Add Client Groups Field to a Form or Note

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About

A client can be added to a specific Group within Group Notes. To reduce time spent navigating to Group Notes, your Agency can add a Dynamic Field type to the Face Sheet, Form, or Note called Client Groups. Once this field has been added to a specific Form or Note, your staff can easily manage adding and removing clients from Groups within that Form or Note.

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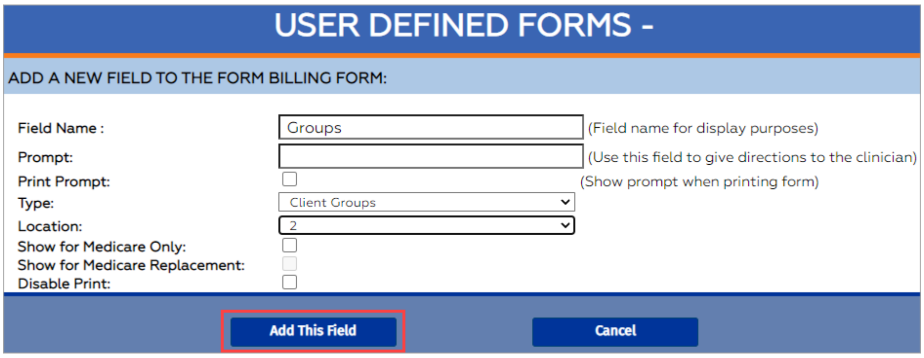
Add Client Groups Field to a Form

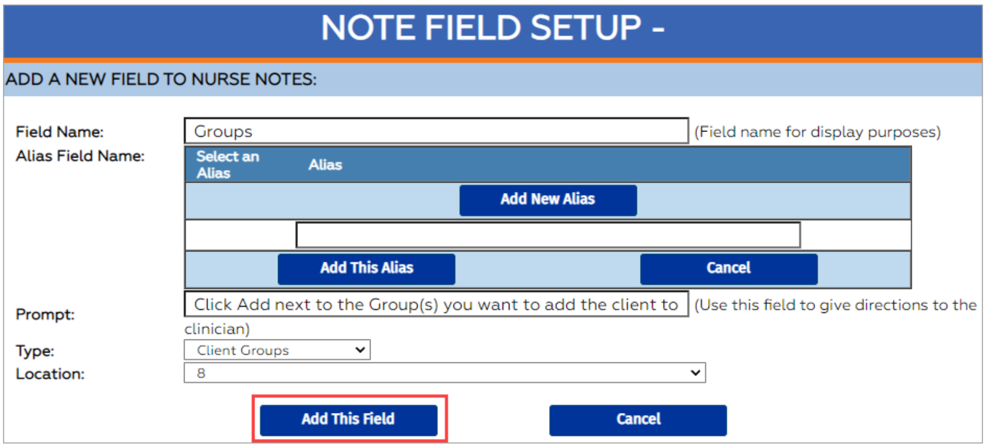
1. Navigate to Form Builder: **Main Menu > Admin Tools Menu > Form Builder**.
2. Select a form from the **Select Form** drop-down menu.
3. Click the **Add New Field** button.

4. From the **Type** drop-down menu, select Client Groups. Once the field type is selected, the available fields will change.
5. Enter the **Field Name** to be displayed on the Form.
6. *(Optional)* Enter a **Prompt** if you want to give directions to the clinician about this particular field.
7. From the **Location** drop-down menu, select where you want this section to be displayed on the Form.
8. *(Optional)* Select the checkbox for **Disable Print** if you don't want the information for this particular field type to be printed when printing the Form.
9. Click the **Add This Field** button.



Add Client Groups Field to a Note

1. Navigate to Note Setup: **Main Menu > Admin Tools Menu > Note Builder**.
2. Select a note from the **Select a Note Type** drop-down menu.
3. Click the **Add New Field** button.
4. From the **Type** drop-down menu, select Client Groups.
5. Enter the **Field Name** to be displayed on the Note.
6. *(Optional)* Click the **Add New Alias** button if your Agency uses aliases. Enter the **Alias** and click the **Add This Alias** button.
7. *(Optional)* Enter a **Prompt** if you want to give directions to the clinician about this particular field.
8. From the **Location** drop-down menu select where you want this section to be displayed on the Note.
9. Click the **Add This Field** button.


NOTE FIELD SETUP -
ADD A NEW FIELD TO NURSE NOTES:
Field Name:
Groups
(Field name for display purposes)
Alias Field Name:
Select an Alias
Alias
Add New Alias
Add This Alias
Cancel
Prompt:
Click Add next to the Group(s) you want to add the client to
(Use this field to give directions to the clinician)
Type:
Client Groups
Location:
8
Add This Field
Cancel