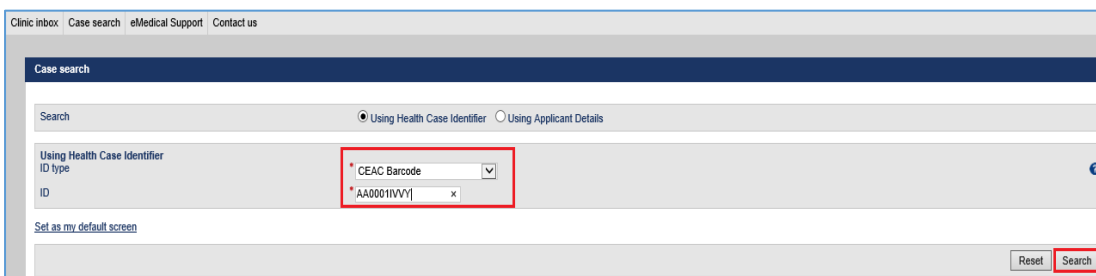# Tip Sheet: How to Create and Use a Group in eMedical

The eMedical system allows you to create 'Groups' and add health cases to a group if you wish to treat those health cases as one unit. This will allow you to navigate quickly between cases in eMedical without the need to search and manage those cases individually.

> **Note:** The grouping functionality is **optional**.
> **Note:** You can only create a group via the **Using Health Case Identifier** option in the **Case search**
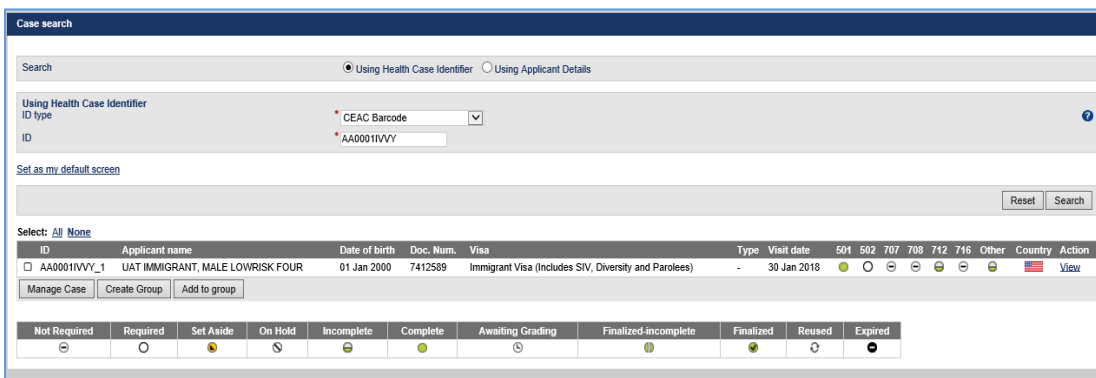
A. Creating a group

Step 1. Select a health case ID type (for example CEAC Barcode)

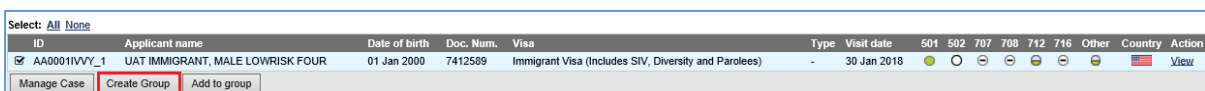**Step 2.** Enter the **ID** for the health case and press the **Search** button

A health case associated with that ID will be listed.

Step 3. Select the check box next to the health case and press the **Create Group** button

A **Health case group** section above the Case search displays.

If there are health case(s) that you want to add to the same group – for example case(s) belonging to a family unit:

Step 4. Enter the **ID** for the health case in the **Case search** section and press the **Search** button

A health case associated with that ID will be listed.

Step 5. Select the health case by clicking the check box to its left and press the **Add to group** button

Health case will be added to the **Health case group** section.

Follow **Step 4 and Step 5** above untill you have added all health cases to the desired group.

Step 6. Enter some text in the **Group Description** field and press the **Save** button

Health case group				
Group description		UAT family	✕	
Select: All None				
Applicant name	Gender	Date of birth	Case Status	Visa
☐ UAT IMMIGRANT, FEMALE HIGHRISK ONE	F	01 Jan 2010	Exam in Progress	Immigrant Visa (Includes SIV, Diversity and Parolees)
☐ UAT IMMIGRANT, MALE LOWRISK FOUR	M	01 Jan 2000	Exam in Progress	Immigrant Visa (Includes SIV, Diversity and Parolees)
Select row to remove from group				Close Save

Note: The **Group description** will assist you to remember the group for later use and should be meaningful. For example a Group description may be a family name.

A success message is displayed to confirm that a group with that description has been created and the **Edit group** hyperlink is automatically added to the right side of the health case in the **Case search** section.

Note: Once a group has been created the **Group ID** under **Common IDs** will be automatically added to the ID type drop down list.

The groups created will be listed in the **Group ID** drop down and allow you to search and manage the cases in that particular group.

Note: The system will automatically generate and add letters CS and numbers to the Group description for the group that you have created following the steps above (for example **CS10005 UAT family**).

Adding additional health case(s) to an existing group

Once you have created a group you can add additional health case(s) to that group by following the steps below:

Step 1. Select **Group ID** in the ID Type drop down list

Step 2. Select the group in the Group ID drop down (for example CS10000 48789) to which you want to add the additional health case(s)

Step 3. Press the **Search** button

Existing health case(s) in that group will be listed.

Step 4. Press the **Edit group** link next to the health case

The **Health case group** section for the selected group displays.

To add health case(s) to this group:

Step 5. In the **Case search** section select the ID Type (for example CEAC Barcode)

Step 6. Enter the ID type for the health case that you want to add to the group and press the **Search** button

The Health case associated with that case ID will be listed

Step 7. Select the health case by clicking the check box on the left and press the **Add to group** button

Health case will be added to the **Health case group** section.

Step 8. Press the **Save** button

A success message will display confirming that health case has been added to the group and **Edit group** hyperlink created next to the health case in the **Case search** section.

Repeat **Steps 5 to 8** to add more health cases to the same group if required.

Step 9. Press the **Close** button once you have finished with adding health cases to a group
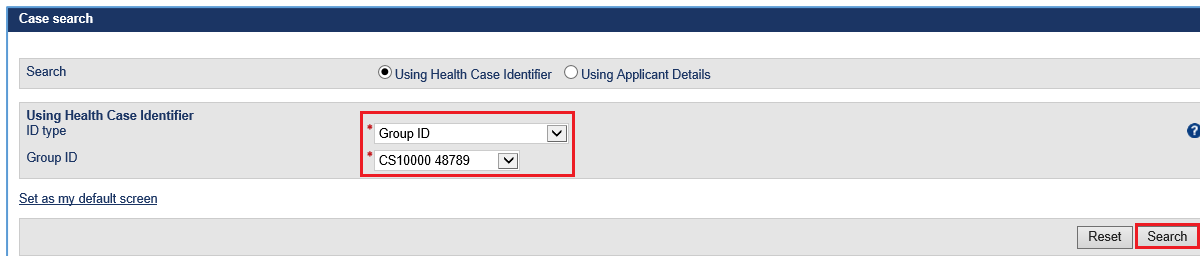
B. Managing and navigating between health cases in a group

Once you have created a group and added all health cases to the group you can manage those by following the steps below:

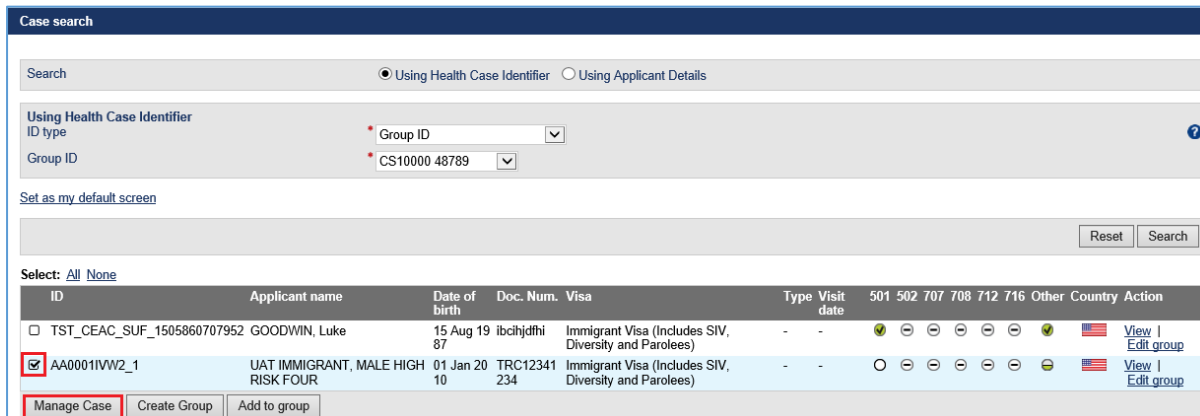**Step 1.** Select **Group ID** in the **ID Type** drop down

Step 2. Select the group in the Group ID drop down (for example CS10000 48789) that you want to manage
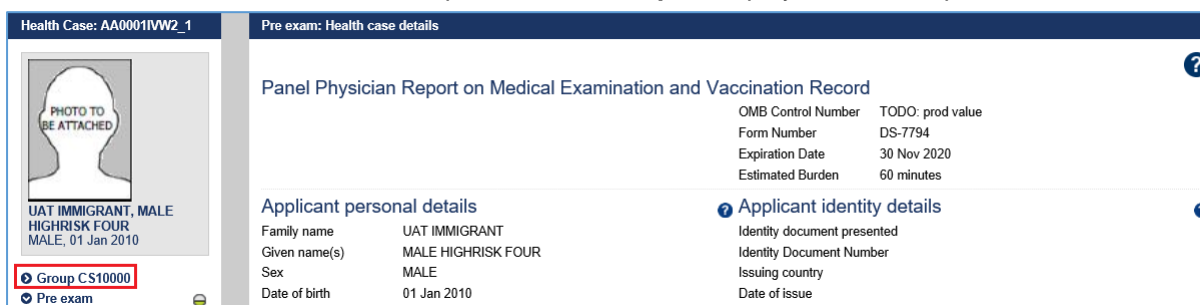
Step 3. Press the **Search** button

Health case(s) in that group will be listed.

Step 4. Select the health case by clicking the check box on the left in the **Case search** section and press the **Manage Case** button

The **Health case details** screen will open with the **Group ID** displayed in the left panel of a health case.

Step 5. Click on the ⊙ icon

Names of the persons in that group will be displayed.

Note: The name in the group will be greyed out for the health case that you are working on.

To navigate to health case of another person in the group click on the person's name and **Health case details** for that person will display.

C. Removing health case(s) from a group

If you have accidentally added a health case to group then you can remove that health case by following the steps below:

Step 1. Select **Group ID** in the ID Type drop down

Step 2. Select the group in the Group ID drop down

Health case(s) in that group will be listed.

Step 3. Press the **Edit group** link next to the health case

The **Health case group** section will display where all health cases in that group will be listed.

Step 4. Select the health case by clicking in the check box next to name

Step 5. Press the **Save** button

The health case will disappear from both the **Health case group** and the **Case search** sections.

Success

Successful save.

Health case group

Group description   48789

Select: All None

	Applicant name	Gender	Date of birth	Case Status	Visa
☐	GOODWIN, Luke	F	15 Aug 1987	Submitted	Immigrant Visa (Includes SIV, Diversity and Parolees)

Select row to remove from group   Close   Save

Note: A group will disappear from the list after you have removed all health cases from that particular group.