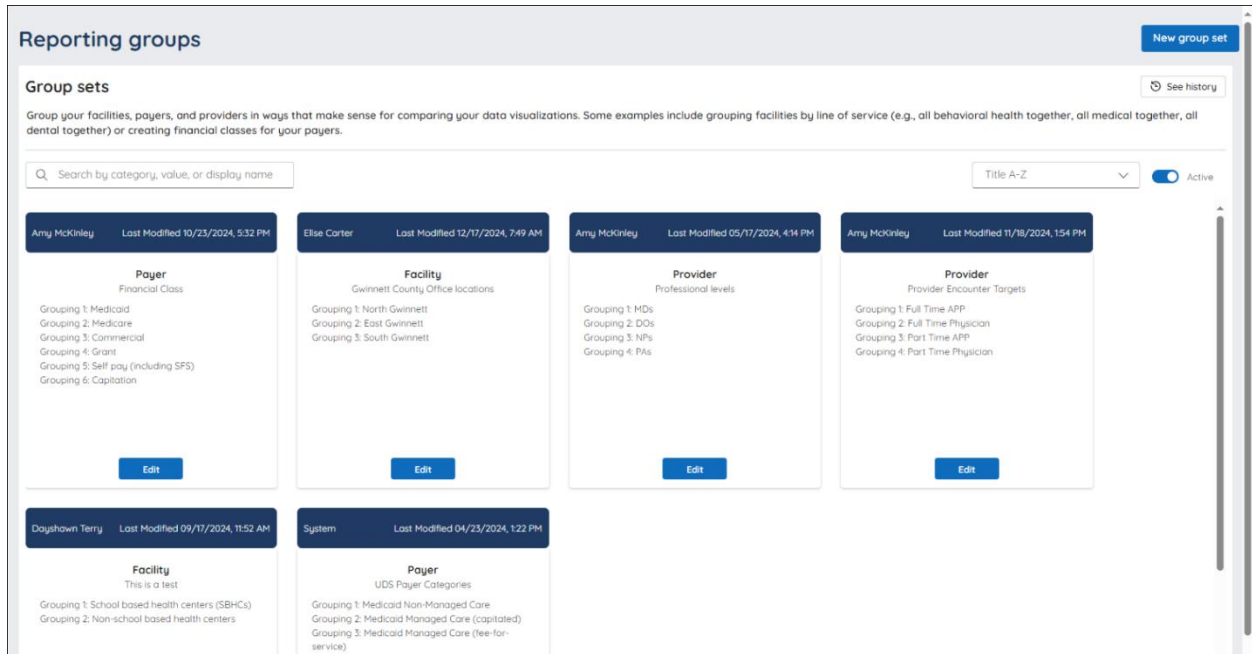


Group sets

Group sets enable you to easily create and edit the categories and groupings used in the dashboards. By utilizing group sets, you can organize data into categories that match the health center's reporting needs. This feature allows you to create new Group sets and modify existing ones, making the dashboard data visualizations more meaningful and insightful.



The screenshot displays the 'Reporting groups' interface. At the top right, there is a 'New group set' button. Below the title, there is a 'Group sets' section with a 'See history' link. A descriptive text explains that group sets are used to organize data for visualizations. A search bar is provided with the placeholder 'Search by category, value, or display name'. To the right of the search bar, there is a 'Title A-Z' dropdown menu and an 'Active' toggle switch. The main content area shows a grid of group set cards. Each card includes the creator's name, the last modified date and time, the category (Payer, Facility, or Provider), a list of groupings, and an 'Edit' button. The cards are arranged in two rows. The first row contains four cards: 'Payer - Financial Class', 'Facility - Gwinnett County Office locations', 'Provider - Professional levels', and 'Provider - Provider Encounter Targets'. The second row contains two cards: 'Facility - This is a test' and 'Payer - UDS Payer Categories'.

Use the **Active** toggle to display only the active **Group sets** information. Refer to the [Toggles section](#) for more details.

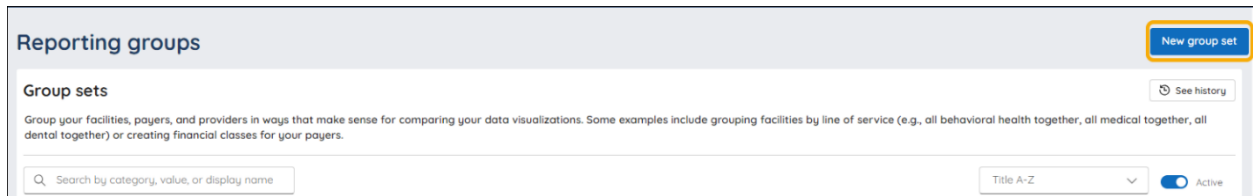
Creating a Group set

The ability to create a group set is permission/role-based. Not all users can access the New group set button.

Important Note: As of Financial Insights v1.3, users can add an unlimited number of payer, provider, or facility Group sets.

Steps to create:

1. Navigate to **Admin Settings**.
2. Locate Reporting groups and click **Group sets**.
3. Click the **New group set** button.



4. The **Add group set** modal opens.
5. Use the drop-down menu to select the **Reporting group type** (Required).
6. Enter the **group set** fields (Required).
 - **Reporting group set name**
 - **Reporting group set description**
7. Use the **+Add grouping name** to enter the grouping name.

Important Notes: Users must enter more than one grouping.

8. Once finished, click **Save**.

Add group set ✕

Reporting group type *
Provider ▾

Reporting group set name *
Dental Providers

Reporting group set description *
All dental providers

Grouping 1 name *
RDAs 🗑

Grouping 2 name *
Hygienists 🗑

Grouping 3 name
Dentists 🗑

+ Add grouping name

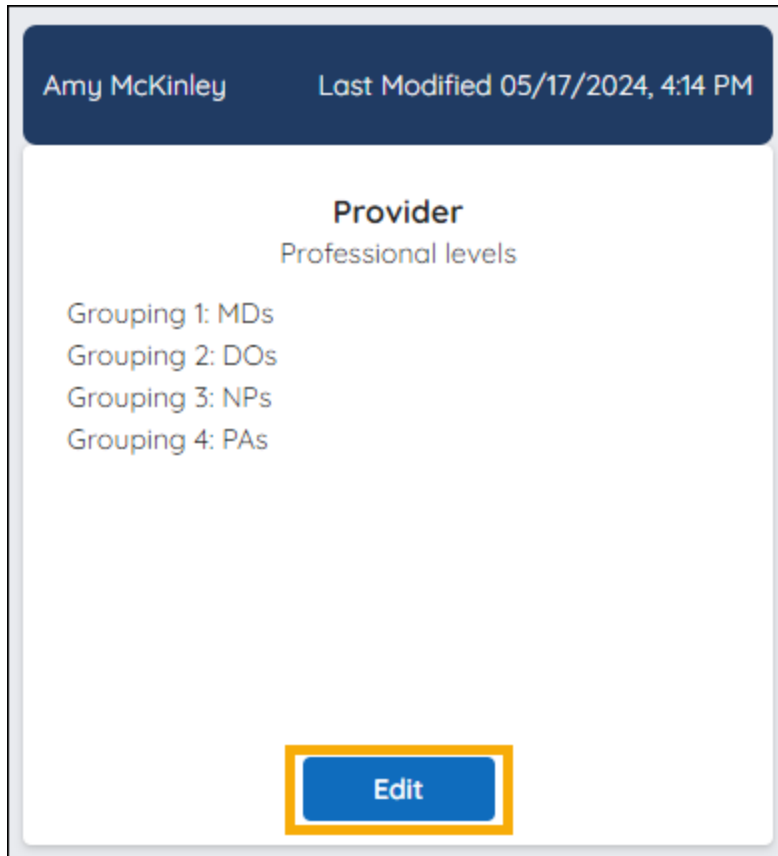
Save Discard

Editing a Group set

The Group sets can be updated or changed as needed. Like creating a Group set, the ability to edit is permissions/role-based.

Steps to edit:

1. Navigate to **Reporting Groups**.
2. Use the Search by textbox to locate the group.
3. Click the **Edit** button.



4. This opens the **Edit group set** page.
5. Review and update the information as needed.

Important Note: The Group set name and type are not editable. To change them, you would deactivate the Group set and create a new Group set with the updated name.

6. Use the **+Add group name** to add a grouping (Optional).
7. Use the **trash can icon** to remove a grouping (Optional).
8. Click **Save**.

Edit group set ✕

Reporting group type *

Provider ▾

Reporting group set name *

Professional levels

Reporting group set description *

to distinguish mid-level providers vs doctors

Grouping 1 name

MDs 🗑️

Grouping 2 name

DOs 🗑️

Grouping 3 name

NPs 🗑️

Grouping 4 name

PAs 🗑️

+ Add grouping name

Save Deactivate

Deactivating/Reactivating a Reporting group

Reporting Group categories can be deactivated and reactivated.