

SanWITS Flow for Outpatient Providers

“Group List”

“Effective July 1, 2019, the service code for groups have been replaced by two new service codes: ODS Clinical Group & ODS Patient Education.”

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

Type Lead Staff Active Yes

Client's Name Unique Client Number

Group Profile List

Actions	Group Name	Group Type	Lead Staff	Day of Week	Time of Day	Start Date	End Date
	text text t	IOT 3x weekly	CoolJ, LL		3:00 AM	1/1/2012	
	text text text t	IOT 3x weekly	CoolJ, LL		10:00 AM	1/1/2015	
	Afternoon	Summer Mix Group	Emerson, Cynthia		1:00 PM	5/1/2018	
	Motivational	OS 2x weekly	Emerson, Cynthia		11:00 AM	5/1/2018	
	IOS & OS Group	ODS Group	Staff, Random, LPC	Tuesday	8:00 AM	7/1/2018	

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- 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: Start Date: End Date:

Group Type: Day of Week: Time of Day:

Lead Staff: Room Location:

Facility:

Co-Lead Staff: Selected Co-Lead Staff:

Description:

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

Administrative Actions

[Create Group Session](#)

[Show All Clients](#) [Edit Roster](#)

Client Name	Unique Client #	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date
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- From the Roster screen, click on “Add Member” hyperlink. **All DMC Billable Groups should have a minimum of 2 active members and a maximum of 12 active members.**

Roster

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

[Add Member](#)

Client Name:

Program:

of Sessions Approved:

Status:

of Sessions Attended:

Status Effective Date:

Client Due:

Reason:

Unique Client Number:

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

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

The screenshot shows the 'Add Member' form. A red arrow points to the 'Client Name' dropdown menu, which is highlighted with a red box. The dropdown menu is open, showing a list of client names and their unique client numbers. The form also includes fields for Program, Status, Status Effective Date, and Reason. There are three buttons at the bottom: Cancel, Save, and 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	Unique Client #	Program	# of Approved Session	# of Sessions Attended	Status	Status Effective Date

The screenshot shows the 'Add Member' form with the following fields filled out: Client Name: DMC-2, ROBERT (2/2/1990); Program: DMC Billing Test Facility/OS : 3/1/2018 -; Status: Active; Status Effective Date: 3/15/18. A red arrow points to the 'Save' button, which is highlighted with a red box. There are three buttons at the bottom: Cancel, Save, and Finish.

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

Actions	Client Name	Unique Client #	Program	# of Approved Session	# of Sessions Attended	Status	Status Effective Date
	DMC-2, ROBERT	DR01020290	DMC Billing Tes/OS: 3/1/2018 -		0	Active	3/15/2018
	DMC-3, MATTHEW	DM01030389	DMC Billing Tes/ODS 3.3 RES: 4/1/2018 -		0	Active	4/5/2018
	Strawberry, One	SO02010186	DMC Billing Tes/IOS: 8/1/2018 -		0	Active	6/1/2018

[Add Member](#)

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

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: Selected Co-Lead Staff:

Description:

Administrative Actions

Create Group Session

Client Name	Unique Client #	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date
DMC-2, ROBERT	DR01020290	DMC Billing Tes/OS: 3/1/2018 -				0 Active	3/15/2018
DMC-3, MATTHEW	DM01030389	DMC Billing Tes/ODS 3.3 RES: 4/1/2018 -				0 Active	4/5/2018
Strawberry, One	SO02010186	DMC Billing Tes/IOS: 8/1/2018 -				0 Active	6/1/2018

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“Effective July 1, 2019, the Service name on the Group Session Notes have changed”

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.
 - *If the entire Group is County Billable, Note Type should be “County Billable.” If you selected County Billable for the Note Type, please enter YES for the Billable field.*
 - Effective July 1, 2019 the Start Time and End Time are required.
 - **Calculate ODS should always be YES.**
 - If there was Travel Time, please add it to the Group Session Notes screen.
 - The “Lead Staff” should be the person who provided the group session.
 - For services provided prior to July 1, 2019 please select ****ODS Group-valid through 6/30/19 DO NOT USE AFTER JUNE 30 2019** for the Service field for Outpatient Services (OS) clients and Intensive Outpatient Services (IOS) clients. **Please see example A.**
 - For clinical group services provided after June 30, 2019, please select ***ODS Clinical Group-valid beginning 7/1/19** for the Service field for **Outpatient Services (OS)** clients and/or **Intensive Outpatient Services (IOS)** clients. *Clinical Groups can be mixed OS and IOS clients. Please see example B.*
 - For patient education group services provided after June 30, 2019, please select ***ODS Patient Education Group-valid beginning 7/1/19**. *Patient Education Groups can be mixed OS and IOS clients. Please see example C.*
As a reminder Patient Education is defined as “*providing research-based education on addiction, treatment, recovery and associated health risks*”.
 - **Patient Education groups cannot be mixed with Clinical Groups as they are not the same service**
 - For Recovery Services group services please select ***Recovery Service Group** for the Service field. **NOTE: Recovery Services clients should have their own group.** Recovery Services clients cannot be mixed with Outpatient Services (OS) clients or Intensive Outpatient Services (IOS) clients. **Please see example D.**
 - # of Service Units/Session field will be pre-populated once you select the Service. You need to enter the total Session Duration time in minutes once you select the Service.
 - Enter the GROUP TYPE in the “Note” Box as this is a required field needed to create Encounters.

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Group Session Notes

Group Name: Training Group Session ID:
 Group Type: ODS Group **A**

Note Type: DMC Billable Start Date: 1/1/2020
End Date:

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

Calculate ODS units: Yes Session Duration: 90 Min
Total Duration: 90 Min

Travel Duration: 0 Min # of Service Units/Sessions: 1

Lead Staff: Admin Staff, Fake Location: Non-residential SUD TX Facility

Service: **ODS Group-valid through 6/30/19 DO NOT USE AFTER JUNE 30 2019

Co-Lead Staff: Adam, Kenneth; Admin Staff, Fake; Alcazar, Shirley; Altarejos, Isabel
 Selected Co-Lead Staff:

Note: Training Group

Administrative Actions

Group Session Notes

Group Name: Training Group Session ID:
 Group Type: ODS Group **B**

Note Type: DMC Billable Start Date: 1/1/2020
End Date:

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

Calculate ODS units: Yes Session Duration: 90 Min
Total Duration: 90 Min

Travel Duration: 0 Min # of Service Units/Sessions: 1

Lead Staff: Admin Staff, Fake Location: Non-residential SUD TX Facility

Service: *ODS Clinical Group-valid beginning 7/1/19

Co-Lead Staff: Adam, Kenneth; Admin Staff, Fake; Alcazar, Shirley; Altarejos, Isabel
 Selected Co-Lead Staff:

Note: Training Group

Administrative Actions

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"Group List"

Group Session Notes

Group Name: Training Group Session ID:
Group Type: ODS Group

Note Type: DMC Billable Start Date: 1/1/2020 End Date:
Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM
Calculate ODS units: Yes
Travel Duration: 0 Min Session Duration: 90 Min Total Duration: 90 Min
Lead Staff: Admin Staff, Fake # of Service Units/Sessions: 1
Location: Non-residential SUD TX Facility
Service: **ODS Patient Education Group valid beginning 7/1/2019

Co-Lead Staff: Adam, Kenneth; Admin Staff, Fake; Alcazar, Shirley; Altarejos, Isabel
Selected Co-Lead Staff:

Note: Training Group

Administrative Actions

Group Session Notes

Group Name: Training Group Session ID:
Group Type: ODS Group

Note Type: DMC Billable Start Date: 1/1/2020 End Date:
Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM
Calculate ODS units: Yes
Travel Duration: 0 Min Session Duration: 90 Min Total Duration: 90 Min
Lead Staff: Admin Staff, Fake # of Service Units/Sessions: 1
Location: Non-residential SUD TX Facility
Service: **Recovery Service Group

Co-Lead Staff: Adam, Kenneth; Admin Staff, Fake; Alcazar, Shirley; Altarejos, Isabel
Selected Co-Lead Staff:

Note: Training Group

Administrative Actions

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

12. After creating the Group Session, you will need to mark your group members as Present, No Show or Excused. **It is required to update the Status for ALL Group Members from the Roster including the members who were No Show or Excused.**

13. Select the names of the members first, then select the appropriate action.

14. For the group members that were **Present** in the Group Session, select the names of the attendees that were present then under the Action drop down menu select “Mark as Present” then click on “Perform Action” hyperlink.

Attendees						Perform Action	Add Attendee
Actions	Individual Note	Misc. Notes	Encounter	Client Name	Unique Client #	Attn	Status
			<input checked="" type="checkbox"/>	DMC-2, ROBERT	DR01020290		
			<input checked="" type="checkbox"/>	DMC-3, MATTHEW	DM01030389		
			<input type="checkbox"/>	Strawberry, One	SO02010188		

15. 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.

Attendees						Create Encounter	Perform Action	Add Attendee
Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attn	Status		
		Create	<input checked="" type="checkbox"/>	DMC-2, ROBERT	5	Present		
		Create	<input checked="" type="checkbox"/>	DMC-3, MATTHEW	5	Present		
		Create	<input checked="" type="checkbox"/>	McDonaki, Ronald	5	Present		
		Create	<input type="checkbox"/>	Blueberry, Six	2			
		Create	<input type="checkbox"/>	Kitty, Hello	2			

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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.”
17. Click on “Refresh” hyperlink from the Administrative Action box. **Note:** You may need to click “Refresh” several 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: Training Group Session ID: 100215
Group Type: ODS Group

Note Type: DMC Billable Start Date: 1/1/2020 End Date:
Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM
Calculate ODS units: Yes
Travel Duration: 0 Min Session Duration: 90 Min
Lead Staff: Admin Staff, Fake Total Duration: 90 Min
of Service Units/Sessions: 1 Location: Non-residential SUD TX Facility
Service: *Recovery Service Group

Co-Lead Staff: Adam, Kenneth; Admin Staff, Fake; Alcazar, Shirley; Altarejos, Isabel
Selected Co-Lead Staff:
Note: Training Group

Administrative Actions: Refresh Finish

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

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

19. 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 needs to be added to the individual’s Encounter.**
 - The Start Time, End Time and Session Duration 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.

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Below you'll find examples for IOS/OS Clinical Group Counseling and IOS/OS Patient Education Encounters.

Clinical Group Counseling IOS encounter example:

Encounter ◀◀ 25 of 25 ▶▶

Note Type: DMC Billable

ENC ID: 531455

Group Session ID: 100218

Program Name: Main Facility/ODS IOS : 7/2/2018 -

Service: Group Counseling IOS

Billable: Yes

Start Date: 1/1/2020

End Date:

Service Location: Non-residential SUD TX Facility

Start Time: 10:00 AM

End Time: 11:30 AM

Group Session Travel Duration: 0 Min

Documentation Duration: 8 Min

Session Duration: 90 Min

Total Duration: 98 Min

Contact Type: Face To Face

Emergency:

of Service Units/Sessions: 1

Visit Type: GP-Group

Medi-Cal Billable: Yes

Pregnant/Postpartum: No

Was an interpreter used? No Interpreter Needed

In what language was the service provided? Cambodian

Which Evidence-Based Practices were used?

Evidence-Based Practices: None, Relapse Prevention, Other

Used Evidence-Based Practices: Motivational Interviewing

Diagnoses for this Service

Primary: F10.180-Alcohol abuse with alcohol-induced anxiety disorder(ICD)

Secondary:

Tertiary:

Rendering Staff: Admin Staff, Fake

Secondary Staff:

Supervising Staff:

Administrative Actions

[Release to Billing](#) [Delete](#)

Cancel Save Finish ▶▶

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Patient Education IOS encounter example:

Encounter ◀◀ 7 of 24 ▶▶

Note Type: DMC Billable

ENC ID: 531451 Group Session ID: 100216

Program Name: Main Facility/ODS IOS : 7/2/2018 -

Service: Patient Education IOS Billable: Yes

Start Date: 1/1/2020 End Date:

Service Location: Non-residential SUD TX Facility Start Time: 10:00 AM End Time: 11:30 AM

Group Session Travel Duration: 0 Min Documentation Duration: 10 Min

Session Duration: 90 Min Total Duration: 100 Min

Contact Type: Face To Face

Emergency: # of Service Units/Sessions: 1

Visit Type: GP-Group Medi-Cal Billable: Yes

Pregnant/Postpartum: No

Was an interpreter used? No Interpreter Needed In what language was the service provided? Cambodian

Which Evidence-Based Practices were used?

Evidence-Based Practices: None, Relapse Prevention, Other

Used Evidence-Based Practices: Motivational Interviewing

Diagnoses for this Service

Primary: F10.180-Alcohol abuse with alcohol-induced anxiety disorder(ICD)

Secondary:

Tertiary:

Rendering Staff: Admin Staff, Fake

Secondary Staff:

Supervising Staff:

Administrative Actions

[Release to Billing](#) [Delete](#)

Cancel Save Finish ▶▶

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Group Counseling OS encounter example:

Encounter 2 of 2

Note Type: **DMC Billable**

ENC ID: 530770

Program Name: **Main Facility/ODS OS : 7/1/2018 -**

Service: **Group Counseling OS**

Group Session ID: **100157**

Billable: **Yes**

Start Date: **7/1/2018**

End Date:

Service Location: **Non-residential SUD TX Facility**

Start Time: **9:00 AM**

End Time: **10:30 AM**

Group Session Travel Duration: **20** Min

Documentation Duration: **8** Min

Session Duration: **90** Min

Total Duration: **118** Min

Contact Type: **Face To Face**

Emergency:

of Service Units/Sessions: **1**

Visit Type: **GP-Group**

Medi-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: **None**, **Motivational Interviewing**, **Other**

Used Evidence-Based Practices: **Relapse Prevention**

Diagnoses for this Service

Primary: **F11.920-Opioid use, unspecified with intoxication, uncomplicated(ICD)**

Secondary:

Tertiary:

Rendering Staff: **Staff, RenderingTest, RADT,LPHA**

Secondary Staff:

Supervising Staff:

Administrative Actions

[Release to Billing](#) [Delete](#)

Cancel **Save** **Finish**

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Patient Education OS encounter example:

Encounter ◀◀ 3 of 3 ▶▶

Note Type: DMC Billable

ENC ID: 531453

Group Session ID: 100217

Program Name: Main Facility/ODS OS : 1/1/2019 -

Service: Group Counseling OS

Billable: Yes

Start Date: 1/1/2020

End Date:

Service Location: Non-residential SUD TX Facility

Start Time: 10:00 AM

End Time: 11:30 AM

Group Session Travel Duration: 0 Min

Documentation Duration: 8 Min

Session Duration: 90 Min

Total Duration: 98 Min

Contact Type: Face To Face

Emergency:

of Service Units/Sessions: 1

Visit Type: PE-Patient Education

Medi-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: None, Motivational Interviewing, Other

Used Evidence-Based Practices: Relapse Prevention

Diagnoses for this Service

Primary: F11.19-Opioid abuse with unspecified opioid-induced disorder(ICD)

Secondary:

Tertiary:

Rendering Staff: Admin Staff, Fake

Secondary Staff:

Supervising Staff:

Administrative Actions

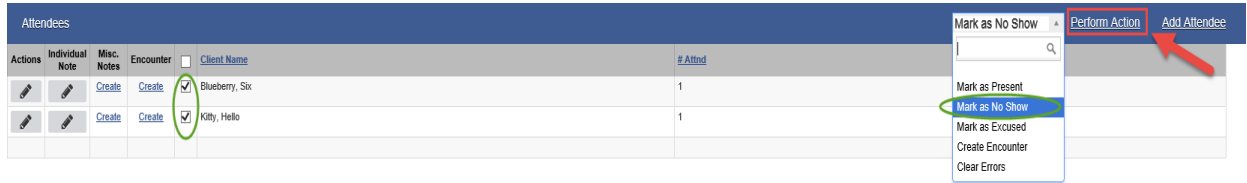
[Release to Billing](#) [Delete](#)

Cancel Save Finish ▶

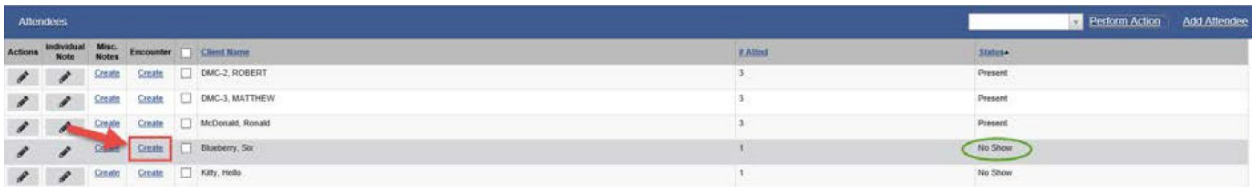
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20. For the group members that were scheduled to the Group Session and were **No Show** or **Excused**, select the names of the attendees, then under the Action drop menu select **“Mark as No Show”** or **“Mark as Excused”**, then click on Perform Action.



21. It is required to create an Encounter for the Group members who were **No Show** to the Group Session. Click **“Create”** under the Encounter column for the clients that were No Show. You need to do this individually for each client that was a No Show.



22. After selecting **“Create”** encounter for each of the Group members that were No Show, the Encounter screen will open.

- Note Type should be **“Non-Billable”**.
- Contact Type should be **“No Show”**.
- Billable will pre-populate to **“No”** and will be grayed out.
- Visit Type should be **“GP-Group”**.
- Please Finalize the Encounter.

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No Show encounter example:

Encounter

Nota Type: **Non Billable**

ENC ID: [] Group Session ID: []

Program Name: **Main Facility/OS : 6/1/2018 -**

Service: **Group Counseling OS** Billable: **No**

Service Location: **Non-residential Substance Abuse TX Facility** Start Date: **9/15/2018** End Date: []

Start Time: [] End Time: []

Travel Duration: [] Documentation Duration: []

Session Duration: [] Total Duration: []

Contact Type: **No Show**

Emergency: [] # of Service Units/Sessions: []

Visit Type: **GP-Group** Medi-Cal Billable: []

Pregnant/Postpartum: []

Was an interpreter used?: [] In what language was the service provided?: []

Which Evidence-Based Practices were used?

Evidence-Based Practices: None, Motivational Interviewing, Relapse Prevention, Other

Used Evidence-Based Practices: []

Diagnoses for this Service

Primary: **F10.151-Alcohol abuse with alcohol-induced psychotic disorder with hallucinations(ICD)**

Secondary: []

Tertiary: []

Rendering Staff: **Hansen, Stephanie, LMFT,LMFT**

Supervising Staff: []

Administrative Actions

Finalize Encounter (indicated by a red arrow)

Cancel Save Finish >>