Patient Groups User Guide

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Healthcare Solutions

Contents

Welcome to Patient Groups

Patient Groups allows you to view and manipulate groups of patients. Groups of patients are created from:

- **Clinical Audit** - They are created automatically when **Clinical Audit** is run.
- **Searches and Reports** - You can select to save the patients found during a search as a group.

What can I do in Patient Groups?

- **Modify** - groups can be modified by adding and removing patients.
- **Work Groups** - make a group into a Work Group, then use a secondary group to merge, combine, include or exclude patients.
- **Generate Recalls** - allows you to generate recalls and recall letters.
- **Produce labels**.
- **Generate History** - creates a history entry to each patient.
- **Reminders** - generate for a groups, these display in Consultation Manager.
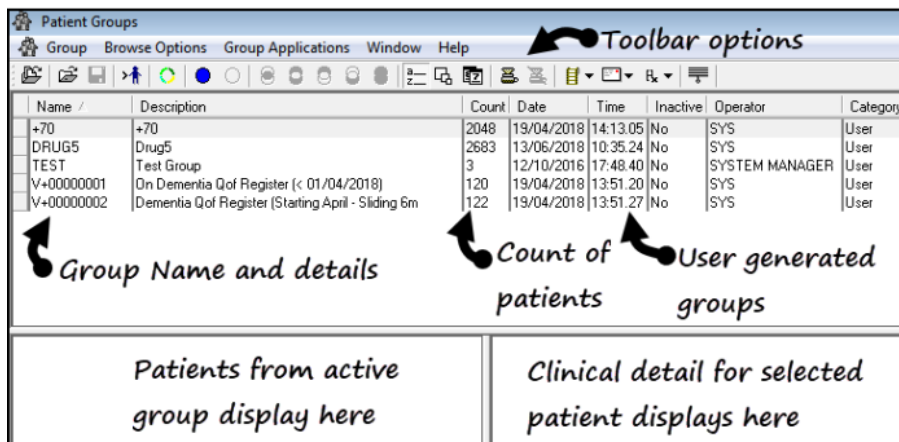
Navigating Patient Groups

Patient Groups allows you to create, manipulate and manage groups of patients.

The **Groups Applications** can then be used to generate:

- **Reminders**
- **Clinical data**
- **Letters**
- **Recalls**

A patient group can also be used within **Searches and Reports** and **Consultation Manager**:

When **Patient Groups** opens the following options are available:

- ![icon] **View Patients from multiple Group(s)** - Firstly, double click on each group to select.

- ![icon] **View Highlighted Group** - Displays the patient list for the current group.

- ![icon] **Patient Select** - Manually select patients to create a group.

- ![icon] **Make Work Group** - Make a group into a Work Group, then use a secondary group to merge, combine, include or exclude patients.

- ⬡ **Select an audit line** - Select a group from the Clinical Audit browser.

  ➡ See **Selecting a Clinical Audit Group** on page **10** for details.

- ⬚ **Sort Alphabetically by name** - Sorts the list of groups alphabetically.

- ⬚ **Sort by Count** - Sorts the list of groups by number of patients in the group.

- ⬚ **Sort by Date** - Sorts the list of groups by date created/last modified.

- ⬚ **Set Filter** - Refine the display of groups, for example, groups you have created.
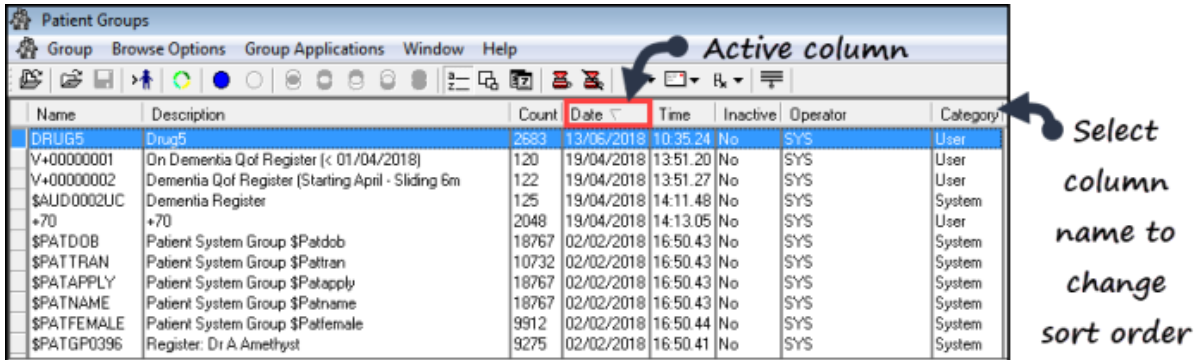
  ➡ See **Setting the Patient Groups Filter** on page **17** for details.

- ⬚ **Clear Filter** - This is only active if a filter is set.

- ⬚ **Generate Labels** - See **Label Printing** on page **35** for details.

- ⬚ **Generate Recalls** - See **Generate Recalls** on page **33** for details.

- ⬚ **Add History Entry** – See **Generating History Entries** on page **42** for details.

- ⬚ **Close**.

Sorting

Select any of the column headers to change the sort order of the groups.

Sorting a List of Groups

Use the toolbar to sort how the list of groups displays, or select the column header:

- **Alphabetically** - **Select to sort alphabetically by Name.**

- **Count** - **Select to sort by number of patients in a group.**

- **Date** - Select to sort by date created

Select the column header again to toggle the view from ascending to descending.

> **Training Tip** - Once you have sorted, for example, by **Name**, you can add a secondary sort, for example, **Date**. Press the **Control** key and select the second column header to apply.

Selecting a Clinical Audit Group

You can browse the list of **Clinical Audits** and select a group from a single audit line. This enables you to make the group into a Work Group, then select a secondary group with which to merge/remove/combine patients.

> ✏ **Note** - If you select an input group from the clinical audit browser, then each time that search is run, it will use the latest generation of that audit line. If you want to run the search later using the patient list as it was originally, then you need to rename and save the group.
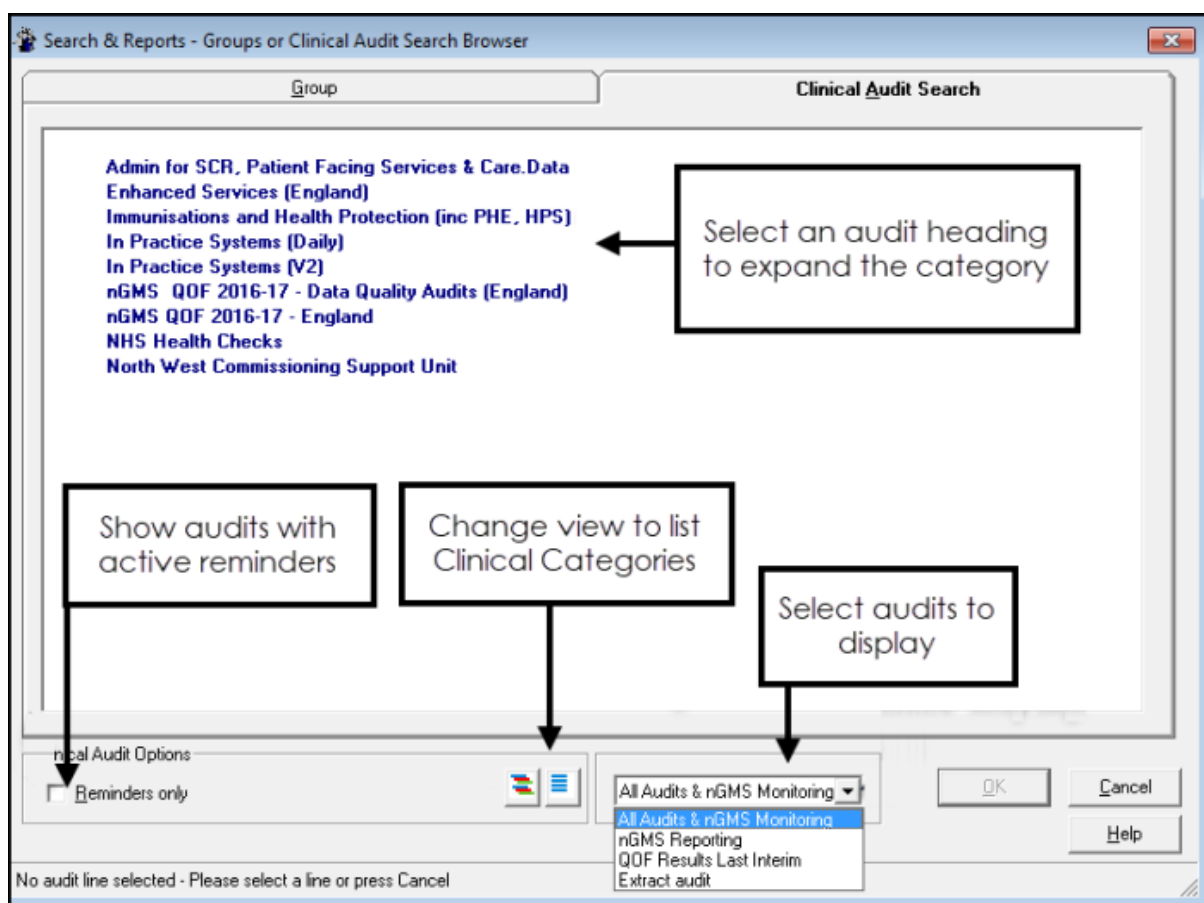
1. Select the **Clinical Audit Search** tab. The view defaults to the audit groups.

> ✏ **Note** - You cannot select an audit group, you need to select an individual group from a clinical category.

2. Optionally, the view can be refined:

-   Select the **Reminders Only** box, to display audits with active reminders.

-   Select **Show all Clinical Categories** to expand all the audits.

-   Change the audit category from **All Audits & nGMS Monitoring** via the drop-down list.

3. Double click on an **Audit Group** heading to display the **Clinical Categories**.

4. Double click on the **Clinical Category** to display the groups.

5. Double click on an individual group to select. The **Patient Groups** view refreshes and includes your chosen search. If you select the **Date** column, the audit group displays at the top of the list.

6. You then have several options:

-   Add another group from either **Clinical Audit** or **Patient Groups**.

-   Make the audit group into a **Work Group** ⬤. See, **Work Groups** on page **39** for details.

-   View the patients, their relevant clinical detail (select a patient name); or right click within the list of patient names to sort, print, save group, or open **Consultation Manager** for a specific patient.

Sorting Patients in a Group

Sort a Group

When you are viewing a list of patients in a group, right click to access the sort options:
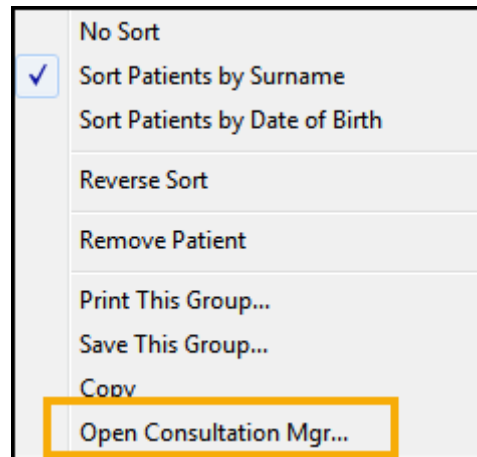
- **Surname** (default).
- **Date of birth.**
- **Reverse Sort** - This reverses the list, for example, listing Z-A instead of A-Z.

Sort Multiple Groups

Multiple groups can be sorted together using the following options:
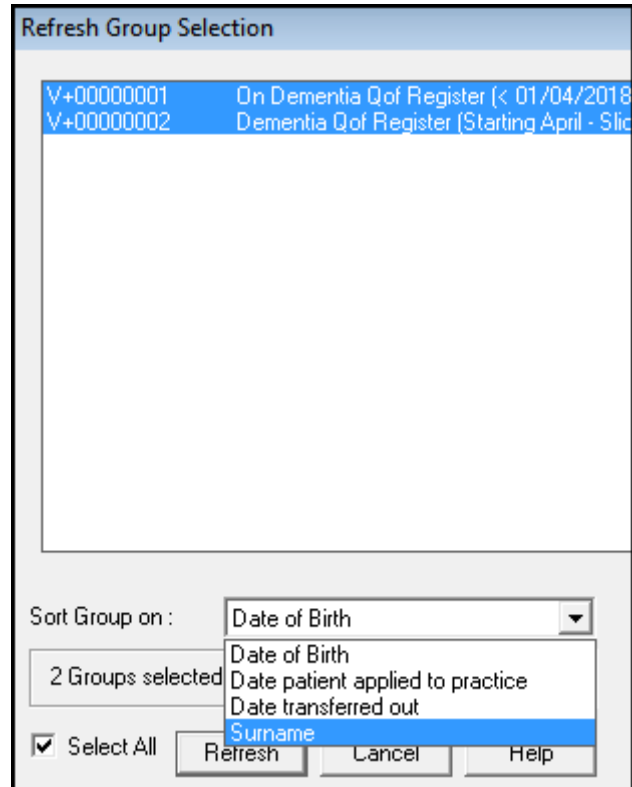
- **Date of birth**
- **Date patient applied to practice**
- **Date transferred out**
- **Surname**

To sort multiple groups:

1. From **Patient Groups**, double click each group name to select.
2. A red dot displays to the left of the group name:

3. Select **Group - Refresh Selected Group(s)** and the **Refresh Group Selection** screen displays.
4. Use the drop down list to select the sort by options:

5. **Select All** is ticked by default, untick if required.
6. Select **Refresh** to proceed.

The groups display with the new sort order.
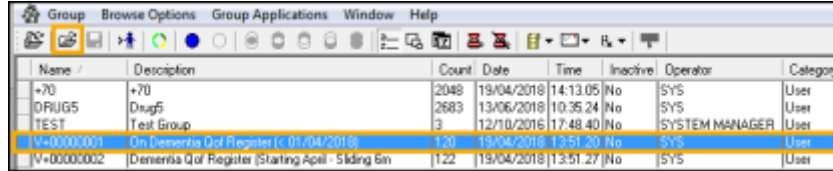
See **Viewing Patients in a Group** on page **14** for details.

Viewing Patients in a Group

To view the patients within a selected group you can either:

- Highlight the group line and select **View Highlighted Group** ⬚ :

- Select **Group - View Selected Group**.

- Double click in the small square to the left of the required group.

The **Group Viewer** displays, with a list of patients on the left and a blank right-hand pane.

- Select a patient name to display clinical details on the right.

- If required, you can right click on a patient and select from:

    - **Various sort options** - Select as required

    - **Remove Patient**

    - **Print This Group**

    - **Save This Group**

    - **Copy**

    - **Open Consultation Manager** - Select to open the selected patient in **Consultation Manager**.

Types of Patient Groups

System Groups

System groups are prefixed with $ and followed by 3 letters which vary depending on the origin of the group:

- **Generated from Clinical Audit**
  Audit Searches - $AUD or $QAU, $INT, $QOF, $QPY
  Audit Sub-searches - $SUB or $GLO, $QFS, $QPS

- **MIQUEST groups and other System groups**
  Patient and GP system groups - prefixed $PAT

User Groups

These are created in the practice by:

- Searches and Reports output

- Within **Patient Groups**, either by combining two existing groups, adding patients to an existing group or creating a new group.

- If you make a system group into the Work Group, then save the Work Group with a new name and description, it becomes a user group.

Displaying the Most Recently Used Patient Groups

To display the nine most recently used groups:

- From **Patient Groups**, select **Group** and they display at the bottom of the list:
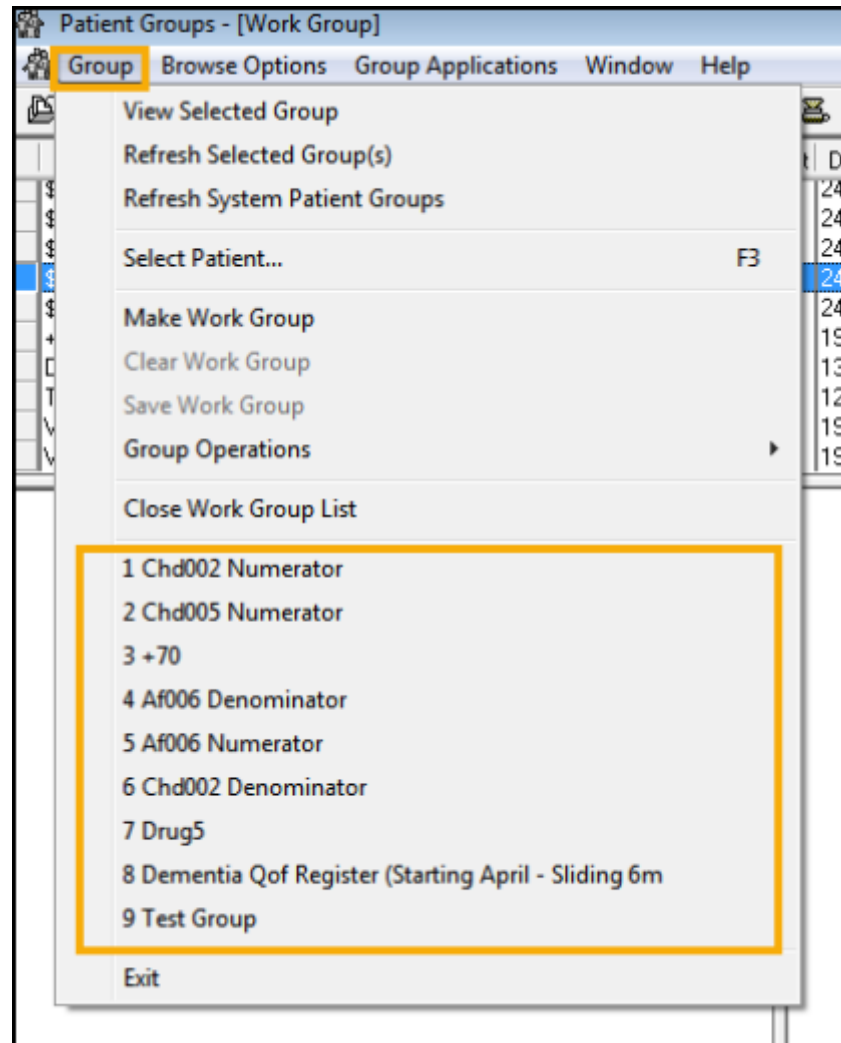
Setting the Patient Groups Filter

The default view consists of all user groups (active and inactive), and excludes system groups.

The filter options modify the view, and the last used filter (on a per user basis) remains active until cleared.

To activate the filter, select **Browse Options** -**Set Filter** or **Filter** [icon] from on the toolbar.
The **Browse Filter Options** displays:
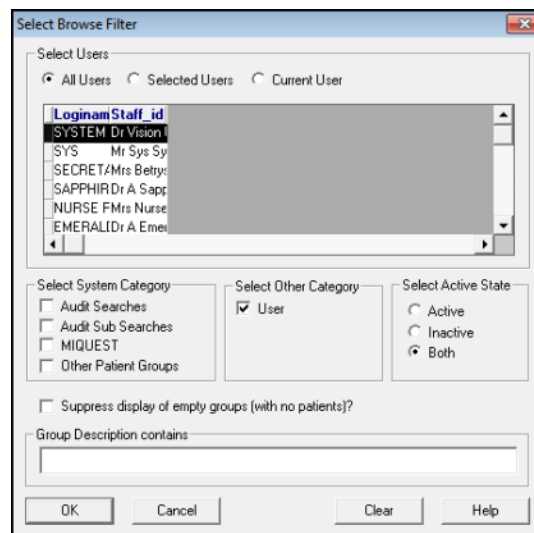
- **All Users**

- **Selected Users** - Filter on users who created the groups.
  Double click on each user to select, '**>**' displays to the left of the user name to indicate selected users.

- **Current User** - Groups created by you.

- **Select System Category**
  Audit searches
  Audit sub-searches
  MIQUEST
  Other Patient Groups

- **Select Other Category** - User created groups.

- **Select Active State** - Active or inactive groups, or both.

- **Suppress display of empty groups** - Tick to remove groups without patients.

- **Group Description contains** - Enter a partial description, for example, *diab* finds groups with *diabetes* in the title.

Select **Clear Filter** [icon] to return to the full list of user groups.
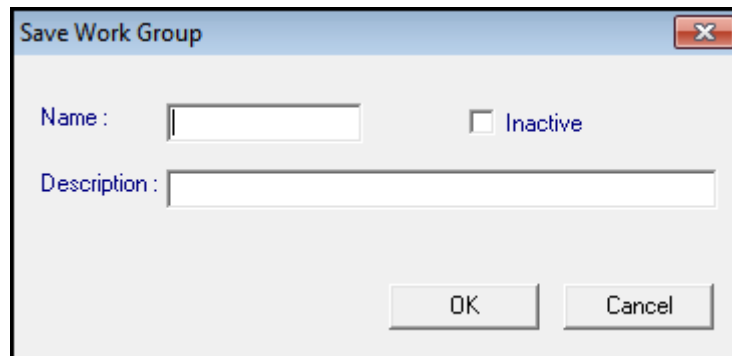
Create a New Group

You can manually create a group by selecting individual patients.

1. If you already have a Work Group in use, use **Clear Work Group** ⬜.

2. Select **Select a Patient** 🧍 and find a patient in the usual way.

3. The patient displays in the bottom left section:
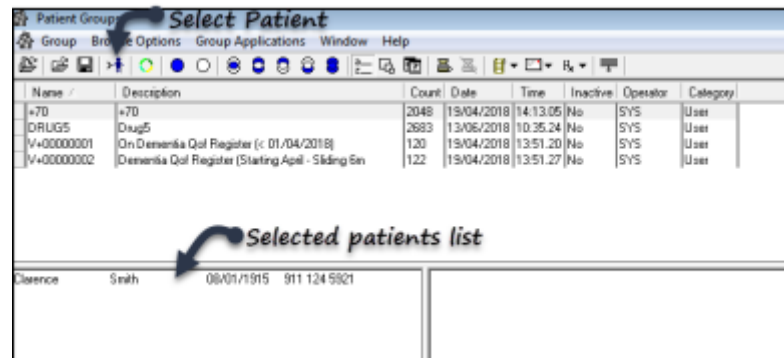
4. Repeat to add further patients to the Work Group.

5. Select **Save** 💾.

6. The **Save Work Group** screen displays, enter a name and description for this **Work Group:**

7. Select **OK** to save.

Opening a Patient Record

To view a patient's clinical record from **Patient Groups**:

- From a patient list, simply right click on the patient required and select **Open Consultation Manager**:
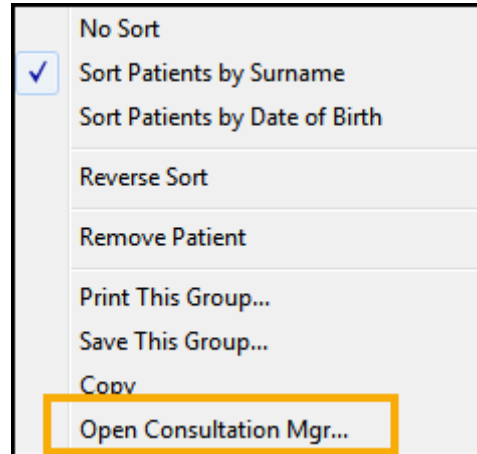
Editing Groups

Remove Patient from Work Group

To remove a patient from a group, right click on the patient to be removed and select **Remove Patient**.

Add patient to Work Group

To add a patient to a group, select **Group - Group Operations - Add New Patient to Work Group**.
The **Vision 3 Patient Select** screen displays, find your patient in the usual way and select **OK**.
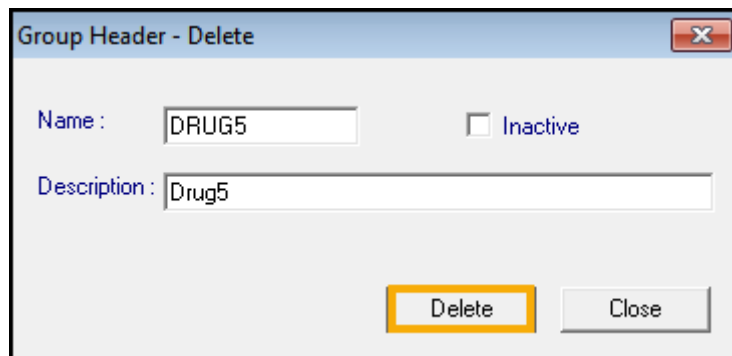
Deleting Groups

You can delete groups in two ways:

Deleting Individual Groups

1. Right click on the group name to access the menu.
2. Select **Delete**.
3. The **Group Header - Delete** screen displays:

4. Select **Delete** and the group deletes.

Deleting Multiple Groups

1. Double click on the groups you want to delete, a red dot displays on the groups selected:

2. Right click on one of the selected groups and select **Delete**.
3. A **Group Selection** screen displays listing the groups selected for deletion.
4. Tick the **Select All** box (to select all the groups), or select each group you want to delete:
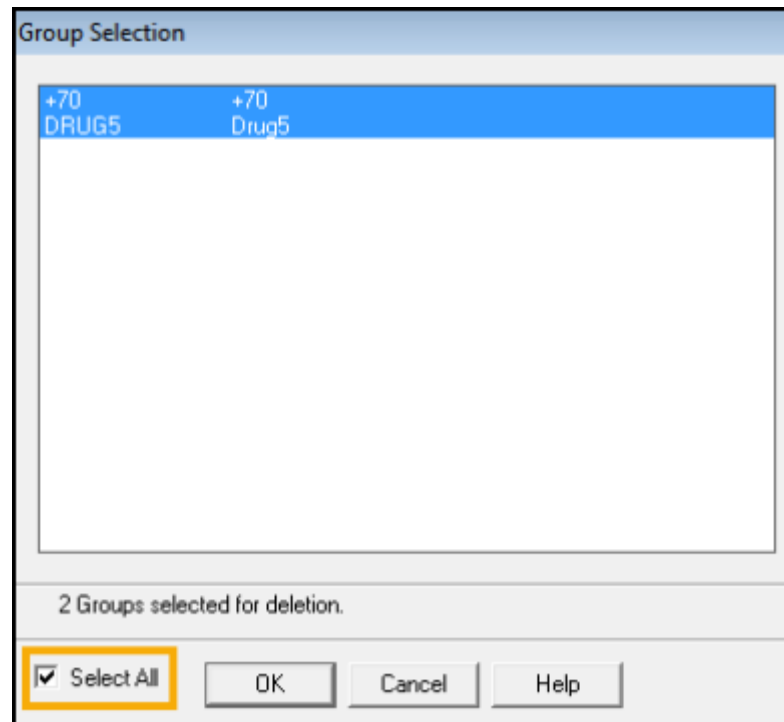
5. Select **OK** and the **Group Header - Delete** screen displays:
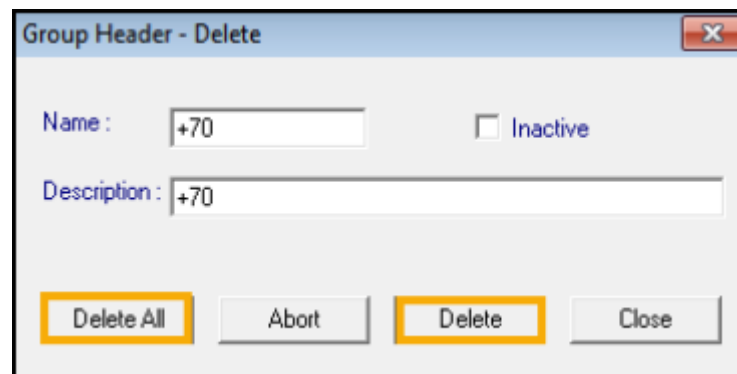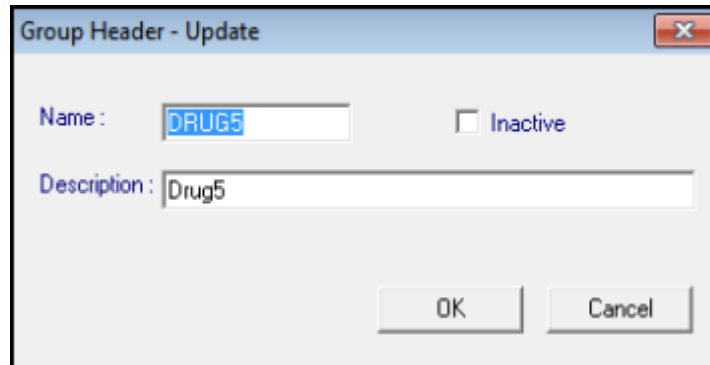
6. Select **Delete All** to delete all the groups, or delete them individually using **Delete**.

Managing Groups

Editing a Group Name

To rename a group:

1. Right click on the group required and select **Edit**.
2. The **Group Header - Update** screen displays:

3. Update as required.
4. Select **OK** to save.

Inactivate Group

To inactivate a group:

1. Right click on the group and select **Edit**.
2. Tick **Inactive.**
3. Select **OK** to confirm
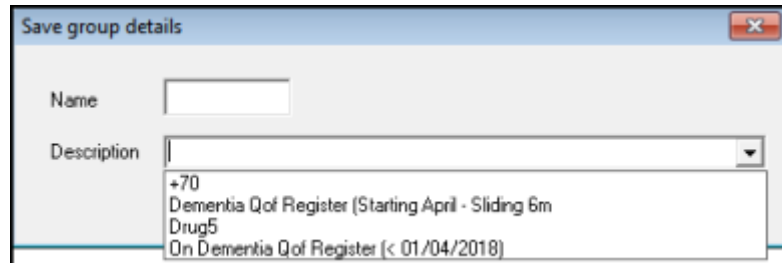
> **Note** - System groups cannot be renamed.

Saving a Group

To save a group that you have updated:
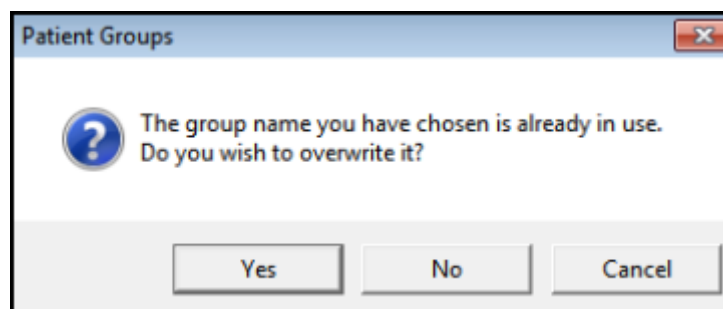
1. From **Patient Groups**, simply right click on the group and select **Save This Group**.

2. The **Save group details** screen displays:

3. Complete as follows:

   - **Name** - Enter a name, up to 10 characters.

   - **Description** - Enter a short description of the group, up to 56 characters, or choose from the available list. If you use a name that has already been used for a group, a prompt displays *The group name you have chosen is already in use. Do you wish to overwrite it? Yes/No:*

Select:

   - **Yes** - To overwrite the existing group.

   - **No** - To keep the original group, and enter a new name for the current group.

If you make changes to a group and select **Close** , you are reminded to save your changes:

Select **Yes** to save your changes.
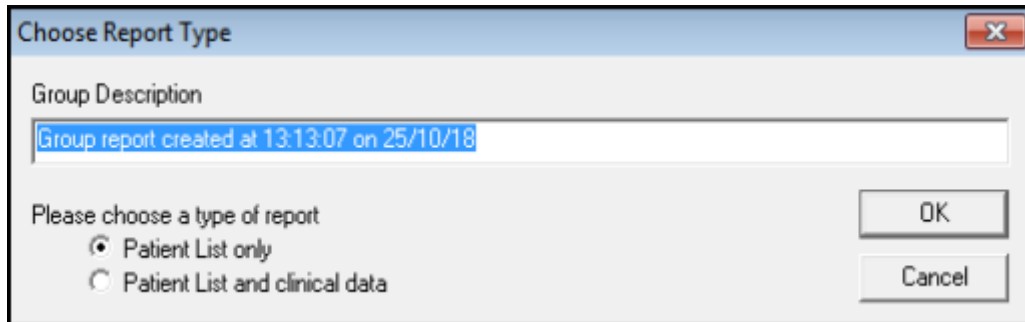
> **Note** - If you make a clinical audit group $AUD or $SUB into the Work Group, then right click and save it with a different name and description (ideally removing the $ from the name), this changes it from a **System** group into a **User** group.

Printing a Group

To print a list of patients within a group:

1. From **Patient Groups**, right click on the group required and select **Print this Group**.

2. The **Choose Report Type** screen displays:

3. Update **Group Description** if required.

4. Select the type of report:

   - **Patient List Only** - Patient Name and DOB only (default)

   - **Patient List and clinical data** - Patient Name, DOB and clinical data

5. Select **OK** to print.

See **Viewing Patients in a Group** on page **14** for details.

Refreshing Groups

You have various Refresh options within **Patient Groups**:
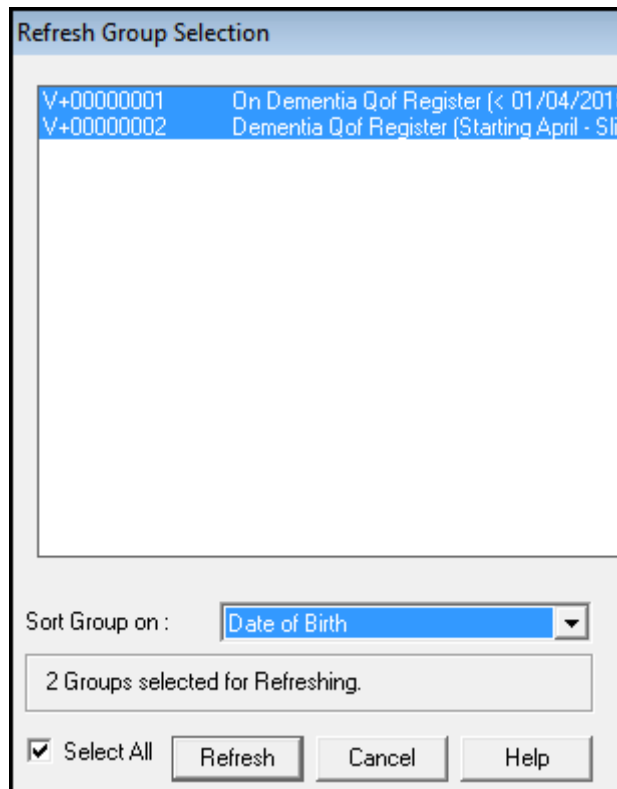
Refreshing Selected Group(s)

Sorts group(s) by date of birth, date patient applied to practice, date transferred out, or surname.

1. From **Patient Groups**, double click on the group(s) required. A red dot displays to indicate the groups selected:

2. Select **Group** - **Refresh Selected Group.**

3. The **Refresh Group Selection** screen displays, with all groups selected:

💡 **Training Tip** - If you have selected a group in error, select it to deselect it.

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4. From **Sort Group** select the order you require:
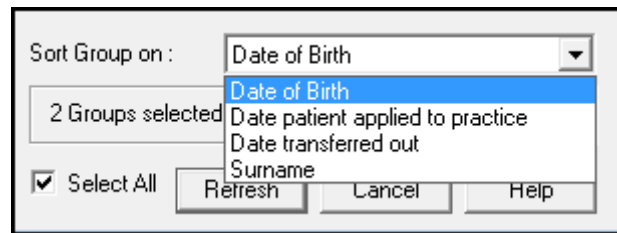
5. Select **Refresh**.

Refreshing System Patient Groups

To refresh system created patient groups:

From **Patient Groups**, select **Group** - **Refresh System Patient Groups**.

✏️ **Note** - This may take some time as it recreates all the system groups.

Refreshing View

If you create a new group or update an existing group from Searches and Reports while **Patient Groups** is open:

From **Patient Groups**, select **Browse Options - Refresh View**, or **<F5>** to display the updated list.

Removing Obsolete Patient Groups

We recommend you delete all old groups no longer associated with **Clinical Audit** and all the old audit groups and groups formed from **MIQUEST** queries.
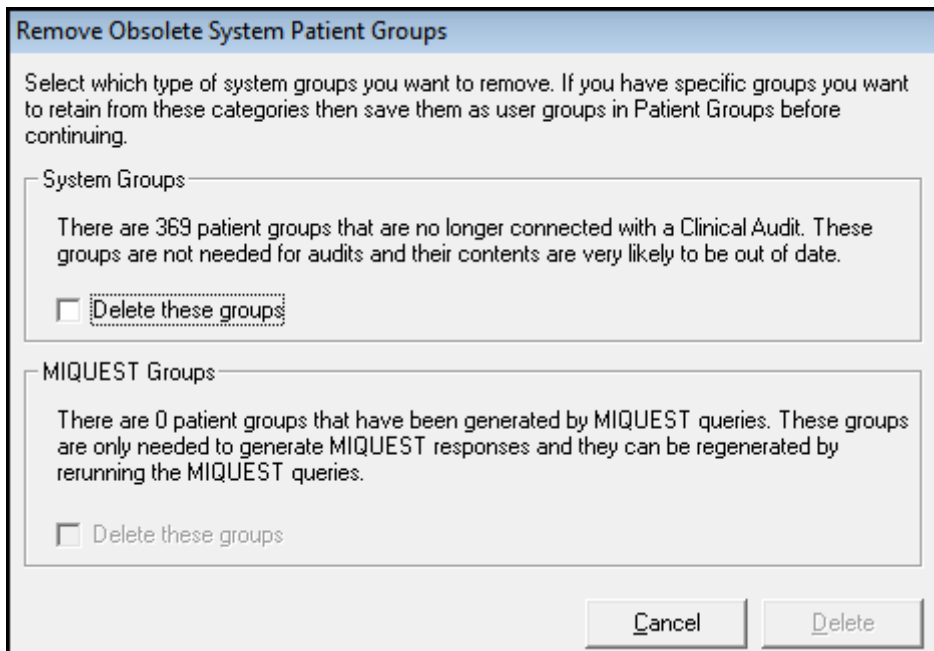
💡 **Training Tip** - You should be running this utility after importing and deleting audits.

To run the **Remove Obsolete** utility:

ℹ️ **Important** - If you want to keep any obsolete groups, save them using **Group - Save As** before running the utility.

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1. From **Patient Groups**, select **Group Applications - Remove Obsolete Patient Groups**.

2. The **Remove Obsolete System Patient Groups** screen displays summarising the number of obsolete groups:

3. Tick:

   - **System Groups - Delete these groups**, to remove outdated system groups.

   - **Miquest Groups** - Delete these groups, to remove old **Miquest** generated groups.

4. Select **Delete** to start the process.

> 💡 **Training Tip** - You can select **Stop** to pause the process if necessary. When you restart, the process continues from where you paused it.

5. On completion the **Remove Groups** screen displays the number of groups deleted:
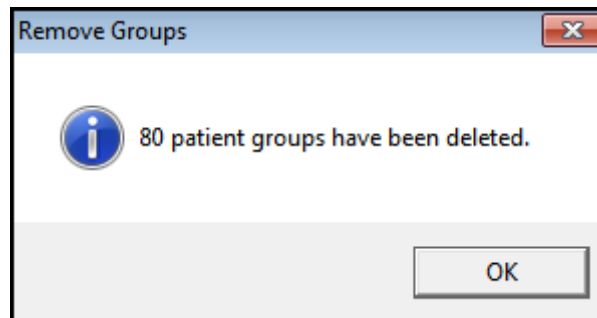
6. Select **OK** to clear.
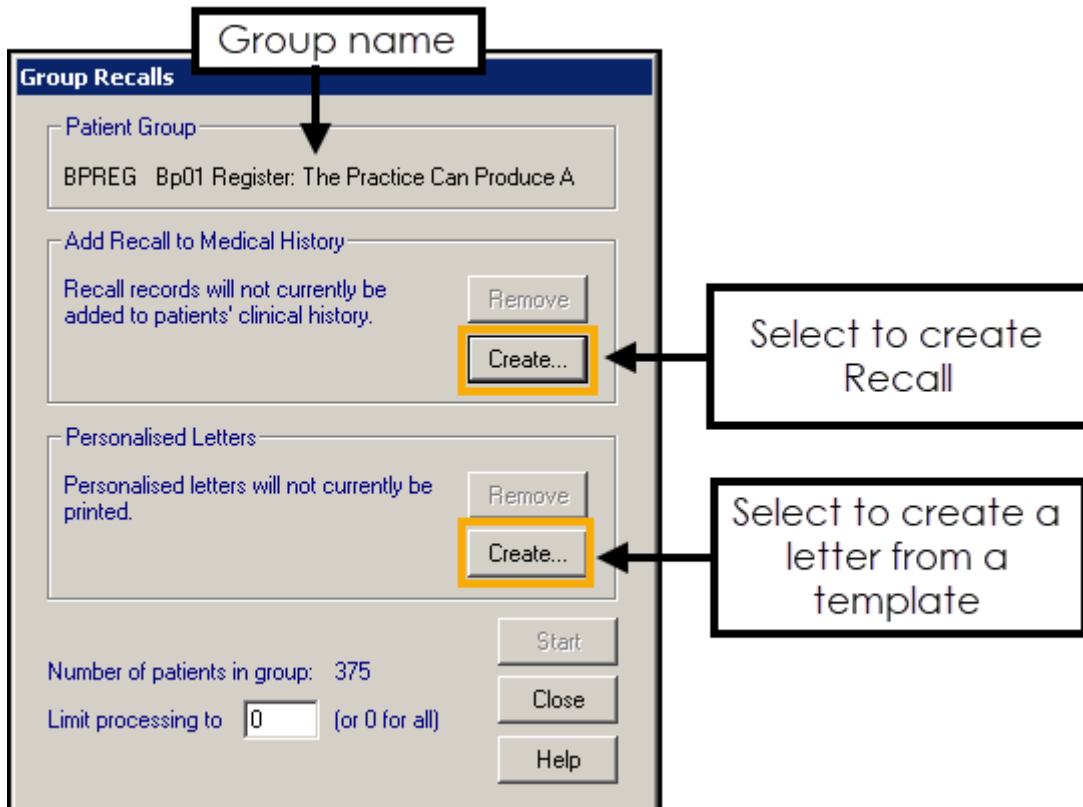
> ➡ See **Deleting Groups** on page **20** for details.

Generate Recalls and Letters

Generate Recalls quickly mail merges a template letter with a group to produce recall letters, for example, immunisations.
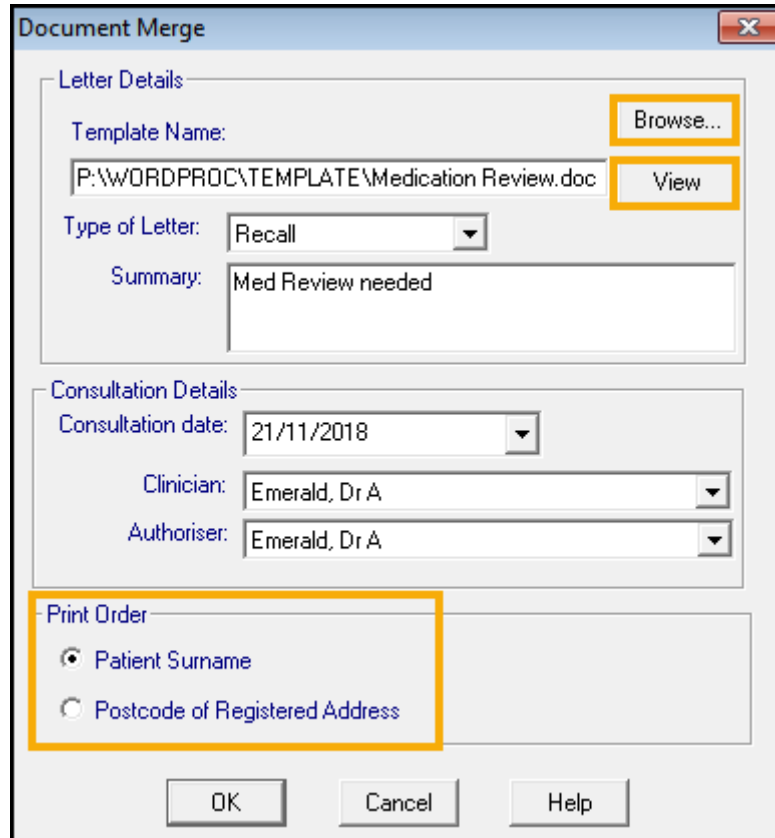
Template letters for recalls are created from the **Vision 3 front screen– Utilities – Word Processor**.

1. Highlight the group to be targeted from the list.

2. Select **Generate Recalls** 🖼️ and the **Group Recalls** screen displays:

3. Optionally, generate a recall for each patient, select **Create** to choose the clinical term for the recall.

4. Select **Create** to add a recall letter template, the **Document Merge** screen displays.

5. Select **Browse** to find a template.

6. Select **OK** to proceed.

7. Optionally, select **View** to preview the letter.

8. If required, enter a comment in the **Summary** box, this displays in the patient's record.

9. The **Consultation Details** default to today, and the **Clinician** and **Authoriser** are used to create the entry in the patient record. Update as required.

10. The **Print Order** defaults to **Patient Surname**, if preferred tick **Postcode**.

11. Select **OK** to return to the **Group Recalls** screen.

12. Select **Start** to generate the letters and recalls.

> **Note** - If you enter a number in the **Limit processing to** box - there is not a restart option.

13. A prompt displays on completion, select **Tick All** to save a copy of the letter in the patient's record.

14. Select **OK** to finish:
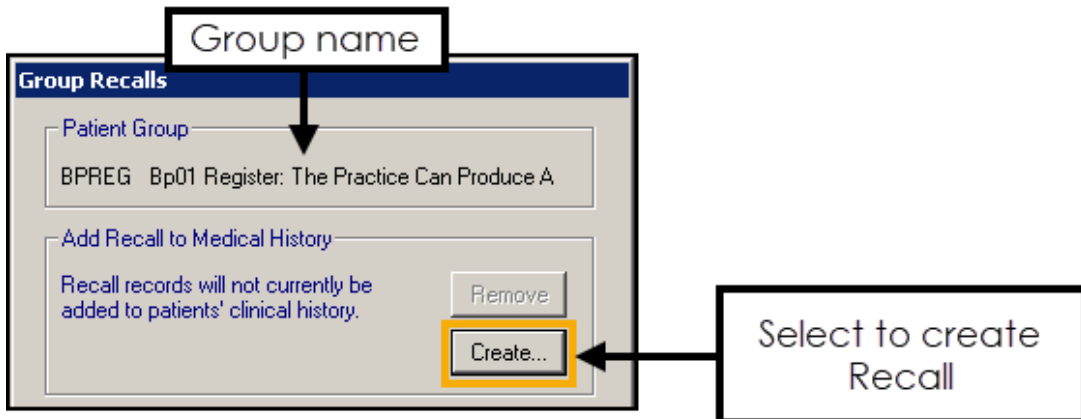
15. If required, print address labels for each patient.

➡️ See **Generate Recalls** on page **33** and **Label Printing** on page **35** for details.
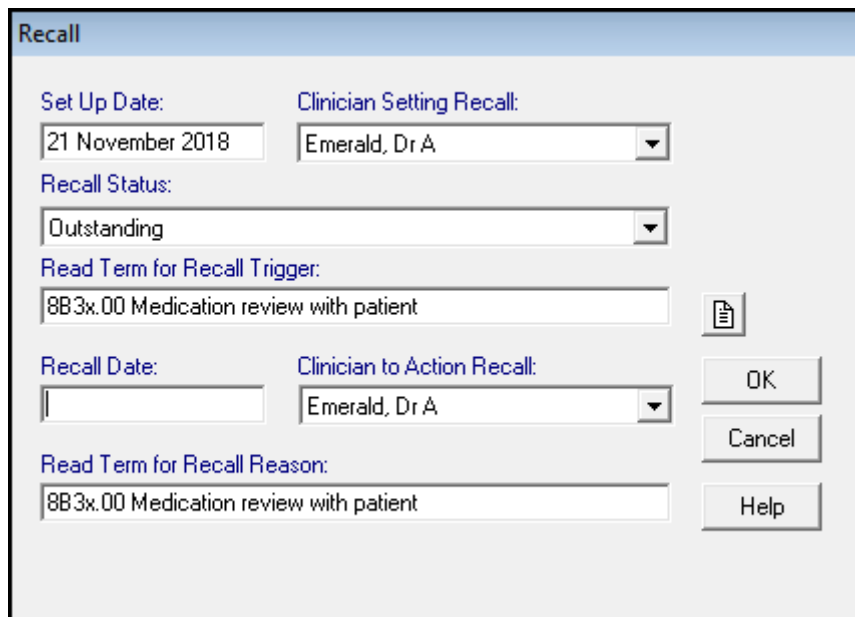
Generate Recalls

A new recall can be added to each patient's medical history.

1. Highlight the group to be targeted from the list.

2. Select **Generate Recalls** ▣ and the **Group Recalls** screen displays:

3. Select **Create** to display the **Recall** screen:

4. Complete the **Recall** form.

- **Set Up Date -** Date that the recall is added, and defaults to today.

- **Clinician Setting Recall -** GP or other practice staff who is carrying out this recall record.
  Select the drop-down arrow to choose from the list.

- **Status of Recall** - Defaults to **Outstanding**, the other options are **Completed**, **Cancelled** or **None**.

- **READ Term for Recall Trigger -** This is the clinical term description that triggers the recall, for example, medication review.

- **Recall Date -** Enter the (future) date that all these patients are to be recalled, standard abbreviations can be used for example, 1m for 1 month.

- **Clinician to Action Recall -** This refers to the GP or other staff member, who will action the recall.
  Select the drop-down arrow to choose from the list.

- **READ term for Recall Reason -** This defaults to the same clinical term selected in **READ term for Recall Trigger**.

- **Notes** 📄 **-** Select to add a note to this recall, select **Close** to return to the recall screen.

5. Select **OK** to finish and return to the **Group Recalls** view.
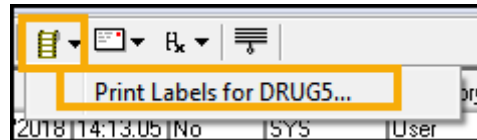
6. Select **Start** to generate the recalls.

➡️ See **Generate Recalls and Letters** on page **30** for details.
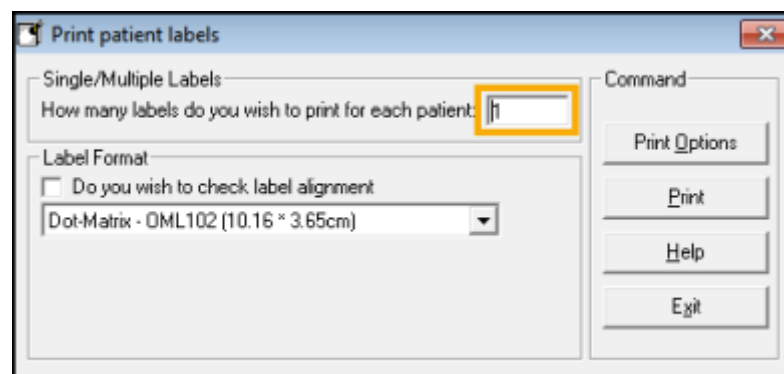

Label Printing

You can generate Address labels for a group of patients.

To create address labels for a group:

1. From **Patient Groups**, highlight a group in the list.

2. Select **Print Labels** and a drop-down of available groups displays:

3. Select the group required and the **Print patient labels** screen displays:

4. Decide how many labels you want to print for each patient - the default is 1.

5. In **Label Format** drop-down, choose the size of label for your printer:

   - Laser - L7164 (6.35 x 7.2 cm)
   - Laser - L7163 (9.9 x 3.81 cm)

   For example, Laser - L7163 (9.9 x 3.81 cm) are two column labels with 7 per column, and 14 per page.

6. Select **Do you wish to check label alignment to preview the labels**.

7. Select **Print Options** to select **Printer**.

8. Place the labels in the printer.

9. Select **Print** and the name(s) of the patient(s) display.

10. Select **Print**.

11. Select **OK**.

12. When finished, select **Close**.

Reminders

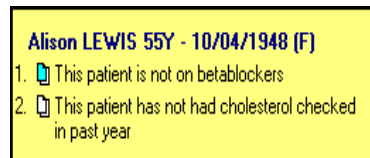You can create reminders for any group within **Patient Groups**, for example, patient has had medication changed from Ventolin to Salbutamol.

The reminders appear as yellow notes in **Consultation Manager**. Reminders can also be added manually to individual patients within **Consultation Manager**, and automatically generated from **Clinical Audit**:

There are two sorts of reminders that can be created in **Patient Groups**. In essence, both attach the same reminder text message initially to all patients within a group:
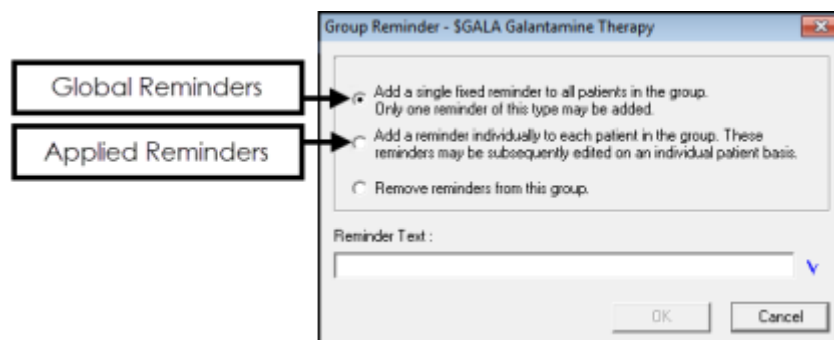
Global Reminders (Single Fixed Reminder)

- Displays a blue **Note** in **Consultation Manager**.
- Bulk delete option, to remove reminder from all patients in the group.
- Bulk edit to change the reminder text changes for all patients in the group.
- The reminder cannot be edited or deleted in **Consultation Manager**.
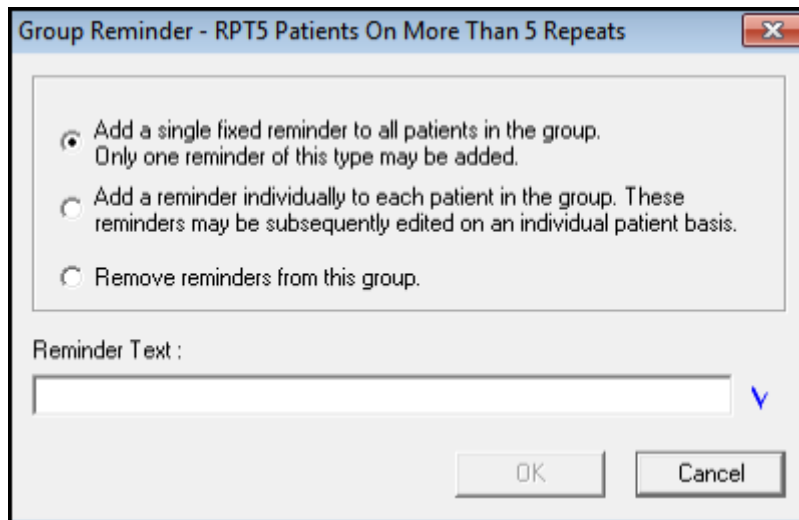
Applied Reminders (Add Reminder Individually)

- Displays a white **Note** symbol in **Consultation Manager**.
- Reminder can be edited within **Consultation Manager** for an individual patient. This converts to a **Manual Reminder**.
- Reminder can be edited within **Patient Groups** and the change affects all unedited reminders for the patients in the group.
- The reminder can be deleted in **Consultation Manager**.
- Bulk remove of reminders unedited reminders.

Generate Reminders

You can generate reminders for a group of patients.

1. Within **Patient Groups** select the group you want to generate reminders for.

2. Select **Group Applications** - **Reminders** and the **Group Reminder** screen displays:

3. Choose the reminder type from the list.

   - **Global Reminder** - **Add a single fixed reminder to all patients in the group. Only one reminder of this type may be added**. A single reminder added to the group, which cannot be edited or deleted in Consultation Manager.

   - **Applied Reminder** - **Add the reminder individually to each patient in the group. These reminders may be subsequently edited on an individual basis.** A single reminder added to the group, this can be edited or deleted in Consultation Manager, although the edited reminder then becomes a manual reminder and cannot be removed with the rest of the group.

4. Enter the **Reminder Text**.

5. Select **OK**.

> **Note** - A consultation type of **Administration** is added to each patient's record in Consultation Manager when a group reminder is created.
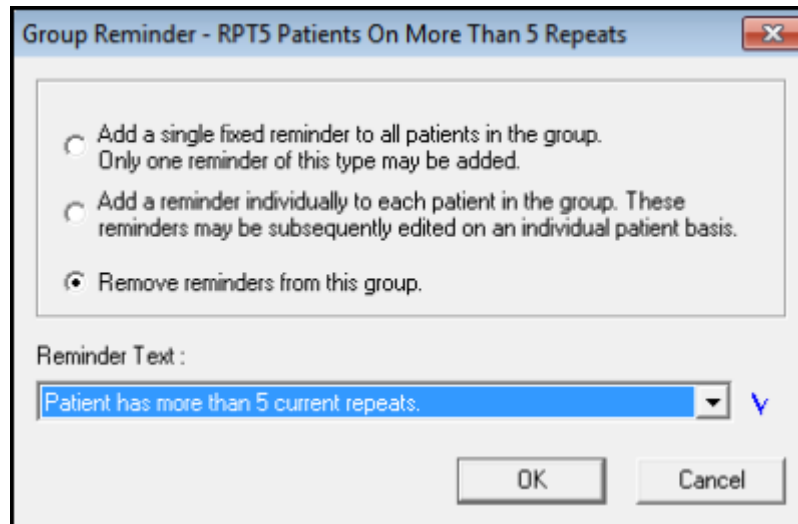
> See **Reminders** on page **36** for details.

Removing Reminders

If a group reminder is no longer needed, these can be removed.

1. Within **Patient Groups**, highlight the group to which a reminder is to be attached.

2. From the menu select **Group Applications** followed by **Reminders**.

3. Select **Remove reminders from this group**.

4. The drop-down list in **Reminder Text** details all reminders attached to the current group.
   Select the reminder you want to remove.

5. Select **OK**.
   The reminders are removed.

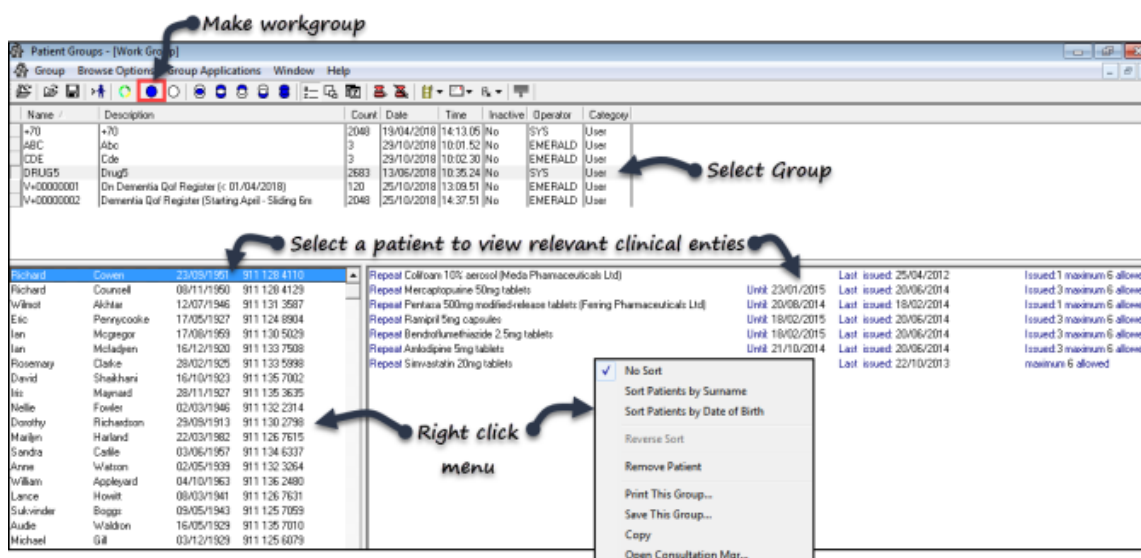**Note** - Any Applied reminders which have been edited in Consultation Manager are not removed.

See **Reminders** on page **36** and **Generate Reminders** on page **37** for details.

Work Groups

If you create a Work Group, you can then use a secondary group to merge, combine, include or exclude patients.

Make a Group into a Work Group

1. From **Patient Groups**, select a group.

2. Select **Make Work Group** 🔵 .

3. The list of patients in the group displays.

4. Right click on the group and select from the following as required:

   - **Sort** - There are various options to display the patients in a group, select as required.

   - **Print** - Select to print a list of the patients in the group.

   - **Save** - Select to save the group.

5. Optionally, select a patient name to view relevant clinical details, these display to the right.
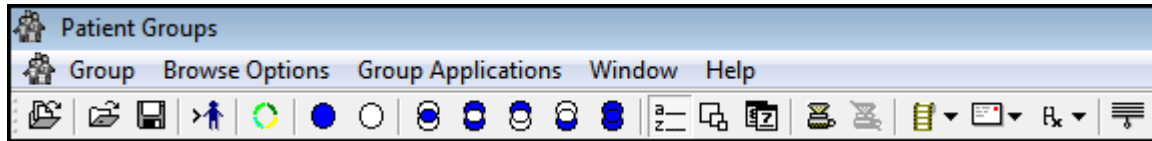   To view the patient record, right click and select **Open Consultation Manager**:

Work Group Menu

When you have an active Work Group, the following options are available:

- ![Save icon] **Save**

- ![Clear Work Group icon] **Clear Work Group**

- ![Keep patients icon] **Keep patients common to both groups** - See **Keep Common Patients** on page **47** for details.

- ![Remove Common Patients icon] **Remove Common Patients** - See **Remove Common Patients** on page **49** for details.

- ![Keep patients in second group icon] **Keeps patients exclusively in the joining (second) group** - Removes all patients from the first group, including any patients who are in both groups, see **Keep Patients only in the Secondary Group** on page **48** for details.

- ![Keep patients in first group icon] - **Keep patients exclusively in the first (work) group** - Removes any patients that are in the both groups and does not import any patients in the joining group, see **Keep Patients only in the Work Group** on page **48** for details.

- ![Add all patients icon] - **Add all patients** - Merges the two groups together, see **Merging Groups** on page **49** for details.

Clear and Close Work Group

Highlight a group and select **Clear Work Group** ![Clear Work Group icon] if you no longer want a group to be the Work Group.

Adding a Patient to a Work Group

To add a patient into a Work Group:

1. Open or make a group into a **Work Group**, see **Work Groups** on page **39** for details.

2. Select **Select a Patient** and the **Patient Select** screen displays.

3. Find your patient in the usual way and select **OK**.
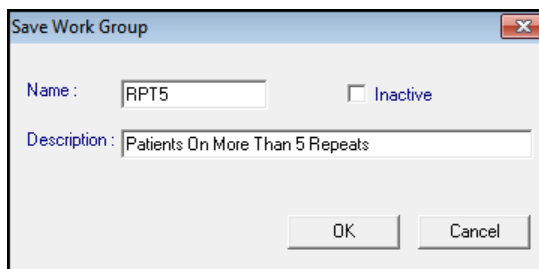
4. The patient is added to the group.

Create a Work Group

A Work Group can be created by selecting patients.

1. Select **Select a Patient** and find patients in the usual way.

2. Select **Save** .

> ✎ **Note** - A minimum of 1 patient is needed to create a group, the Save Work Group screen displays.

3. Enter a **Name** and **Description** for your group:

4. Select **OK** to create the group.

5. The new group displays in the list.

6. Optionally, you can highlight the new **Work Group** and then select:

   - **Select a Patient** to select and add further patients to the group.

   - To work with a secondary group

   - **Generate Recalls** to send a recall letter to each member of the group, see **Generate Recalls and Letters** on page **30** for details.

   - **Label Printing** to print labels for each member of the group, see **Label Printing** on page **35** for details.

Generating History Entries

From **Patient Groups**, you can add a clinical term to all the patients in a group.

ℹ️ **Important** - This function must be used with caution as there is no way to bulk undo this process.


✏️ **Note** - You must have rights to add clinical data in **Consultation Manager** to use this facility.

To bulk add a **Medical History** entry to the clinical record of every patient in a group:

1. From **Patient Groups**, select the patient group you want to add a clinical term to.

2. Select **Group Applications - Generate History**, or select **Generate History** ℞ ▼ :
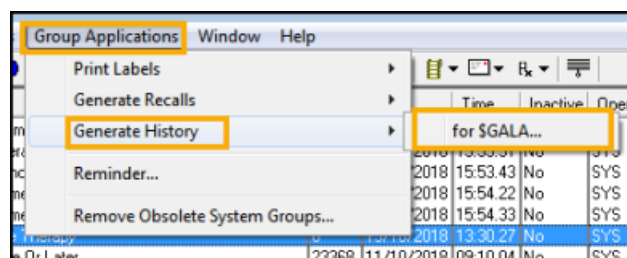
3. Select the group required. If you have created a Work Group, you can select that over the selected group:
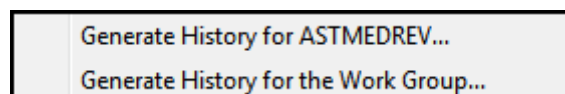
    A brief screen displays confirming how many patients are in the group, followed by the **History Add** screen.

4. Complete the **History - Add** screen in the usual way with the clinical term, priority and any free text required.

💡 **Remember** - This entry is identical for every patient.

---

5. Select **OK** to proceed.

The entry is added to all the patients in the group. If a patient is open elsewhere, you are warned that they are not updated.

Select a Secondary Group

If you select one group as the Work Group, you can choose a second group to merge with the Work Group, and decide which patients to keep or delete.

1. Make a group into the Work Group, see **Work Groups** on page **39** for details.

2. Double click on a second group to select, a red dot displays in the left-hand column. This is now the secondary group.

3. You then have five options to merge Work Group (blue) with the secondary group (white):

   - **Keep common patients**, see **Keep Common Patients** on page **47** for details.

   - **Remove common patients**, see **Remove Common Patients** on page **49** for details.

   - **Keep patients not in the Work Group**, see **Keep Patients only in the Secondary Group** on page **48** for details.

   - **Remove patients in the Secondary Group**, see **Keep Patients only in the Work Group** on page **48** for details.

   - **Merge groups**, see **Merging Groups** on page **49** for details.

Note - You only ever work with two groups at the same time, one of which is the Work Group. Once you save the result of the merge, you can select a third group and merge.

Adding or Removing Patients from a Group

Viewing a secondary group activates options to add and move patients to the Work Group, along with add and remove patients from the current (secondary) group.

✏️ **Note** - If you want to add or remove patients from a system group (starting with $), make the selected group the **Work Group** 🔵 and **Save** 💾 with a new name and description.

---

1. Highlight the group and select **View Highlighted Group** 📤.
2. The **Patient Groups** viewer displays.
3. Select a patient in the list and the following options become available:

   - 🏃 **Move Selected patient to Work Group** - Removes the patient from the group and puts them in the Work Group. Only active if there is a separate Work Group.

   - 🧍 **Add selected patient to Work Group** - Adds the patient to the Work Group, and keeps them in the current group. Only active if there is a separate Work Group.

   - 🧍 **Remove selected patient from group** - Deletes the patient from the current group.

   - 🧍 **Select patient to add to group** - Select a patient from your patient register to add to this Work Group.

   - ▦ **Close Viewer** - If you have made changes, you are reminded to save before closing the viewer.

➡️ See **Create a Work Group** on page **41** for details.

Examples of Patient Group Manipulation

One group of patients can be made into the Work Group as the starting point for merging and modifying with other groups. You can also select patients individually and make into a Work Group.

You may want to manipulate several groups. The way to do this is to create a Work Group and process this first with one group, and save the resulting Work Group with a new name. Then select another group and process this with the saved Work Group.

For example, you may have three groups, Smokers, Elderly and Diabetics. You can find different groups of patients from these three groups.

Find Patients who Smoke, but who are not Elderly or Diabetic

1. Highlight the group of *Smokers* and select **Make Work Group** .
2. Double click the *Elderly* group, to make this the secondary group.
3. Select **Remove patients from the Work Group** .
4. This removes the *Elderly* patients from the *Smokers* group, leaving patients in the Work Group are smokers who are not elderly:
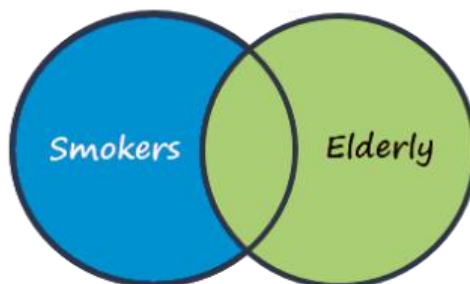
5. Select **Save the Work Group** , and enter a name, for example, *Smoking*.
6. Select **Clear the Work Group** .
7. Choose the group *Smoking* and select **Make Work Group** .
8. Double click the *Diabetic* group.
9. Select **Remove patients from the Work Group** .
10. This removes the *diabetics* from the *young smokers,* resulting in a group of *smokers who are not elderly or diabetic*:
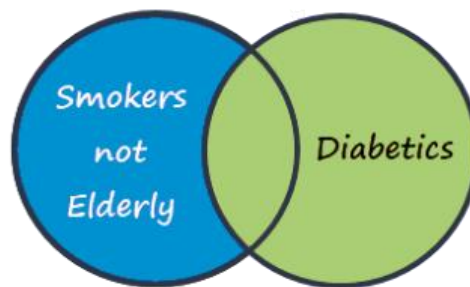
11. To finish, select **Save the Work Group.**

## *Find the patients who are Elderly, Diabetic Smokers*

1. Choose the *Elderly* group and select **Make Work Group** .

2. Double click the *Diabetic* group, to make this the secondary group.

3. Select **Keep Common Patients** .

4. The Work Group now contains patients who are *elderly* and *diabetic:*
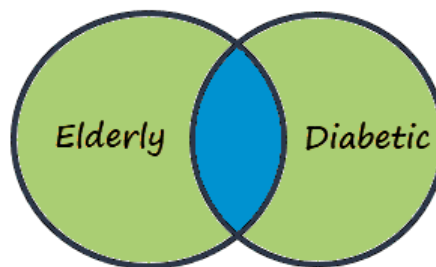
5. **Select Save the Work Group** .

## Find Patients who are Elderly, Diabetic and Non Smokers

1. Choose *Elddiab* group (the elderly diabetics found in the previous example).

2. Select **Make Work Group** [●].

3. Double click the group of *Smokers*, to make this the secondary group.

4. Select **Remove patients from the Work Group** [⊖].
   This removes the *smokers* from the *elderly diabetics*, leaving *elderly, diabetic non-smokers*.
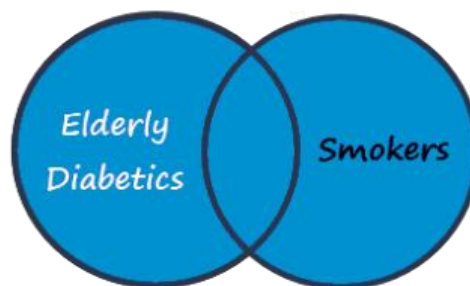
Keep Common Patients

Keep Common Patients [⊖] the result includes only patients that are in both the Work Group and the secondary group.
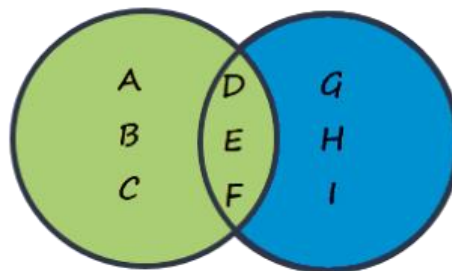For example:

- Work Group: **A B C D E F.**

- Secondary Group: **D E F G H I.**

- The resulting Work Group is **D E F:**
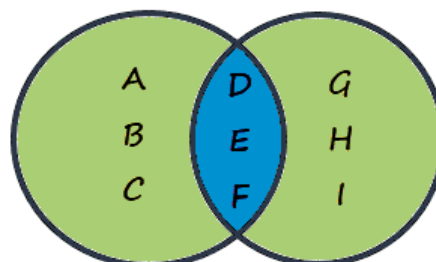
Keep Patients only in the Secondary Group

Keep patients that are in the selected group but not in the Work Group - the resulting group keeps the patients who are not in the original Work Group and only in the secondary group.

For example:

- Work Group: **A B C D E F.**
- Secondary Group: **D E F G H I.**
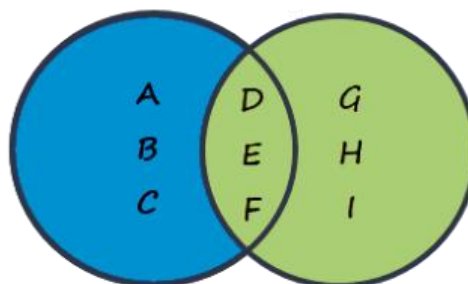- The resulting Work Group is **G H I**:

Keep Patients only in the Work Group

Remove patients in the selected group from the Work Group - the resulting Work Group removes all patients that are in the secondary group, including patients in both groups.
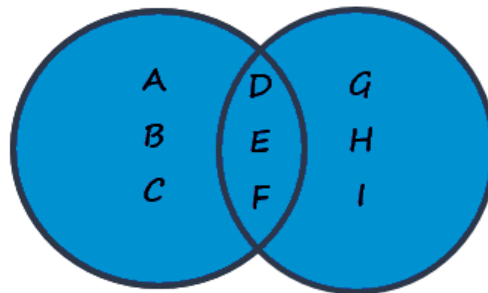
For example:

- Work Group: **A B C D E F**
- Secondary Group: **D E F G H I**
- The resulting Work Group is **A B C:**

Merging Groups

Add patients in the selected group to the Work Group - combines a Work Group and a Secondary Group together.
For example:

- Work Group: **A B C D E F.**
- Secondary Group: **D E F G H I.**
- The resulting Work Group is **A B C D E F G H I :**

Remove Common Patients

Remove Common Patients - the resulting Work Group only contains patients that were in either the Work Group or the secondary group, but not both groups.

For example:

- Work Group: **A B C D E F.**
- Secondary Group: **D E F G H I.**
- The resulting Work Group is **A B C G H I:**