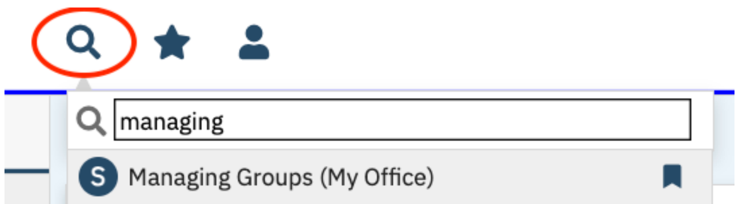
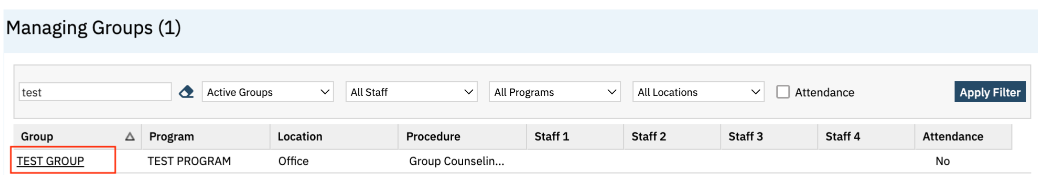
SmartCare Group Services User Guide

Last updated 2/21/2024

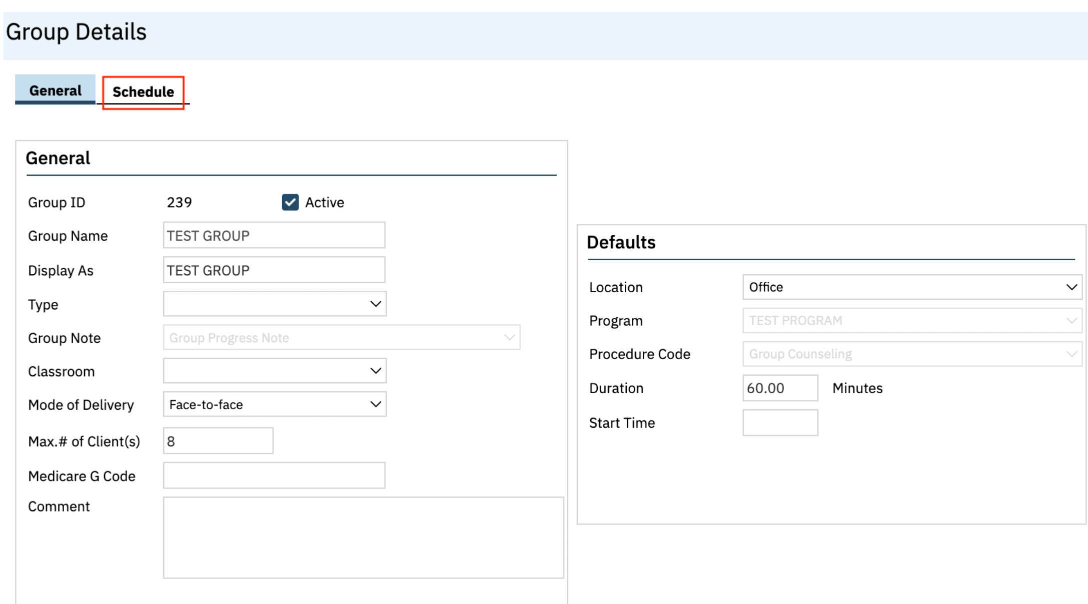
1. To document a group service, use the **magnifying glass** form search icon and enter “managing.” Select **Managing Groups (My Office)**.



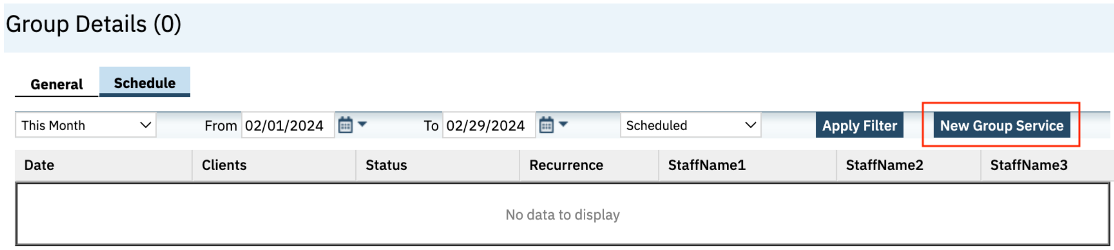
2. From this screen, select the group to document by clicking on the relevant link in the **Group** column. You can search for the group using the filters and clicking the **Apply Filter** button. In the example below, “test” was used as the search word so that Test Group displayed.



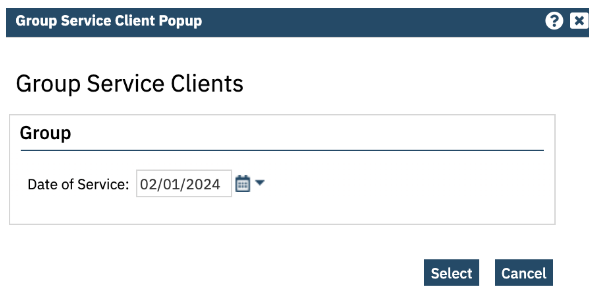
3. Clicking on the Group name opens the **Group Details** screen. Confirm the auto populated group information is accurate and click on the **Schedule** tab.



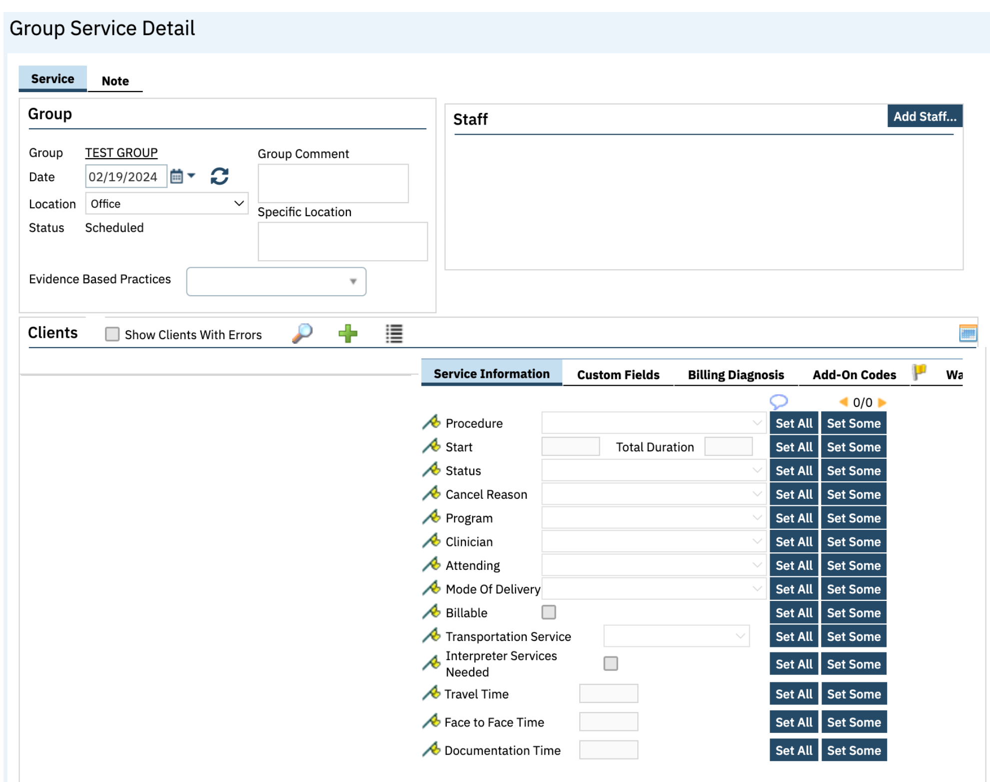
4. Click on the **New Group Service** button.



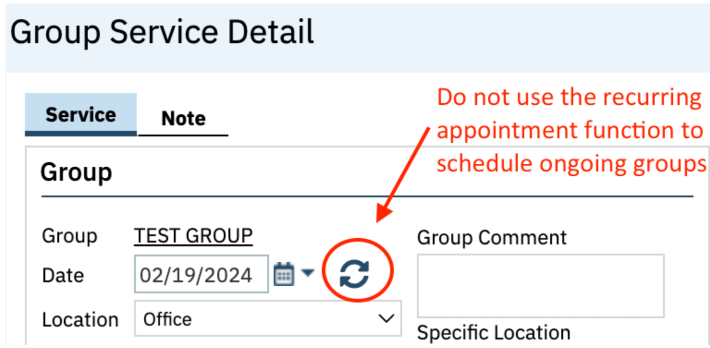
5. You will see the **Group Service Client Popup** window. Enter the date of the group in the **Date of Service** box and click **Select**.



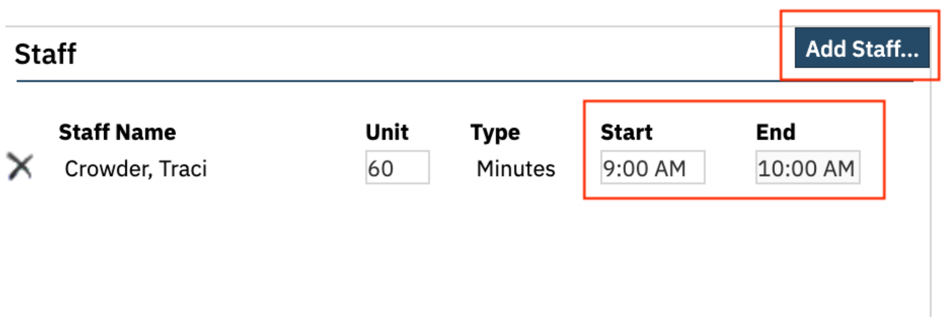
6. The **Group Service Detail** screen opens. Group information populates into the **Group** box.



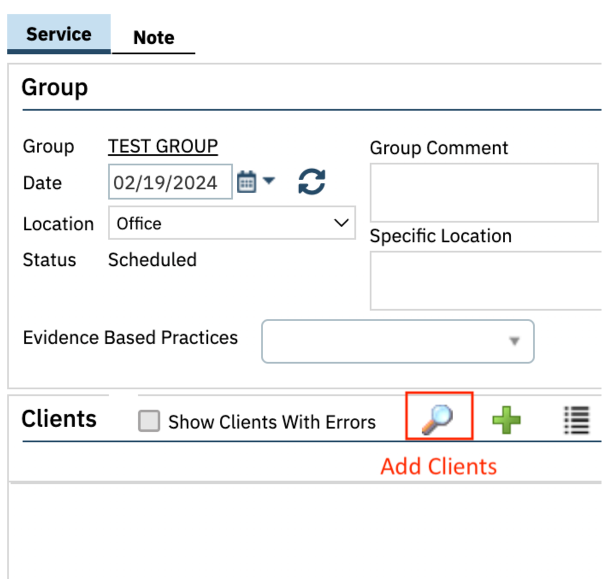
7. **Do not use the recurring appointment function to schedule ongoing groups.** Scheduling individuals in groups far into the future results in billing challenges when individuals are no longer enrolled but continue to show up in group services.



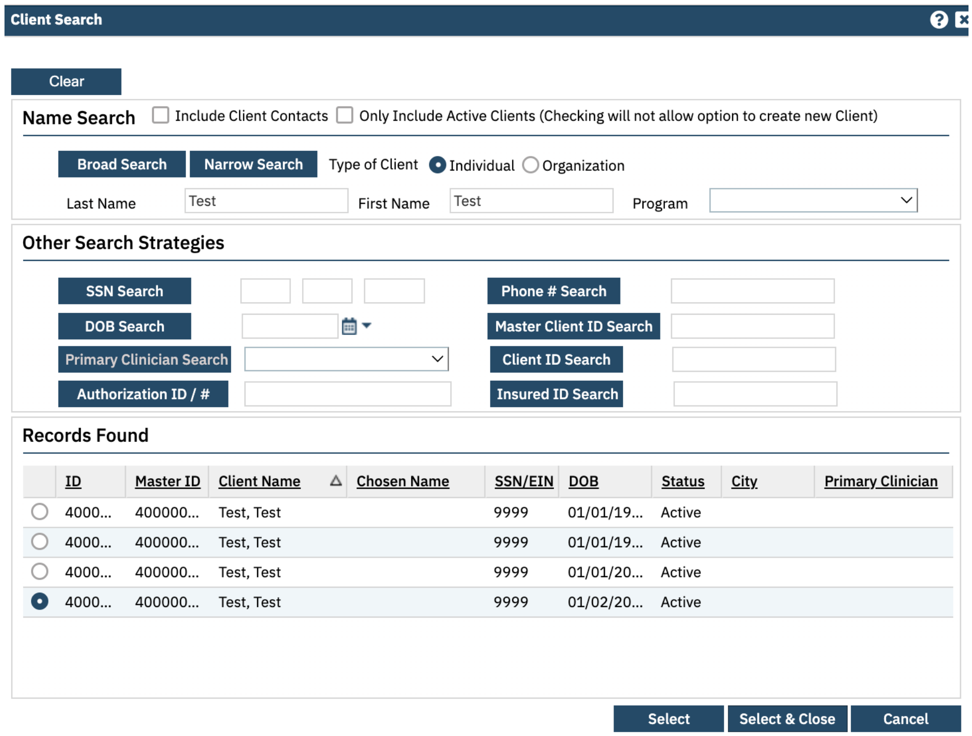
8. To identify the staff who provided the group service in the **Staff** box, click the blue **Add Staff** button. From the **Group Services Staff Pop Up** window, select the staff name and click **OK**. Enter the group **Start** and **End** time in the **Staff** box. If the wrong staff is selected,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



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

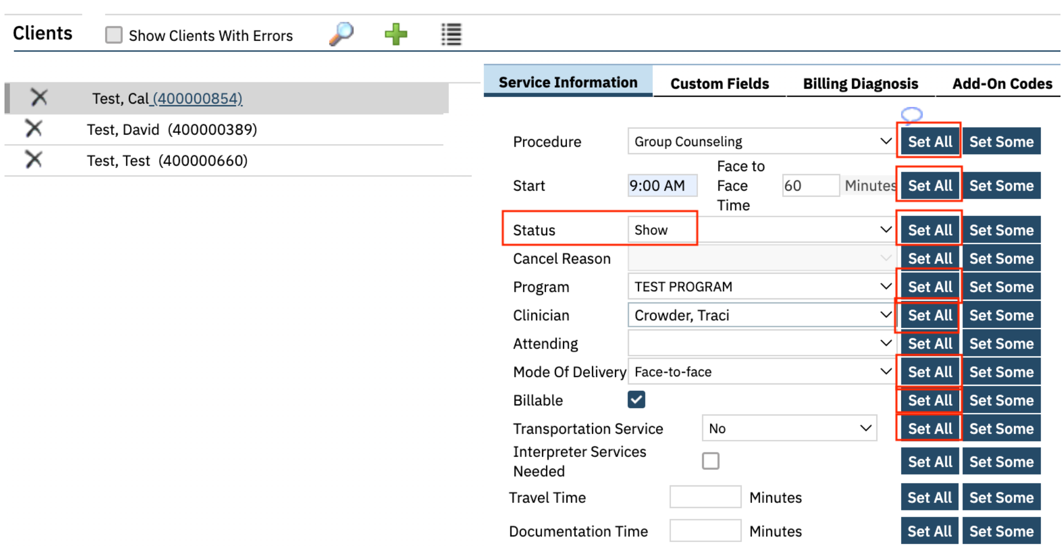


10. This opens the **Client Search** pop up window. Locate the client, select the radio button next to the client's name and click the blue **Select** button. Clicking the Select button adds them to the client list for the group. Continue locating and selecting for each client in the group. When you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

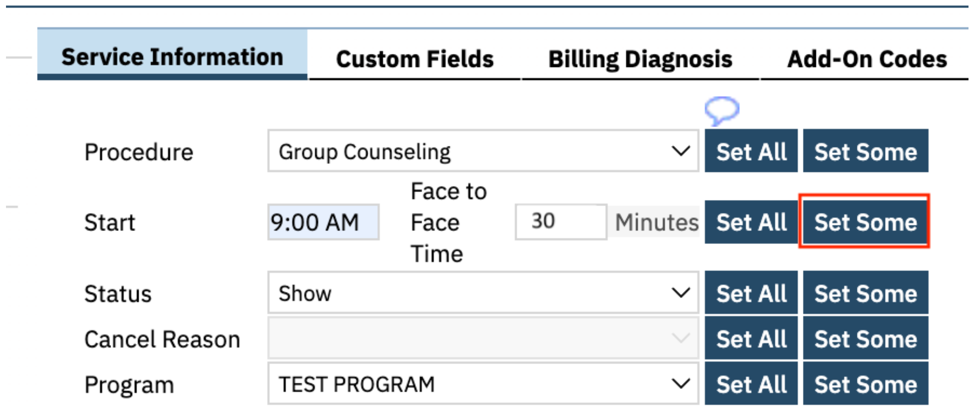


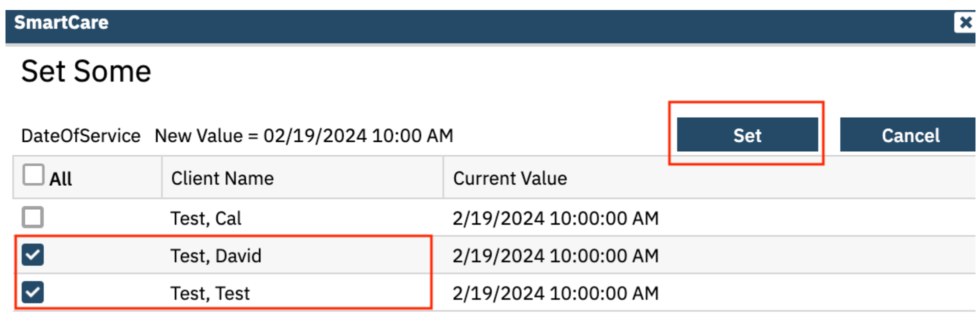
11. You will see the client list and service information populated into the **Clients** box. Once you have the client list complete, complete the **Service Information**.

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.

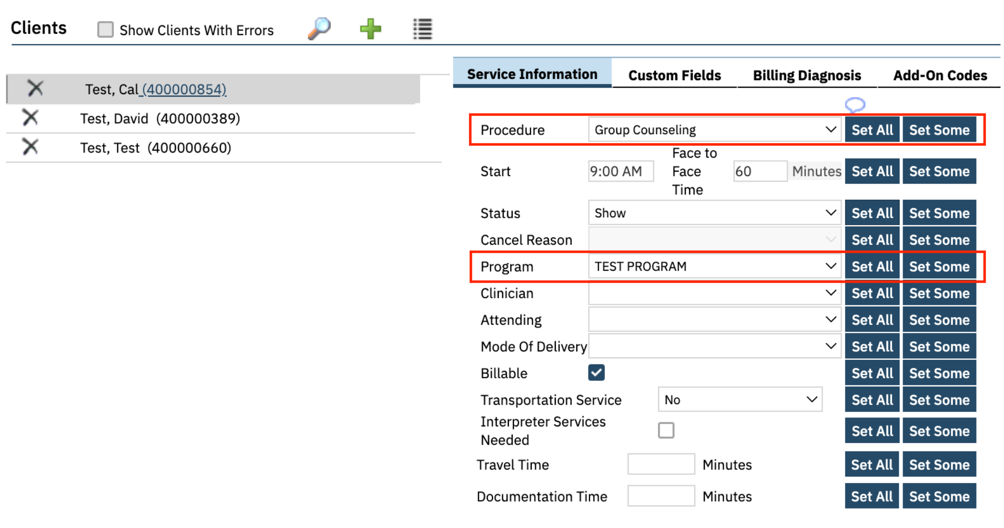


13. If you want to change the **Service Information** for some of the members of the group but not all, click the blue **Set Some** button next to the service information item you want to change. This will bring up the **Set Some Pop Up**. Select the clients you want to include in this change and click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

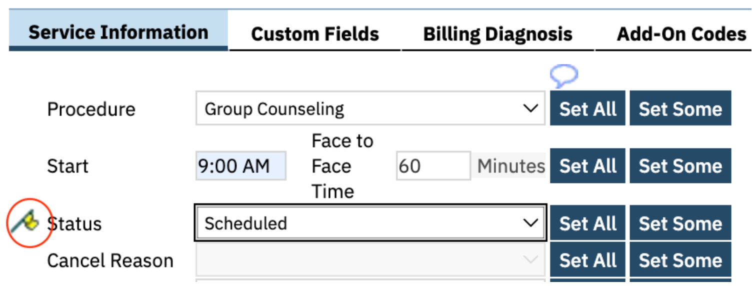




14. You may have individuals enrolled in different programs attend the same group as program can apply to facility, level of care, or funding source. In this situation, for each client in the group, make sure that the Procedure and Program are correct for that individual. If you need to change the Procedure 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.

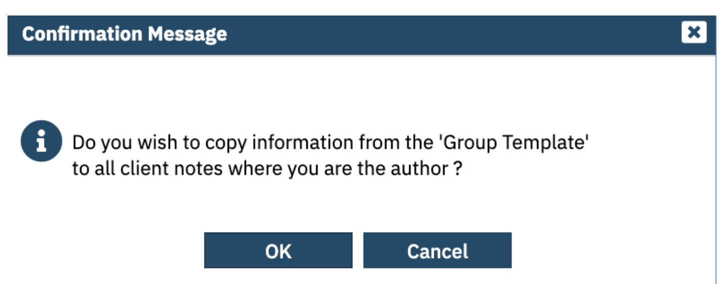


15. If you see a yellow flag next to an item in the **Service Information** tab, this means that you need to set this information for each client's note. Make sure the information is accurate and click **Set All** or **Set Some** (depending on whether the change applies to everyone in the group or only 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**.



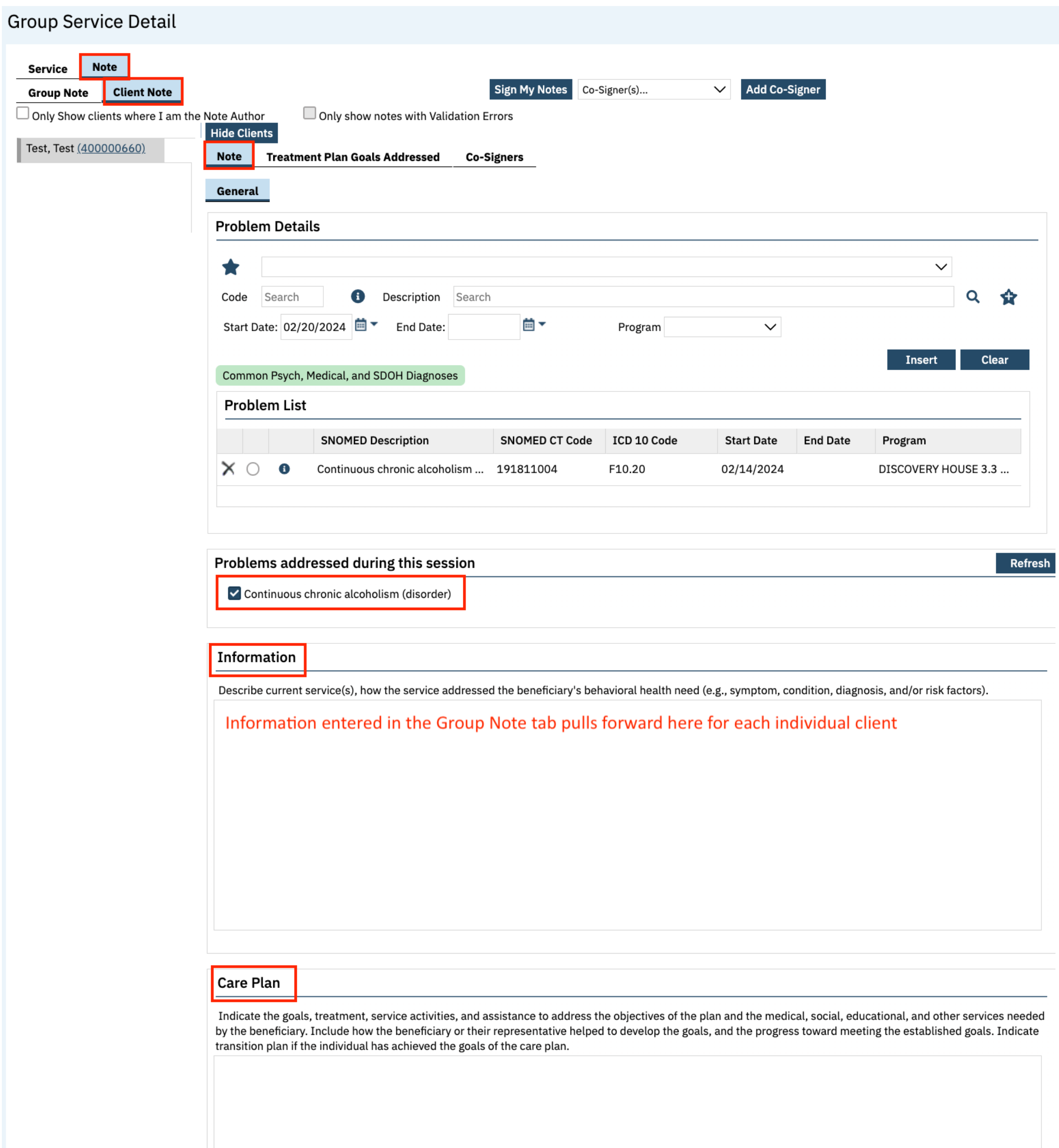
16. When the **Service Information** is correct, click on the **Note** tab at the top left and complete the **Group Note** section. This includes the number in the group, any non-clients that participated, and the Group Summary (the group information that applies to all participants). When this is complete,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

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

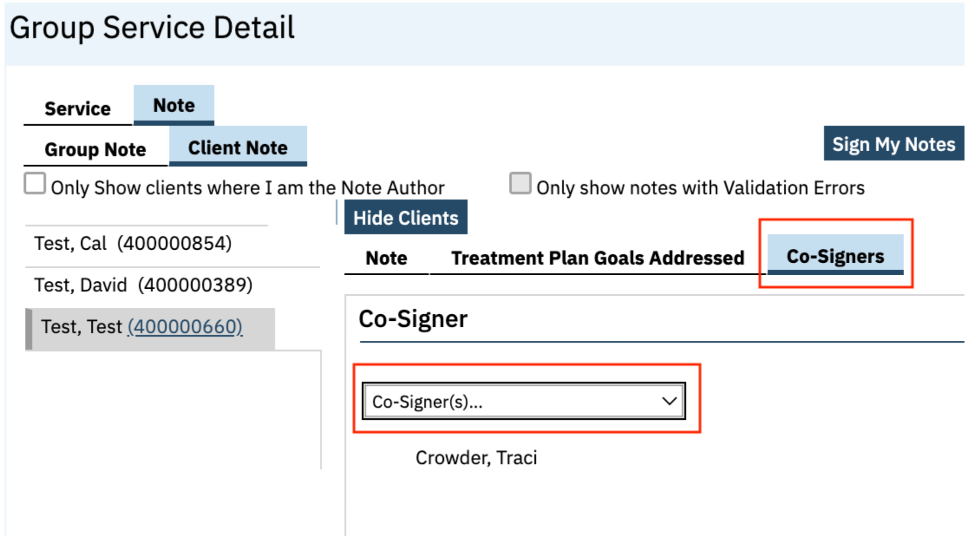


18. From the **Note** tab, click on the **Client Note** tab. You will see the list of group members on the left side of the screen.

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.

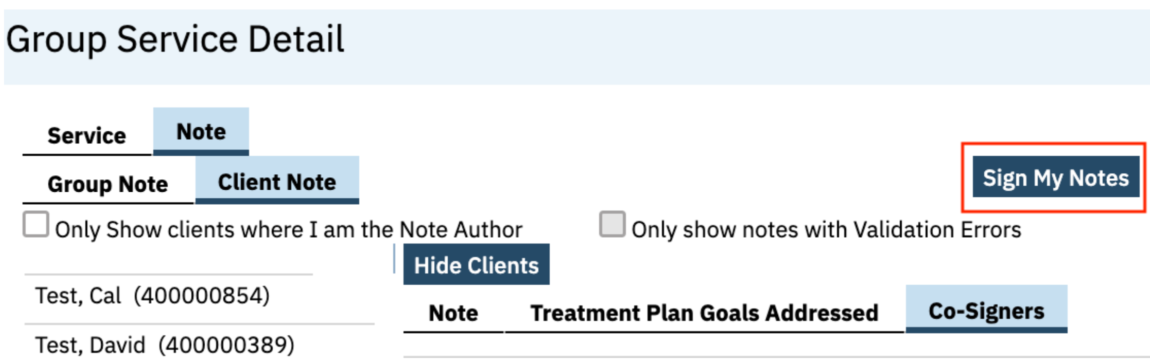


25. If a Co-Signer is required, click on the **Co-Signers** tab. Select the staff from the Co-Signers dropdown list. This will add the staff to the list of people who will be asked to co-sign the note.



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.



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.