

Resource Groups

This section is accessed via the **Sharing Group Profile** screen. (See Figure 1-29)

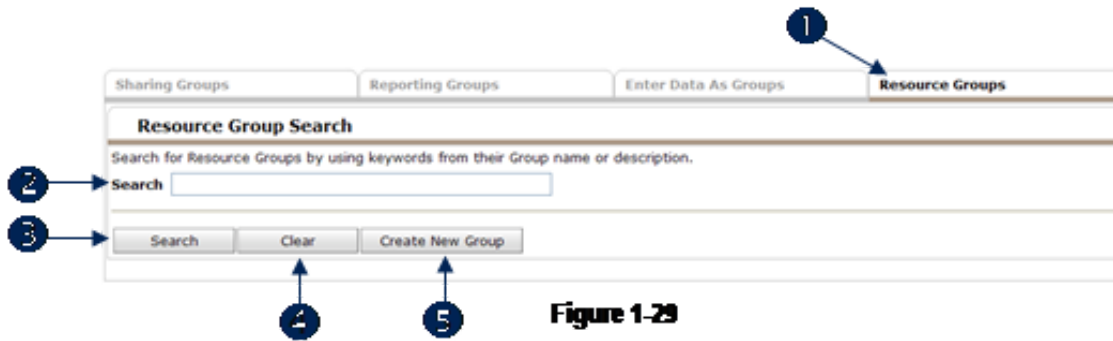


Figure 1-29

13.

1. Click the **Resource Groups** tab to move into this area. **(1)** To locate a resource group, enter key words in the **Search** field **(2)** and click **Search**. **(3)** Key words may be words in the group's name or words found in the group's description. Click **Clear** **(4)** to empty the search field and begin a new search. Click **Create New Group** **(5)** to add a resource group. (See Figure 1-30)



Figure 1-30

2. After initiating a search, **Resource Group Search Results** displays. **(1)** Click the **Red X** icon to delete a **Resource Group** (a confirmation screen will display). **(2)** Click the **Edit** icon **(3)** or the **Name** or **Group ID** **(4)** to modify the selected group. (See Figure 1-31)



Figure 1-31

3. When adding a new resource group (after clicking **Create New Group**) the **Resource Group Profile** screen will display. **(1)** Enter a **Group Name**, **(2)** a **Description**, **(3)** and check **Region Based** if required. **(4)** A region-based resource group will automatically add providers to the group if they are in the same geographic region. Click **Save** to retain the changes. **(5)** Click **Save & Exit** to retain the changes and return to the previous screen. **(6)** Click **Exit** to return to the previous screen without retaining the changes. **(7)** (See Figure 1-32)

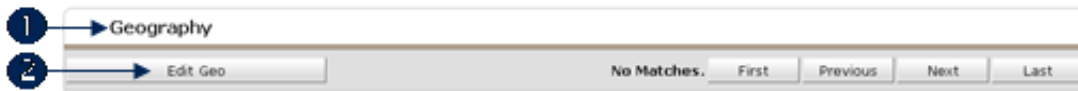


Figure 1-32

4. Checking **Region Based** while adding a resource group will result in the display of the **Geography** area. **(1)** Click **Edit Geo** to assign a geography to the group. **(2)** (See Figure 1-33)

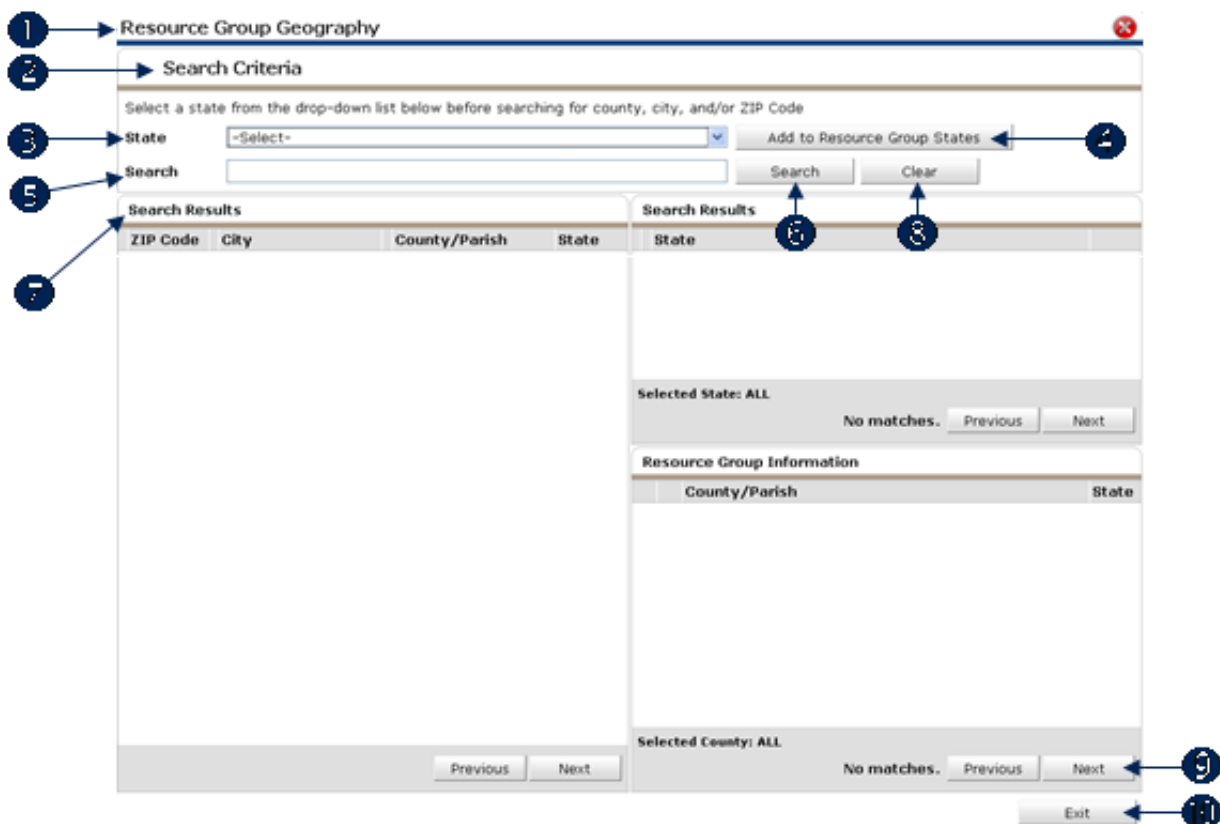


Figure 1-33

5. **Resource Group Geography** will display. **(1)**
6. The following functions are available in **Search Criteria (2)**:
 - a: Select a **State** in the drop down field. **(3)** Click **Add to Resource Group States** to add all **Counties, Cities and ZIP Codes** of the selected state to the group as **Geographies Served (4)**
 - b: To assign a county, city or ZIP Code to the group, select a **State** in the drop down field. **(3)** Enter a key word in the **Search** field, **(5)** and click **Search (6)** **Search Results** will display. **(7)** The search results show **ZIP Codes, Cities and Counties** from the selected state that match the

key word. Click **Clear** to reset the **Search** field. **(8)**

c: Use **Previous** and **Next** to navigate through the search results. **(9)**

d: Click the **Green Plus** icon  to add the **Zip Code**, **City** or **County** to the provider.

e: Click **Exit** to return to the previous screen. As changes are made they are automatically updated in the group record, therefore save is not required. **(10)** (See Figure 1-34)



Figure 1-34

7. The selected Geography will display when returning to the **Resource Group Profile** screen. (See Figure 1-35)

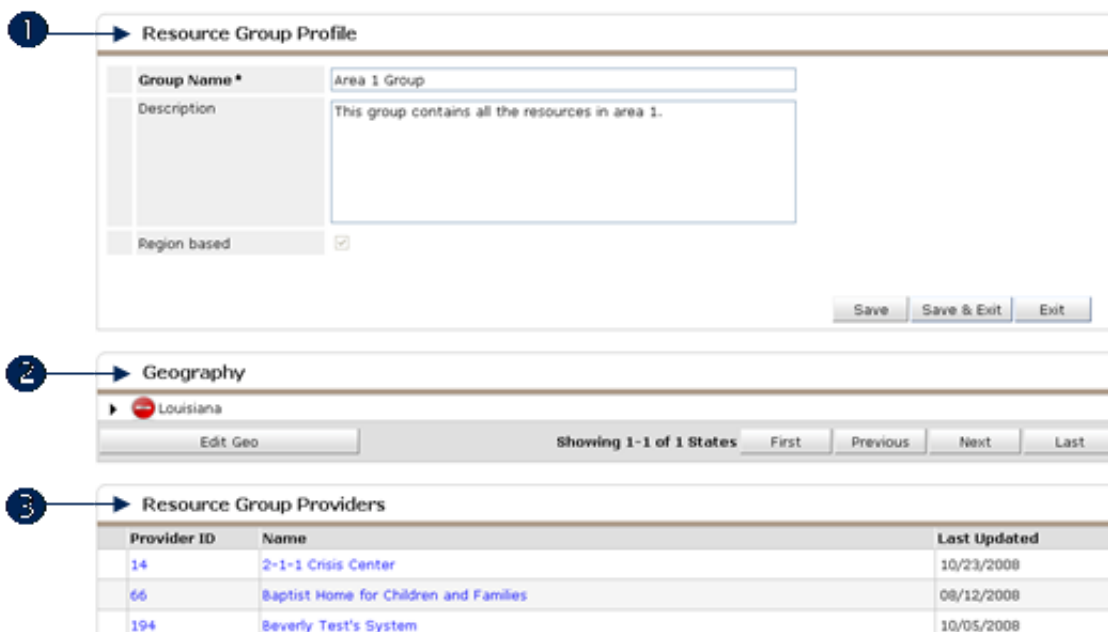





Figure 1-35

8. After adding a resource group, or when a resource group is accessed in edit mode (by clicking the **Edit** icon), the **Resource Group Profile (1)** will include **Geography (2)** (if the group is region based) and **Resource Group Providers. (3)** (See Figure 1-36)



Figure 1-36

9. In **Resource Group Profile**, a list of providers contained in the resource group is display in the section labeled **Resource Group Providers**. In this area, the **Red Minus** icon  is available to

remove a provider from the resource group. The **ServicePoint Logo** icon  indicates that the provider uses *ServicePoint*. The **Group** icon  indicates that the Level 1 provider and all subordinate providers are included in the group.

10. Click **Manage Providers (1)** to add or modify providers associated with the reporting group.

Related Information: The functionality associated with managing providers in the group is fully described in the [Provider Groups – Manage Providers](#) section of the help file.