

Configure a Group Note

Last Modified on 03/28/2022 8:32 am EDT

Path: Main Menu > Admin Tools Menu > Note Builder

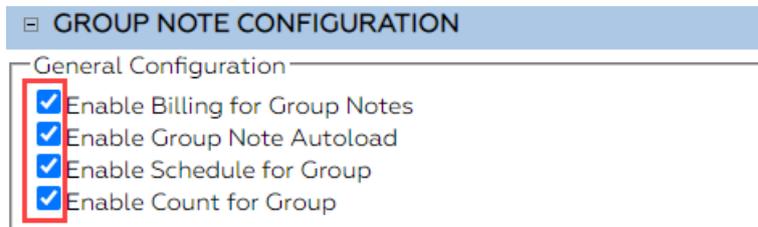
About

Functionality on Group Notes can be enabled or disabled via Group Note Configuration in the Note Builder depending on your Agency's needs. Below, are descriptions of the available options for General Configuration and for Client Search Details as well as how to enable them in Group Note Configuration.

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General Configuration Options

- **Enable Billing for Group Notes:** When selected, the Billing widget is displayed in the Group Note for each client in the Group.
- **Enable Group Note Autoload:** When selected, each client's Group Note is automatically loaded upon selecting the Group.
- **Enable Schedule for Group:** When selected, it displays a schedule that you can use as a visual cue as to when the Group typically meets.
- **Enable Count for Group:** When selected, a section called Group Counts is displayed and contains information on overall capacity, client count, and remaining spots left in the group.



GROUP NOTE CONFIGURATION

General Configuration

- Enable Billing for Group Notes
- Enable Group Note Autoload
- Enable Schedule for Group
- Enable Count for Group

Client Search Detail Options

The options below determine what information is displayed alongside the client's first name and last name when searching for a client in a Group Note.

- **No Additional details:** No additional details are displayed, only the client's first and last name.
- **Date of Birth:** Displays the date of birth after the client's first and last name.
- **Case #:** Displays the case number after the client's first and last name.

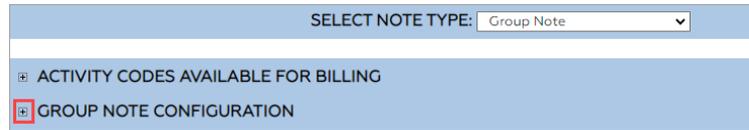


Client Search Details

- No Additional Details
- Date of Birth
- Case #

Enable Group Note Features

1. Navigate to Note Builder: **Main Menu > Admin Tools > Note Builder** .
2. From the **Select Note Type** drop-down, select **Group Note**.
3. Click **+** next to Group Note Configuration.



4. In the General Configuration section, select the checkbox(es) for the functionality you want to enable.
5. In the Client Search Details section, select the **radio button** of the details you'd like displayed after the client's first name and last name when searching for a client in a Group Note.
6. Click the **Update Configuration** button.



Note: To cancel changes made in this section, click the **Cancel Configuration Changes** button.