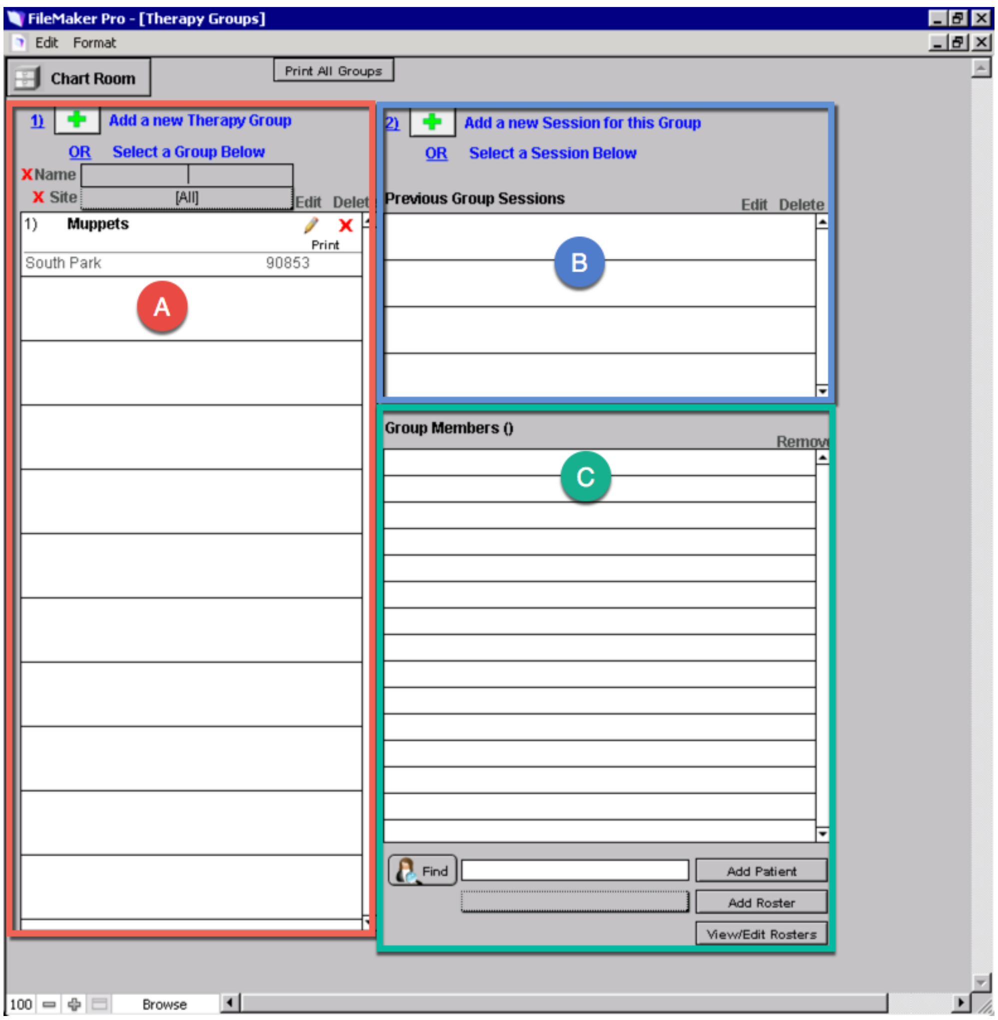
Creating Batch Group Therapy Notes

1. Click the **Therapy Groups** button from the Chart Face file cabinet drawer.

2. The Therapy Groups window will open showing areas A, B, and C. This will look familiar to the Settings & Directories > Group Level Settings & Directories tab > Therapy Groups tab.

   A. Therapy Groups section is where a therapy group can be edited, deleted, or created.
   B. Group Sessions section is where a user can view, edit, and add batch group therapy notes.
   C. Group Members is where patients can be added to groups.



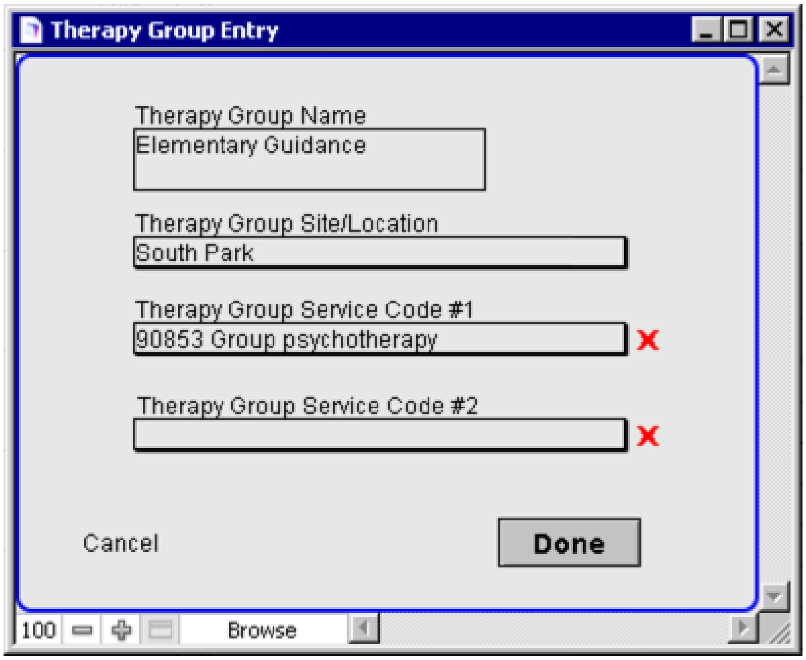
3. To create a Therapy Group, click on the **Add a new Therapy Group** button in the upper left.

4. Fill in the Therapy Group Name.

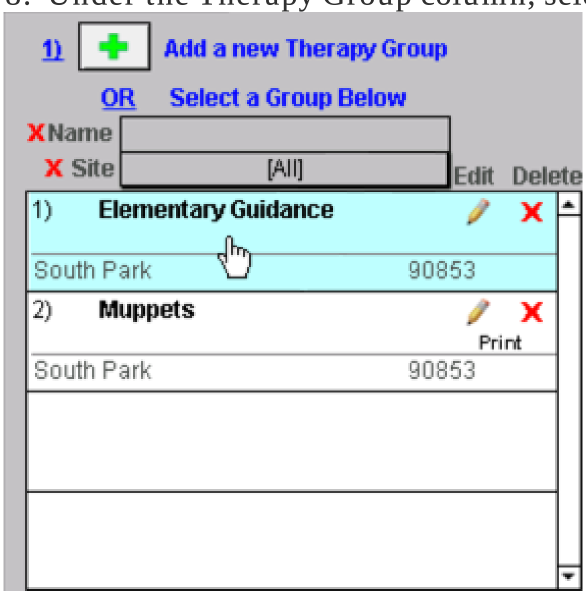
5. Change the Therapy Group Site/Location as needed.

6. Add the service code.

7. Click the  button.



8. Under the Therapy Group column, select the group that you would like to add patients to.



9. Add patients to the group by individual patient, by roster, or a combination of both.

Individually:

- Click the  button to find a patient.

- Type the patients name in the field and press return or the 

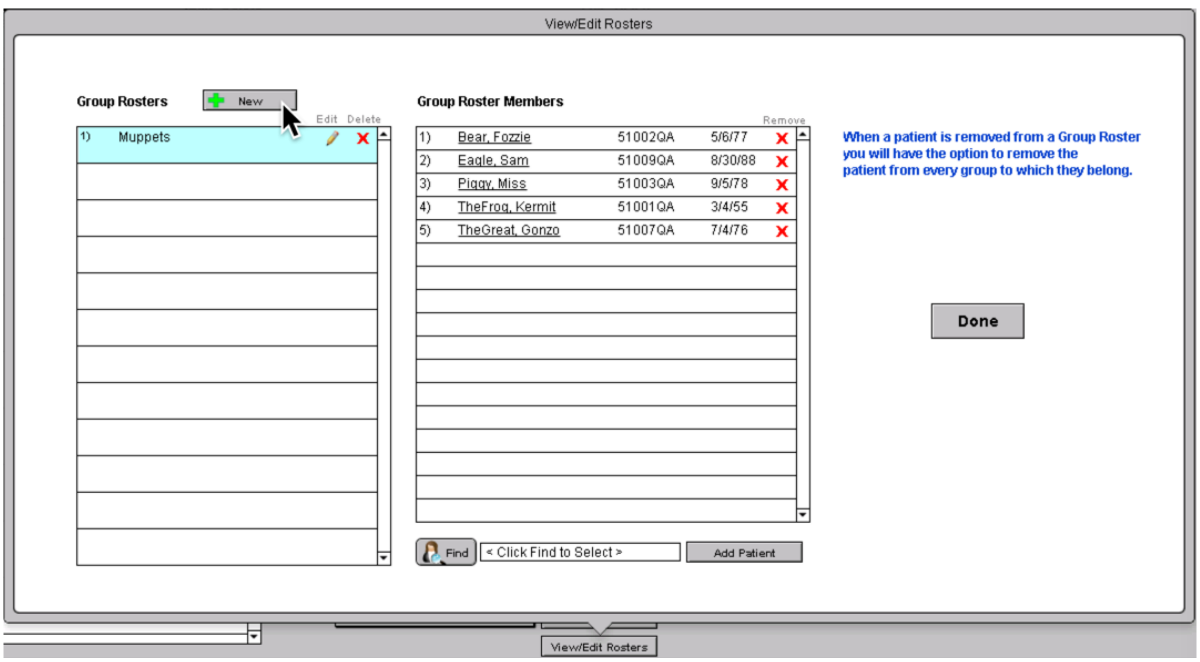
button to select a patient (or if only one patient meets criteria that patient will be selected).

By Roster:

- Click the 

button.

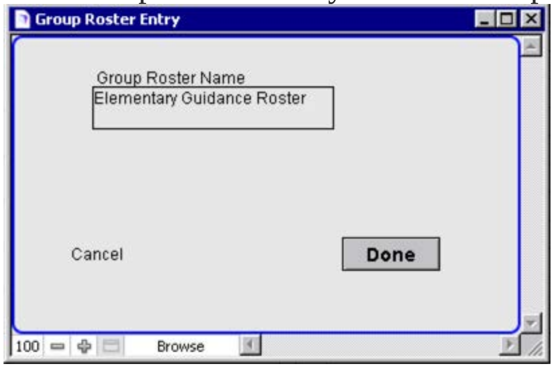
- The View/Edit Rosters popup window will appear.



- Click the 

button to create a new roster.

- The Group Roster Entry window will populate. Type in the name of the roster and click Done.



- With the new Group Roster selected, click the 

button to start adding patients.

- The patient's name will show in the field. Click the Add Patient button to add the patient to the roster. 

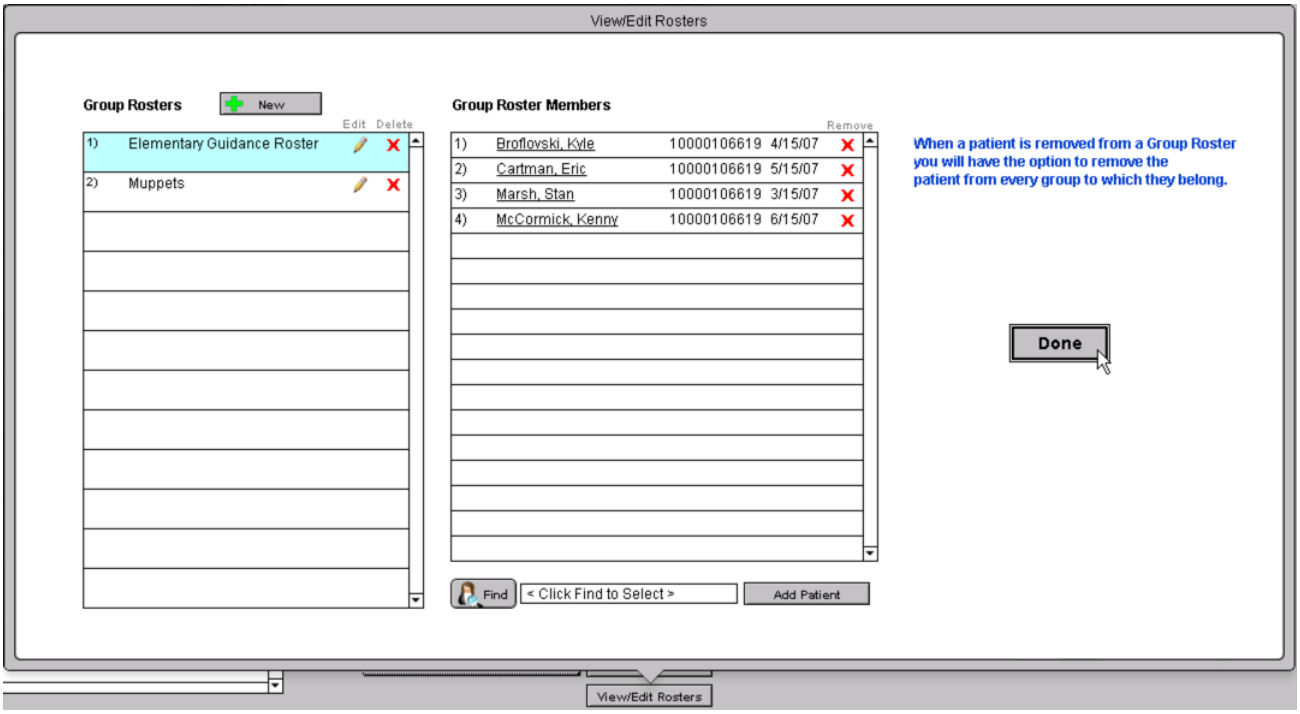
- Continue adding all the patients for the roster using the 

and 

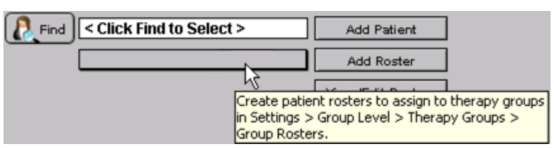
buttons.

- When all of the patients have been added, click the 

button.

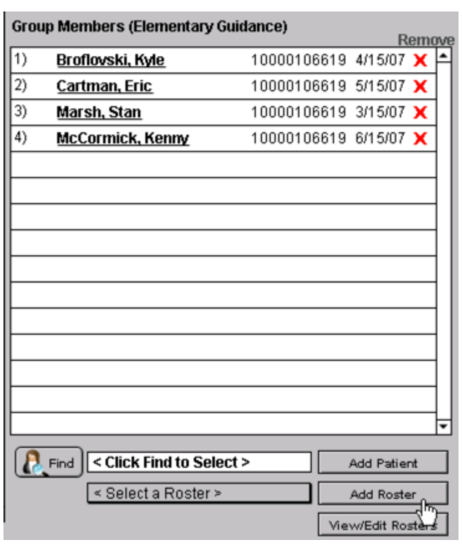


- Click in the dropdown field to add the newly created group (or any roster in the menu selection).



- Click the 

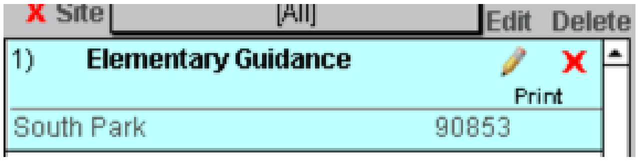
 button.



10. Clicking the  will delete group members as needed.

11. Printing, editing, and deleting can be done on the left by the following buttons.

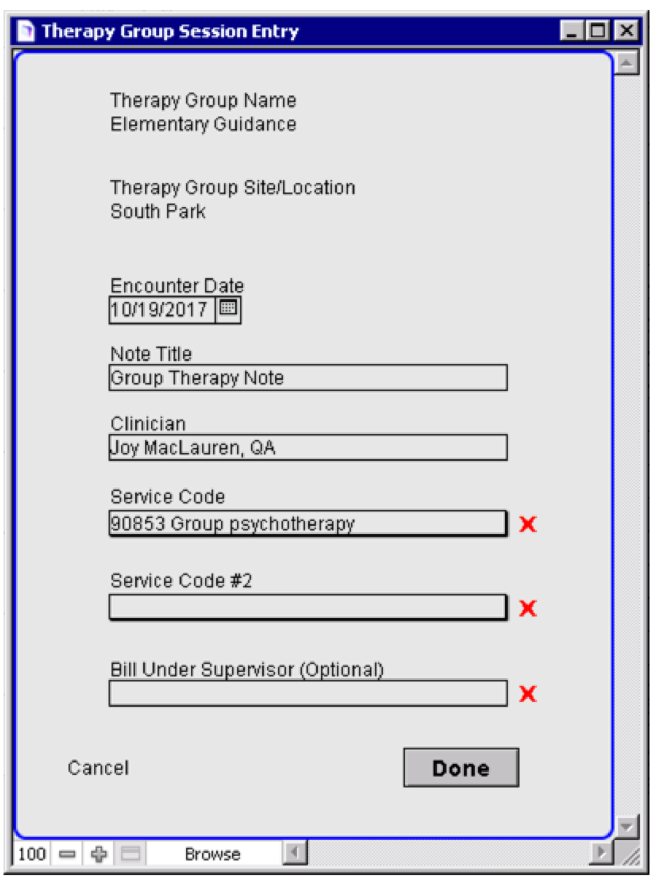
- **X Name** field is where the user can search for a group by name.
  - o Clicking the **X** button resets to a blank entry.
- **X Site [All]** field is where the user can limit the groups by site.
  - o The **X** button resets to All sites.



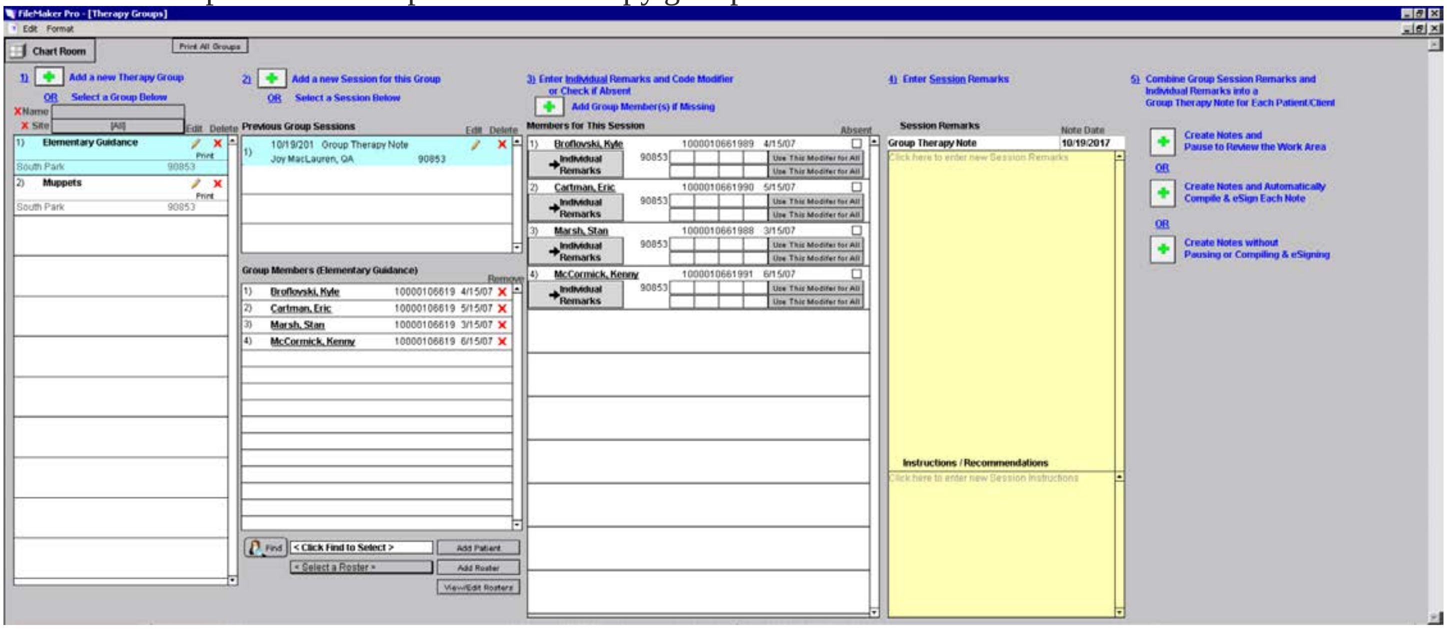
- **X** button deletes the group.
- button edits the group.
- Print button next to the group name prints only that group's members.

12. Click the **Add a new Session for this Therapy Group** button to create a new batch group therapy note for the chosen group. The Therapy Group Session Entry Window will open.

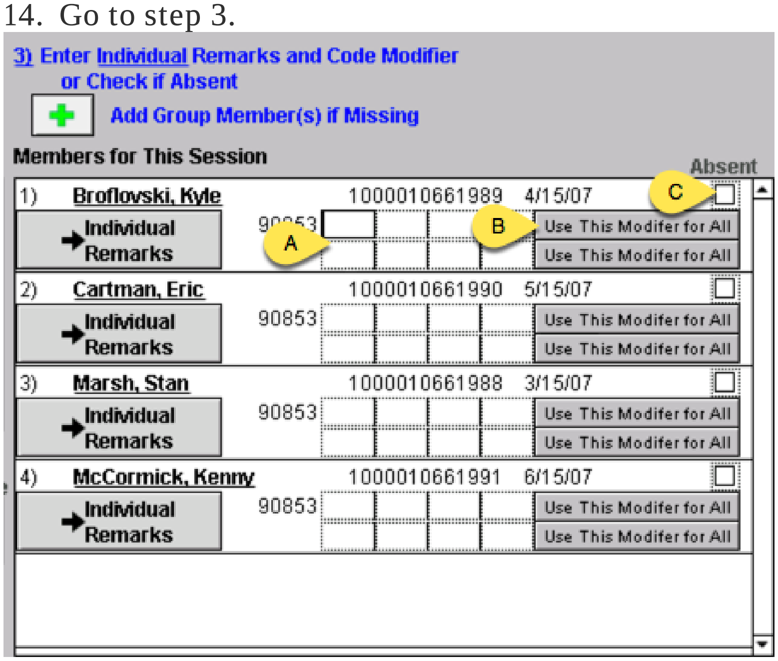
- Change the encounter date if needed.
- Edit the Note Title if desired.
- Change Clinician if desired.
- Confirm or change the Service Code or add a second Service Code.
- Add a Bill Under Supervisor if needed.
- Click the **Done** button to continue.



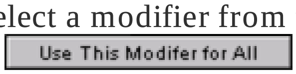
13. This will open all five steps for the therapy groups.



14. Go to step 3.

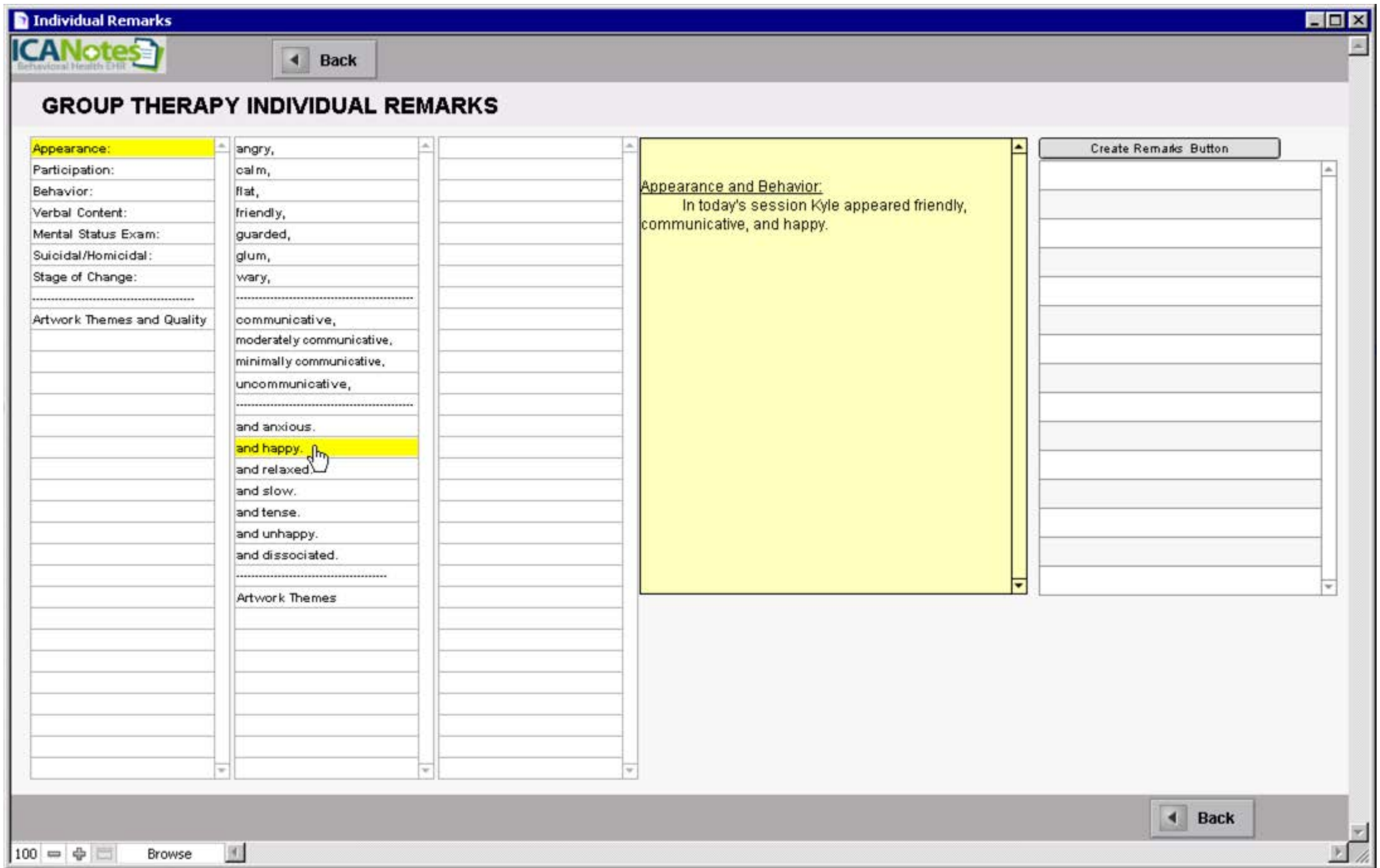


A. Add or select a modifier from the dropdown menu (if set up from Settings + Directories).

B. Click the  button to set the modifier for all group members.

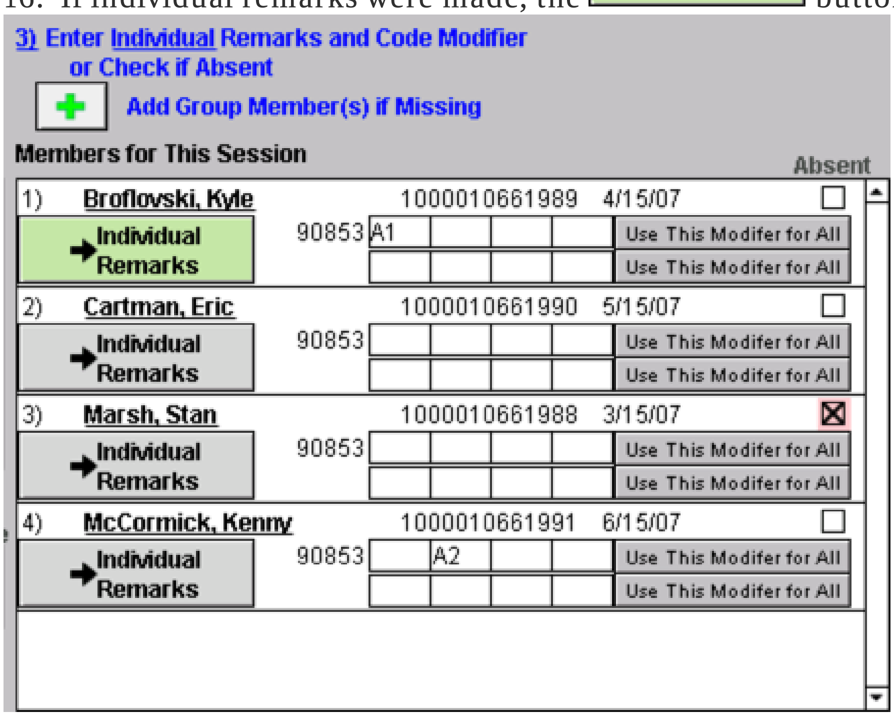
C. Indicate who was absent for the group (if any). If you indicate absent, a note will not be generated for this patient.

15. If the user would like to include individual remarks, click on the  button by the patient's name to open the Individual Remarks window.

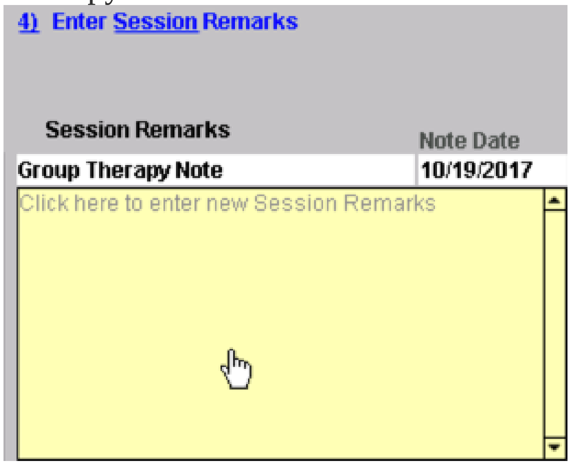


16. If individual remarks were made, the 

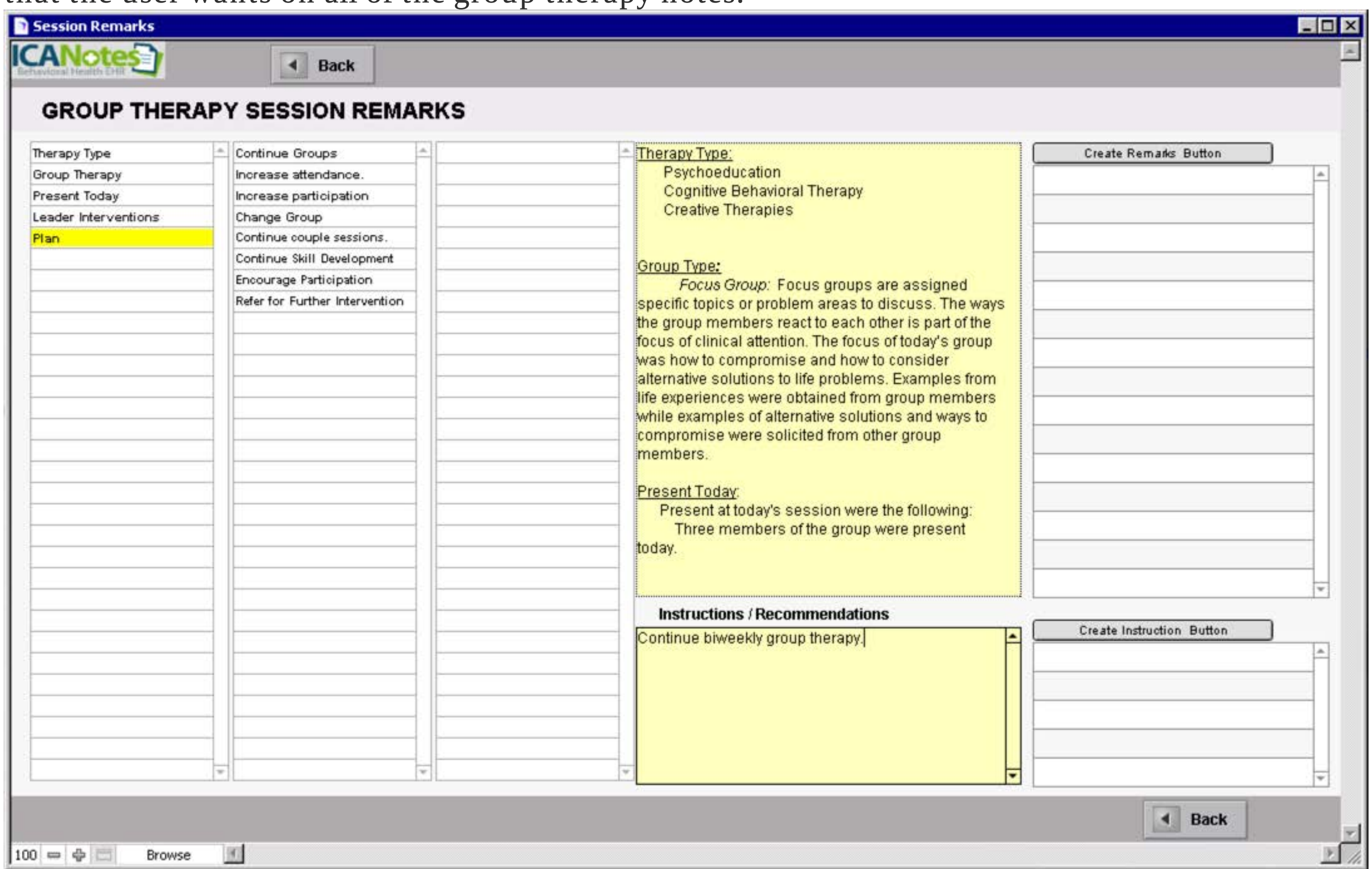
button turns green.



17. Go to step 4 to create the group session remarks. Click within the yellow field to open the Group Therapy Session Remarks shrub window.

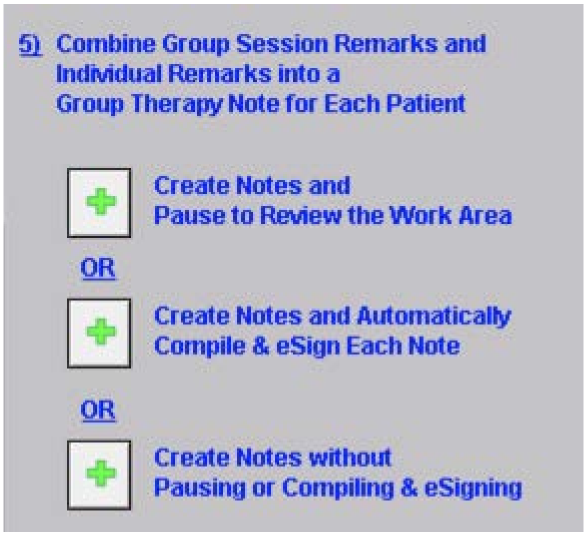


18. Within the Group Therapy Session Remarks, use the shrubs from left to right to create the notes that the user wants on all of the group therapy notes.



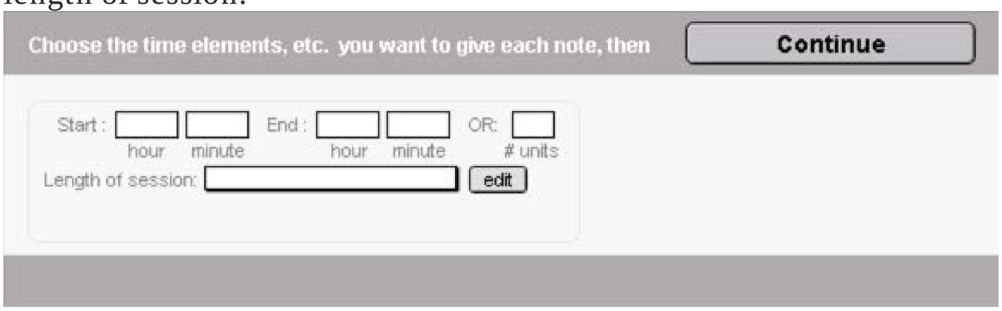
19. Once the group therapy remarks are entered, click the  button to return to Group Therapy window.

20. Go to step 5 to combine the group session remarks and individual remarks into a group therapy note for each group member.

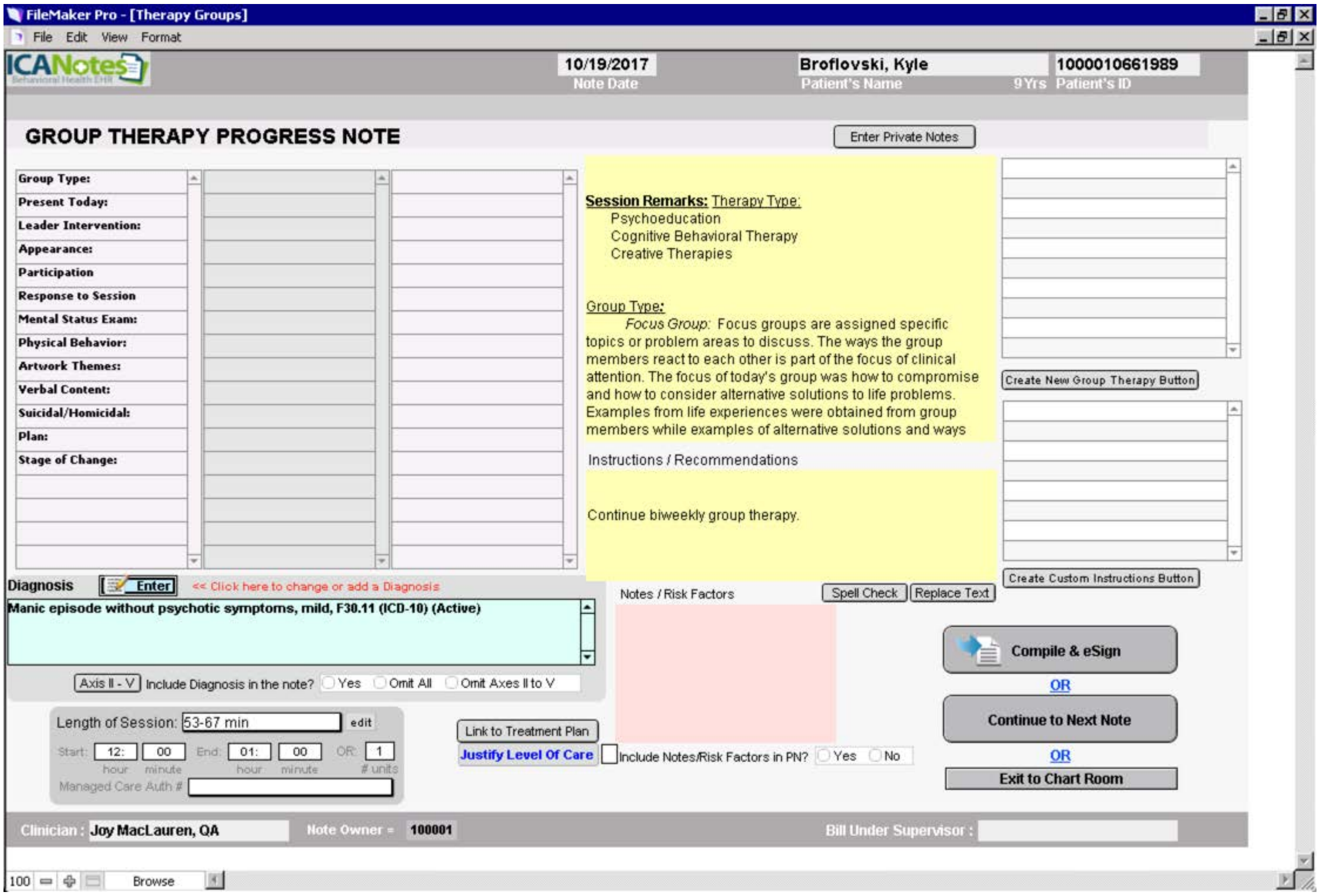


21. You will see three choices.

Whatever choice you make, you will be brought to this window next to set up start/end times and length of session.



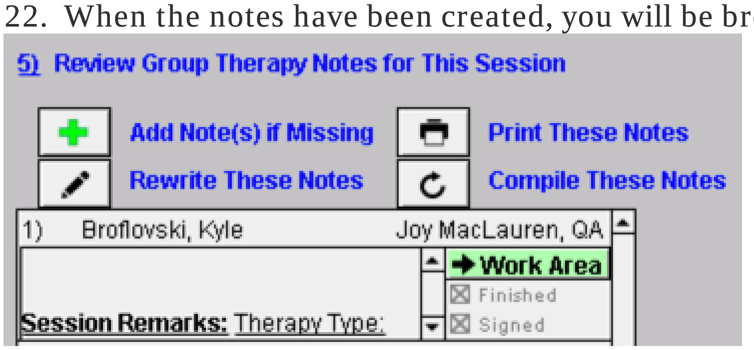
- This choice will allow the user to go into the individual group therapy note to make changes. This choice is useful if using managed care authorizations, editing diagnoses, notes and risk factors, linking to treatment plan, and justify level of care.



- This choice will compile and eSign each note if the user has eSignature set up. Popups may need to be navigated through if there are any uncompiled notes on the patient's chart or if managed care authorizations are a requirement.

- This choice will create the notes but not compile or eSign.

22. When the notes have been created, you will be brought back to the Therapy Groups screen.



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 - If a patient was marked absent (in step 14), you can click this button to create the note (after you have deselected absent).

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 - If you want to redo all the notes, you can click this button.

- Print These Notes - This will print all the notes.
- Compile These Notes - Clicking this button will compile all the notes.

If you click the ➔ Work Area button by a patient's name, you will return to the individual's Group Therapy Progress Note.