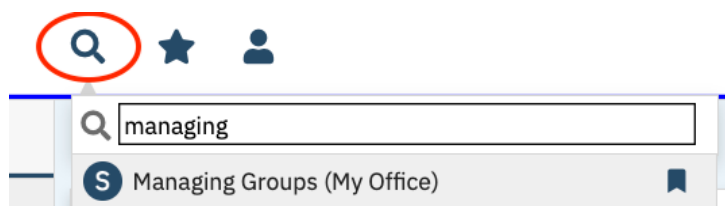


1. To document a group service, use the **magnifying glass** form search icon and enter “managing.” Select **Managing Groups (My Office)**.



2. From this screen, select the group to document by clicking on the relevant link in the **Group** column. You can search for the group using the filters and clicking the **Apply Filter** button. In the example below, “test” was used as the search word so that Test Group displayed.

Managing Groups (1)

test Attendance

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
TEST GROUP	TEST PROGRAM	Office	Group Counselin...					No

3. Clicking on the Group name opens the **Group Details** screen. Confirm the auto populated group information is accurate and click on the **Schedule** tab.

Group Details

General **Schedule**

General

Group ID: 239 Active

Group Name: TEST GROUP

Display As: TEST GROUP

Type:

Group Note:

Classroom:

Mode of Delivery: Face-to-face

Max.# of Client(s): 8

Medicare G Code:

Comment:

Defaults

Location: Office

Program: TEST PROGRAM

Procedure Code: Group Counseling

Duration: 60.00 Minutes

Start Time:

- Click on the **New Group Service** button.

Group Details (0)

General **Schedule**

This Month From 02/01/2024 To 02/29/2024 Scheduled Apply Filter **New Group Service**

Date	Clients	Status	Recurrence	StaffName1	StaffName2	StaffName3
No data to display						

- You will see the **Group Service Client Popup** window. Enter the date of the group in the **Date of Service** box and click **Select**.

Group Service Client Popup

Group Service Clients

Group

Date of Service: 02/01/2024

Select Cancel

- The **Group Service Detail** screen opens. Group information populates into the **Group** box.

Group Service Detail

Service Note

Group

Group TEST GROUP Group Comment

Date 02/19/2024

Location Office Specific Location

Status Scheduled

Evidence Based Practices

Staff Add Staff...

Clients Show Clients With Errors

Service Information Custom Fields Billing Diagnosis Add-On Codes Wa

Procedure		Set All	Set Some
Start	Total Duration	Set All	Set Some
Status		Set All	Set Some
Cancel Reason		Set All	Set Some
Program		Set All	Set Some
Clinician		Set All	Set Some
Attending		Set All	Set Some
Mode Of Delivery		Set All	Set Some
Billable		Set All	Set Some
Transportation Service		Set All	Set Some
Interpreter Services Needed		Set All	Set Some
Travel Time		Set All	Set Some
Face to Face Time		Set All	Set Some
Documentation Time		Set All	Set Some



7. **Do not use the recurring appointment function to schedule ongoing groups.** Scheduling individuals in groups far into the future results in billing challenges when individuals are no longer enrolled but continue to show up in group services.

Group Service Detail

Service **Note**

Group

Group TEST GROUP Group Comment


Date 02/19/2024   Specific Location

Location Office Specific Location

Do not use the recurring appointment function to schedule ongoing groups

8. To identify the staff who provided the group service in the **Staff** box, click the blue **Add Staff** button. From the **Group Services Staff Pop Up** window, select the staff name and click **OK**. Enter the group **Start** and **End** time in the **Staff** box. If the wrong staff is selected, use the X icon next to the person's name to delete from the **Staff** box.

Staff Add Staff...



Staff Name	Unit	Type	Start	End
 Crowder, Traci	<u>60</u>	Minutes	<u>9:00 AM</u>	<u>10:00 AM</u>

9. To identify the clients who participated in the group, click on the **magnifying glass** icon at the top of the **Clients** box.

Service **Note**

Group




Group TEST GROUP Group Comment

Date 02/19/2024   Specific Location

Location Office Specific Location

Status Scheduled

Evidence Based Practices ▼

Clients Show Clients With Errors   

Add Clients

10. This opens the **Client Search** pop up window. Locate the client, select the radio button next to the client's name and click the blue **Select** button. Clicking the Select button adds them to the client list for the group. Continue locating and selecting for each client in the group. When you reach the last client, click the blue **Select and Close** button.

11. You will see the client list and service information populated into the **Clients** box. Once you have the client list complete, complete the **Service Information**.
12. The first client will be highlighted. As you make changes, this will update this specific client. If all clients in the list participated in the group, verify that the information in the **Service Information** tab is correct and change the **Status** to **Show**. Click the blue **Set All** button for each of these items to confirm this information is correct for all clients in the group.

13. If you want to change the **Service Information** for some of the members of the group but not all, click the blue **Set Some** button next to the service information item you want to change. This will bring up the **Set Some Pop Up**. Select the clients you want to include in this change and click the blue **Set** button. For example, if one client only attended the group for 30 minutes instead of the planned 60 minutes.

Service Information	Custom Fields	Billing Diagnosis	Add-On Codes
Procedure	Group Counseling		Set All Set Some
Start	9:00 AM	Face to Face Time 30 Minutes	Set All Set Some
Status	Show		Set All Set Some
Cancel Reason			Set All Set Some
Program	TEST PROGRAM		Set All Set Some

SmartCare

Set Some

DateOfService New Value = 02/19/2024 10:00 AM

Set Cancel

<input type="checkbox"/> All	Client Name	Current Value
<input type="checkbox"/>	Test, Cal	2/19/2024 10:00:00 AM
<input checked="" type="checkbox"/>	Test, David	2/19/2024 10:00:00 AM
<input checked="" type="checkbox"/>	Test, Test	2/19/2024 10:00:00 AM

14. You may have individuals enrolled in different programs attend the same group as program can apply to facility, level of care, or funding source. In this situation, for each client in the group, make sure that the Procedure and Program are correct for that individual. If you need to change the Procedure or Program, use the **Set Some** button and choose the client(s) for which the change applies. If you get an error or have any problems making this change, contact smartcaresupport@cchealth.org.

Clients Show Clients With Errors

Service Information	Custom Fields	Billing Diagnosis	Add-On Codes
Procedure	Group Counseling		Set All Set Some
Start	9:00 AM	Face to Face Time 60 Minutes	Set All Set Some
Status	Show		Set All Set Some
Cancel Reason			Set All Set Some
Program	TEST PROGRAM		Set All Set Some
Clinician			Set All Set Some
Attending			Set All Set Some
Mode Of Delivery			Set All Set Some
Billable	<input checked="" type="checkbox"/>		Set All Set Some
Transportation Service	No		Set All Set Some
Interpreter Services Needed	<input type="checkbox"/>		Set All Set Some
Travel Time		Minutes	Set All Set Some
Documentation Time		Minutes	Set All Set Some

15. If you see a yellow flag next to an item in the **Service Information** tab, this means that you need to set this information for each client's note. Make sure the information is accurate and click **Set All** or **Set Some** (depending on whether the change applies to everyone in the group or only some). In the example below, the **Status** needs to be set for all or some. Do not leave it as Scheduled since you are documenting the note after the group has occurred. Change it from Scheduled to Show, No Show, or Cancel and click **Set All** or **Set Some**.

The screenshot shows the 'Service Information' tab with the following fields and buttons:

- Procedure:** Group Counseling (dropdown), Set All, Set Some
- Start:** 9:00 AM (time), Face to Face (checkbox), 60 (minutes), Minutes (dropdown), Set All, Set Some
- Status:** Scheduled (dropdown), Set All, Set Some (A yellow flag icon is next to this field)
- Cancel Reason:** (dropdown), Set All, Set Some

16. When the **Service Information** is correct, click on the **Note** tab at the top left and complete the **Group Note** section. This includes the number in the group, any non-clients that participated, and the Group Summary (the group information that applies to all participants). When this is complete, click on the blue **Update My Client Notes** button. This will push this information to notes for all members of the group.

The screenshot shows the 'Group Service Detail' form with the 'Note' tab selected. The 'Group Note' section is active, and the 'Update My Client Notes' button is highlighted with a red box. The form contains the following fields:

- Service:** Note (selected)
- Group Note / Client Note:** Group Note (selected)
- Sign My Notes:** Sign My Notes, Co-Signer(s)... (dropdown), Add Co-Signer
- Template:** Crowder, Traci (dropdown), Update My Client Notes (button)
- Total Number in Group:** 2
- List non-client group members:** None
- Group Summary:** This is the information that occurred for everyone in group - topic, activity, etc.

17. When you see the copy information confirmation message, click **OK**.

The screenshot shows a 'Confirmation Message' dialog box with the following text:

Do you wish to copy information from the 'Group Template' to all client notes where you are the author ?

Buttons: OK, Cancel

18. From the **Note** tab, click on the **Client Note** tab. You will see the list of group members on the left side of the screen.

19. Select the client for whom you are writing the note.
20. Complete the **Note** section for the client.
21. **Problem List** information that has been entered into SmartCare will populate into the note. Add problems to the **Problem List** as necessary. Adding problems here will populate back into the **Client Clinical Problem Details (Client)** screen. After adding problems, be sure to click **Save** at top right.
22. Select the problems that were addressed in the group session. If you have added any problems to the problem list during this note writing, click **Refresh** to update this list.
23. In the **Information** box, you will see information documented in the **Group Note** section that applies to all clients in the group populated into the individual's note. Add the specific information relating to the client.
24. Add goals, plans, next steps into the **Care Plan** box.

Group Service Detail

Service **Note**

Group Note **Client Note**

Sign My Notes Co-Signer(s)... Add Co-Signer

Only Show clients where I am the Note Author Only show notes with Validation Errors

Hide Clients

Test, Test (400000660)

Note Treatment Plan Goals Addressed Co-Signers

General

Problem Details

★

Code Search Description Search

Start Date: 02/20/2024 End Date: Program

Insert Clear

Common Psych, Medical, and SDOH Diagnoses

Problem List

	SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program
X	Continuous chronic alcoholism ...	191811004	F10.20	02/14/2024		DISCOVERY HOUSE 3.3 ...

Problems addressed during this session Refresh

Continuous chronic alcoholism (disorder)

Information

Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).

Information entered in the Group Note tab pulls forward here for each individual client

Care Plan

Indicate the goals, treatment, service activities, and assistance to address the objectives of the plan and the medical, social, educational, and other services needed by the beneficiary. Include how the beneficiary or their representative helped to develop the goals, and the progress toward meeting the established goals. Indicate transition plan if the individual has achieved the goals of the care plan.

25. If a Co-Signer is required, click on the **Co-Signers** tab. Select the staff from the Co-Signers dropdown list. This will add the staff to the list of people who will be asked to co-sign the note.

The screenshot shows the 'Group Service Detail' interface. At the top, there are tabs for 'Service' and 'Note'. Below these are sub-tabs for 'Group Note' and 'Client Note'. A 'Sign My Notes' button is located in the top right. There are two checkboxes: 'Only Show clients where I am the Note Author' and 'Only show notes with Validation Errors'. A 'Hide Clients' button is also present. Below the checkboxes, there is a list of client names with their IDs: 'Test, Cal (400000854)', 'Test, David (400000389)', and 'Test, Test (400000660)'. The 'Test, Test' entry is highlighted. Below the client list, there are three tabs: 'Note', 'Treatment Plan Goals Addressed', and 'Co-Signers'. The 'Co-Signers' tab is selected and highlighted with a red box. Below the tabs, there is a 'Co-Signer(s)...' dropdown menu, also highlighted with a red box, with 'Crowder, Traci' listed below it.

26. Complete a note for each client in the group by highlighting the next client's name and completing steps 16 – 21 above.

27. When you are finished with all notes, click blue **Sign My Notes** button.

This screenshot is similar to the previous one, showing the 'Group Service Detail' interface. The 'Co-Signers' tab is still selected. The 'Sign My Notes' button is now highlighted with a red box. The 'Test, Test' client entry is no longer highlighted. The 'Co-Signer(s)...' dropdown menu is no longer highlighted.

28. You can see the completed group note for each client by opening the client chart and going to the **Services (Client)** screen.

29. You will see the group service display on your **Staff Calendar (My Office)** screen.