UNIVERSITY OF MARYLAND
INSTITUTE FOR GOVERNMENTAL SERVICE & RESEARCH

SMART Tip Sheets
Group Notes

MARYLAND DEPARTMENT OF HEALTH AND MENTAL HYGIENE

Group Notes
- Group Type
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- Group Roster
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This tip sheet explains how to setup and maintain groups, as well as how to create group notes and encounters.

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Behavioral Health System Baltimore

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Group Notes

Group Type

Before entering Group Lists, Sessions and Rosters, the Group Type module allows you to enter/add group types as needed. Group Types are entered BY FACILITY.

1. **Entry Steps**: From the menu tree, click **<u>Group List</u>**.

2. From the **Group List** module, click **<u>Group Type</u>**.

3. To edit or delete a group type, click **<u>Edit</u>** or **<u>Delete</u>** from the Actions menu on the right hand side.

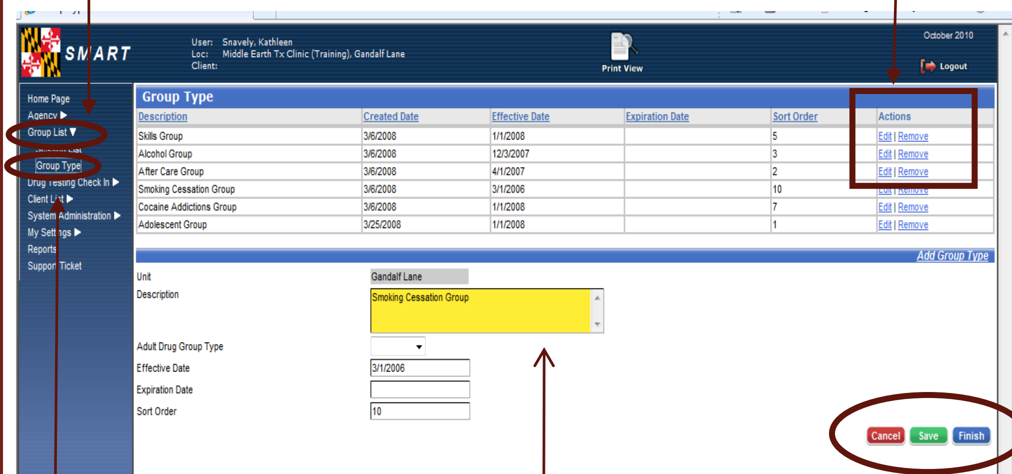
4. To add a new Group Type, click **<u>Add Group Type</u>**. Then enter the **Description** and if desired, also the **Effective Date**, **Expiration Date** or the **Sort Order**. **Sort Order** allows you to sort the list of groups based on the integer you place in this field.

5. When complete, click **<u>Save</u>**. You will now notice that the **Group Type** has been listed above. To enter additional Group Types, repeat steps 3 through 5.

6. When all **Group Types** have been entered, click **<u>Finish</u>** to be taken to the Group List screen. **Note**: This is an initial step, as well as maintenance, this does not have to be completed each time you enter group notes.

To get started, click Group List from the Left Menu Bar.

To edit or delete a Group Type, click Edit or Remove in the Actions column.



To add/edit a group type, click Group Type.

Type the Group Type Description here as you would like to appear in the drop down.

Click Save to save the Group Type to the list and add more. Click Finish when all Group Types have been entered.

Group Notes

Group List (Group Profile)

The Group List module allows the user to create new groups and build a Roster of clients that are assigned to certain groups. These groups are specific to a certain day of the week, time, and room location. They also have a roster of clients associated with them.

1. **Entry Steps**: From the Left Menu Bar, click **Group List**. **Note**: A list of **Group Types** should have been established prior to entering **Group Lists**.

2. Once you are in the **Group Profile List**, you can either review an existing **Group Profile** or add a new one. To add a new **Group Profile**, click **<u>Add</u>** to generate the **Group Profile** Screen.

3. Enter the **Group Name**, **Group Type** (this will be a drop down of the **Group Types** you created . Then select any other **Co-Lead Staff** from the mover box.

4. Draft a **Description** of the group.

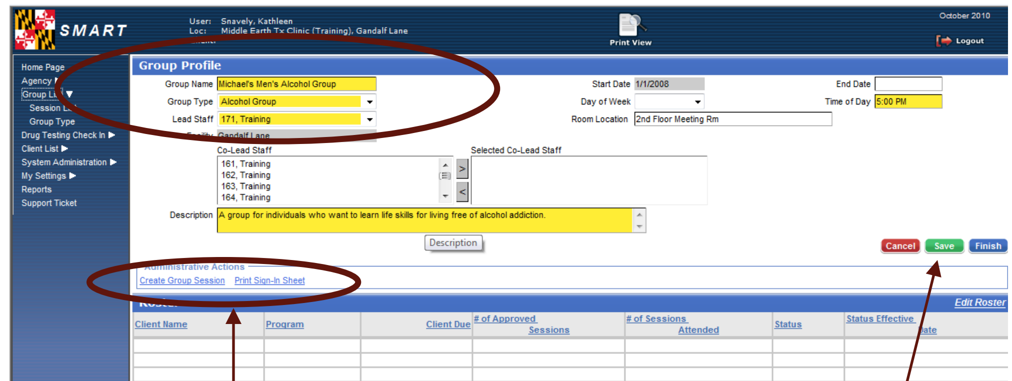
5. When finished, click **<u>Save</u>**.

6. Click **<u>Finish</u>** to view your **Group Profile** List. If you would like to change or update information for the group created, you can do so by clicking **<u>Review</u>**. You can also click **<u>Delete</u>** to permanently remove it from the list. Clicking **<u>Session List</u>** will take you to the **<u>Session List</u>** for a particular group.

To Edit or View the Group List, click **<u>Group List</u>** from the Left Menu Bar.

To review or delete an existing Group Profile, click Review or Delete.

Click Add to create a new Group Profile.



You can also **<u>Print a Sign In Sheet</u>** or **<u>Create a Group Session</u>**.

To save your Group Profile, click **<u>Save</u>**.

You can **<u>Review</u>** or **<u>obliterate</u>** a Group Profile, or go to the **<u>Session List</u>** by clicking in the **Actions** column.

Group Notes

Group Roster

The Group Roster allows you to assign clients to a group.

1. **Entry Steps**: To add clients to your group **Roster**, click **Group List**, click **<u>Review</u>** to enter an existing **Group Profile**, then click Edit Roster from the Group Profile screen.

2. To review an existing client on the **Roster**, click **<u>Review</u>** in the **Actions** column or **<u>Remove</u>** to delete the client from the Roster.

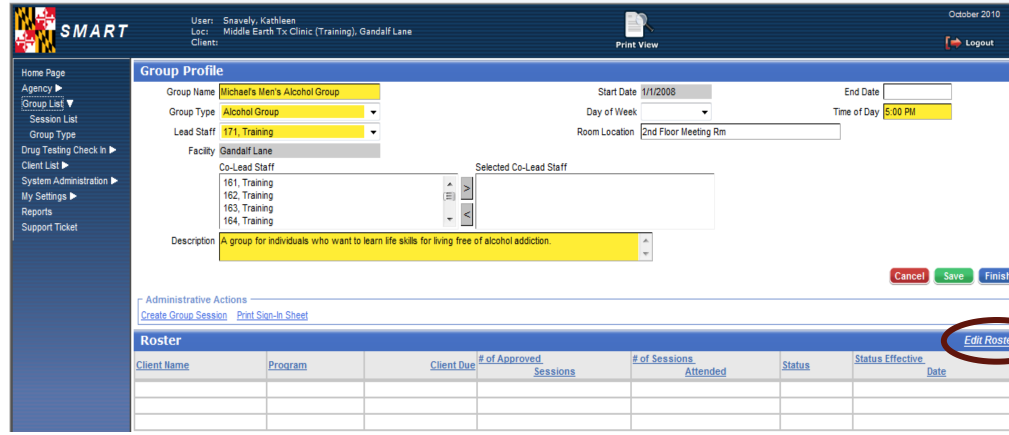
3. Click **<u>Add Member</u>** to add a new client to the Roster for the **Group**.

4. Select a client from the **Client Name** drop-down, enter the **# of Sessions Approved**, **Program**, **Status** and **Status Effective date**. **Status Effective Date** must be greater than or equal to the **Program Enrollment Start Date**.

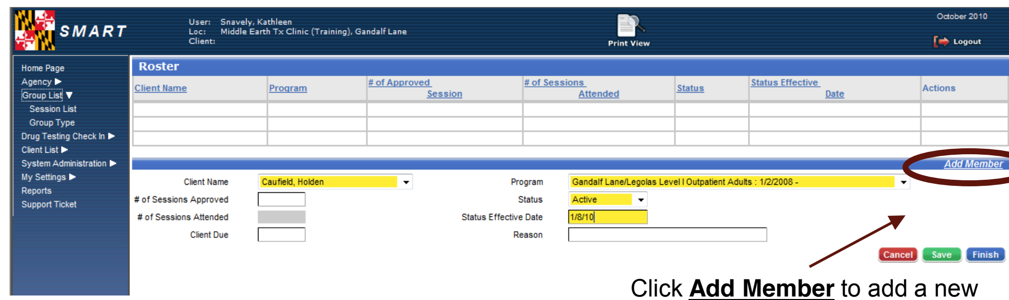
5. A client must have an active **Admission** and **Enrollment** record IN THIS FACILITY, but no **Discharge** record, in order to add him/her to the **Group Roster**. However, all clients with an active intake in this facility will appear in the **Client Name** drop down.

6. Make sure that the client's status when adding them to the **Roster** is either **Active** or **Waiting**, otherwise the client will not be permitted to join a group session.

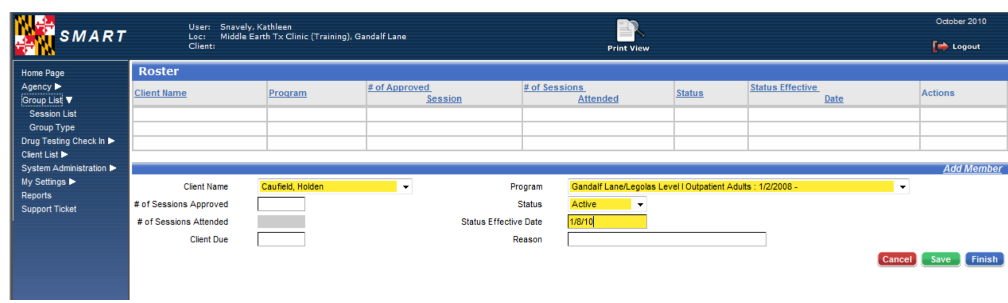
7. Once you have populated the fields with the required data, click **<u>Save</u>** to save the record, or click **<u>Finish</u>** to return to the **<u>Group Profile</u>** screen.



Click Edit Roster from the Group Profile screen.



Click **<u>Add Member</u>** to add a new client to the Group Roster.



Group Notes

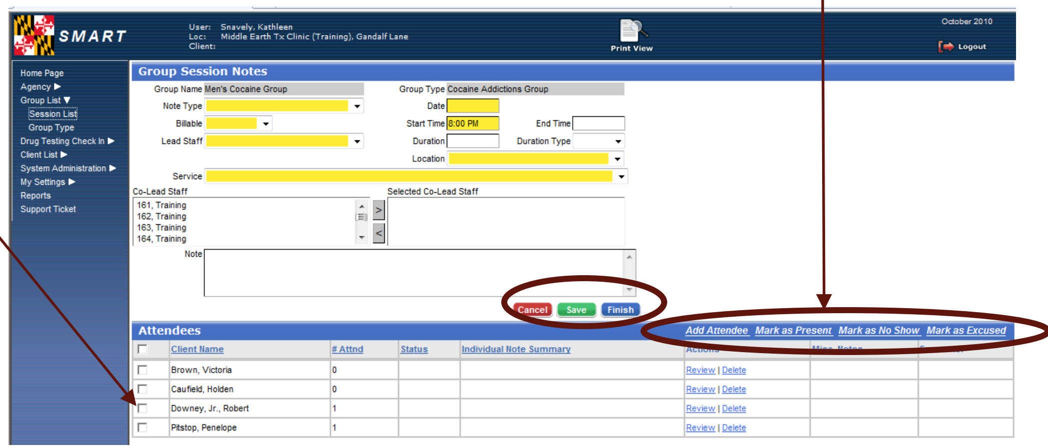
Group Session – Session Notes

The Session List allows you to create a record that documents a group treatment session.

1. **Entry Steps**: From the **Group Session List**, click **Add**, to enter **Group Session Notes**.
2. Enter the **Note Type**, **Date**, **Location**, **Lead Staff,** and **Service**. You may also add meeting notes. This applies to the whole counseling session.
3. To document clients who were present, excused or did not show, select the clients from the **Attendees** list by clicking on the selection box located to the left of the client's name, then select the appropriate outcome: **Mark as Present**, **Mark as No Show**, or **Mark as Excused**. Then click **Save**. Follow the same steps to document other client outcomes. This saves the outcome only in the **Group** Area. To save the outcome in the Client's **Encounter** record, you must choose outcome in the treatment encounter record.

   Note: The **Group Session Notes** are general notes and are not specific to any individual client or attendee. They are copied to the Client's **Miscellaneous** or **Encounter** note when one clicks "**Create**."
4. To add an attendee, you must first make sure that they have been added to the **Group Roster** (see p. 4 to follow the steps of adding a client to the **Roster**). Click **Add Attendee**.
5. Actions creates a note in the **Group Session** and allows you to include in it the Individual Encounter Record. **Miscellaneous** and **Encounters** create records in those modules. See following pages.
6. After reviewing or entering an individual note to the **General Session Note,** click **Finish**.

Select Attendees and then click Mark as Present, Mark as No Show or Mark as Excused, then click Save and repeat to document multiple client outcomes.

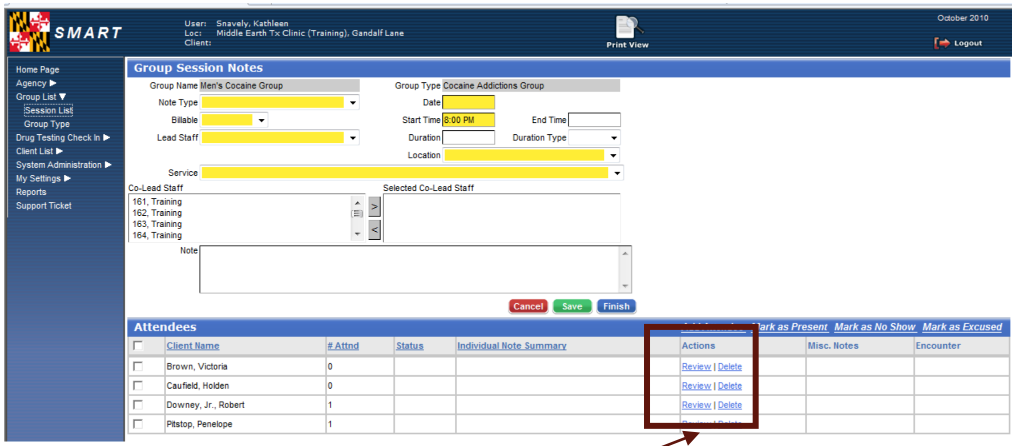


Group Notes

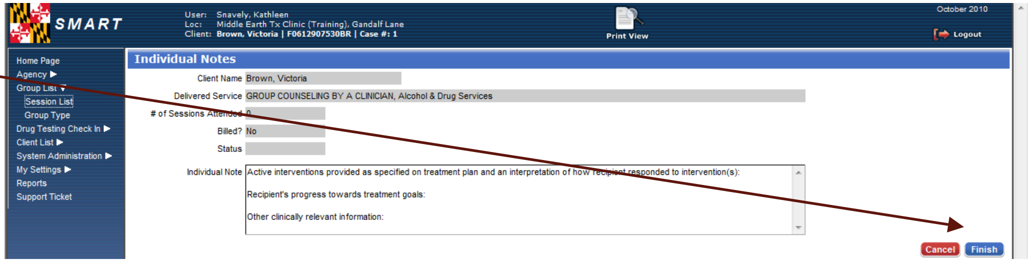
Group Session – Actions

Actions allows you to enter information for a client with the group note, and optionally copy it to Misc notes and/or Encounter Notes.

1. From the **Group Session Notes** screen, click **Review** under **Actions**.
2. Enter the **Individual Note**. This note will appear under **Individual Note Summary** on the **Group Session** screen.
3. This **Action Note** will also be copied to **Miscellaneous** or **Encounters** notes if the user creates either of those from the Group Session screen.
4. Actions cannot be signed and therefore can be edited at any time.
5. When finished, click Finish.



Actions notes are stored with each individual in the group session note and are also copied to the miscellaneous or encounter note when they are created.

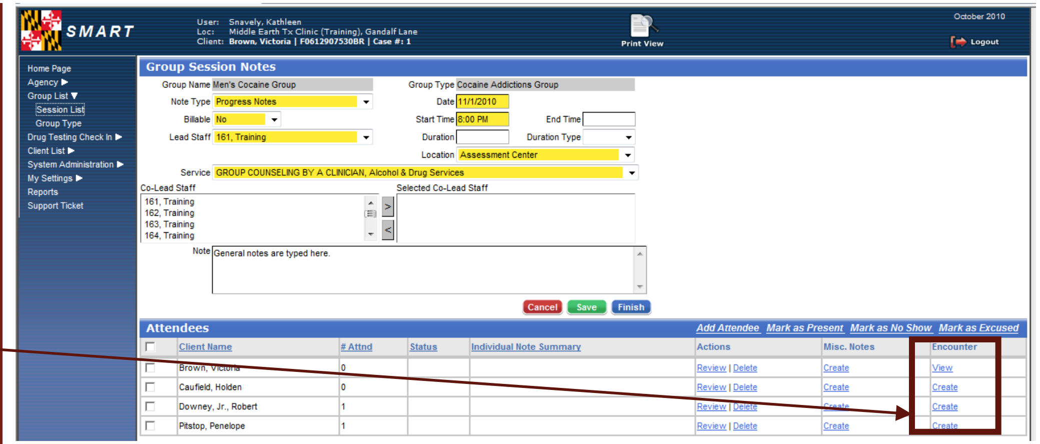


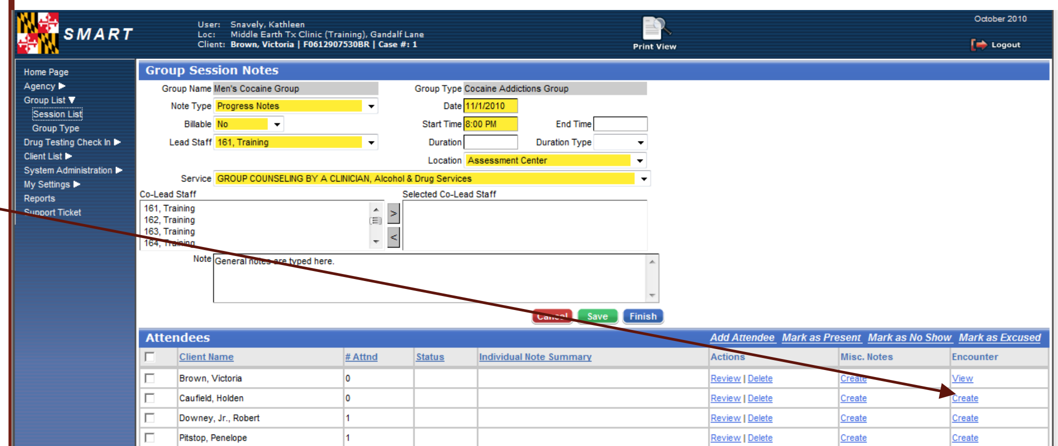
Group Notes

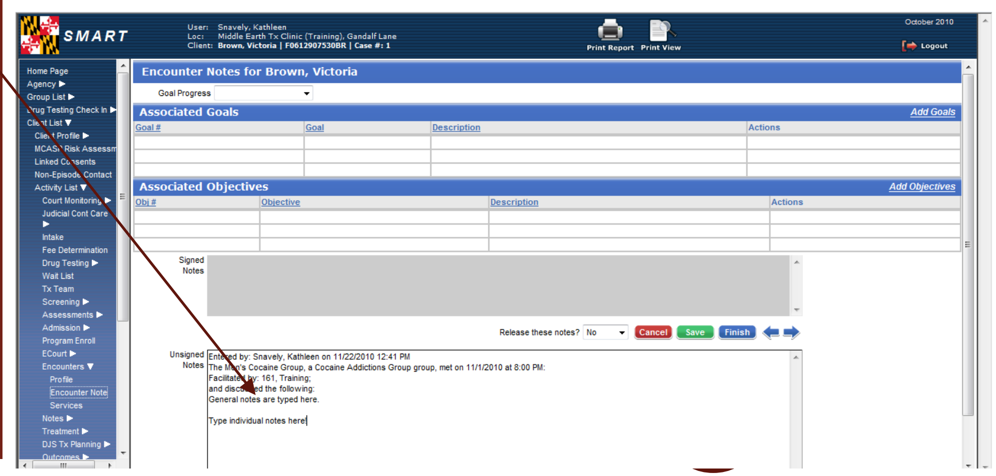
Group Session – Individual Encounter Notes

Encounters allow the user to copy the Group Session information to an individual client encounter note.

1. From the **Group Session Notes** screen, for an individual client, click **Create** under **Encounter** to enter an individual note that will appear in the **Encounter** list for the individual client.
2. After clicking **Create** under **Encounter**, the Encounter screen will generate and display the information previously entered into the **Group Session Notes**, including the group notes (see **Unsigned Notes**).
3. Enter any additional information on the **Encounter** screen you wish to add. Make sure that **Outcome Code** is selected – **Attended**, **FTA**, or **Excused**. Also, be sure to enter the **Payment Source.**
4. To enter an individual note, click **Next**.
5. The **Group Note** that was entered on the **Group Session** screen will be copied to this individual note. You may modify or augment the individual note in the **Unsigned Notes** field. When the note has been reviewed and completed, you may leave it in the **Unsigned Notes** field or you may finalize the note by signing it – click **Sign Note**.
6. If an action was entered for this client, it will be copied to the individual note as well.
7. When completed, click **<u>Save</u>** or **<u>Finish</u>**. **<u>Finish</u>** will take you back to the **<u>Group Session Notes</u>**.







Group Notes

Group Session – Individual Misc. Notes

Miscellaneous notes allow the user to copy the Group Session information to an individual client miscellaneous note.

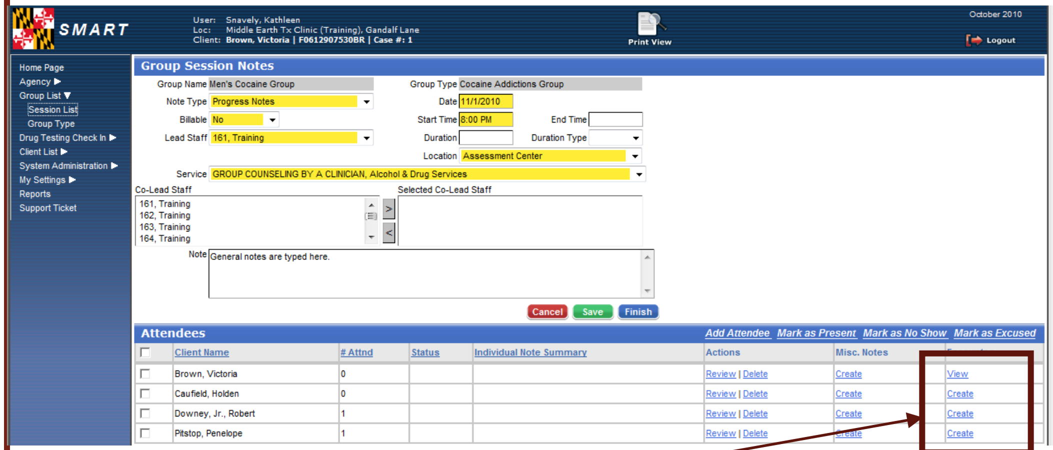
1. From the **Group Session Notes** screen, for an individual client, IGSR recommends that treatment providers in Maryland do not select the **Miscellaneous Notes**, as groups are treatment and therefore require an encounter note.

2. If you do choose to use either Miscellaneous Notes, they function in the same manner as creating an **Encounter Note**. From the **Group Session Notes** screen, for an individual client, click **Create** under **Misc. Notes** to enter an individual note for a client that will appear in the **Misc. Notes** list for the individual client.

3. After clicking **Create** under **Misc. Notes**, the **Miscellaneous Notes** screen will generate and display the information previously entered into the **Group Session Notes**, including the group notes (see **Unsigned Notes**).

4. Enter the **Note Type**, the **Frequency** and an **Individual Note**.

5. When completed, click **Save** or **Finish**. **Note**: make sure all information is accurate prior to clicking **Save** or **Finish**, as once clicked, the note is no longer editable.



Group session notes are clinical and should be documented only in Encounter Notes in Maryland.