

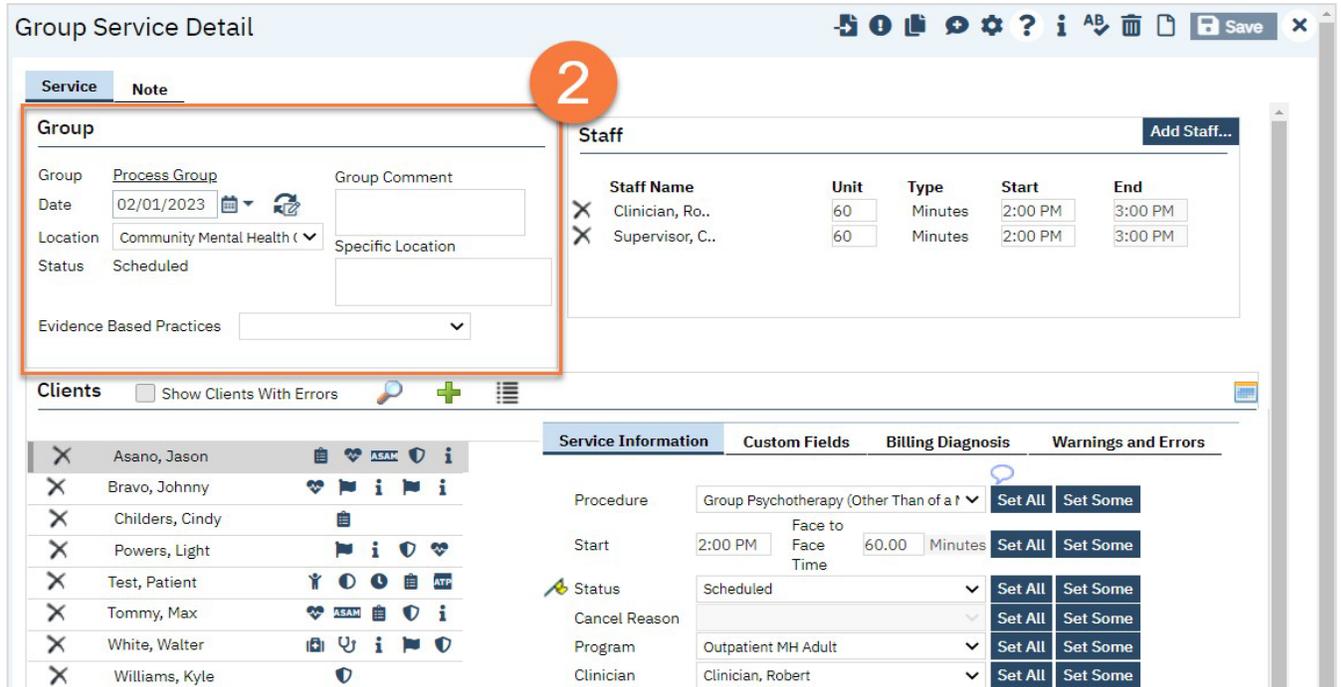
How To Write A Group Progress Note

1. On your Appointments for Today widget, click on the link for the time of the group you're documenting.

Appointments For Today 		
Client Name/Description	Time	Status
Training, Manual(T...	08:00 AM	Scheduled   
Testing, Jose(Ment...	09:00 AM	Show   
Lunch	12:00 PM	
Process Group	02:00 PM	Show
Paper Work	04:00 PM	

How To Write A Group Progress Note

- 2. This opens the Group Services Detail screen. In the upper left, you'll see the group information. Confirm the information and add any additional information regarding the entire group.



The screenshot shows the 'Group Service Detail' interface. A red box highlights the 'Group' information section, which includes fields for Group Name, Date, Location, Status, and Evidence Based Practices. A red circle with the number '2' is placed over the top right corner of this section. Below the Group section is a 'Clients' list with names and icons. To the right is a 'Staff' table and a 'Service Information' section with various dropdowns and buttons.

Staff Name	Unit	Type	Start	End
✕ Clinician, Ro..	60	Minutes	2:00 PM	3:00 PM
✕ Supervisor, C..	60	Minutes	2:00 PM	3:00 PM

Service Information	Custom Fields	Billing Diagnosis	Warnings and Errors
Procedure	Group Psychotherapy (Other Than of a t		Set All Set Some
Start	2:00 PM	Face to Face 60.00 Minutes	Set All Set Some
Status	Scheduled		Set All Set Some
Cancel Reason			Set All Set Some
Program	Outpatient MH Adult		Set All Set Some
Clinician	Clinician, Robert		Set All Set Some

How To Write A Group Progress Note

3. In the upper right, you'll see the staff members that are set as facilitators for this group.
 - a. Make edits to which staff members were present. For example, if a staff was only present for half of the group time, indicate this by editing the Unit (how many minutes they were present) and the Start Time to match what actually happened.
 - b. If a staff member was not present, click the Delete icon next to their name to remove them from this service.
 - c. If an additional staff member was present who is not listed, click the Add Staff button.

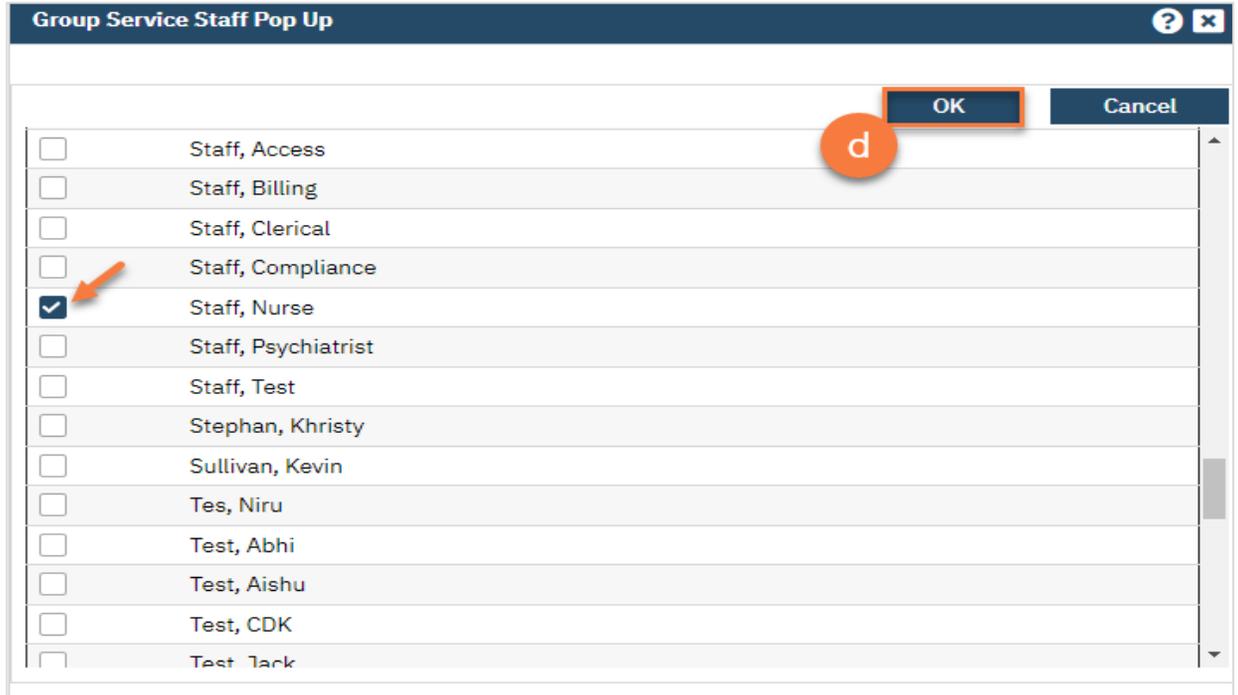
The screenshot shows the 'Group Service Detail' window. On the left, there are tabs for 'Service' and 'Note'. Below these are fields for 'Group' (Process Group), 'Date' (02/01/2023), 'Location' (Community Mental Health), and 'Status' (Scheduled). A 'Staff' table is highlighted with an orange box and contains the following data:

Staff Name	Unit	Type	Start	End
Clincian, Ro..	60	Minutes	2:00 PM	3:00 PM
Supervisor, C..	60	Minutes	2:00 PM	3:00 PM

Annotations: '3' is a large orange circle above the Staff table. 'a' is a smaller orange circle over the 'Unit' and 'Start' columns. 'b' is a smaller orange circle over the delete 'X' icons. 'c' is a smaller orange circle over the 'Add Staff...' button. Below the Staff table is a 'Clients' list with names like Asano, Jason and Bravo, Johnny. On the right, there are tabs for 'Service Information', 'Custom Fields', 'Billing Diagnosis', and 'Warnings and Errors'. The 'Service Information' tab is active, showing fields for Procedure, Start, Status, Program, and others, each with 'Set All' and 'Set Some' buttons. A blue question mark icon is in the bottom right corner.

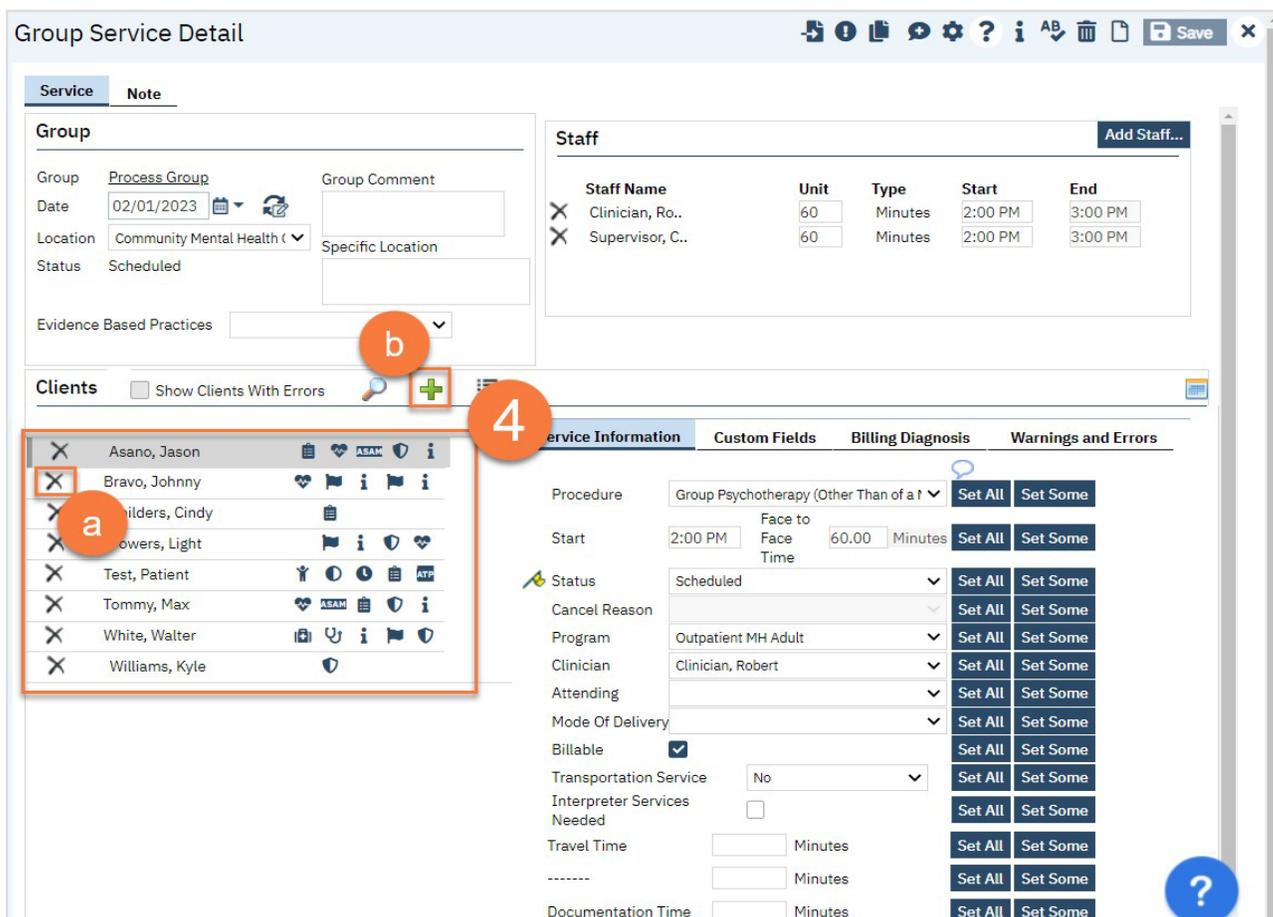
How To Write A Group Progress Note

- d. This brings up the Group Service Staff Pop Up. Select the staff member(s) you want to add and click OK.



How To Write A Group Progress Note

4. On the middle left side of the screen, you'll see the list of clients enrolled in this group. Make edits to this list to confirm the group roster.
 - a. To remove a client from the roster, click the Delete Service icon. DO NOT do this if they are simply a no-show. Only do this to remove them from this service's roster entirely.
 - b. To add a client who has already been enrolled in this group, click the Plus icon.



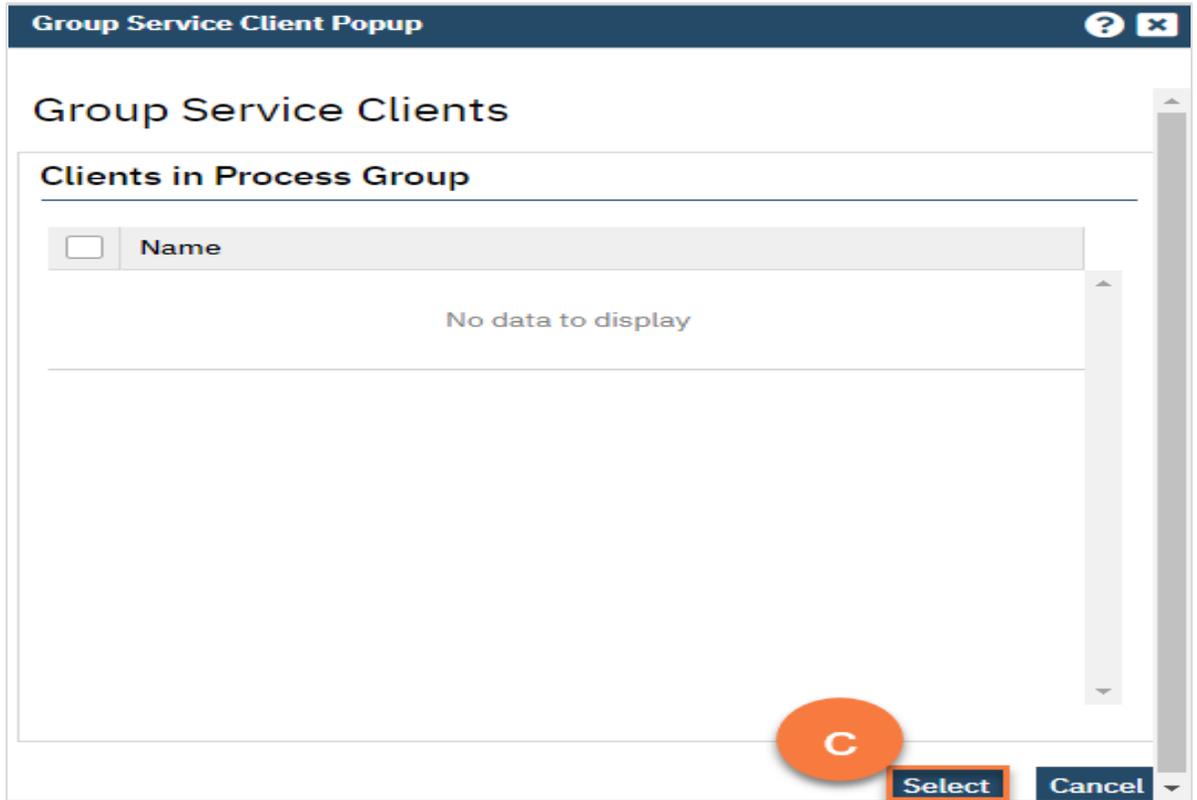
The screenshot shows the 'Group Service Detail' interface. The 'Clients' section is highlighted with an orange box and contains a list of clients with 'X' icons for removal. A red box highlights the 'X' icon for 'Bravo, Johnny' with the letter 'a'. A red circle with the letter 'b' is placed over the plus icon in the 'Clients' header. A large red circle with the number '4' is placed over the plus icon in the 'Clients' header. The right side of the screen shows service information fields like 'Procedure', 'Start', 'Status', etc., with 'Set All' and 'Set Some' buttons.

Staff Name	Unit	Type	Start	End
✕ Clinician, Ro..	60	Minutes	2:00 PM	3:00 PM
✕ Supervisor, C..	60	Minutes	2:00 PM	3:00 PM

Client Name	Remove (X)	ASAM	Info (i)	Shield
Asano, Jason	✕			
Bravo, Johnny	✕			
Childers, Cindy	✕			
Crowthers, Light	✕			
Test, Patient	✕			
Tommy, Max	✕			
White, Walter	✕			
Williams, Kyle	✕			

How To Write A Group Progress Note

- c. This will open up the Group Service Client Popup, which will list any additional clients that are enrolled in this group. Select the client and then click Select to add them to this service.



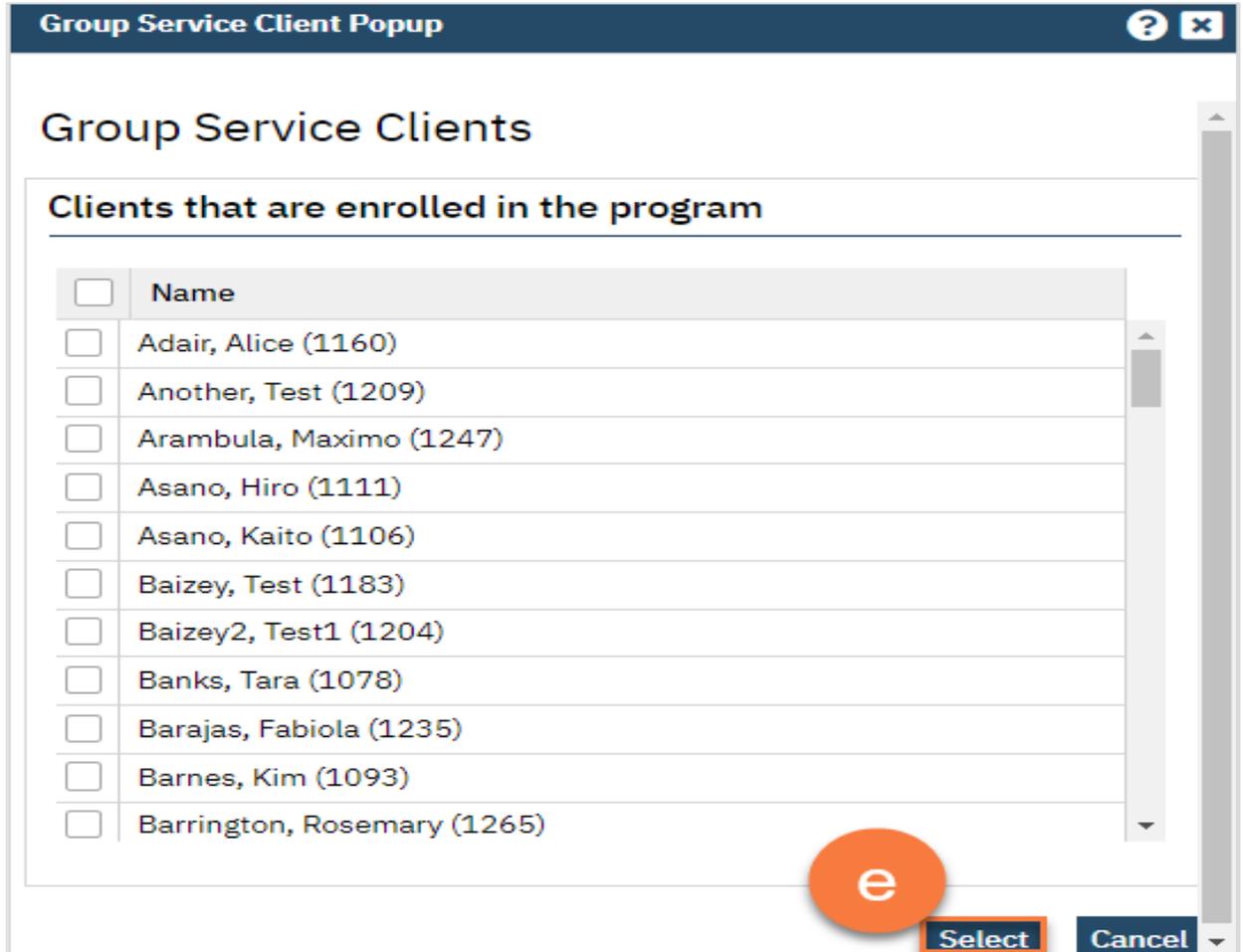
How To Write A Group Progress Note

- d. To add a client who is enrolled in this program but not yet enrolled in this group, click the List icon.



How To Write A Group Progress Note

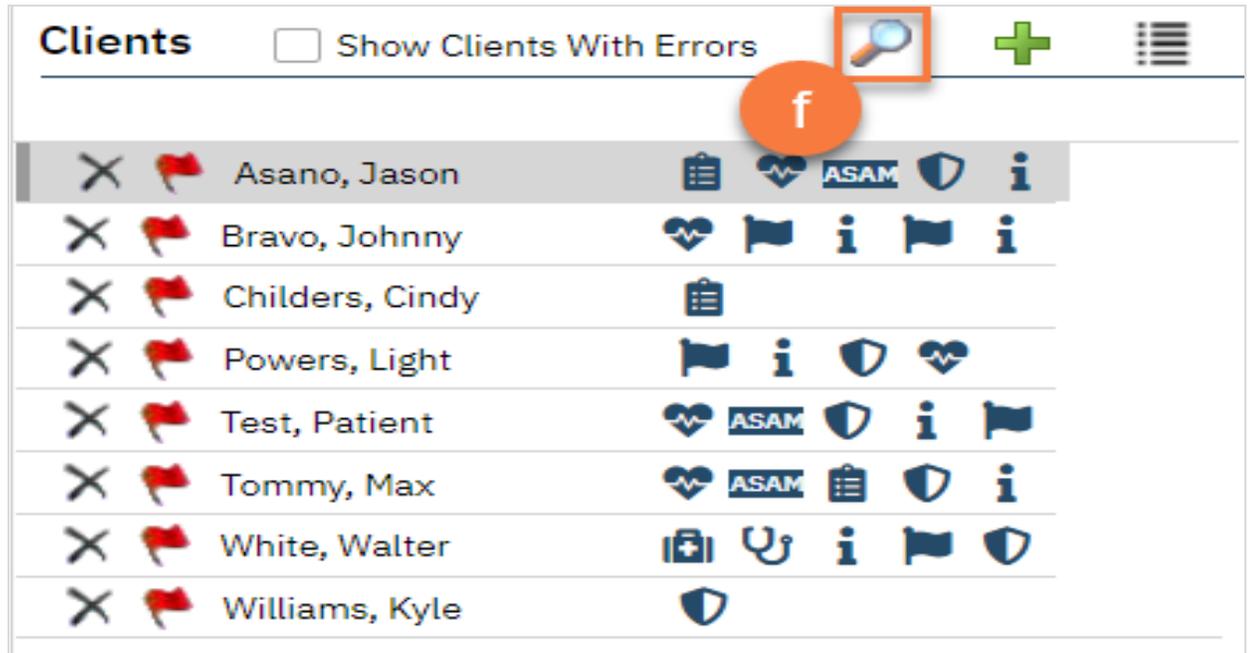
- e. This will open up the Group Service Client Popup, which will list any clients that are enrolled in this program but are not yet enrolled in this group. Select the client(s) you want to add and click Select to add them to this service.



<input type="checkbox"/>	Name
<input type="checkbox"/>	Adair, Alice (1160)
<input type="checkbox"/>	Another, Test (1209)
<input type="checkbox"/>	Arambula, Maximo (1247)
<input type="checkbox"/>	Asano, Hiro (1111)
<input type="checkbox"/>	Asano, Kaito (1106)
<input type="checkbox"/>	Baizey, Test (1183)
<input type="checkbox"/>	Baizey2, Test1 (1204)
<input type="checkbox"/>	Banks, Tara (1078)
<input type="checkbox"/>	Barajas, Fabiola (1235)
<input type="checkbox"/>	Barnes, Kim (1093)
<input type="checkbox"/>	Barrington, Rosemary (1265)

How To Write A Group Progress Note

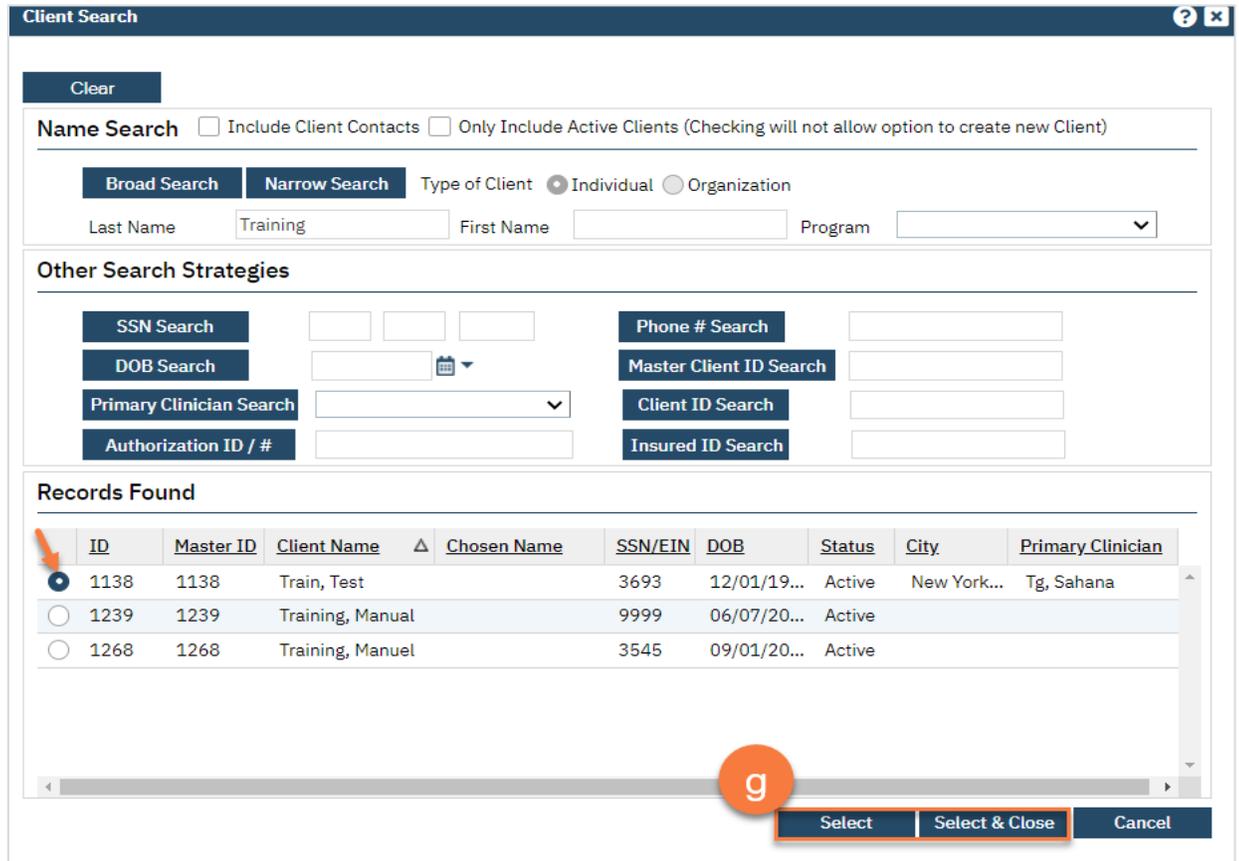
f. To add a client from another program, click on the Magnifying Glass icon.



Clients		<input type="checkbox"/> Show Clients With Errors			
	 Asano, Jason				
	 Bravo, Johnny				
	 Childers, Cindy				
	 Powers, Light				
	 Test, Patient				
	 Tommy, Max				
	 White, Walter				
	 Williams, Kyle				

How To Write A Group Progress Note

- g. This will bring up the client search function. Search for the client you want to add and click Select & Close. If you want to add more than 1 client, you can simply click Select and then search for the next client you want to add.

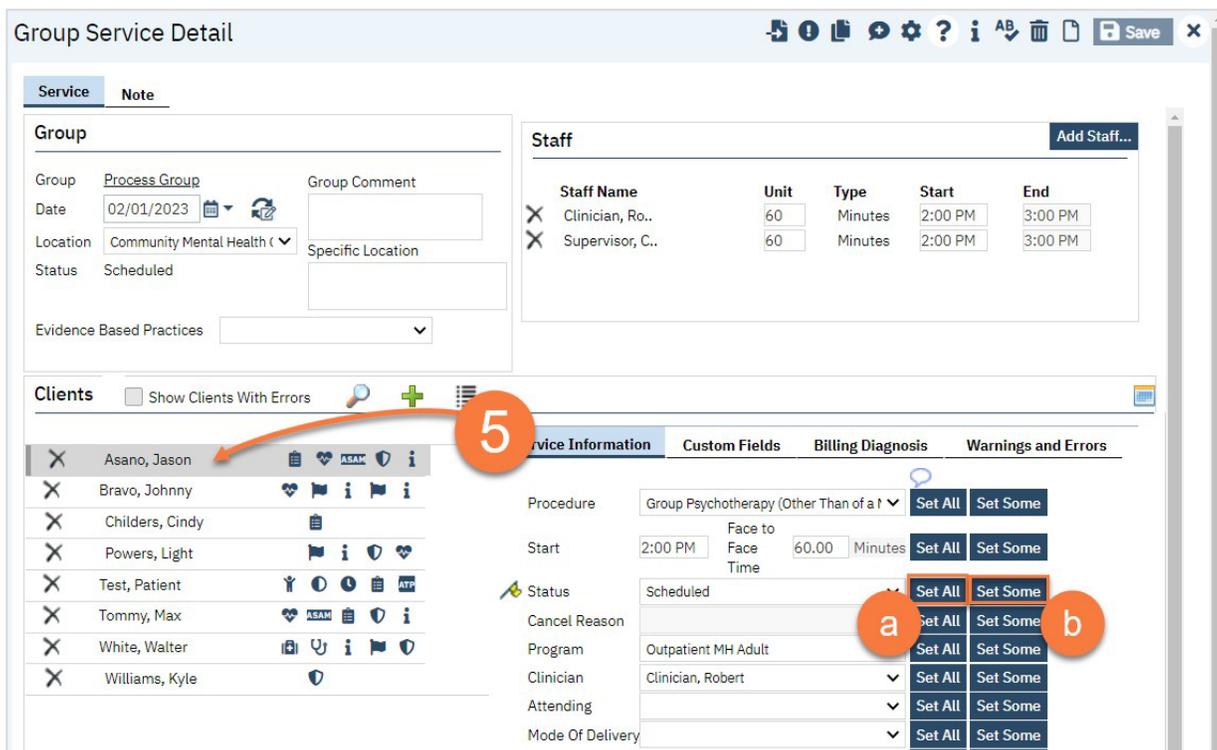


The screenshot shows the 'Client Search' window with various search options. The 'Name Search' section includes checkboxes for 'Include Client Contacts' and 'Only Include Active Clients'. Below this are buttons for 'Broad Search' and 'Narrow Search', and a 'Type of Client' selector with 'Individual' selected. Search fields for 'Last Name' (containing 'Training'), 'First Name', and 'Program' are visible. The 'Other Search Strategies' section contains buttons for SSN, DOB, Primary Clinician, Authorization ID, Phone #, Master Client ID, Client ID, and Insured ID searches. The 'Records Found' table lists three records, with the first one selected. A red arrow points to the selection radio button in the first row. A red circle with the letter 'g' is positioned over the 'Select & Close' button at the bottom right.

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
1138	1138	Train, Test		3693	12/01/19...	Active	New York...	Tg, Sahana
1239	1239	Training, Manual		9999	06/07/20...	Active		
1268	1268	Training, Manuel		3545	09/01/20...	Active		

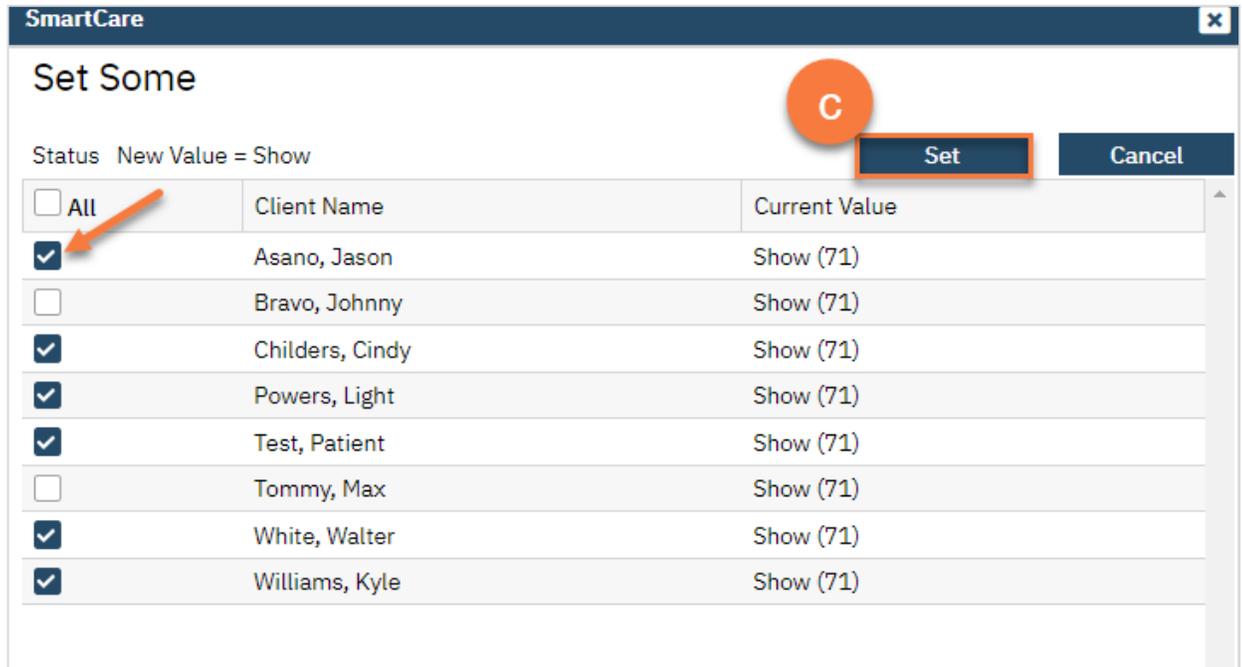
How To Write A Group Progress Note

5. Once you have your group roster set up, move to the service information section. The first client will be highlighted. As you make changes, this will update this particular client. This is where you mark whether clients who were a no-show for the group, or who canceled.
 - a. If you want to set this information for all of the clients, click the “Set All” button. You can do this for each item in the service information section.
 - b. If you want to set this information for more than one client, but not all of them, click the “Set Some” button.



How To Write A Group Progress Note

- c. This will bring up the Set Some pop-up window. Select the clients you want to include in this change (e.g. all the clients who you want to mark as “show”). Then click Set.

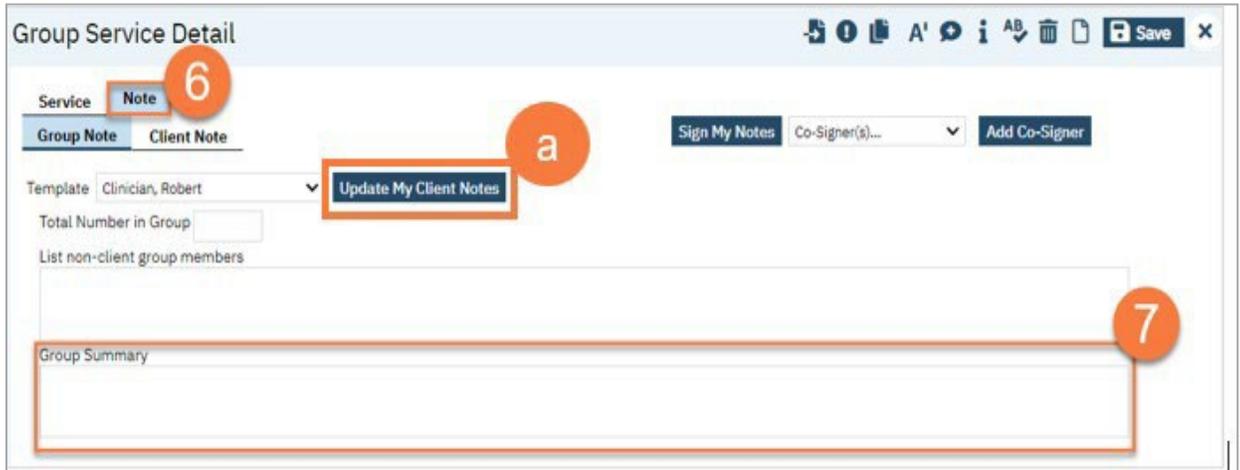


The image shows a 'SmartCare' window titled 'Set Some'. At the top, it says 'Status New Value = Show'. There are two buttons: 'Set' and 'Cancel'. The 'Set' button is highlighted with an orange box and a 'C' in a circle above it. Below the buttons is a table with columns for 'All', 'Client Name', and 'Current Value'. The 'All' checkbox is checked and has an orange arrow pointing to it. The table lists several clients with their names and current values, all of which are 'Show (71)'. The checkboxes for 'Asano, Jason', 'Childers, Cindy', 'Powers, Light', 'Test, Patient', 'White, Walter', and 'Williams, Kyle' are all checked.

<input type="checkbox"/> All	Client Name	Current Value
<input checked="" type="checkbox"/>	Asano, Jason	Show (71)
<input type="checkbox"/>	Bravo, Johnny	Show (71)
<input checked="" type="checkbox"/>	Childers, Cindy	Show (71)
<input checked="" type="checkbox"/>	Powers, Light	Show (71)
<input checked="" type="checkbox"/>	Test, Patient	Show (71)
<input type="checkbox"/>	Tommy, Max	Show (71)
<input checked="" type="checkbox"/>	White, Walter	Show (71)
<input checked="" type="checkbox"/>	Williams, Kyle	Show (71)

How To Write A Group Progress Note

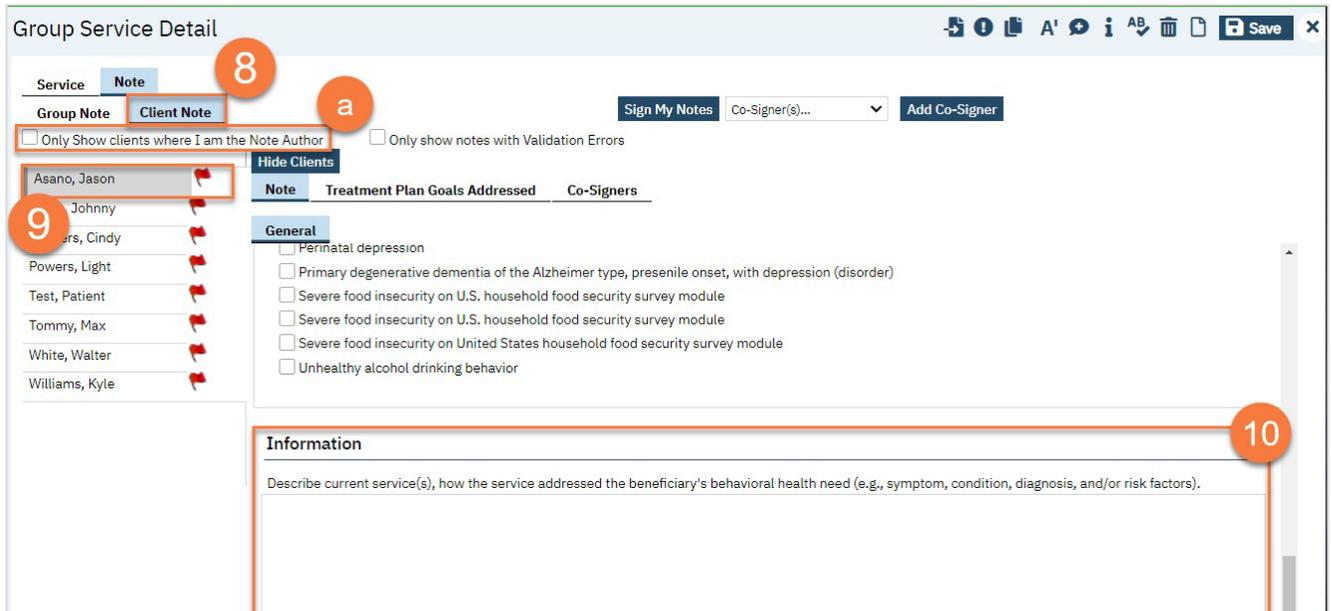
6. Once you've completed the service information, navigate to the Note tab.
7. Enter the group note summary.
 - a. Click the Update My Client Notes button. This will be pushed to all of the group member's notes.



The screenshot shows the 'Group Service Detail' form. At the top right, there are icons for print, info, refresh, zoom, and a 'Save' button. Below the title, there are two tabs: 'Service' and 'Note', with the 'Note' tab selected and circled in orange with the number '6'. Under the 'Note' tab, there are two sub-tabs: 'Group Note' and 'Client Note'. To the right of these tabs are buttons for 'Sign My Notes', a dropdown menu for 'Co-Signer(s)...', and an 'Add Co-Signer' button. Below the tabs, there is a 'Template' dropdown menu set to 'Clinician, Robert' and a button labeled 'Update My Client Notes' which is circled in orange with the letter 'a'. Below the template is a text input field for 'Total Number in Group' and another for 'List non-client group members'. At the bottom, there is a large text area for 'Group Summary' which is outlined in orange and has a circled orange '7' at its bottom right corner.

How To Write A Group Progress Note

- 8. Navigate to the Client Note tab.
- 9. On the left side of the screen, select the client you're writing the note for.
 - a. You can click on the checkbox "Only Show clients where I am the Note Author" to limit the clients on the list.
- 10. On the right side of the screen, enter the individual client's note for this group service.



How To Write A Group Progress Note

11. Add problems to the problem list as necessary. See Problem List for more information. After adding any problems, make sure to click Save.

The screenshot shows the 'Group Service Detail' interface. On the left, there is a list of clients: Asano, Jason; Bravo, Johnny; Childers, Cindy; Powers, Light; Test, Patient; Tommy, Max; White, Walter; and Williams, Kyle. The main area is divided into 'Problem Details' and 'Problem List'. The 'Problem List' contains a table with the following data:

		SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program
X	○	Subchronic schizophrenia with ...	111482003	F20.3	11/18/2022		Access Unit
X	○	Perinatal depression	10211000132109	F32.9	11/18/2022		Access Unit
X	○	Primary degenerative dementia...	10532003	F32.9	11/18/2022		Outpatient MH Adult
X	○	Severe food insecurity on U.S. h...	470951000124105	Z59.41	11/18/2022		Access Unit
X	○	Severe food insecurity on U.S. h...	470951000124105	Z59.41	11/18/2022		Access Unit
X	○	Severe food insecurity on Unite...	470951000124105	Z59.41	11/18/2022		Access Unit
X	○	Unhealthy alcohol drinking beh...	1093988100011...	F10.10	12/21/2022		Access Unit

A red circle with the number '11' is positioned over the 'Save' button in the top right corner of the software window.

How To Write A Group Progress Note

12. Select problems that were addressed in today's session. If you've added any problems to the problem list during this note writing, click Refresh to update this list.

The screenshot shows the 'Group Service Detail' interface. On the left is a list of clients: Asano, Jason; Bravo, Johnny; Childers, Cindy; Powers, Light; Test, Patient; Tommy, Max; White, Walter; Williams, Kyle. Each name has a red arrow icon next to it. Above the list are tabs for 'Service' and 'Note', and sub-tabs for 'Group Note' and 'Client Note'. There are buttons for 'Sign My Notes', 'Co-Signer(s)...', and 'Add Co-Signer'. Below the client list is a 'Hide Clients' button. The main area contains a table with columns for 'Note', 'Treatment Plan Goals Addressed', and 'Co-Signers'. Two rows are visible: one for 'Severe food insecurity on United States household food security survey module' dated 11/18/2022, and another for 'Unhealthy alcohol drinking behavior' dated 12/21/2022. At the bottom, a section titled 'Problems addressed during this session' is highlighted with an orange border. It contains a list of six medical conditions, each with an unchecked checkbox: 'Subchronic schizophrenia with acute exacerbations (disorder)', 'Perinatal depression', 'Primary degenerative dementia of the Alzheimer type, presenile onset, with depression (disorder)', 'Severe food insecurity on U.S. household food security survey module', 'Severe food insecurity on United States household food security survey module', and 'Unhealthy alcohol drinking behavior'. A 'Refresh' button is located in the top right corner of this section. A red circle with the number '12' is overlaid on the right side of the interface.

How To Write A Group Progress Note

13. To add Co-Signers as necessary, navigate to the Co-Signers tab.
 - a. Select the staff from the dropdown menu. This will add them to the list of people who will be asked to co-sign the note.
14. Once you're finished with all of your notes, click "Sign My Notes."

