Office Practicum

Document a Group Note
Last Modified on 03/28/2022 8:34 am EDT

Path: Main Menu > Progress Notes Menu > Group Notes

About

Group Notes are used for documentation of Group Therapy activities and/or sessions and allow you to enter documentation for each client in the Group without having to create an individual Note for each. The appearance of your Group Notes window is determined by what you have enabled for your Agency. See **Configure a Group Note** for more details.

Document a Group Note

1. Navigate to Group Notes by following the path above.
2. In the **Select an Existing Group** field, start typing the name of the Group and select it from the list. Select the **View my groups only** checkbox to narrow down your search to your Groups only.

> **Note:** To create a new Group:
> 1. In the **Group Name** field, enter a name for the Group.
> 2. Select a **Location** from the drop-down.
> 3. *(Optional)* Select the **Temporary** checkbox if this Group is only temporary.
> 4. Click the **Create** button.

3. *(Optional)* Adjust the **Capacity** field in Group Counts as necessary. When a user is added or removed from the Group, the Client Count field increases or decreases. The difference between the Capacity and Client Count fields is what is displayed in Spots Remaining, which will turn red if your Group exceeds capacity.

4. *(Optional)* Adjust the days and times the Group typically meets, as necessary. You can add a row by clicking the **Add** button and save any changes by clicking the **Save** button .

Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Start Time	End Time	
☐	☐	☑	☐	☑	☐	☐	3:00 PM	4:00 PM	Delete
☐	☑	☐	☑	☐	☑	☐	8:00 PM	9:00 PM	Delete

> **Note**: The information displayed on the Schedule on the Group Note is not connected to the Scheduler. The information shown here is entered manually by your Agency and is used to keep track of your meeting times without having to navigate to the Scheduler to check.

5. In the **Clients**, **Interventions**, and **Users** fields, type and search for any clients, interventions, or users that need to be added to the group and click the **Add** button. To remove a client, intervention, or user click the **X** next to which selection you'd like to remove.

> **Notes**:
> - Click the Filter ▼ to narrow down your Client search by Case Assignments, Programs, and Locations or your User search by User Role.
> - To add or remove clients and users from existing Group Appointments, see **Manage a User's Group Scheduler Appointments from Maintain Users and Group Notes** and **Manage a Client's Group Scheduler Appointments from the Group Note or Client Groups Field on a Form or Note**.

6. If you do not have the Group Note Autoload functionality enabled, click the **Turn Load On** button to load the Group Note fields.
7. Enter in a **Group Note**, which applies to all clients in the Group.

Group Note (applies to all attending Clients):

This is my group note.

8. The **Date of Service** defaults to today's date. Enter billing information for the Group in the first **Billing Data** box that is displayed. The information entered here auto-populates billing information into each one of the individual **Billing Data 1** boxes displayed under each client in the Group.

Date of Service:	01/27/2022	
Billing Data (overwrites all attending Clients Billing Data):		
Start Time:	03:00 am	(Format: hh:mm AM/PM)
Stop Time:	05:00 am	(Format: hh:mm AM/PM)
Activity Code:	90835 GROUP THERAPY	
Units:		

> **Note**: You can edit billing information for each client if needed by making changes to the Billing Data 1 box under the specific client. (e.g. A client arrives late to the group and you need to edit their Start Time).

9. Select the **Attended** or **Did Not Attend** radio button for each client and their **Participation** or other details shown in your Group Note.

Hamburger, Joe: ⦿ Attended ◯ Did Not Attend

This Client does not have any Goals that are linked to the Interventions in this group.

Client's group participation: Leave blank if the client did not attend.

Spoke Frequently

10. If you are ready to finalize, click the **Enter Charts as Final** button.
11. The pop-up below is displayed, click the **Yes** button to proceed.

Information

Entering this group note will make it final. You will NOT be able to edit any of the information entered here, including billing information (if applicable). Are you sure you would like to submit this note?

Cancel   Yes

12. Enter your **Password** to finalize the Note or click on the **Use E-Signatures** button to use an electronic signature.
13. Click the **Submit** button. A message is displayed that Notes were entered successfully.

Group Notes

Notes were entered succesfully.

Group Notes   Main Menu

📌 **Note**: As you move through the Group Note, any data entered is autosaved.