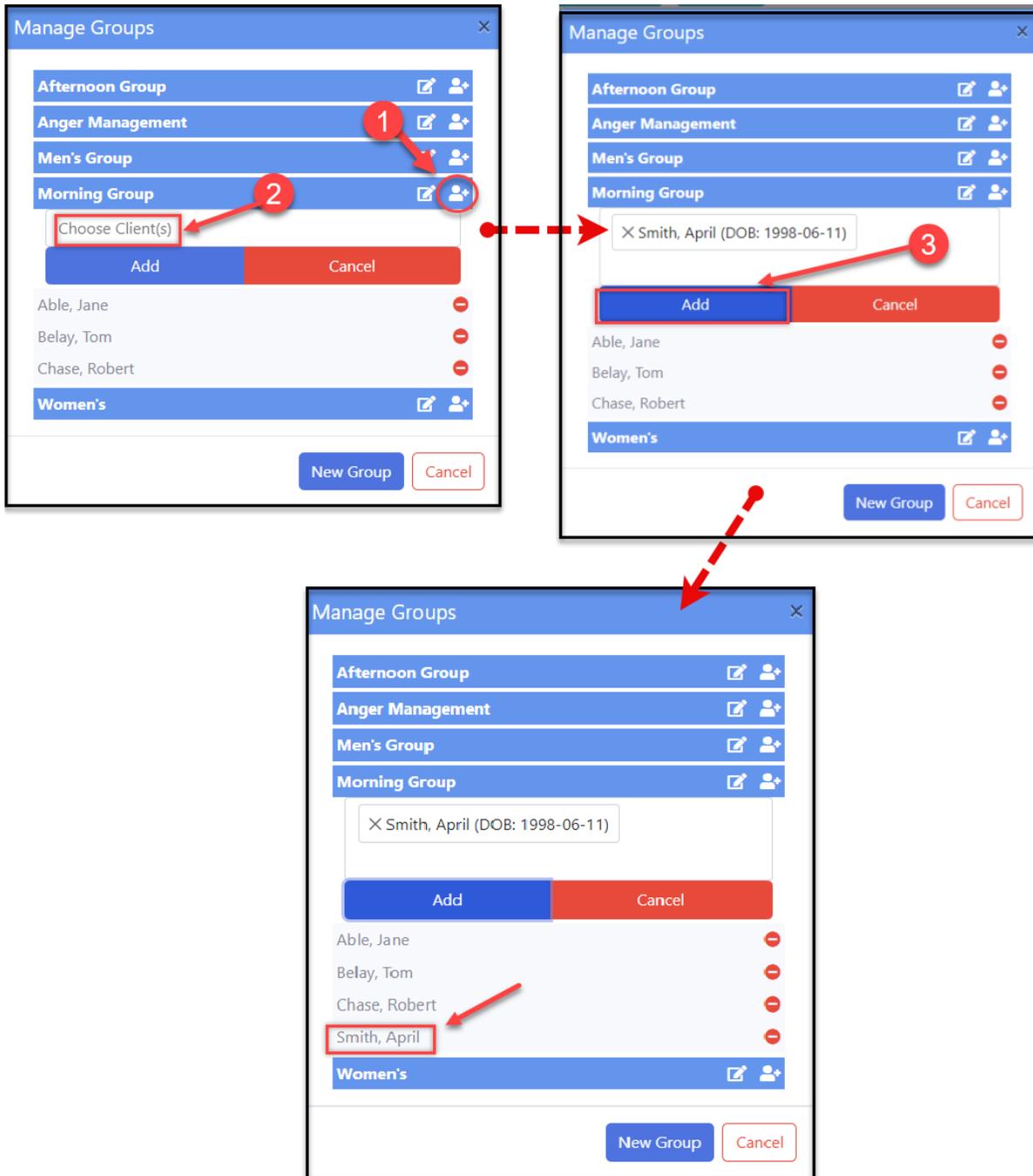
**Click [New Group] button to add a new group to your Manage Groups**

**Click on the Group Name to see the list of clients in that group**



**Click the Pencil Icon to edit the Group Name and remove the clients from the list**

1. Click the person icon  to add a client
2. Click the Choose Client(s) to select a client that is not in the group list
3. Click the [Add] button to add the client to your group list
4. Here you can see the client added the group



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