

Creating and Assigning Reviews to a User Group

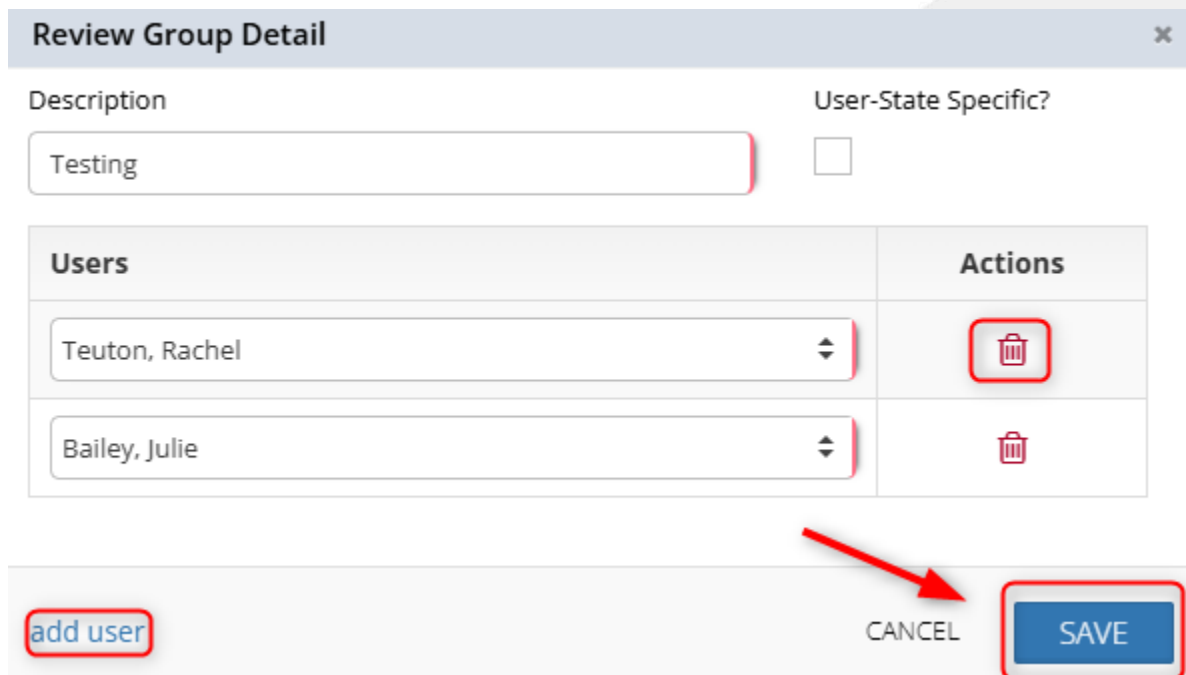
Overview

CMPOne allows for reviews to be assigned at both the individual and group level. Users can be assigned to multiple groups at once, allowing for flexibility when configuring groups and assigning reviews. This document will detail how to create review groups, how to assign users to those groups, and how to assign reviews to those review groups.

Creating Review Groups

- Navigate to **Administration > Lookups > Case File > Review Groups**.
- Click Add New.
- In the Description box, enter a name for your group.
- Click add user to enter a new user into the group, then select that new user from the dropdown provided.
- Repeat this step until all users are assigned to the group.
Note: If you accidentally add a user you do not want in this group, just click the red garbage can in the actions column beside their name to remove that user.
- Click Save.

Once a group is created, select it from the grid to edit, add or delete users, or delete the group entirely.

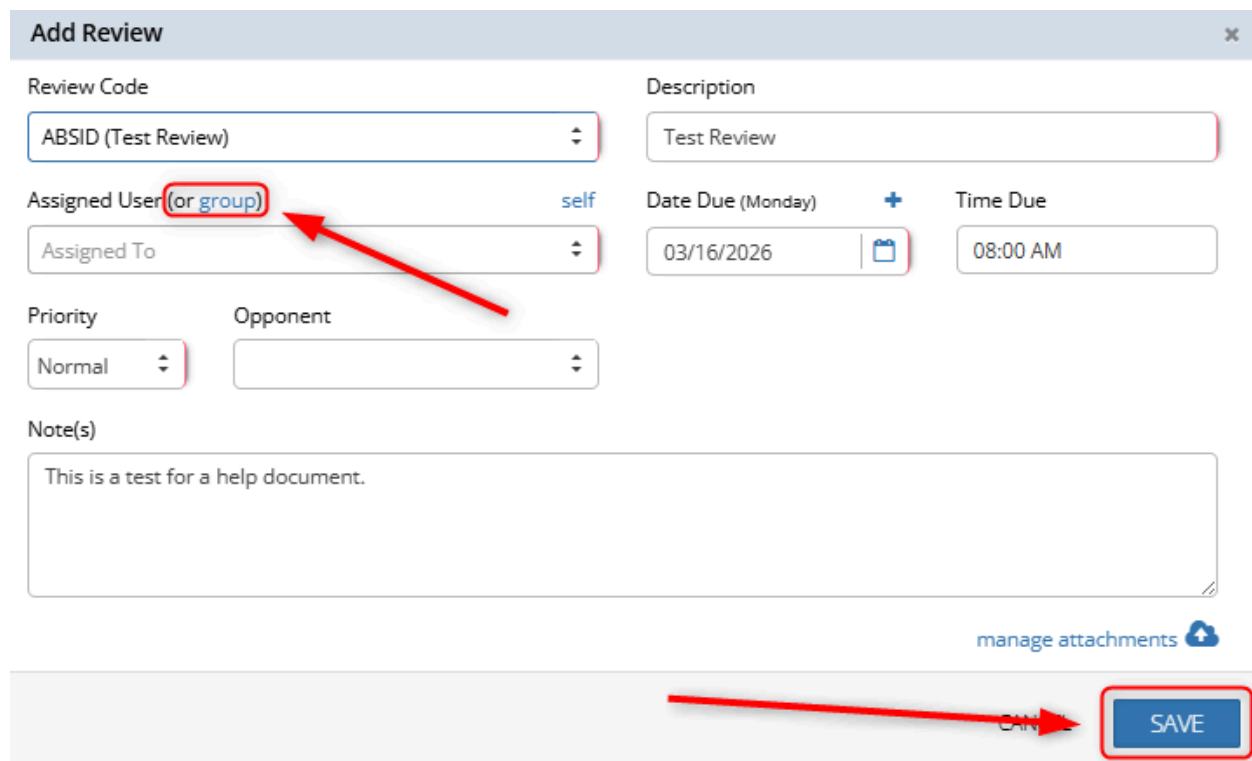
A screenshot of the "Review Group Detail" form. The form has a title bar with "Review Group Detail" and a close button (X). Below the title bar, there are two fields: "Description" with a text input containing "Testing" and "User-State Specific?" with an unchecked checkbox. Below these fields is a table with two columns: "Users" and "Actions". The "Users" column contains two dropdown menus with the names "Teuton, Rachel" and "Bailey, Julie". The "Actions" column contains two red trash can icons. At the bottom of the form, there are three buttons: "add user" (highlighted with a red box), "CANCEL", and "SAVE" (highlighted with a red box). A red arrow points from the "add user" button to the "SAVE" button.

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Assigning Reviews to Review Groups

- Navigate to **Case File > Reviews**.
- Click Add New.
- Select a review code, enter a description, and enter a date due, as well as any other optional fields you wish.
- Click (or group) beside the Assigned User drop down, to show all review groups, then select the desired group from the drop down.
- Click Save.

Group Reviews will appear in the Reviews section of the assigned case file, as well as in the My Reviews area for each user assigned to the group.

A screenshot of the "Add Review" form in CaseMaster Pro. The form is titled "Add Review" and has a close button (X) in the top right corner. It contains several fields: "Review Code" with a dropdown menu showing "ABSID (Test Review)"; "Description" with a text input field containing "Test Review"; "Assigned User" with a dropdown menu showing "Assigned To" and a red box around the text "(or group)" with a red arrow pointing to it; "Date Due (Monday)" with a date input field showing "03/16/2026" and a calendar icon; "Time Due" with a time input field showing "08:00 AM"; "Priority" with a dropdown menu showing "Normal"; and "Opponent" with an empty dropdown menu. Below these fields is a "Note(s)" section with a text area containing "This is a test for a help document." and a "manage attachments" link with a plus icon. At the bottom right, there is a red box around the "SAVE" button with a red arrow pointing to it.

Questions?

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