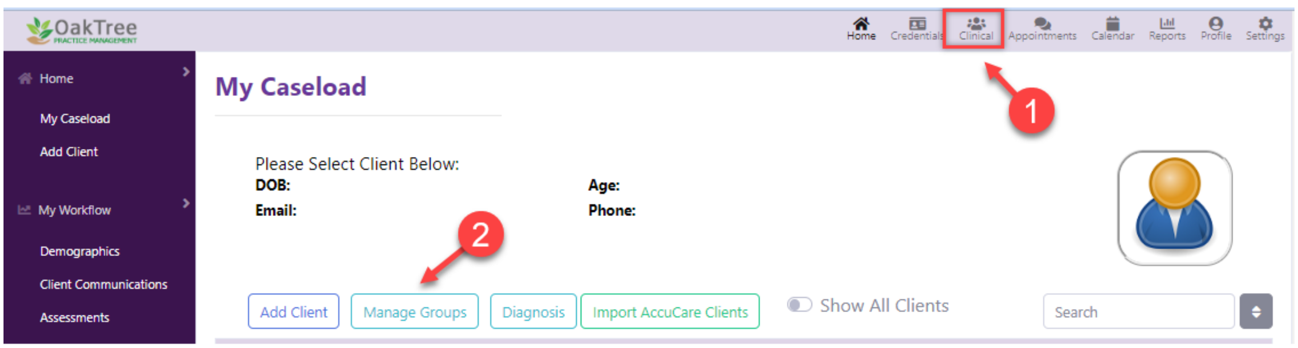
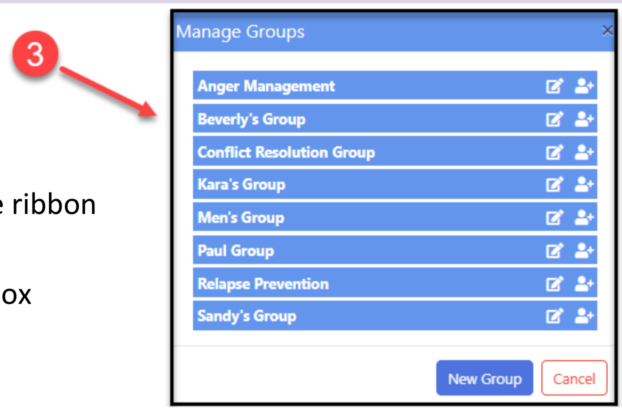
OakTree Practice Management:
Managed Groups

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.

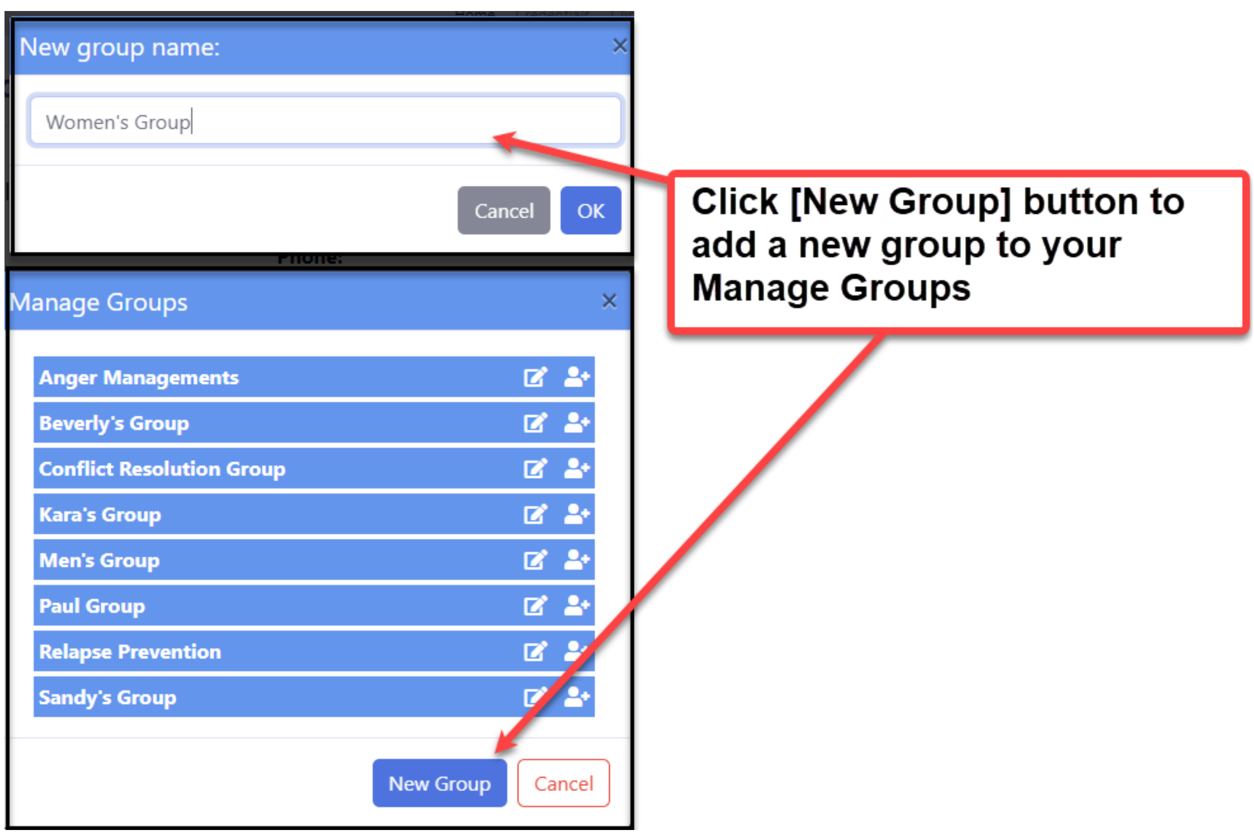




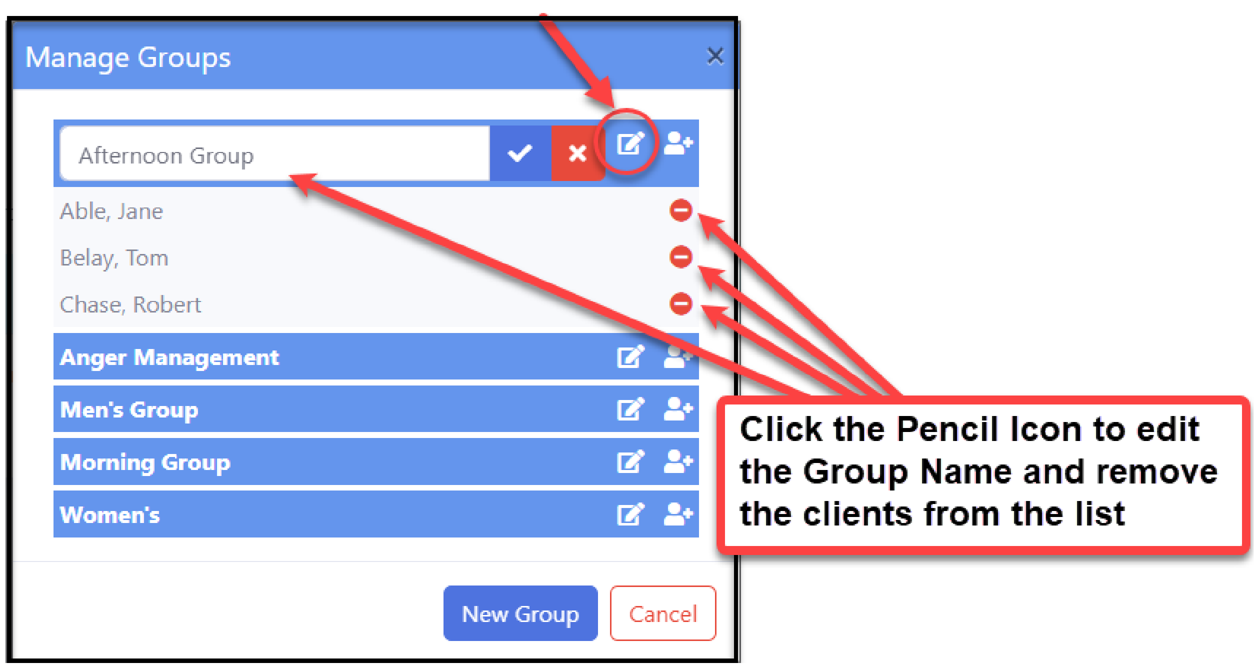
1. Go to the Clinical module found on the ribbon
2. Click the [Manage Groups] button
3. This opens the Manage Group dialog box

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 on the Group Name to see the list of clients in that group
Manage Groups
Afternoon Group
Anger Management
Men's Group
Morning Group
Able, Jane
Belay, Tom
Chase, Robert
Women's
New Group
Cancel
Manage Groups
Afternoon Group
Anger Management
Able, Jane
Belay, Tom
Men's Group
Morning Group
Women's
New Group
Cancel


Manage Groups
Afternoon Group
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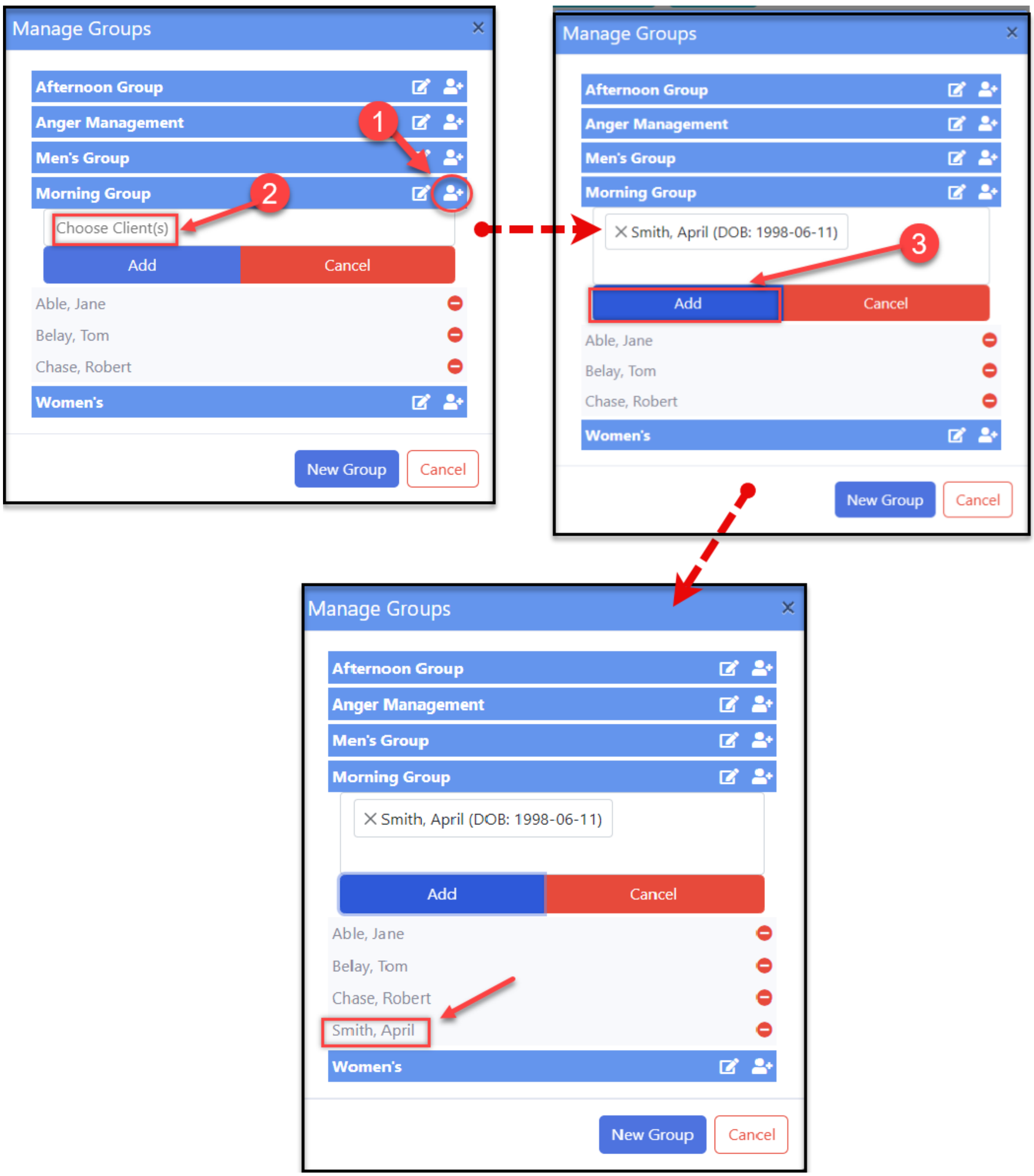
Men's Group
Morning Group
Women's
New Group
Cancel
Click the Pencil Icon to edit the Group Name and remove the clients from the list

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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