



# **Group Functionality Resource Guide**

April 1, 2025

# Contents

Overview ..... 3

Managing Groups ..... 4

    Manage an Existing Group ..... 5

    Add a New Group..... 5

    Add an Existing Client to a Group ..... 6

    Add a New Client to a Group ..... 8

Using Groups ..... 9

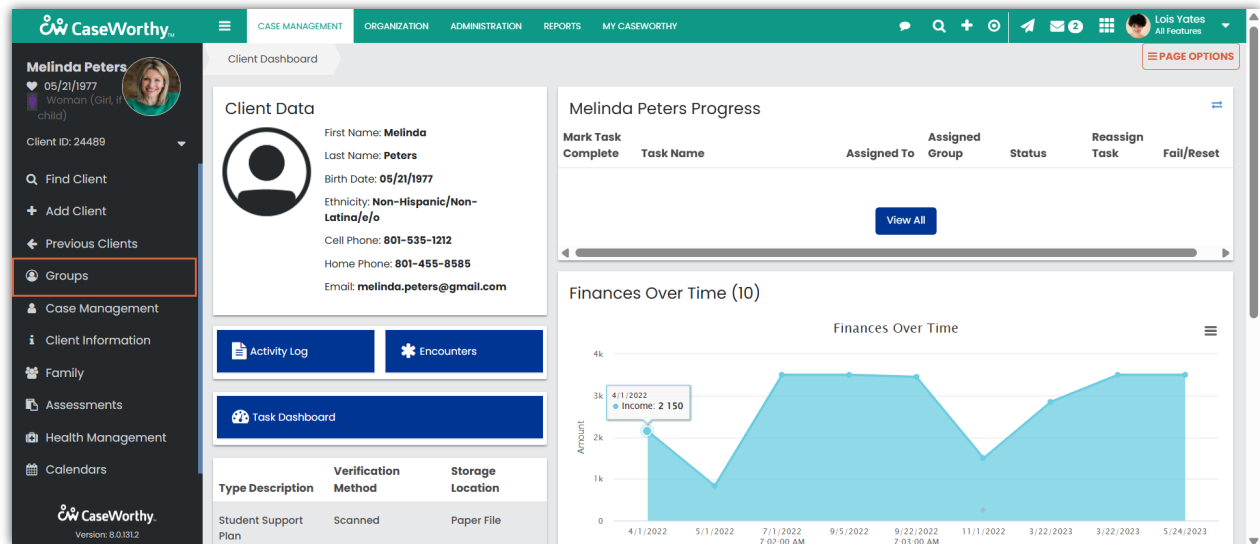
## Overview

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 screenshot shows the CaseWorthy Client Dashboard for Melinda Peters. The navigation menu on the left has 'Groups' highlighted. The main content area shows client data, progress, and a financials chart.

**Client Data**

- First Name: Melinda
- Last Name: Peters
- Birth Date: 05/21/1977
- Ethnicity: Non-Hispanic/Non-Latina/e/o
- Cell Phone: 801-535-1212
- Home Phone: 801-455-8585
- Email: melinda.peters@gmail.com

**Melinda Peters Progress**

Mark Task Complete	Task Name	Assigned To	Assigned Group	Status	Reassign Task	Fail/Reset
<a href="#">View All</a>						

**Finances Over Time (10)**

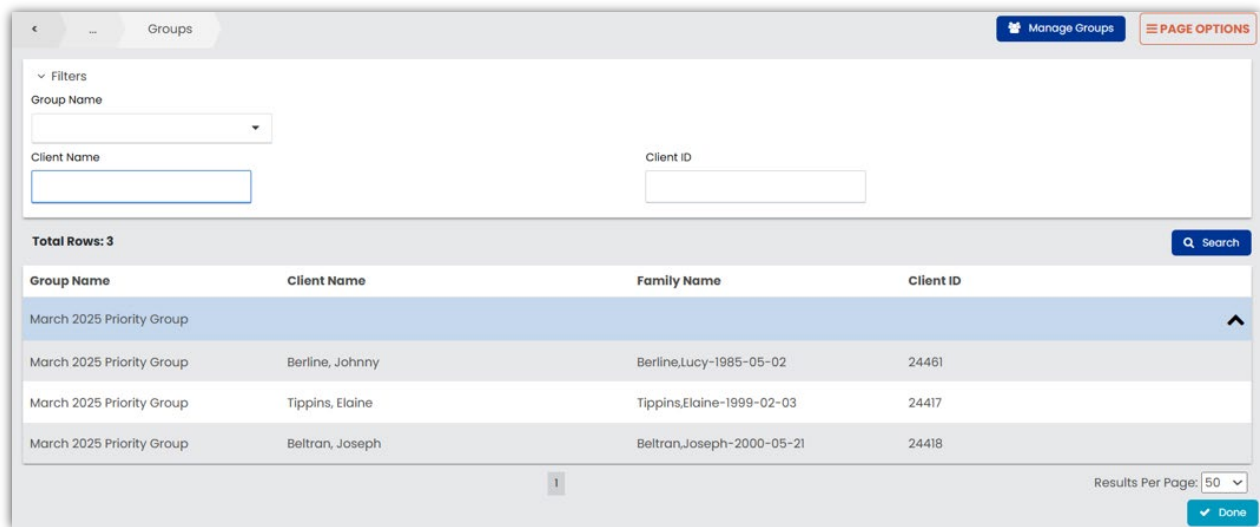
Finances Over Time

Amount

4/1/2022 Income: 2 150

4/1/2022 5/1/2022 7/1/2022 7:02:00 AM 9/5/2022 9/22/2022 7:03:00 AM 11/1/2022 3/22/2023 5/24/2023

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



The screenshot shows the CaseWorthy Groups page. It includes filters for Group Name, Client Name, and Client ID. The table below lists the groups and their associated clients.

**Filters**

- Group Name
- Client Name
- Client ID

**Total Rows: 3**

Group Name	Client Name	Family Name	Client ID
March 2025 Priority Group	Berline, Johnny	Berline,Lucy-1985-05-02	24461
March 2025 Priority Group	Tippins, Elaine	Tippins,Elaine-1999-02-03	24417
March 2025 Priority Group	Beltran, Joseph	Beltran,Joseph-2000-05-21	24418

Results Per Page: 50

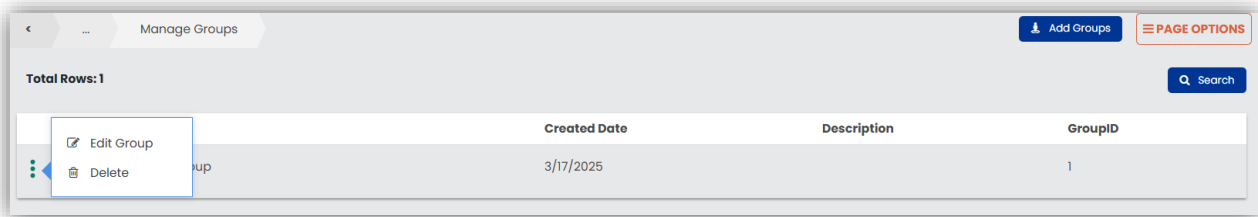
[Done](#)

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.



Manage Groups

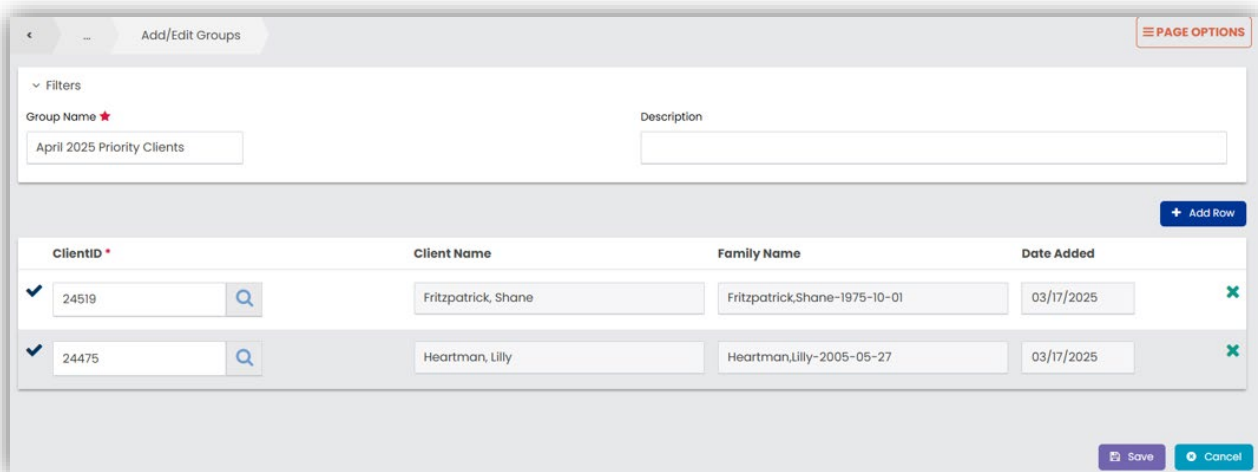
Add Groups PAGE OPTIONS

Total Rows: 1 Search

	Created Date	Description	GroupID
<div> <div>Edit Group</div> <div>Delete</div> </div>	3/17/2025		1

## Add a New Group

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



Add/Edit Groups PAGE OPTIONS

Filters

Group Name \* Description

April 2025 Priority Clients

+ Add Row

ClientID *	Client Name	Family Name	Date Added
✓ 24519	Fritzpatrick, Shane	Fritzpatrick,Shane-1975-10-01	03/17/2025
✓ 24475	Heartman, Lilly	Heartman,Lilly-2005-05-27	03/17/2025

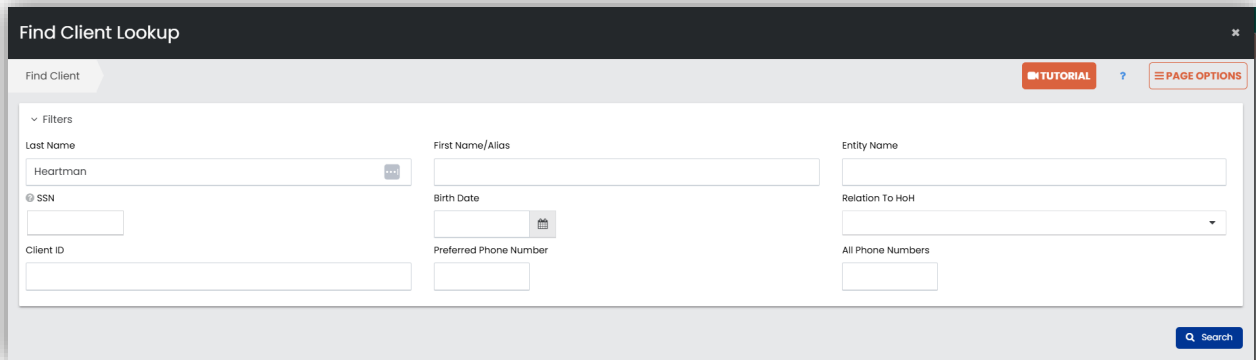
Save Cancel

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.

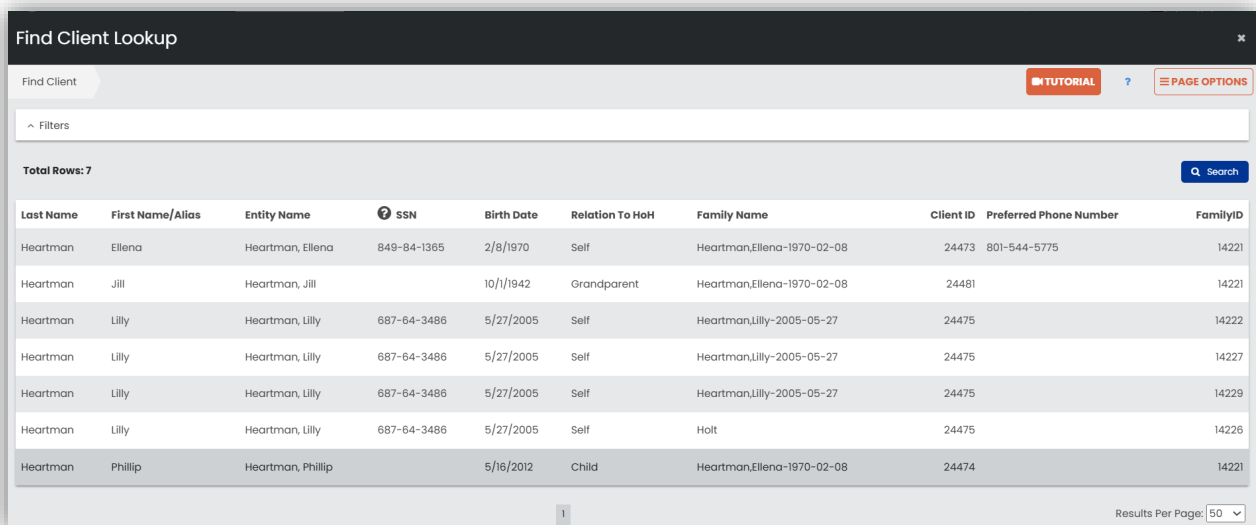
Search for the Client using any of the available filters and then click SEARCH.



The **Find Client Lookup** form contains the following fields:

- Filters:**
  - Last Name:
  - First Name/Alias:
  - Entity Name:
  - SSN:
  - Birth Date:
  - Relation To HoH:
  - Client ID:
  - Preferred Phone Number:
  - All Phone Numbers:
- Buttons:** TUTORIAL, PAGE OPTIONS, and a Search button.

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

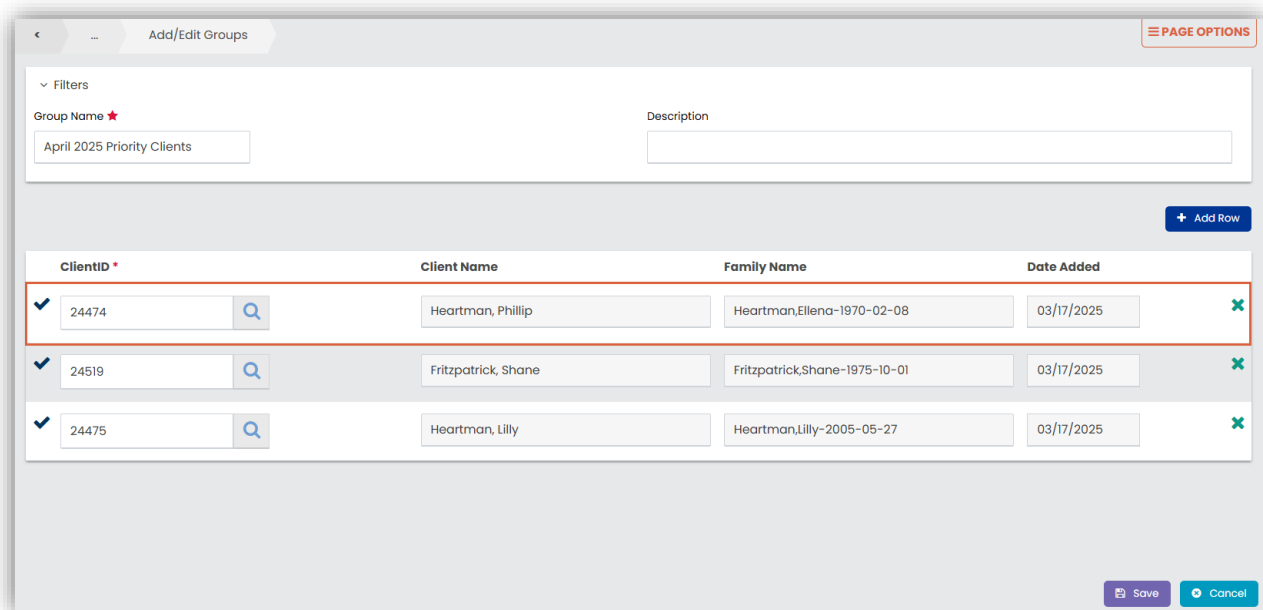


The **Find Client Lookup** results table displays the following data:

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

Results Per Page: 50

The Client is added to the group.



← ... Add/Edit Groups PAGE OPTIONS

Filters

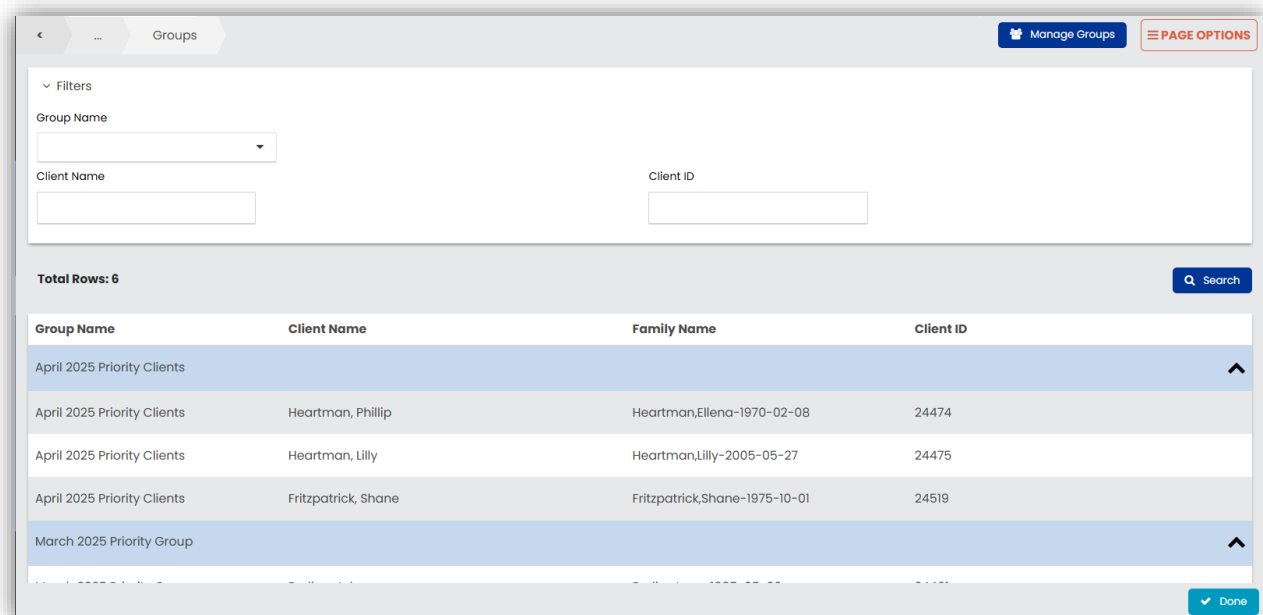
Group Name ★  Description

+ Add Row

ClientID *	Client Name	Family Name	Date Added
<input checked="" type="checkbox"/> 24474 <input type="text" value="24474"/>	<input type="text" value="Heartman, Phillip"/>	<input type="text" value="Heartman,Ellena-1970-02-08"/>	<input type="text" value="03/17/2025"/>
<input checked="" type="checkbox"/> 24519 <input type="text" value="24519"/>	<input type="text" value="Fritzpatrick, Shane"/>	<input type="text" value="Fritzpatrick,Shane-1975-10-01"/>	<input type="text" value="03/17/2025"/>
<input checked="" type="checkbox"/> 24475 <input type="text" value="24475"/>	<input type="text" value="Heartman, Lilly"/>	<input type="text" value="Heartman,Lilly-2005-05-27"/>	<input type="text" value="03/17/2025"/>

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.



← ... Groups Manage Groups PAGE OPTIONS

Filters

Group Name

Client Name  Client ID

Total Rows: 6 Search

Group Name	Client Name	Family Name	Client ID
April 2025 Priority Clients			
April 2025 Priority Clients	Heartman, Phillip	Heartman,Ellena-1970-02-08	24474
April 2025 Priority Clients	Heartman, Lilly	Heartman,Lilly-2005-05-27	24475
April 2025 Priority Clients	Fritzpatrick, Shane	Fritzpatrick,Shane-1975-10-01	24519
March 2025 Priority Group			

## Add a New Client to a Group

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

The screenshot shows the 'Add Client Demographics' form with the 'Other Information' tab selected. The form includes the following fields and options:

- Identifying Info** (selected tab)
- Address Information**
- Contact Information**
- Other Information** (active tab)
- Sharing**: A dropdown menu currently set to 'Shared'.
- Add to Group**: A checkbox that is checked.
- Scan Card ID**: An empty text input field.
- Group**: A dropdown menu with a list of options: '--Nothing--', 'April Priority 2025', and 'March Priority 2025'.
- Previous**: A button to navigate to the previous step.
- Save** and **Cancel**: Buttons at the bottom right of the form.

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.

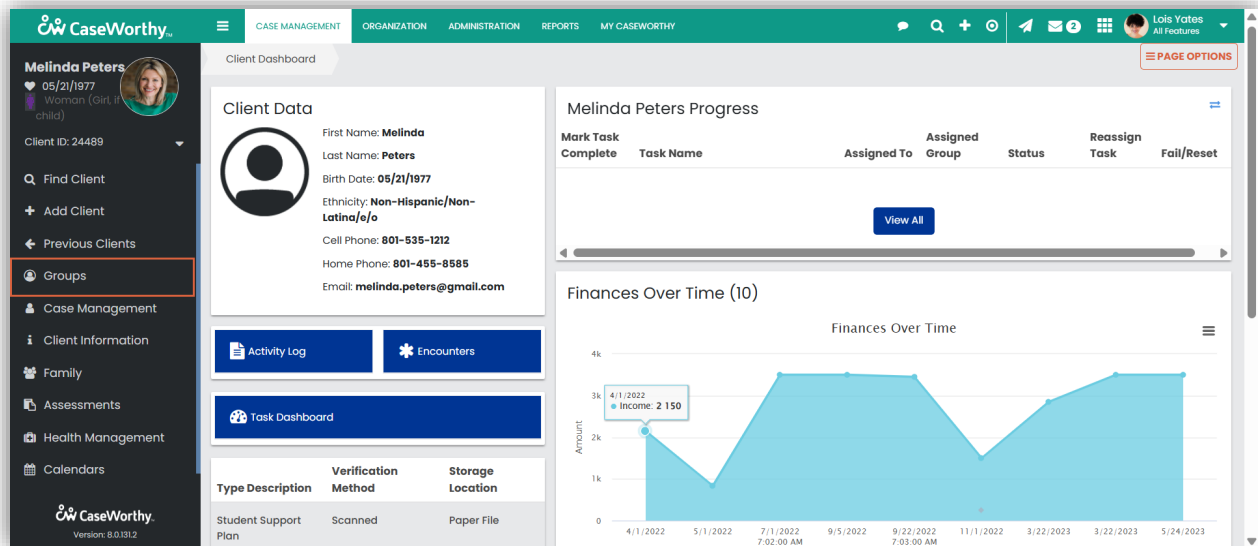
Navigate to the *Groups* page to confirm the Client was added.

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



# Using Groups

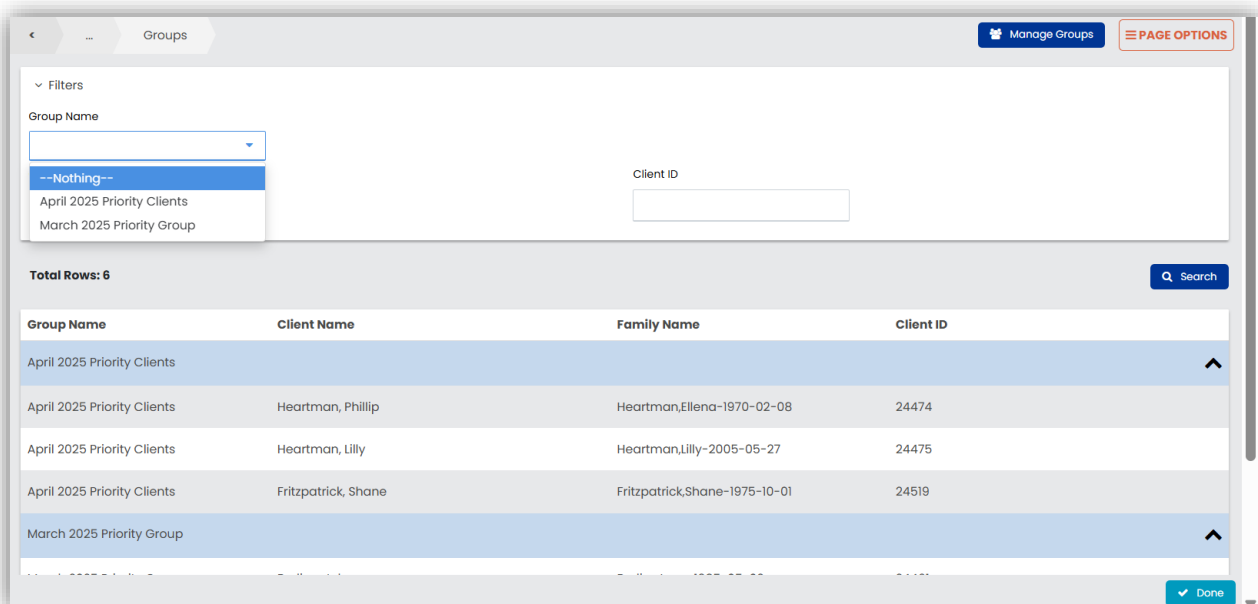
On the Case Management tab, Groups is a new option in the Navigation Menu.



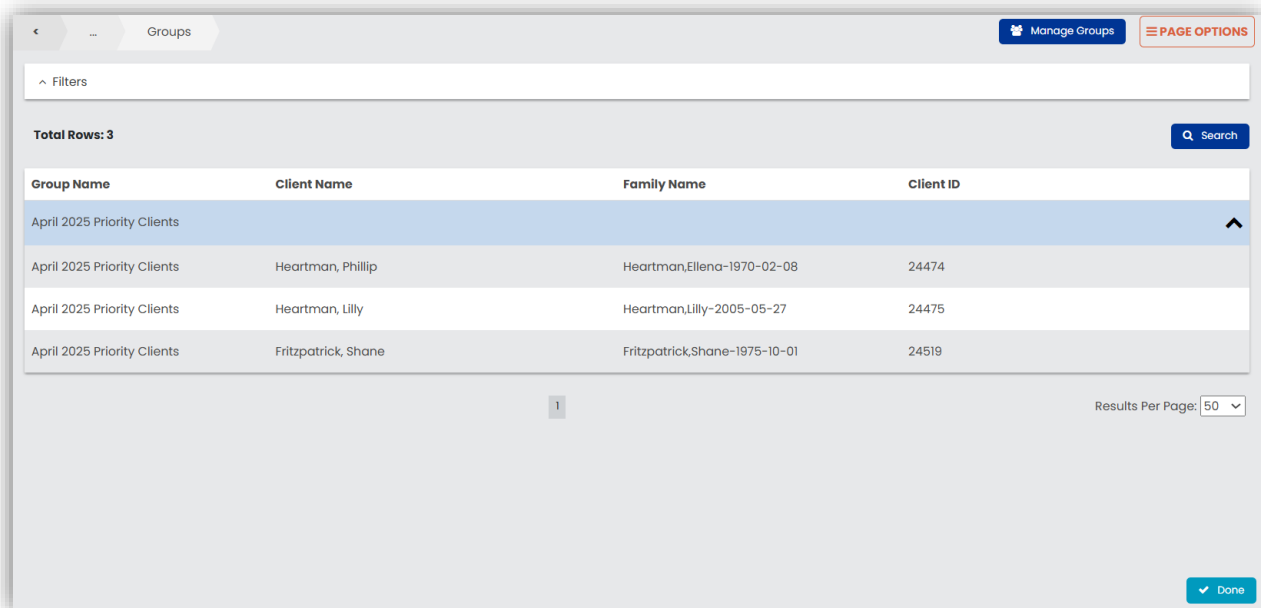
To easily access a group of Clients you're working with, use the Groups feature instead of the Find Client tool.

Select Groups from the Navigation Menu.

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



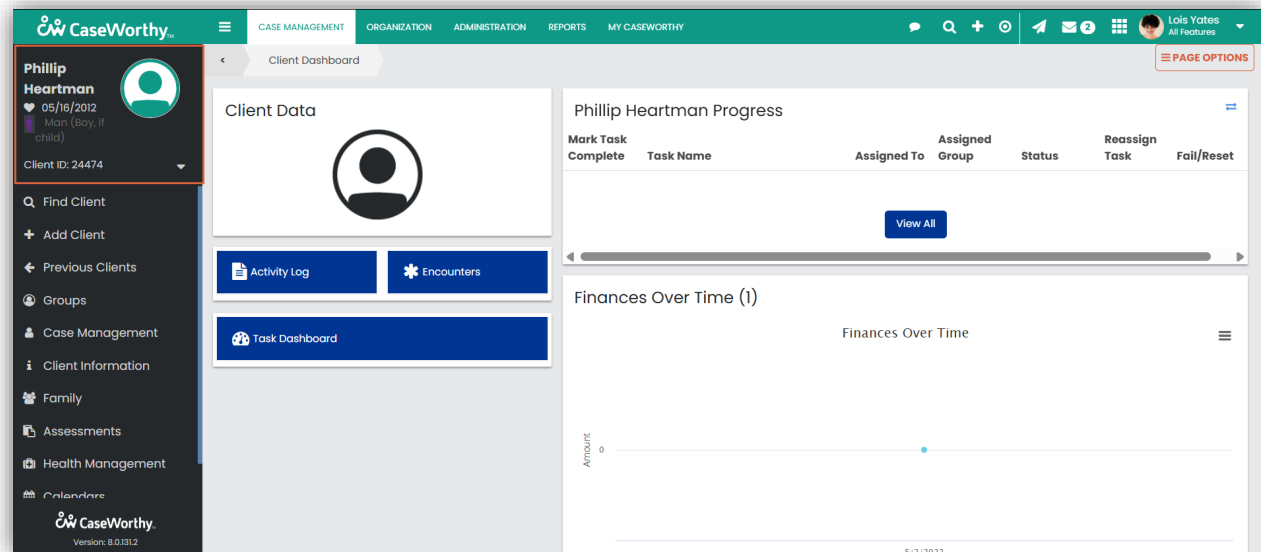
You can filter group results at the top by selecting an existing group from the **Group Name** dropdown or by entering a **Client Name** or **Client ID**. Click SEARCH.



The screenshot shows the 'Groups' management page. At the top, there's a 'Filters' section with a 'Group Name' dropdown and a 'Search' button. Below this, a table lists groups. The first group is 'April 2025 Priority Clients', which is expanded to show a list of clients. The table has columns for Group Name, Client Name, Family Name, and Client ID. At the bottom right, there's a 'Results Per Page' dropdown set to 50 and a 'Done' button.

Group Name	Client Name	Family Name	Client ID
April 2025 Priority Clients			
April 2025 Priority Clients	Heartman, Phillip	Heartman,Ellena-1970-02-08	24474
April 2025 Priority Clients	Heartman, Lilly	Heartman,Lilly-2005-05-27	24475
April 2025 Priority Clients	Fritzpatrick, Shane	Fritzpatrick,Shane-1975-10-01	24519

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



The screenshot shows the 'Client Dashboard' for Phillip Heartman. The left sidebar contains a navigation menu with options like 'Find Client', 'Add Client', 'Previous Clients', 'Groups', 'Case Management', 'Client Information', 'Family', 'Assessments', 'Health Management', and 'Calendar'. The main content area is divided into two sections. The top section, 'Client Data', shows a profile card for Phillip Heartman with his date of birth (05/16/2012), gender (Male), and client ID (24474). Below this are buttons for 'Activity Log', 'Encounters', and 'Task Dashboard'. The bottom section, 'Phillip Heartman Progress', shows a table with columns for 'Mark Task Complete', 'Task Name', 'Assigned To', 'Assigned Group', 'Status', 'Reassign Task', and 'Fail/Reset'. A 'View All' button is present below the table. At the bottom, there's a 'Finances Over Time (1)' chart showing a single data point for the amount.

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.