

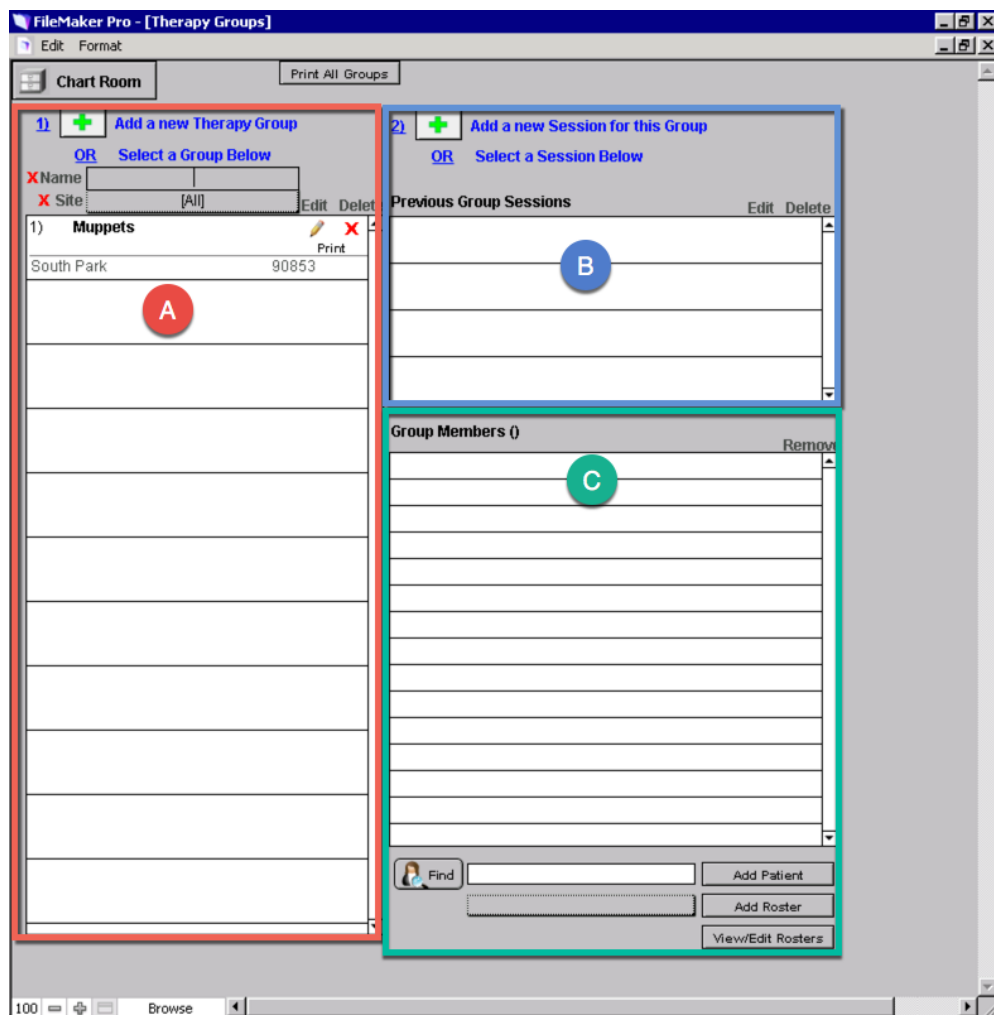
## Creating Batch Group Therapy Notes

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.

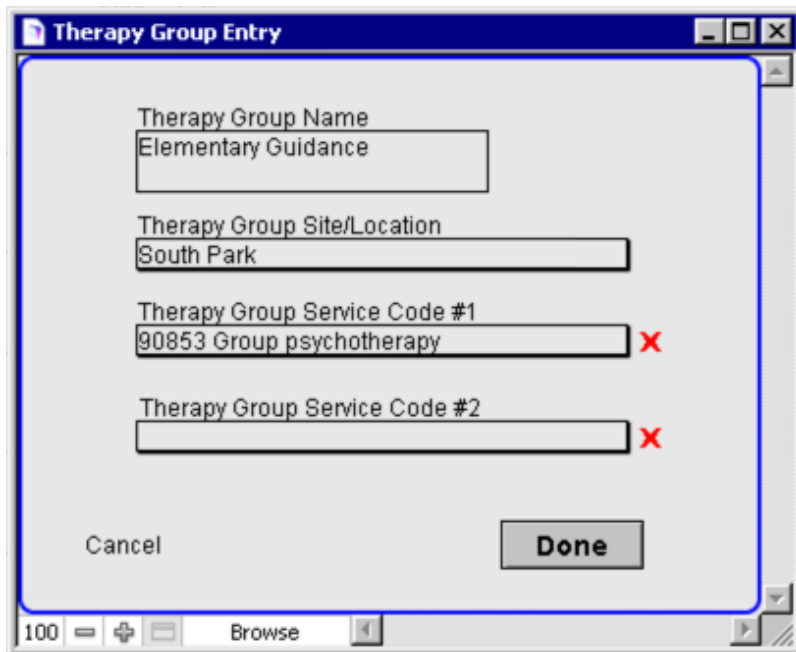


3. To create a Therapy Group, click on the  **Add a new Therapy Group** button in the upper left.
4. Fill in the Therapy Group Name.

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

6. Add the service code.

7. Click the **Done** button.

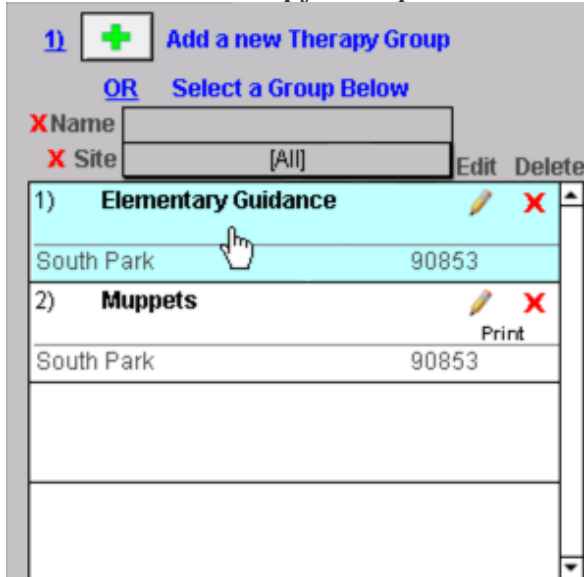


The image shows a 'Therapy Group Entry' dialog box with the following fields and values:

- Therapy Group Name: Elementary Guidance
- Therapy Group Site/Location: South Park
- Therapy Group Service Code #1: 90853 Group psychotherapy (marked with a red X)
- Therapy Group Service Code #2: (empty, marked with a red X)

Buttons: Cancel, Done

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



The image shows a 'Therapy Group' selection interface with the following elements:

- Buttons: **1)** **Add a new Therapy Group**, **OR** **Select a Group Below**
- Fields: **X** Name, **X** Site [All]
- Buttons: **Edit**, **Delete**
- Table:

	Therapy Group	Site	Service Code	
1)	Elementary Guidance	South Park	90853	
2)	Muppets	South Park	90853	<b>Print</b>

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

Individually:

- Click the **Find** 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).

**Find Patient**

Type Last Name, First Name, and/or ID [separated by spaces]

type patient name here

Press Return to Find


Find

Cancel

Patient Name	DOB	City, State	Zip	Patient ID#	Status

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By Roster:

- Click the  button.
- The View/Edit Rosters popup window will appear.

View/Edit Rosters

### Group Rosters

+ New
Edit Delete

1)	Muppets	✖

### Group Roster Members

				Remove
1)	<u>Bear, Fozzie</u>	51002QA	5/6/77	✖
2)	<u>Eagle, Sam</u>	51009QA	8/30/88	✖
3)	<u>Piggy, Miss</u>	51003QA	9/5/78	✖
4)	<u>TheFrog, Kermit</u>	51001QA	3/4/55	✖
5)	<u>TheGreat, Gonzo</u>	51007QA	7/4/76	✖

Find

< Click Find to Select >

Add Patient

Done

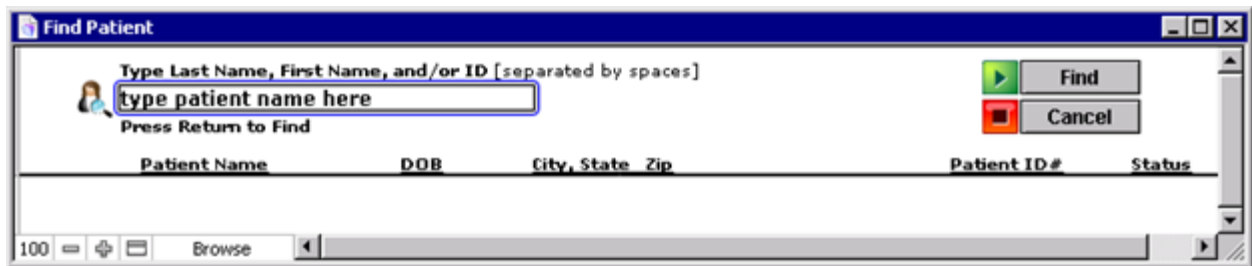
View/Edit Rosters

- Click the  button to create a new roster.

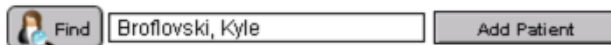
- The Group Roster Entry window will populate. Type in the name of the roster and click Done.




- With the new Group Roster selected, click the  button to start adding patients.

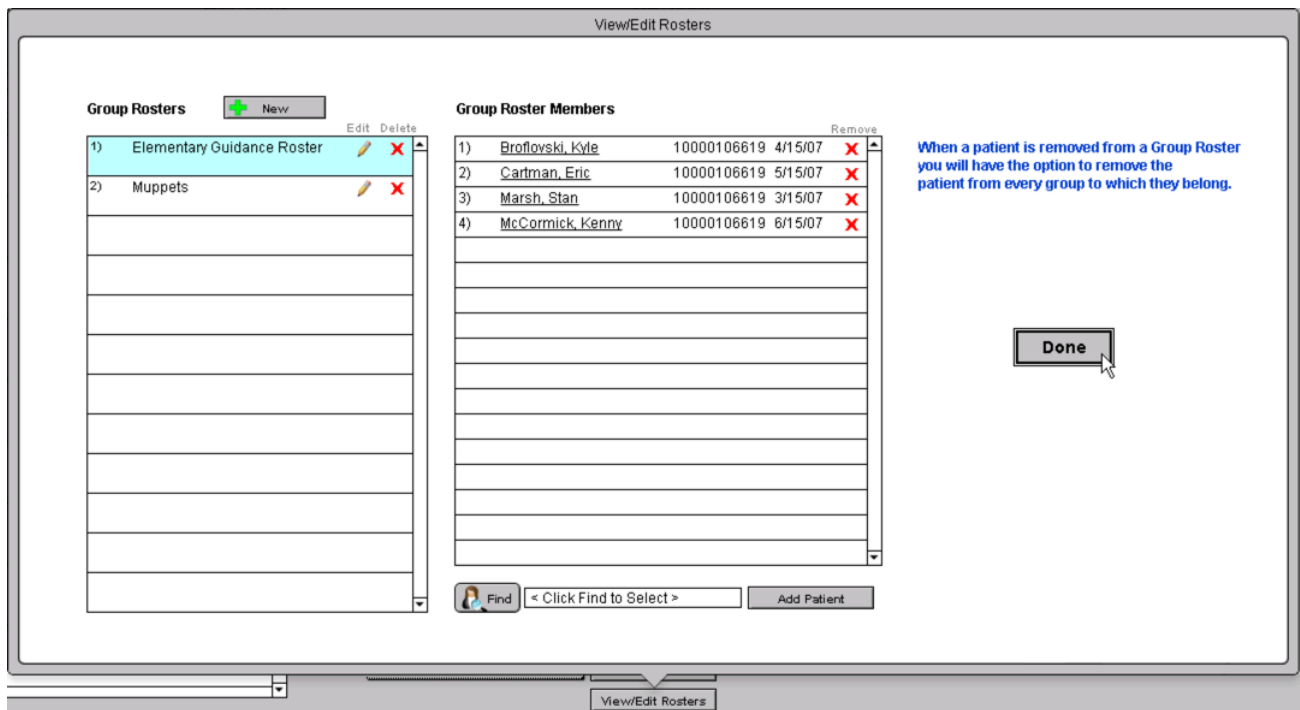


- The patient's name will show in the field. Click the Add Patient button to add the patient to the roster.

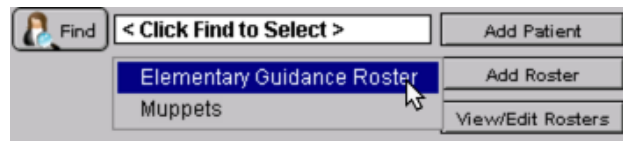
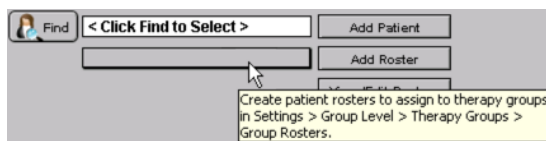


- Continue adding all the patients for the roster using the  and  buttons.

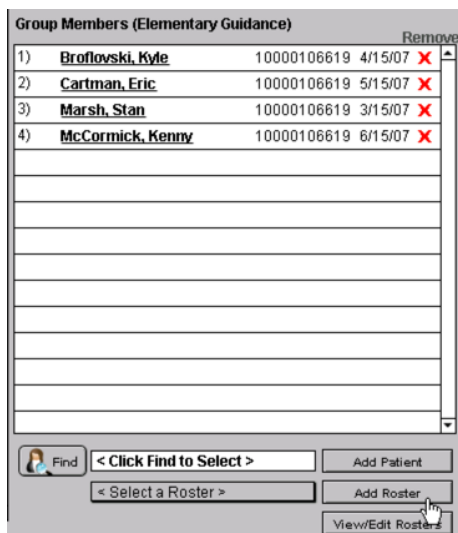
- When all of the patients have been added, click the  button.



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



- Click the **Add Roster** button.



10. Clicking the **X** 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.
  - Clicking the **X** button resets to a blank entry.
- **X** Site  [All] field is where the user can limit the groups by site.
  - The **X** button resets to All sites.

<b>X</b> Site	<input type="text"/> [All]	Edit	Delete
1)	<b>Elementary Guidance</b>		<b>X</b>
	South Park	90853	Print

- **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.

Therapy Group Session Entry

Therapy Group Name  
Elementary Guidance

Therapy Group Site/Location  
South Park

Encounter Date  
10/19/2017

Note Title

Clinician

Service Code  
 **X**

Service Code #2  
 **X**

Bill Under Supervisor (Optional)  
 **X**

Cancel

Done

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

The screenshot shows the FileMaker Pro interface for 'Therapy Groups'. It displays five steps for creating therapy group notes:

- 1) Add a new Therapy Group**: Includes fields for Name, Site, and a list of existing groups like 'Elementary Guidance' and 'Muppets'.
- 2) Add a new Session for this Group**: Includes fields for Session Name, Date, and a list of previous sessions.
- 3) Enter Individual Remarks and Code Modifier or Check if Absent**: A table with columns for Name, ID, Date, and Absent status. It lists members like Broflovski, Kyle; Cartman, Eric; Marsh, Stan; and McCormick, Kenny.
- 4) Enter Session Remarks**: A large text area for entering session remarks.
- 5) Combine Group Session Remarks and Individual Remarks into a Group Therapy Note for Each Patient/Client**: Includes buttons for 'Create Notes and Paste to Review the Work Area', 'Create Notes and Automatically Compile & eSign Each Note', and 'Create Notes without Pasting or Compiling & eSigning'.

14. Go to step 3.

This close-up shows Step 3 of the interface. It features a table for 'Members for This Session' with columns for Name, ID, Date, and Absent status. The table lists four members: Broflovski, Kyle; Cartman, Eric; Marsh, Stan; and McCormick, Kenny. Each member has a button labeled 'Individual Remarks' and a 'Use This Modifier for All' button. A yellow circle 'A' points to the ID field, a yellow circle 'B' points to the 'Use This Modifier for All' button, and a yellow circle 'C' points to the 'Absent' checkbox.

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

B. Click the **Use This Modifier for All** 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.

Individual Remarks

ICANotes  
Behavioral Health CRM

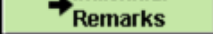
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### GROUP THERAPY INDIVIDUAL REMARKS


Appearance:	angry,		<p>Appearance and Behavior:</p> <p>In today's session Kyle appeared friendly, communicative, and happy.</p>	<p>Create Remarks Button</p>
Participation:	calm,			
Behavior:	flat,			
Verbal Content:	friendly,			
Mental Status Exam:	guarded,			
Suicidal/Homicidal:	glum,			
Stage of Change:	wary,			
Artwork Themes and Quality	communicative,			
	moderately communicative,			
	minimally communicative,			
	uncommunicative,			
	and anxious:			
	and happy:			
	and relaxed:			
	and slow:			
	and tense:			
	and unhappy:			
	and dissociated:			
Artwork Themes				

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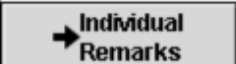

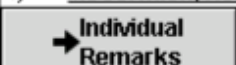
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16. If individual remarks were made, the  button turns green.

3) Enter Individual Remarks and Code Modifier or Check if Absent

 Add Group Member(s) if Missing

#### Members for This Session

					Absent
1) Broflovski, Kyle	1000010661989	4/15/07	<input type="checkbox"/>		
	90853	A1		Use This Modifier for All	
				Use This Modifier for All	
2) Cartman, Eric	1000010661990	5/15/07	<input type="checkbox"/>		
	90853			Use This Modifier for All	
				Use This Modifier for All	
3) Marsh, Stan	1000010661988	3/15/07	<input checked="" type="checkbox"/>		
	90853			Use This Modifier for All	
				Use This Modifier for All	
4) McCormick, Kenny	1000010661991	6/15/07	<input type="checkbox"/>		
	90853	A2		Use This Modifier for All	
				Use This Modifier for All	



4) Enter [Session Remarks](#)

Session Remarks	Note Date
Group Therapy Note	10/19/2017
<a href="#">Click here to enter new Session Remarks</a>	

Session Remarks

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## GROUP THERAPY SESSION REMARKS

Therapy Type	Continue Groups	<b>Therapy Type:</b> Psychoeducation Cognitive Behavioral Therapy Creative Therapies	<div>Create Remarks Button</div>
Group Therapy	Increase attendance.		
Present Today	Increase participation		
Leader Interventions	Change Group		
Plan	Continue couple sessions.		
	Continue Skill Development	<b>Group Type:</b> <i>Focus Group:</i> Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention. The focus of today's group was how to compromise and how to consider alternative solutions to life problems. Examples from life experiences were obtained from group members while examples of alternative solutions and ways to compromise were solicited from other group members.	<div>Create Remarks Button</div>
	Encourage Participation		
	Refer for Further Intervention		

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

**5) Combine Group Session Remarks and Individual Remarks into a Group Therapy Note for Each Patient**



Create Notes and  
Pause to Review the Work Area

OR



Create Notes and Automatically  
Compile & eSign Each Note

OR



Create Notes without  
Pausing or Compiling & eSigning

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.

Choose the time elements, etc. you want to give each note, then **Continue**

Start :   End :   OR:   
hour minute hour minute # units

Length of session:  **edit**



Create Notes and  
Pause to Review the Work Area

- 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.

FileMaker Pro - [Therapy Groups]

10/19/2017 Note Date Broflovski, Kyle Patient's Name 1000010661989 9 Yrs Patient's ID

### GROUP THERAPY PROGRESS NOTE

Enter Private Notes

Group Type:	
Present Today:	
Leader Intervention:	
Appearance:	
Participation:	
Response to Session:	
Mental Status Exam:	
Physical Behavior:	
Artwork Themes:	
Verbal Content:	
Suicidal/Homicidal:	
Plan:	
Stage of Change:	

**Session Remarks:** Therapy Type:  
 Psychoeducation  
 Cognitive Behavioral Therapy  
 Creative Therapies

**Group Type:**  
 Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention. The focus of today's group was how to compromise and how to consider alternative solutions to life problems. Examples from life experiences were obtained from group members while examples of alternative solutions and ways

**Instructions / Recommendations**  
 Continue biweekly group therapy.

**Diagnosis** Enter << Click here to change or add a Diagnosis  
 Manic episode without psychotic symptoms, mild, F30.11 (ICD-10) (Active)

Axis II - V Include Diagnosis in the note? ☐ Yes ☐ Omit All ☐ Omit Axes II to V

Length of Session: 53-67 min edit  
 Start: 12:00 End: 01:00 OR: 1  
 Managed Care Auth #

Link to Treatment Plan  
 Justify Level Of Care ☐ Include Notes/Risk Factors in PN? ☐ Yes ☐ No

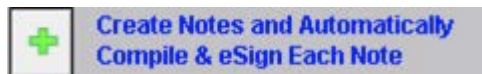
Notes / Risk Factors Spell Check Replace Text

Create New Group Therapy Button

Create Custom Instructions Button

Compile & eSign  
 OR  
 Continue to Next Note  
 OR  
 Exit to Chart Room

Clinician: Joy MacLauren, QA Note Owner: 100001 Bill Under Supervisor:



- 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.

5) Review Group Therapy Notes for This Session

Add Note(s) if Missing Print These Notes  
 Rewrite These Notes Compile These Notes



1) Broflovski, Kyle Joy MacLauren, QA

Work Area

☒ Finished  
☒ Signed

Session Remarks: Therapy Type:

- Add Note(s) if Missing - If a patient was marked absent (in step 14), you can click this button to create the note (after you have deselected absent).
- Rewrite These Notes - 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  button by a patient's name, you will return to the individual's Group Therapy Progress Note.

FileMaker Pro - [Therapy Groups]

ICANotes Behavioral Health EHR

10/19/2017 Note Date

Broflovski, Kyle Patient's Name

1000010661989 10 Yrs Patient's ID

### GROUP THERAPY PROGRESS NOTE

Enter Private Notes


Group Type:		
Present Today:		
Leader Intervention:		
Appearance:		
Participation		
Response to Session		
Mental Status Exam:		
Physical Behavior:		
Artwork Themes:		
Verbal Content:		
Suicidal/Homicidal:		
Plan:		
Stage of Change:		

**Session Remarks: Therapy Type:**  
 Psychoeducation  
 Cognitive Behavioral Therapy  
 Creative Therapies

**Group Type:**  
*Focus Group:* Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention. The focus of today's group was how to compromise and how to consider alternative solutions to life problems. Examples from life experiences were obtained from group members while examples of alternative solutions and ways

Instructions / Recommendations

Continue biweekly group therapy.

Diagnosis  Enter << Click here to change or add a Diagnosis

Manic episode without psychotic symptoms, mild, F30.11 (ICD-10) (Active)

Axis II - V Include Diagnosis in the note? ☐ Yes ☐ Omit All ☐ Omit Axes II to V

Length of Session: 53-67 min edit

Start: 12:00 End: 01:00 OR: 1  
 hour minute hour minute # units

Managed Care Auth #

Link to Treatment Plan

Justify Level Of Care

Include Notes/Risk Factors in PN? ☐ Yes ☐ No

Notes / Risk Factors

Spell Check Replace Text

Create New Group Therapy Button

Create Custom Instructions Button

Compile & eSign

OR

Return

Clinician: Joy MacLauren, QA Note Owner = 100001 Bill Under Supervisor :

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