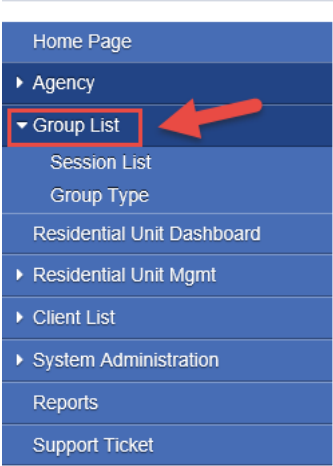


SanWITS Flow for Opioid Treatment Providers

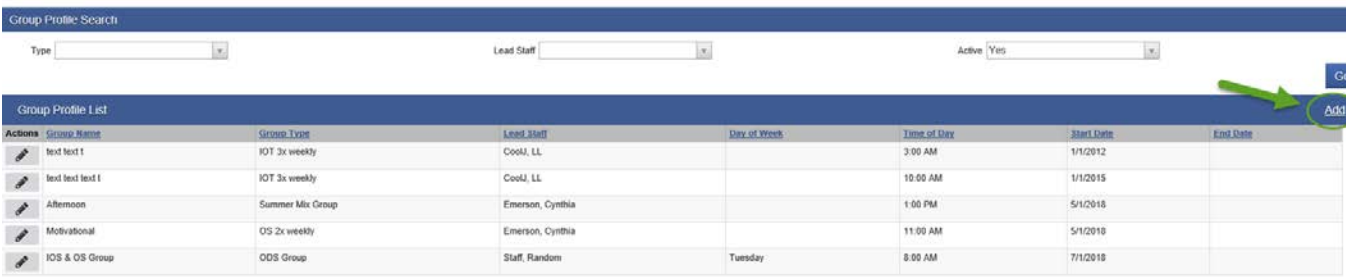
“Group List”

Group Counseling for OTP programs falls under pre-ODS guidelines and should only be created through the SanWITS Group List.

1. Go to **Group List** from the Navigation Pane.



2. To create a new Group Profile, click on “Add” hyperlink.



SanWITS Flow for Opioid Treatment Providers

“Group List”

- A Group Profile should be created as needed for different types of groups.** In the Group Profile screen, please complete all the required fields for the group profile. **Note:** The “Lead Staff” and “Time of Day” fields are required for the profile; however, these fields should be edited to the appropriate lead staff and start time on each group session as needed. After completing this information please click “Save”.

Group Profile

Group Name: August Group Start Date: 8/1/2018 End Date: []

Group Type: ODS Group Day of Week: [] Time of Day: 9:00am

Lead Staff: Nunez, Janeth Room Location: []

Facility: Main Facility

Co-Lead Staff: Adam, Kenneth; Ailshie, Douglas; Alcazar, Shirley; Altarejos, Isabel

Selected Co-Lead Staff: []

Description: Motivational Group

Buttons: Cancel, Save, Finish

- After saving the Group Profile, click on the hyperlink “Edit Roster.”

Administrative Actions

Create Group Session Print Sign-In Sheet

Roster

Client Name	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date

Buttons: Show All Clients, Edit Roster

- From the Roster screen, click on “Add Member” hyperlink. **All DMC Billable Counseling Groups should have a minimum of 2 present attendees and a maximum of 12 present attendees.**

Roster

Actions	Client Name	Program	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date

Buttons: Add Member

Client Name: []

of Sessions Approved: []

of Sessions Attended: []

Client Due: []

Program: []

Status: []

Status Effective Date: []

Reason: []

Finish

SanWITS Flow for Opioid Treatment Providers

“Group List”

6. From the Roster screen, type in the name of the client on the “Client Name” field.

Actions	Client Name	Program	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date

Client Name: [Dropdown Menu]

Program: [Dropdown Menu]

Status: [Dropdown Menu]

Status Effective Date: [Date Picker]

Reason: [Text Field]

Buttons: Cancel, Save, Finish

7. After selecting your client’s name, please select the correct Program Enrollment for your client.

- Client must have an active program enrollment. Please select “Active” for the Status field, then enter the Status Effective Date (the date the client joined the group).
- Status Date cannot be prior to Program Enrollment Date. After completing all the required fields, click Save.
- **You’ll need to repeat this step for each of the clients you need to add to the roster.**

Actions	Client Name	Program	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date

Client Name: DMC-2, ROBERT (2/2/1990)

Program: DMC Billing Test Facility/OS - 3/1/2018

Status: Active

Status Effective Date: 3/15/2018

Reason: [Text Field]

Buttons: Cancel, Save, Finish

SanWITS Flow for Opioid Treatment Providers

“Group List”

8. After adding all your clients to the Roster, click Finish.

Actions	Client Name	Program	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date
	DMC-2, ROBERT	DMC Billing Tes/OIS 3/1/2018 -		0	Active	3/15/2018
	DMC-3, MATTHEW	DMC Billing Tes/OIS 3.3 RES: 4/1/2018 -		0	Active	4/5/2018
	McDonald, Ronald	Main Facility/33/OIS 3.1 RES: 5/24/2018 -		0	Active	5/25/2018

Add Member

Client Name

of Sessions Approved

of Sessions Attended

Client Due

Program

Status Effective Date

Status

Reason

Finish

9. Each time this Group meets, from the Group Profile screen, click on “**Create Group Session**” hyperlink.

Group Profile

Group Name Start Date End Date

Group Type Day of Week Time of Day

Lead Staff Room Location

Facility

Co-Lead Staff
Adam, Kenneth
Albino, Douglas
Alcazar, Shirley
Altarejos, Isabel

Selected Co-Lead Staff

Description

Administrative Actions

[Create Group Session](#) [Print Sign-In Sheet](#)

Client Name	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date
DMC-2, ROBERT	DMC Billing Tes/OIS 3/1/2018 -				Active	3/15/2018
DMC-3, MATTHEW	DMC Billing Tes/OIS 3.3 RES: 4/1/2018 -				Active	4/5/2018
McDonald, Ronald	Main Facility/33/OIS 3.1 RES: 5/24/2018 -				Active	5/25/2018

Show All Clients Edit Roster

SanWITS Flow for Opioid Treatment Providers

“Group List”

10. In the **Group Session Notes** screen, please complete all the required fields.
- If you have at least one DMC client, Note Type should be “DMC Billable.” If you selected DMC Billable for Note type, please enter **YES** in the Billable field.
 - **Calculate ODS units- should always be NO.**
 - The “Lead Staff” should be the person who provided the group session.
 - Please select ***Groups ODS** for the Service field always.
 - Please enter **zero** for the Documentation Duration Time.
 - Please enter **zero** for Travel Duration Time.
 - **Note: Documentation Duration and Travel Duration should always be zero.**
 - Please enter the GROUP TYPE in the “Note” Box even though this box is showing as an optional field. The Group Note Box is a required field needed to create Encounters.

Group Session Notes

Group Name: October Group Session ID:

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date: Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM

Calculate ODS units: No Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hansen, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min # of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: *Group ODS

Co-Lead Staff: Abinales, Gieselle; Account, New; Acuff, Beth; Adam, Kenneth Selected Co-Lead Staff:

Note: Motivational Group

Administrative Actions: Cancel Save Finish

SanWITS Flow for Opioid Treatment Providers

“Group List”

11. After completing all the required fields in the Group Session Notes screen, click “Save.”

Group Session Notes

Group Name: October Group Session ID:

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date:

Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM

Calculate ODS units: No

Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hansen, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min

Location: Non-residential Substance Abuse TX Facility

Service: *Group ODS

Co-Lead Staff: Abinales, Gieselle; Account, New; Acuff, Beth; Adam, Kenneth

Note: Motivational Group

Administrative Actions:

12. After creating the Group Session, you will need to mark your group members as Present if they attended the session. Please select the names of the members first, then select the appropriate action. If your provider agency would like to use the session status to track No Show or Excused clients, you may do so, but this will not be required at this time.

13. Please select the names of the Group members who were Present for the Session, then under the Action drop menu select “Mark as Present” and then click on “Perform Action” hyperlink.

Attendees

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd
			<input checked="" type="checkbox"/>	DMC 2, ROBERT	0
			<input checked="" type="checkbox"/>	DMC-3, MATTHEW	0
			<input checked="" type="checkbox"/>	McDonald, Ronald	0

Perform Action Add Attendee

- Mark as Present
- Mark as No Show
- Mark as Excused
- Create Encounter
- Clear Errors

SanWITS Flow for Opioid Treatment Providers

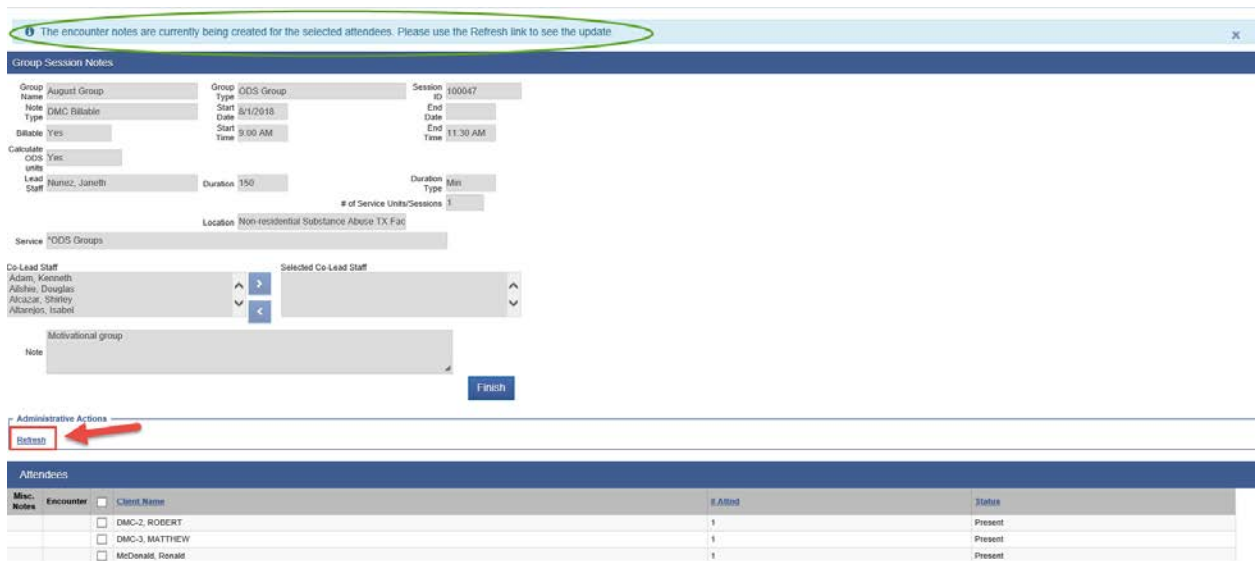
“Group List”

14. Please select the names of the Group Members who were **Present**, under the Action drop menu, select **“Create Encounter”**, then click on **“Perform Action”** hyperlink. After doing this, the system will create Bulk Encounters for the selected clients. **All DMC Billable Counseling Groups should have a minimum of 2 present attendees and a maximum of 12 present attendees.**



Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status*
		Create	Create	DMC-2, ROBERT	5	Present
		Create	Create	DMC-3, MATTHEW	5	Present
		Create	Create	McDonald, Ronald	5	Present
		Create	Create	Blueberry, St.	2	
		Create	Create	Kitty, Hello	2	

15. After performing the action **“Create Encounter”** for the Group members who were marked as **Present**, you’ll receive this message: **“The Encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update.”** Please click on **“Refresh”** hyperlink from the Administrative Action box. **Note:** You may need to click **“Refresh”** more than 2 times.



The encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update.

Group Session Notes

Group Name: August Group, Group Type: ODS Group, Session ID: 100047
Note: DMC Billable, Start: 8/1/2018, End: [blank]
Bilable: Yes, Type: [blank], Start Time: 9:00 AM, End Time: 11:30 AM
Calculate ODS: Yes, units: [blank]
Lead Staff: Name: Janeth, Duration: 150, Duration Type: Min, # of Service Units/Sessions: 1
Location: Non-residential Substance Abuse TX Fac
Service: ODS Groups

Co-Lead Staff: Adams, Kenneth, Alibeu, Douglas, Alkacir, Shirley, Alvarado, Isabel

Motivational group

Note: [blank]

Administrative Actions: Refresh

Misc. Notes	Encounter	Client Name	# Attnd	Status
	<input type="checkbox"/>	DMC-2, ROBERT	1	Present
	<input type="checkbox"/>	DMC-3, MATTHEW	1	Present
	<input type="checkbox"/>	McDonald, Ronald	1	Present

SanWITS Flow for Opioid Treatment Providers

“Group List”

16. Once the Encounters are created, the “View” hyperlink will become available under the Encounter column.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status
			View	DMC-2, ROBERT	1	Present

17. For the Group Members who were “Present,” from which Bulk Encounters were created, all the information in the Encounter screen will be pre-populated **except** for the Pregnant/Postpartum question for female clients only

- Group Counseling Encounters will have a Group Session ID.
- Service field will pre-populate. Please do **not** change the Service name.
- **Documentation Duration should always be zero.**
- **Travel Duration should always be zero.**
- The Start Time, End Time and Session Duration needs to be adjusted if client arrives late to the session or leaves early.
- The “Used Evidence-Based Practices” will auto-populate to None. Please change to the Evidence-Based Practice that was used for the Group: Motivational Interviewing, Relapse Prevention, or both.

Encounter 1 of 2

Note Type: DMC Billable
ENC ID: 528549
Program Name: OTP Facility/OTP - 5/1/2018
Service: Group Counseling OTP
Bilable: Yes

Group Session ID: 3000/9
Created Date: 10/31/2018 10:02 AM

Service Location: Non-residential Substance Abuse TX Facility
Start Date: 8/1/2018
Start Time: 11:00 AM
End Date: [blank]
End Time: 12:30 PM

Travel Duration: 0 Min
Documentation Duration: 0 Min
Session Duration: 90 Min
Total Duration: 90 Min

Contact Type: Face To Face
Emergency: [blank]
Vital Type: OP-Group
of Service Units/Sessions: 1
Med-Cal Billable: Yes

Pregnant/Postpartum: No
Was an interpreter used?: No Interpreter Needed
In what language was the service provided?: English

Which Evidence-Based Practices were used?
Evidence-Based Practices: Motivational Interviewing, Relapse Prevention, Other
Used Evidence-Based Practices: None

Diagnoses for this Service:
Primary: F11.21-Opioid dependence, in remission(ICD)
Secondary: [blank]
Tertiary: [blank]

Rendering Staff: Hansen, Stephanie, Counselor
Supervising Staff: [blank]

Administrative Actions: Release to Billing, Delete

Buttons: Cancel, Save, Finish