Add a Client To or Remove a Client From Groups in a Form or Note or Face Sheet

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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 by following the instructions **here**. Staff can easily manage clients and the Groups they are assigned to from this field on a Form or Note.

Add a Client To or Remove a Client From Groups on a Form

1. Navigate to a Form that you have added the field type Client Groups to.
2. Complete the Form as you normally would.
3. Locate the Groups field (based on how your Agency named it) and click **Add** next to the Group or Groups you want to add the client to and click **Remove** next to the Group or Groups you want to remove the client from.

Groups Test

Name ↑	
Art Therapy M-F,	Add
Family Empowerment T/Th	Remove
g	Add

4. Click one of the following buttons:

- **Save:** to save the data entered on this Form.
- **Save and Exit:** to save recent updates and exit the Form**.**
- **Save and Print:** to save recent updates and print the Form.
- **E-Signature/Seal:** to electronically sign this Form with an option to permanently seal it.
- **Assign To**: to assign this Form to one or more users.

Add a Client To or Remove a Client From Groups on a Note

1. Navigate to a Note that you have added the field type Client Groups to.
2. Complete the Note as you normally would.
3. Locate the Groups field (based on how your Agency named it) and click **Add** next to the Group or Groups you want to add the client to and click **Remove** next to the Group or Groups you want to remove the client from.

ClientGroup

Name ↑	
Art Therapy M-F,	Add
Family Empowerment T/Th	Remove
g	Add

4. Click one of the following buttons:

- **Enter Note (Draft)**: to save your Note as a draft.
- **Enter Note (Final)**: to save your Note as Final.

Add a Client To or Remove a Client From Groups on the Face Sheet

Note: If this field was added to the Face Sheet, you will only be able to utilize the functionality when you go in to edit the Face Sheet.

1. Navigate to the Face Sheet: **Admissions > Face Sheet**.
2. Search for and select the client.
3. Click the **Edit** button.
4. Locate the Groups field (based on how your Agency named it) and click **Add** next to the Group or Groups you want to add the client to and click **Remove** next to the Group or Groups you want to remove the client from.

ClientGroup

Name ↑	
Art Therapy M-F,	Add
Family Empowerment T/Th	Remove
g	Add

5. Click the **Update** button.