Group Functionality Resource Guide

April 1, 2025

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Overview

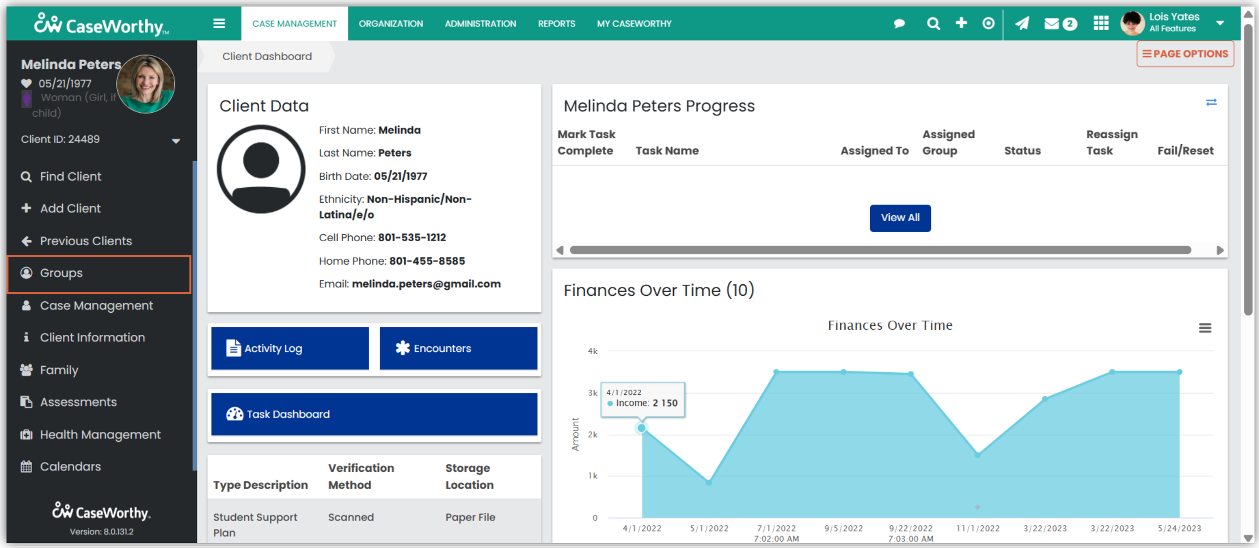
CaseWorthy's Group Functionality allows you to efficiently organize and track Clients, helping you manage caseloads, prioritize specific groups, and streamline communication. You can create groups for your most frequently accessed Clients and easily assign new Clients to existing groups during the intake process. This eliminates the need to manually remember Clients or repeatedly use the Find Client feature.

As groups become integrated into more CaseWorthy features, they will further enhance workflow and efficiency. This guide will be updated to reflect new features as they are added.

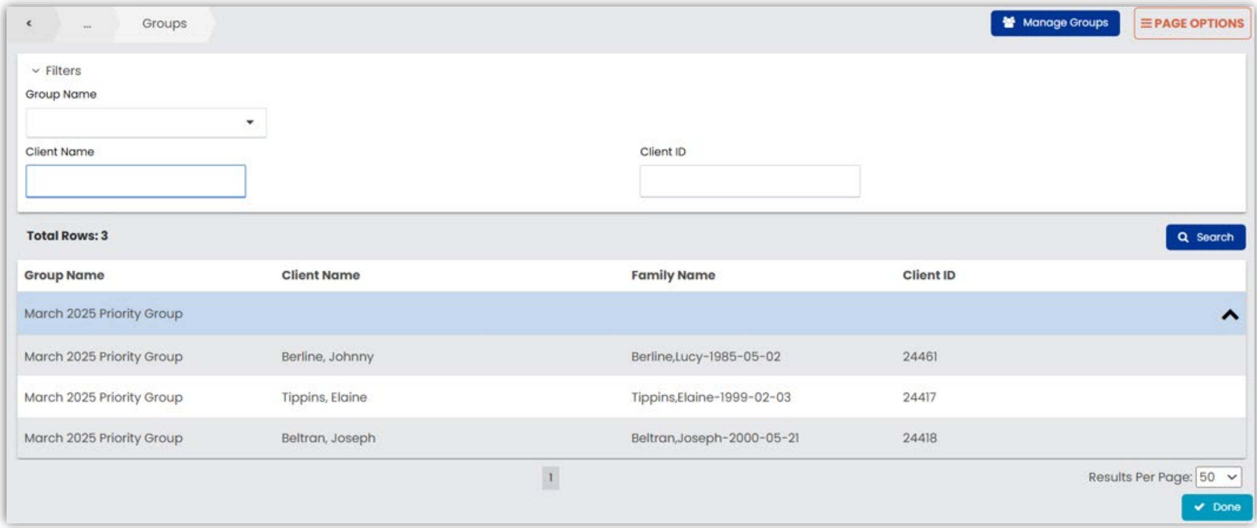
Managing Groups

On the Case Management tab, Groups is a new option in the Navigation Menu.

Select Groups.



The *Groups* page is displayed, which displays a list of your existing groups along with the Clients that belong to each group.

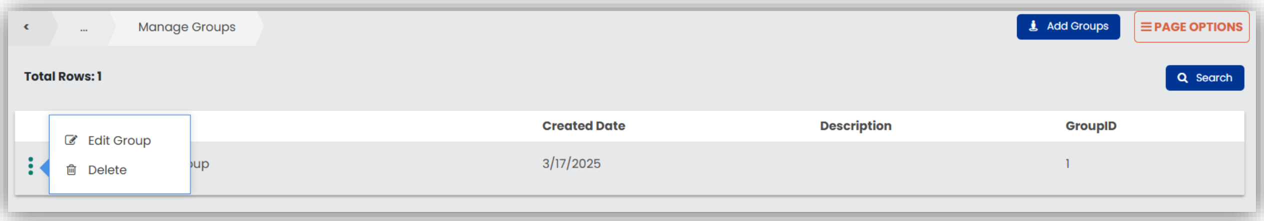


You can filter the list by **Group Name**, **Client Name**, and **Client ID**.

Manage an Existing Group

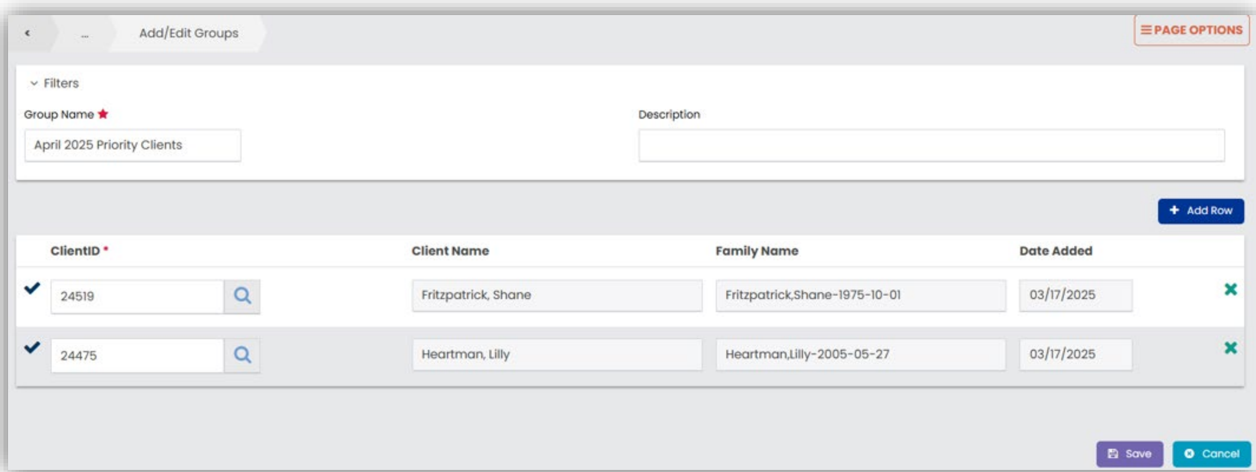
To view existing groups or create a new group, select MANAGE GROUPS.

Existing groups are displayed, which can be edited or deleted on this form.



Add a New Group

To add a new collection of Clients, select ADD GROUPS.

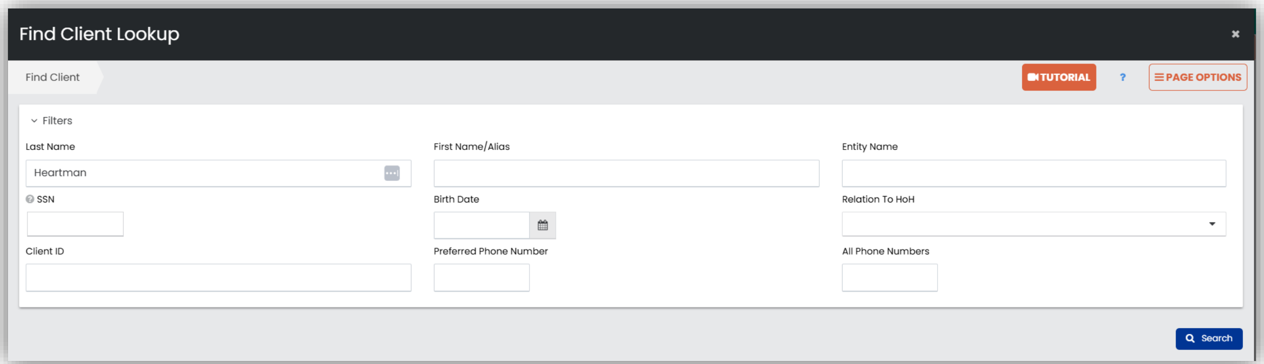


Enter a name for the group and a description of the group.

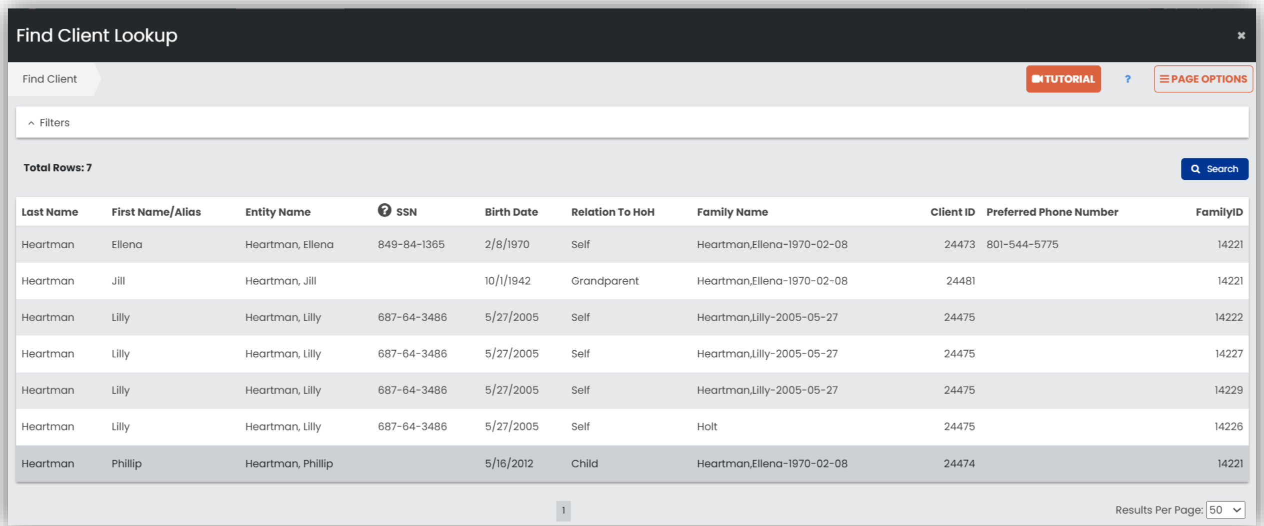
Add an Existing Client to a Group

To add an existing Client to the new group, click the magnifying glass icon to open the *Find Client* form.

Search for the Client using any of the available filters and then click SEARCH.

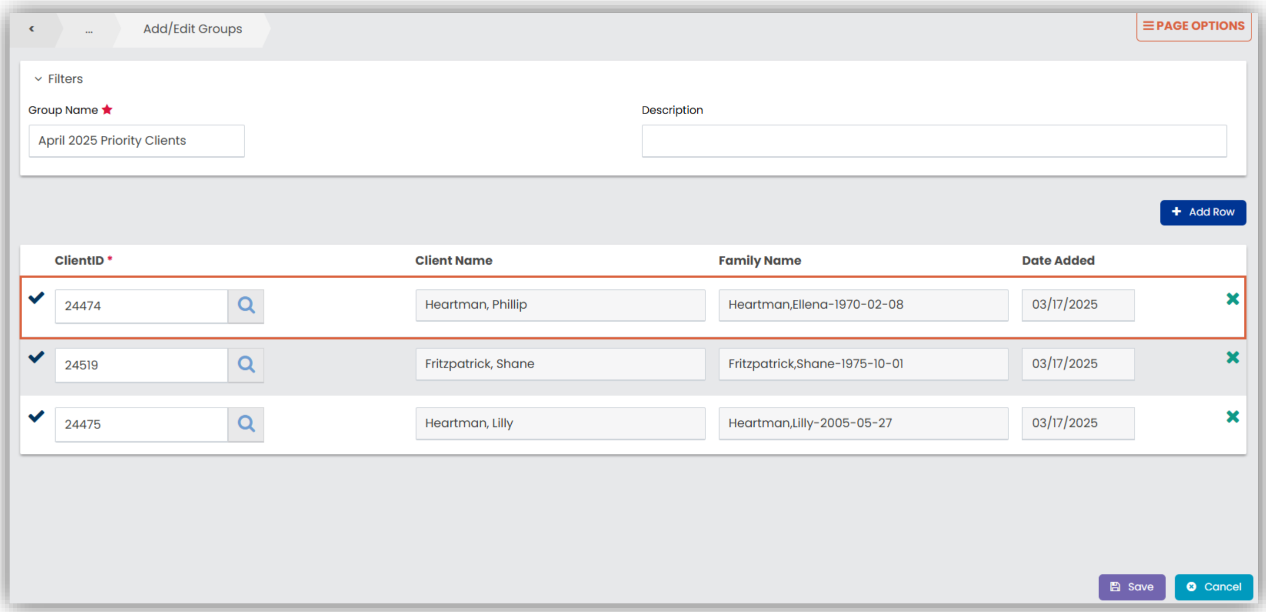


A list of Clients that match the search criteria are displayed. Select the Client record.



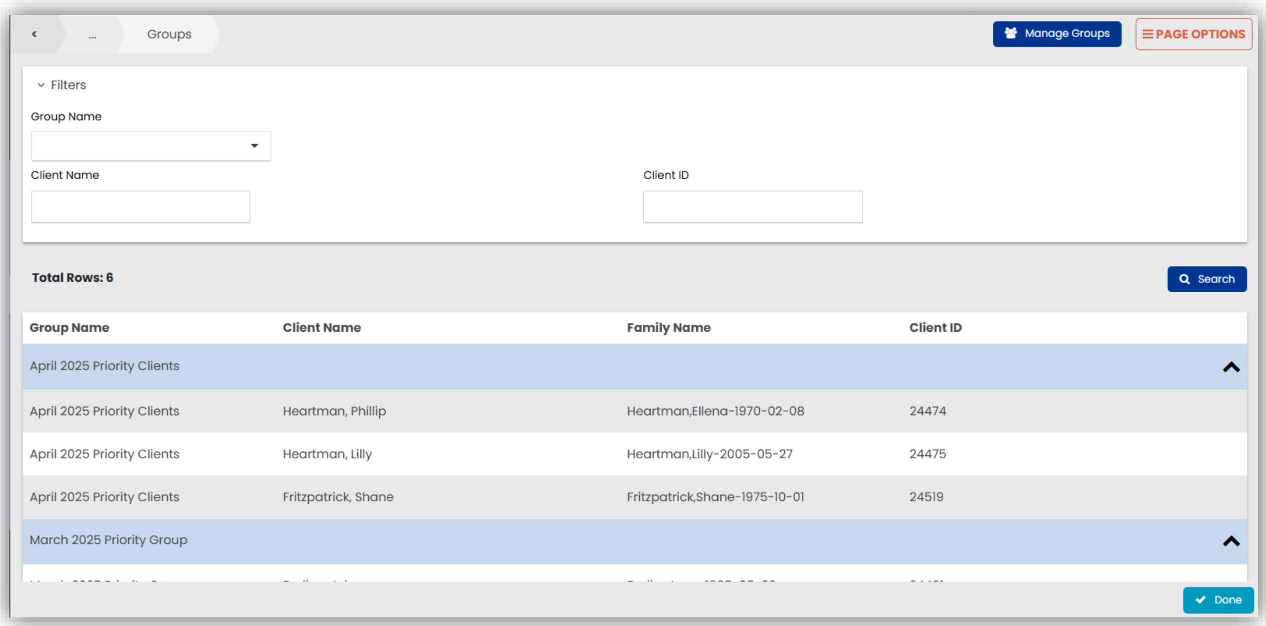
Last Name	First Name/Alias	Entity Name	SSN	Birth Date	Relation To HoH	Family Name	Client ID	Preferred Phone Number	FamilyID
Heartman	Ellena	Heartman, Ellena	849-84-1365	2/8/1970	Self	Heartman,Ellena-1970-02-08	24473	801-544-5775	14221
Heartman	Jill	Heartman, Jill		10/1/1942	Grandparent	Heartman,Ellena-1970-02-08	24481		14221
Heartman	Lilly	Heartman, Lilly	687-64-3486	5/27/2005	Self	Heartman,Lilly-2005-05-27	24475		14222
Heartman	Lilly	Heartman, Lilly	687-64-3486	5/27/2005	Self	Heartman,Lilly-2005-05-27	24475		14227
Heartman	Lilly	Heartman, Lilly	687-64-3486	5/27/2005	Self	Heartman,Lilly-2005-05-27	24475		14229
Heartman	Lilly	Heartman, Lilly	687-64-3486	5/27/2005	Self	Holt	24475		14226
Heartman	Phillip	Heartman, Phillip		5/16/2012	Child	Heartman,Ellena-1970-02-08	24474		14221

The Client is added to the group.



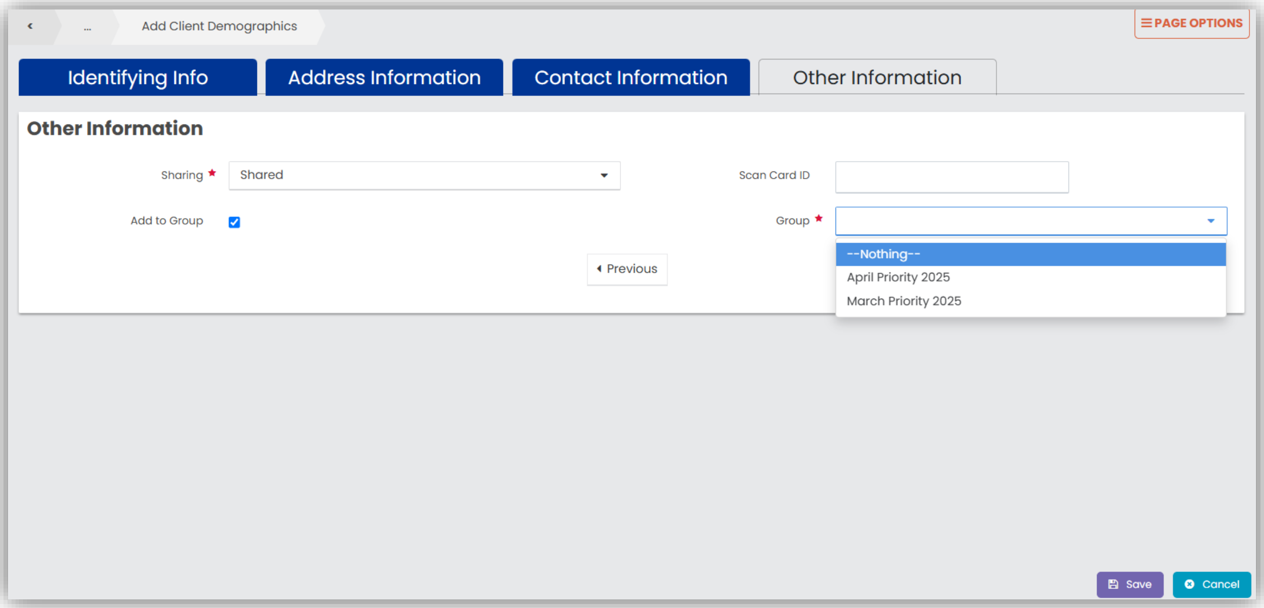
When done adding Clients to the new group, click SAVE.

The new group and the Clients within the group are displayed on the *Groups* form.



Add a New Client to a Group

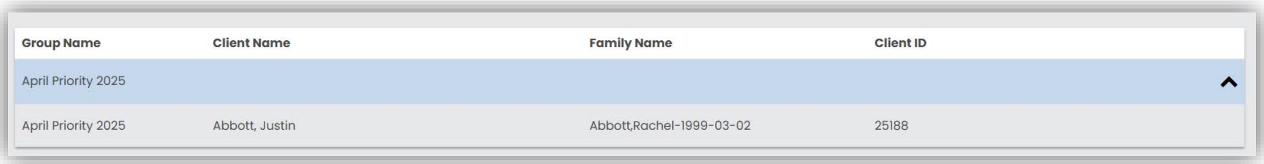
When adding a new Client on the *Add Client Demographics* form, select the Other Information tab.



To add the Client to one of your existing groups, select the **Add to Group** option.

The **Group** dropdown automatically appears, listing all your current groups. Simply select the applicable group to add the Client, then SAVE the changes.

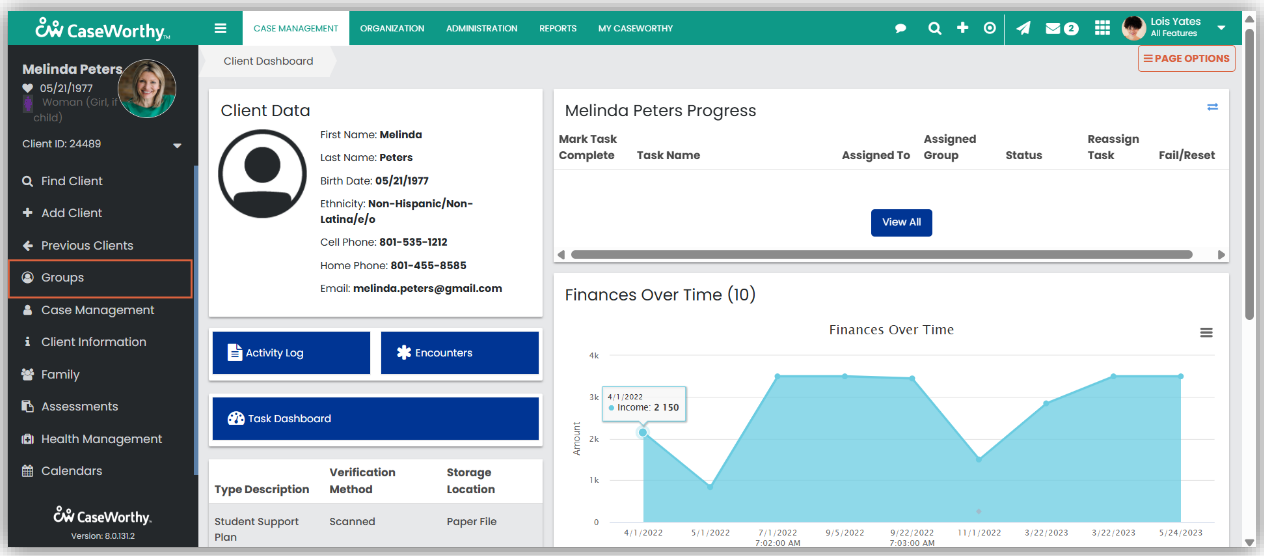
Navigate to the *Groups* page to confirm the Client was added.



Group Name	Client Name	Family Name	Client ID
April Priority 2025			
April Priority 2025	Abbott, Justin	Abbott,Rachel-1999-03-02	25188

Using Groups

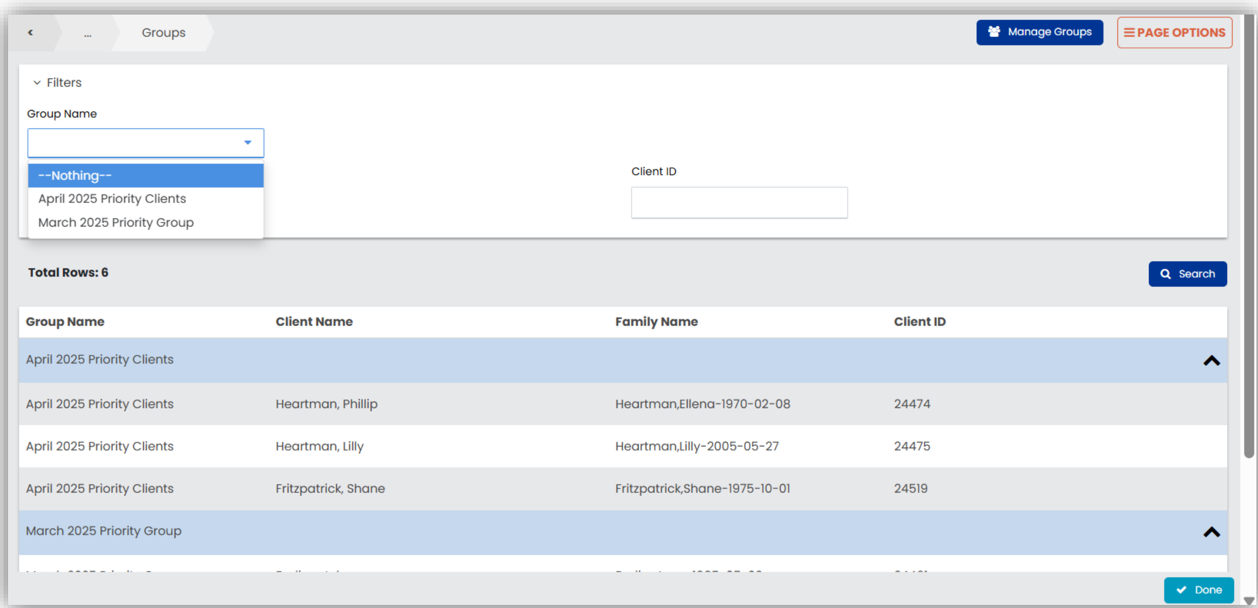
On the Case Management tab, Groups is a new option in the Navigation Menu.



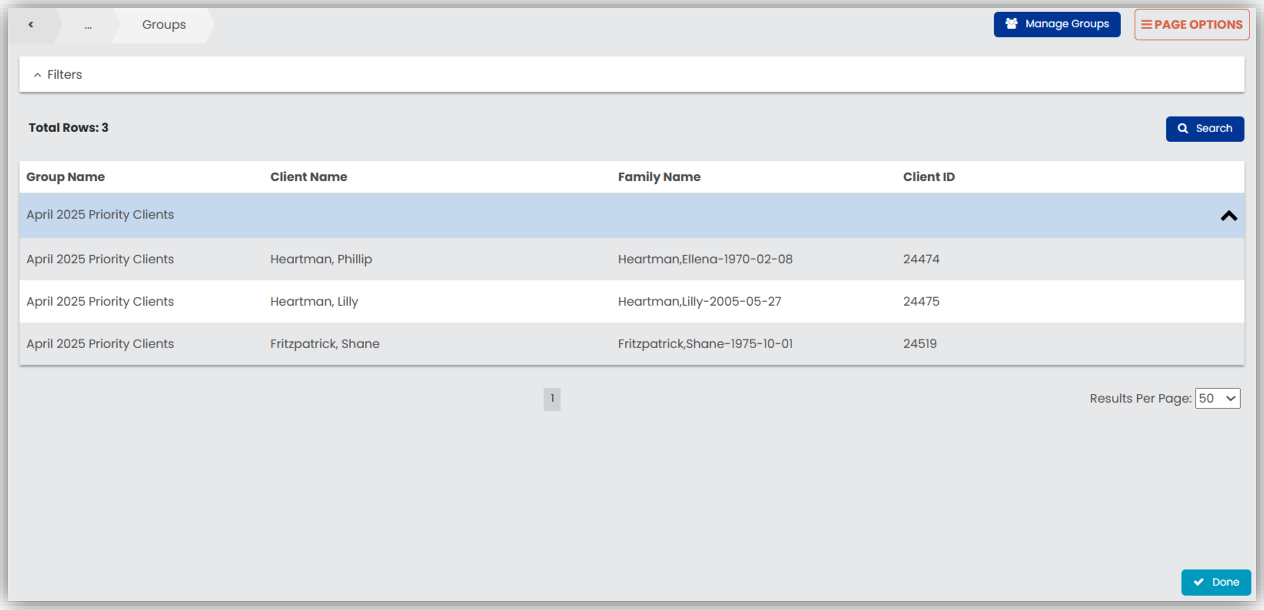
To easily access a group of Clients you're working with, use the Groups feature instead of the Find Client tool.

Select Groups from the Navigation Menu.

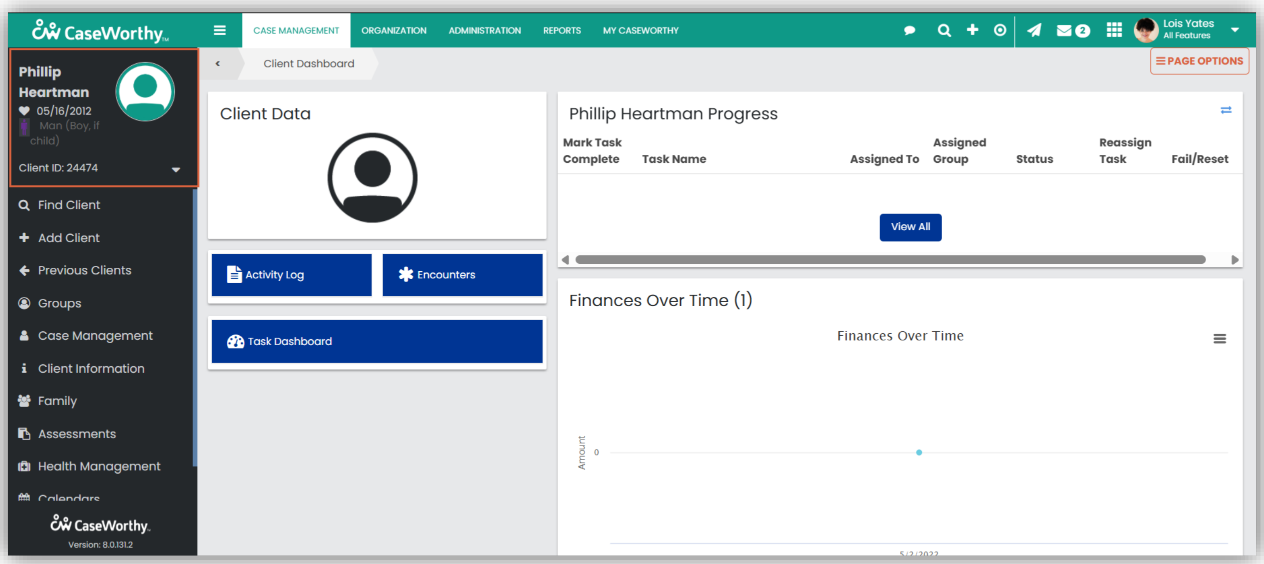
The *Groups* form displays all existing groups along with the Clients assigned to each group.



You can filter group results at the top by selecting an existing group from the **Group Name** dropdown or by entering a **Client Name** or **Client ID**. Click SEARCH.



Select the Client from the list, and they will automatically be loaded into the Entity Corner.



The new Groups menu option remains available in the Navigation Menu, allowing you to easily load the next Client from a group when you are ready.