#### "Group List"

The Group Module is being required specifically for DMC ODS to ensure that Group Counseling encounter notes are created and billed appropriately. Group Counseling Encounters (H0005) for Outpatient Providers should only be created using the SanWITS Group List.

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



2. To create a new Group Profile, click on **"Add"** hyperlink.

Group	Profile Search						
Ту	pe	<b>x</b> .	Lead Staff	3	Active Yes	Υ.	
							Go
Grou	up Profile List						Add
Actions	Group Name	Group Type	Level 33am	Day of Week	Time of Day	Start Date	End Date
	text text t	IOT 3x weekty	Coekl, LL		3:00 AM	1/1/2012	
	text text text I	IOT 3x weekly	CoolJ, LL		10:00 AM	1/1/2015	
	Afternoon	Summer Mix Group	Emerson, Cynthia		1:00 PM	5/1/2018	
1	Motivational	OS 2x weekly	Emerson, Cynthia		11:00 AM	5/1/2018	
ø	IOS & OS Group	ODS Group	Staff, Random	Tuesday	8:00 AM	7/1/2018	

# 3. 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. <u>Note</u>: 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 P	Profile									
	Group Name	August Group	Start Date	8/1/2018	Ê	End Date	<b>#</b>			
	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, Dougla Alcazar, Shirley Altarejos, Isabe	s / #	Ŷ		l Co-Lead S	Staff			k Ø	
Description	Motivational Gro	סטק				<i>i</i> ,				
						Cancel	Save Fin	ish		

4. After saving the Group Profile, click on the hyperlink "Edit Roster."

Create Group Session Print Sign-In Shee						
Roster						Show All Clients Edit Rust
<b>Client Name</b>	Prooram	Client Due	T of Approved Sessions	T of Sessions Attended	Status	Status Effective Date

5. From the Roster screen, click on "Add Member" hyperlink. <u>All DMC Billable</u> <u>Counseling Groups should have a minimum of 2 present attendees and a</u> <u>maximum of 12 present attendees</u>.

#### "Group List"

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Client Name # of Sessions Approved		Program Status			Add Mer
					Ada Mer

6. From the roster screen, type in the name of the client on the "Client Name" field.

Roster	-	-	_	-	_	11-
Actions <u>Client Name</u>	Prosenter	# of Approved Seasion	# of Seraiona Attended	Steben	Status Effective Date	
						Add Member
Client Name	*	Pro	gram	8	U	
# of Sessions Approved	Q		tatus 🛛 🕴			
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Orange, Two						Cancel Save Finist
	One (1/1/1986) e (3/24/1995)					
Test, Three	(6/22/1984)					
Test, Two (2						
time, test (1/ Uchiha, Sak						

- 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.

		Add Member
Client Name DMC-2, ROBERT (2/2/1990)	Program DMC Billing Test Facility/OS : 3/1/2018 -	
# of Sessions Approved	Status Active *	
# of Sessions Attended	Status Effective Date 3/15/2018	
Client Due	Reason	
		Cancel Save Fin

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

tions 💭	Jient Name	Program		E of Approved Sexalon	E of Scaniona Attended	Status	Status Effective Date
🖋 DA	MC-2, ROBERT	DMC Billing Tes/OS: 3/1/2018 -			0	Active	3/15/2018
/ DA	WIC-3, MATTHEW	DMC Billing Tex/ODS 3.3 RES: 4/1/2018 -			0	Active	4/5/2018
1 Mc	AcDonald, Ronald	Main Facility33/ODS 3.1 RES: 5/24/2018 -			0	Active	5/25/2018
							Add Mem
	Client Name		Program				Add Mem
	Client Name		Program Status			-	Add Mem
							Add Mem

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

up Profile				_														
Group Name	August Group	x	Start Date	8/1/2018		End Date		-										
Group Type	ODS Group	1	Day of Week	2		Time of Day	9:00 AM											
Lead Staff	Nunez, Janeth	Υ.	Room Location															
Facility	Main Facility																	
Co-Lead Staff				Selecte	id Co-Lead S	Staff												
Adam, Kenneth Aitshie, Dougta Alcazar, Shirley Altarejos, Isabe	E.		0						0									
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10. In the **Group Session Notes** screen, please complete all the required fields.

- If you have at least <u>one</u> DMC client, Note Type should be "DMC Billable." If you selected DMC Billable for Note type, please enter YES in the Billable field.
- If the <u>entire</u> Group is County Billable, Note Type should be "County Billable." If you selected County Billable for the Note Type, please enter NO for the Billable field.
- Calculate ODS should always be <u>YES</u>.
- The "Lead Staff" should be the person who provided the group session.
- Please select \*Groups ODS for the Service field for Outpatient
   Services (OS) clients and Intensive Outpatient Services (IOS) clients.
- Please enter <u>zero</u> for the Documentation Duration Time.
   Documentation time should be added to the individual's Encounter screen.
- If there was Travel Time, please add it to the Group Session screen under Travel Duration. Travel time should not be added to the individual's encounter screen
- 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.

Croup Session Notes			
Group Name: October Group Group Type: ODS Group		Session ID:	
Bilable Yes v	* Start Date 8/1/2018 🚔 Start Time 9:00 AM	End Date	ä
Cateulate ODS units Yes * Documentation Duration 0 Min * Lead Staff Hancon, Stephanic, LMF1, LMF1		<ul> <li>Session Duration 90</li> <li>Duration Type Mith</li> </ul>	Min +
Service "Group ODS	# o t ocation Non-residential Substr	rt Service Units/Sessions 1 ance Abuse TX Facility	•
Co Lead Statt Ahinates, Gissalle Account, New Acutt, Rein Adam, Kenneth	Selected Co Lead Staff		~ ~
Note Molivational Group			]
- Administrative Actions			

#### "Group List"

- 11. **Recovery Services clients should have their own group.** Recovery Services clients <u>cannot</u> be mixed with Outpatient Services (OS) clients or Intensive Outpatient Services (IOS) clients.
  - If you have at least <u>one</u> DMC client, Note Type should be "DMC Billable." If you selected DMC Billable for Note type, please enter YES in the Billable field.
  - If the <u>entire</u> Group is County Billable, Note Type should be "County Billable." If you selected County Billable for the Note Type, please enter NO for the Billable field.
  - Calculate ODS should always be <u>YES</u>.
  - The "Lead Staff" should be the person who provided the group session.
  - Please select **\*Recovery Service Group** for the Service field.
  - Please enter <u>zero</u> for the Documentation Duration Time.
     Documentation time should be added to the individual's Encounter screen.
  - If there was Travel Time, please add it to the Group Session screen under Travel Duration. Travel time should not be added to the individual's encounter screen
  - 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.

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N	Motivational Group ODS Group				Session ID:							
Note Type Billable Calculate ODS units		Start Date 8/1/2018 Start Time 9.00 AM	Ê		End Date End Time 10		8					
ocumentation Duration	CONTRACTOR OF A DECISION	Travel Duration <mark>0</mark> Total Duration 90	Min	* of Serv	Session Duration 90 Duration Type Mi rice Units/Sessions 1		Min	¥				
Service	*Recovery Service Group	Location Non-reside	ntial Subs	lance	Abuse TX Facility	v v						
o-Lead Staff binales, Gieselle iccount, New icuff, Beth idam, Kenneth		Selected Co-Lead S	Staff			< >						
Note	Motivational Group	_										
Administrative Action	15									Can	icel	Save

#### "Group List"

12. After completing all the required fields in the Group Session Notes screen, click "Save."

Group Name: Otchber Group   Group Type: DDS Group     Nete Type DMC Bilable   Wei Start Date   Start Time Start Time   Group Collesting Start Time   Calculate ODS wins Yeis   Calculate ODS wins<	Group Type: DOS Group Note Type: DOS Group Bitsole Yes * Start Date 9/1/2018 End Date Bitsole Yes * Start Time 9/00 AM End Time extrater Doration Do Min * Travel Duration 0 Min * Session Duration 90 Min * Lead Staff Hansen, Stephanie, UMFT, UMFT * Travel Duration 0 Doration 90 Min * Location Worr-esidential Substance Abuse TX Facility * Scence Group ODS * 4 Staff Service Units/Sessions 1 Location Mon-residential Substance Abuse TX Facility *	oup Session Notes						
Biable Yes  Ves Vistar Duration Ves Vistar Time 9:00 AM End Time Calculate ODS units Yes Unmentation Duration Ves I and Staff Harrisen, Stephanie, LMF7 LMF7 V Total Duration 9:00 AM Ves Vistar Ves V	Billable Yes Start Time 9 0.00 AM End Time Cataland CDS units Yes Service Duration 9 Min Service Duration 9 Min Service Duration 90 Min Service Duration 90 Min Service Service With/Services 3 Service With/Services 3 Service With/Services 3 Service Servic			Session ID:				
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menatation Duration 0 Min  Travet Duration 0 Min  Sension Duration 9 Min  Lead Staff Lead Staff Lead Staff Group OOS Sension Group OOS Sen	eertation Duration 0 Min  Travel Duration 9 Min  Seesion Duration 90 Min  Total Duration 190 Min  Tota	and the second second	Start Time 9.00 AM	End Time				
al of Service Units/Service Un	If of Service Units/Services 1     Locaton Non-residential Substance Abuse TX Facility      Service *Group ODS      Selected Co-Lead Staff      Ges Glocale     New     Selected Co-Lead Staff      Mole Motivational Group		* Travel Duration 0	Min * Session Duration 90	Min *	i .		
Location Non-residential Substance Abuse TX Facility + Service *Group ODS *	Location Workesidential Substance Abuse TX Facility	Lead Staff Hansen, Stephante,	LMFT,LMFT + Total Duration 90	Duration Type Min	*			
exist Courte Court	Service "Group ODS"			# of Service Units/Sessions 1				
nad Staff Selected Collead Staff nalos, Gioselle ount, New m, Kenneth	d Staff Selected Co-Lead Staff ec. Globelle nt, New Bein Co		Location Non-residen	tial Substance Abuse TX Facility	<b>a</b> .			
ice, Giocolde art, New Cold Each Cold Kenneth Cold	les, Giocolie nt New Dem	Service *Group ODS						
ant, New 2 Beth Constraints (Kenneth	nt, New Baeh	d Staff	Selected Co-Lead St	aff				
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		Note Motivational Group						
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- 13. 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.
- 14. 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.

Administrative Actions	
Attendees	Perform Action Add Atten
Actions Individual Miec. Encounter	#Attud
I I DMC-2, ROBERT	0 Mark as Present
DMC-3, MATTHEW	0 Mark as No Show Mark as Excursed
/ / McDenald, Renald	0 Create Encounter Clear Errors

#### "Group List"

15. 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. <u>All DMC Billable Counseling Groups should have a</u> minimum of 2 present attendees and a maximum of 12 present attendees.

Atler	idees						ate Encounter ) Perform Action Add Attende
Actions	Individual Note	Misc. Notes	Encounter	0	Client Nome	6 Atted	Status-
		Create	Create	P	DMC-2, ROBERT	5	Present
		Create	Greate	M	DMC-3, MATTHEW	5	Present
1		Steate	Greate	0	McDonald, Ronald	5	Present
1	1	Create	Create		Blueberry, Six	2	
		Create	Conate		Xitty, Hello	2	

16. 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. <u>Note</u>: You may need to click "Refresh" more than 2 times.

							idate.	_	_	_		 	 		
roup Session Note	5								í						
Group Name: Group Type:					Session ID: 100340										
Note Type	DMC Billable		Start Date 8/1/2018		End Date										
Eillacle	Yes		Start Time 9:00 AM		End Time										
Calculate ODS units		And in case of the local data													
Documentation Duration		Mn +	Travel Duration 0	Min +	Session Duration 90	Mit	+								
Lead Staff	Hansen, Step	phanie, LMFT,LMFT	Total Duration 90		Duration Type Mitt										
			Location Non-reside		rice Units/Sessions 1										
Service	Group ODS		Constant in the second		sam tritalay										
o-Lead Staff			Selected Co-Lead	Co.M											
Abinales, Gieselle Account, New			^ >			~									
koult, Beth Mam, Kenneth			¥ <			~									
Note	Motivational	Group													
Administrative Actions															
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17. Once the Encounters are created, the "View" hyperlink will become available under the Encounter column.

	ISUGUYC HU	20112				
Atte	ndees			1		Perform Action Add Attendee
Actions	Individual Note	Misc. Notes	Encounter	Client Name	<u># Attnd</u>	<u>Statue</u>
ø	1	<u>Create</u>	<u>View</u>	DMC-2, ROBERT	1	Present

- 18. For the Group Members who were "Present", from which Bulk Encounters were created, all the information in the Encounter screen will be prepopulated **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 needs to be added to the individual's Encounter.
  - The <u>Start Time</u>, <u>End Time</u> and <u>Session Duration</u> need 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.

Note Type DMC Billable	1							
ENG ID 527351				4	iroup Session 10	100063	Created Date 9/25/2018 3.2	28 PM
Program Name DMC Billing Test Facil	ty/OS : 8/20/2018 -							
Service Group Counseling OS					Billable	Yes -		
-		Start Date 8/1/201	8 00	End Date	m			
Service Location Non-residential Subst	ince Abuse TX Facility	* Start Time 9.00 AM	1	End Time 1	MA 00:0			
Travel Duration 15 Min	1.00	Documentation Duration 10	Min	×.				
Session Duration 60 Min	1 . W.	Total Duration 85	Min	*				
Contact Type Face To Face +								
	Emergency	*	# of Service Units/Sessions	3				
	Visit Type GP-G	ROUD	· Medi-Cal	Yes -				
regnan6Postpartum Yes			* Billable					
Was an interpreter				Fastal		121		
Was an interproter used? No Interproter Neoded	*	In what language was the	service provided?	English		1		
Was an interpreter	*	In what language was the	service provided?	English				
Was an interpreter used? No Interpreter Needed ch Evidence-Based Practices were used? tence-Based Practices	•	Used Evidence-Based Practice		English		*		
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Was in Intervention Mite Intervention Needed de Evidence Based Practices were used? Interve Based Practices Were and the Intervention Based Prevention Negrosses for this Service Prinny F11.11-Optical abures, in Secondary Tertary	remission/JCD)	2 Vard Extense Read Parale		English		e N N		
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