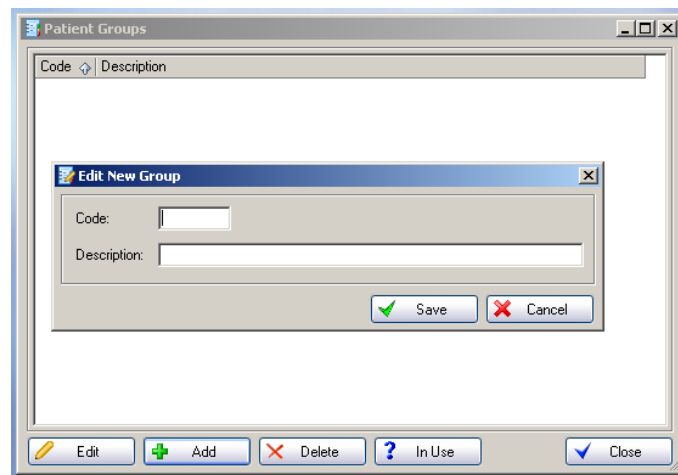


4B. (9) Software Set Up – Patient Groups

Patient Groups are helpful for reporting purposes. For example, if you want to track Patients whom are Females under age 25 your group name could be created as F<25, or you could create a Group for those Patients whom are always LATE to their appointment, or for Liability Cases (such as Work Comp, Auto, or Third Party). This section will allow you to **Add**, **Edit**, or **Delete** a Patient Group.


You may also want to consider using the Groups feature to keep track of what year your patients first began with your practice. For example: 2007, 1998, etc.

Note: At this time a Patient can only be placed in one Patient Group.



1 Adding a Patient Group

From the Top Navigational Menu, select “**Set Up**”, and then “**Patient Groups**”.

 **Quick Tip!** You can also add a new **Group** while in the Patient Record by selecting “**Add**” from the menu provided in the **Group** field located in the “**Edit Patient Data**” screen.

- A In the **Code** field, create a name of up to 5 characters (numbers, letters, or combination thereof) for this Patient Group which will allow you to identify this Group when this code appears on various screens and reports.
- B In the **Description** field, enter a short description for this group (up to 50 characters).
- C Click the **Save** button when done.

2 Editing a previously entered Patient Group

From the Top Navigational Menu, select “**Set Up**”, and then “**Patient Groups**”.

- A In the opened “**Patient Groups**” screen, left click on the name of the Group you need to edit the information for.
- B To open and begin editing the Group you chose, either double-click on the Group Name selected, or click the “**Edit**” button at the bottom of the “**Patient Groups**” screen.
- C Make the changes as necessary to the fields available.
- D Click “**Save**” when done.

3 Deleting a Patient Group

From the Top Navigational Menu, select “**Set Up**”, and then “**Patient Groups**”.

- A In the opened “**Patient Groups**” screen, left click on the name of the Group you need to delete.
- B From the bottom of the screen, click on the “**Delete**” button, and, if you are certain that you want to delete this Patient Group, answer “**Yes**” when asked if you are sure you want to delete it.

Note: When attempting to delete the Patient Group, should a message appear stating “*Cannot Delete. Data in Use*”, click the “**Ok**” button to close the message window. Then, click the “**In Use**” button at the bottom of the “**Patient Groups**” screen. A “**Patient Groups in Use**” screen will open listing the **Last Name, First Name, and Patient Account Number (PAN)** of the Patients which are using this Insurance within their claims or their record. The Group information must first be removed from all the Patient claims and records that appear on this list before being able to delete this Patient Group.