

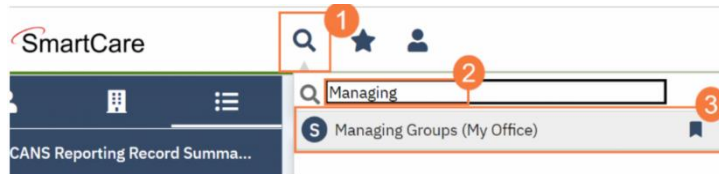
## Group User Guide

### CalMHSA Documentation Guide: Required Progress Note Service Information

- The type of service rendered
- A narrative describing the service, including how the service addressed the person's behavioral health need (e.g., symptom, condition, diagnosis and/or risk factors).
- The date that the service was provided to the beneficiary.
- Duration of the service, including travel and documentation time, which should be documented separately.
- Location of the person in care at the time of receiving the service.
- A typed or legibly printed name, signature for the service provided and date of signature.
- ICD 10 code.44
- Current procedural terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) code.
- The plan, or next steps, including but not limited to, planned action steps by the provider or by the person in care, collaboration with the person in care, collaboration with other provider(s) and any update to the problem list as appropriate.
- For groups facilitated by multiple practitioners, a single progress note signed by one of the practitioners can be used to document the group service provided.
- Information about the specific involvement and specific amount of time of involvement of each practitioner in the group activity. Travel and documentation time should be captured separately
- A list of group participant names needs to be maintained. Please note, due to confidentiality standards, the full list of group participants must not be kept in any single participant's personal health records: instead the MHP or practitioner must maintain the full participant list outside of any participant's health records.

## How to Set up a Group in SmartCare

1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. This takes you to the Managing Groups list page. Click the New icon.

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
123	CalMHSA Admin	Community Menta...	Group Psychothe...	Stephan, K...				No
cb7881testdivto...	Access Unit	Ambulance - Ai...	Alcohol and/or...	Zunjarwad,...				No
Managing Stress	Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician,...				No
Process Group	Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician,...	Vencill, K...			No
Steps in Recove...	SUD Outpatient...	Office	Alcohol and/or...	Clinician,...				No
Test Group	Access Unit	Ambulance - Ai...	Alcohol and/or...	Test, Aish...				No
Test1111	G_Pro1	Ambulance - Ai...	Multiple-Family...					No
testcb7881	Test Program	Ambulance - Ai...	Alcohol and/or...	Zunjarwad,...				No
testgroupdiv	Access Unit	Ambulance - Ai...	Alcohol and/or...	Zunjarwad,...				No

5. This takes you to the Group Details screen. It is best to complete this screen from top to bottom. You will also not be allowed to move on to the Note tab until the Service time is completed. The following fields in bold are required. **Enter the group's name**. This will auto-populate the "Display As" field, which you can change if necessary.
6. **In the Group Note drop-down, select "Group Progress Note"**.
7. **Enter the mode of delivery**.
8. **Enter the service information about the group in the Defaults section**

**Group Details**

**General**

Group ID  Active

**Group Name** Training Group SetUp

Display As Training Group SetUp

Type

**Group Note** Group Progress Note

Classroom

**Mode of Delivery** Face-to-face

Max.# of Client(s)

Medicare G Code

Comment

**Defaults**

Location Community Mental Health Center

Program Outpatient MH Adult

Procedure Code Group Psychotherapy (Other Than of a Multiple-Famil

Duration 90 Minutes

Start Time 10:00 AM

9. Add Clients, as applicable. For some groups that are drop-in, you may not have any clients to include. If this is a closed group, or an ongoing group, we recommend adding the clients here. For STRTP's, if this group has a mix of Fresno County, Presumptive Transfer and Out of County Placement youth (Non-Presumptive Transfer), you would only add clients that are Fresno County or Presumptive Transfers. **Click Add Clients.**

**Attendance**

Attendance [Schedule...](#)

Group Note Type

Add all clients enrolled in Program

Default Procedure  [Set Client Specific Default...](#)

**Clients**  Automatically add clients from roster to new group service

Clients which may attend this group. [Add Clients...](#) 9

Client Name
No data to display

**Staff**

Staff that may lead this group. [Add Staff...](#)

Is Clinician	Staff Name
No data to display	

- a. This brings up the client search pop-up. Search for the client you want to add to the group. **Select the client from the Records Found section.**
- b. **Click "Select."**

- c. When you've finished adding all clients, you can click **"Select & Close"**.

**Client Search**

Clear

Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

**Name Search**   Type of Client  Individual  Organization

Last Name Training First Name Manual Program

**Other Search Strategies**

**Records Found**

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/> 1239	1239	Training, Manual		9999	06/07/20...	Active	Sacrame...	
<input type="radio"/> 1268	1268	Training, Manuel		3545	09/01/20...	Active		

10. Add the group facilitators. You can have more than one facilitator. **Click Add Staff.**

**Attendance**

Attendance

Group Note Type

Add all clients enrolled in Program

Default Procedure

**Clients**  Automatically add clients from roster to new group service

Clients which may attend this group.

Client Name

No data to display

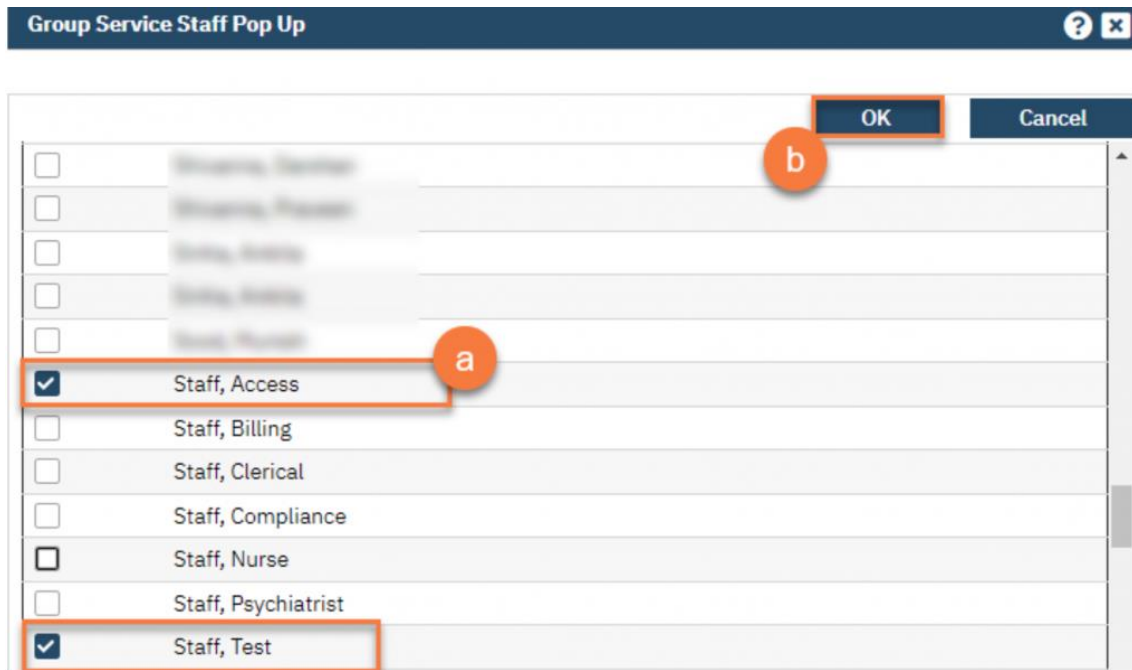
**Staff**

Staff that may lead this group.

Is Clinician Staff Name

No data to display

- a. This brings up the Group Services Staff Pop Up. **Select the facilitator(s) from the list.**
- b. **Click OK.**



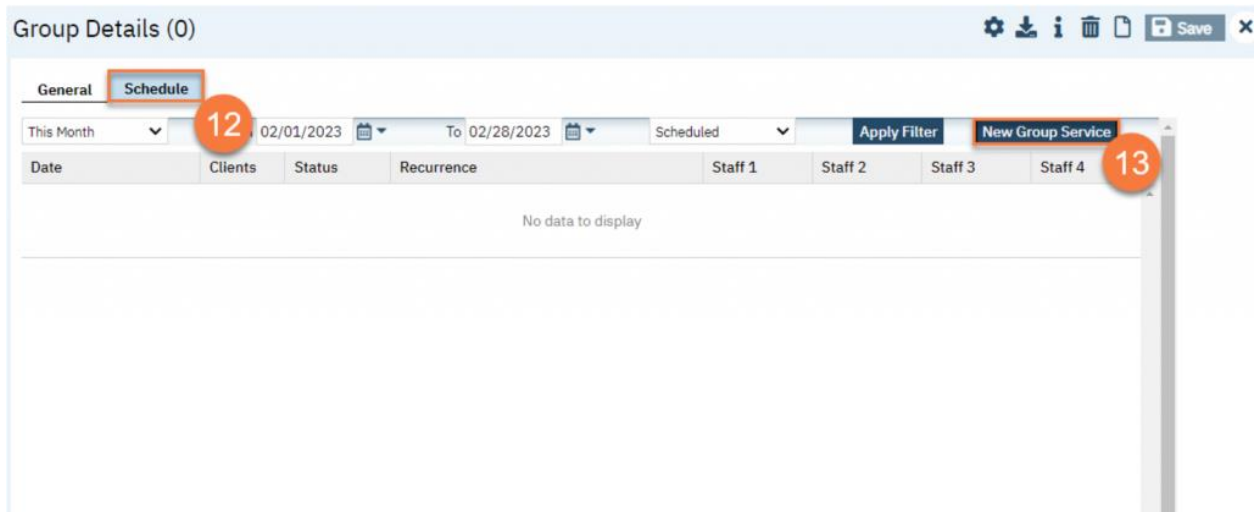
- c. This takes you back to the Group Details page. **Select the primary staff member** by selecting them under “Is Clinician”.

11. Click Save.



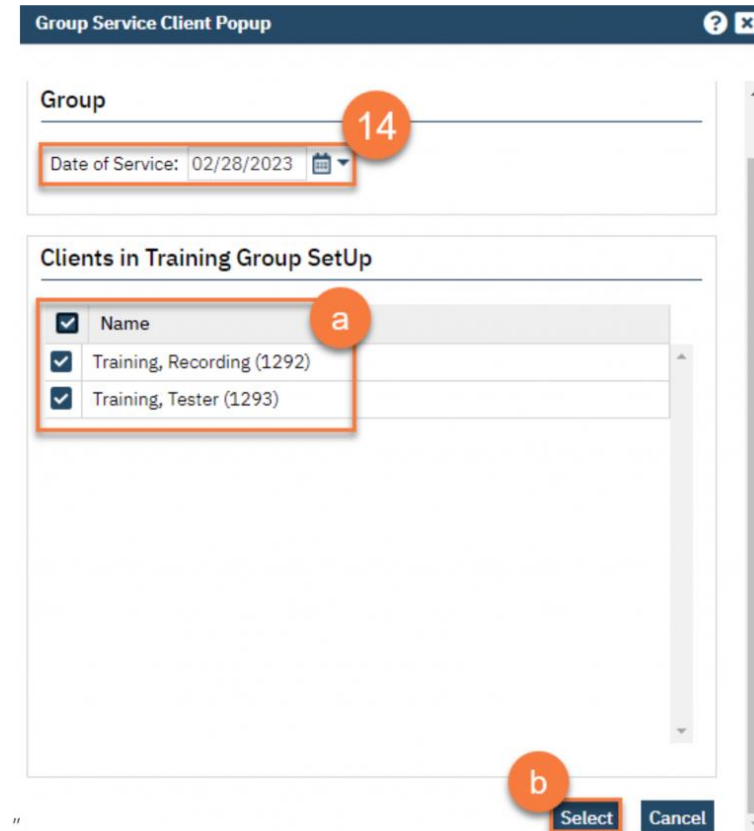
12. Navigate to the Schedule tab.

13. Click “New Group Service”

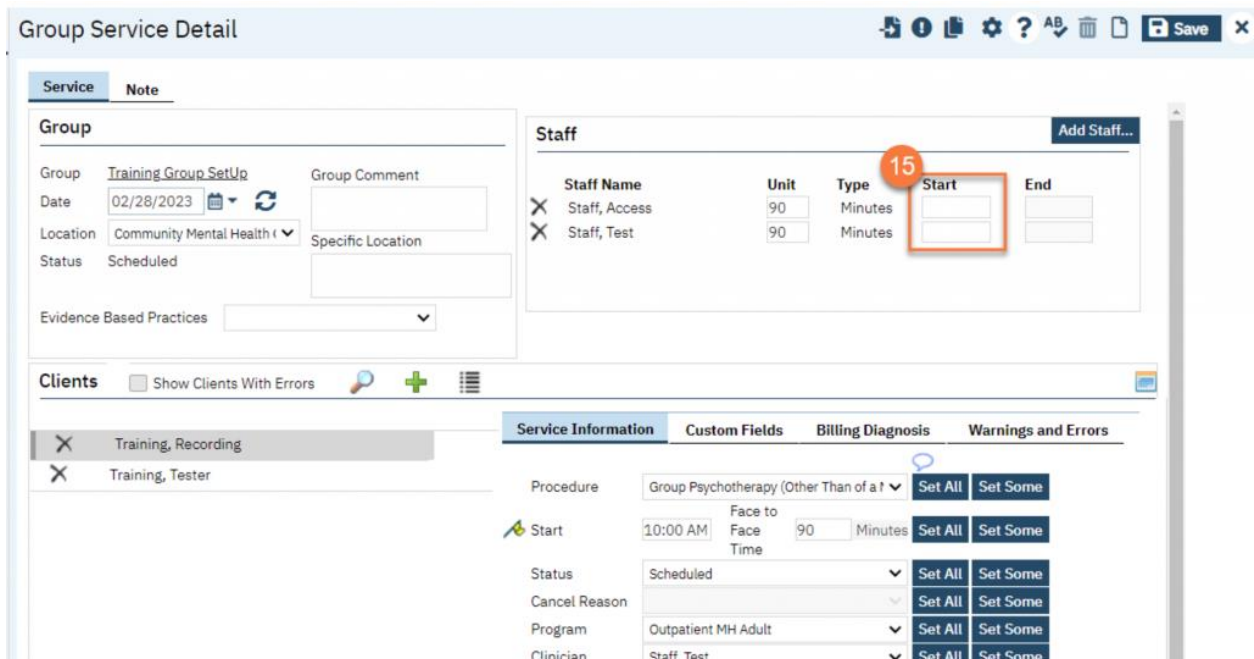


14. This brings up the Group Service Client Popup window. Enter the first date of the group.

- a. Select the clients you're expecting to attend. You can click the top-most checkbox to select all the clients.
- b. Click "Select."



15. This takes you to the Group Service Detail screen. **Confirm the group information. Enter the staff's start time for both facilitators.** This is a required field.



- a. **If any of the clients require transportation**, make sure to enter that by clicking on the client's name and entering their specific information in the service information section.

The screenshot shows the 'Clients' interface with the 'Service Information' tab selected. The client 'Training, Tester' is highlighted. An orange arrow points from the client name to the 'Transportation Service' dropdown menu, which is currently set to 'Transportation Service'. Other fields include Procedure (Group Psychotherapy), Start Time (10:00 AM), Status (Scheduled), and Program (Outpatient MH Adult).

16. **Click Save.**

17. To set this up as a recurring group service, **click the recurrence icon, your service date will need to be a future date**

The screenshot shows the 'Group Service Detail' interface. The 'Group' section is visible, showing the date '02/28/2023' and a recurrence icon (circular arrow) highlighted with an orange circle and the number '17'. The 'Staff' section lists two staff members: 'Staff, Access' and 'Staff, Test'. The 'Save' button in the top right corner is highlighted with an orange circle and the number '16'. The 'Clients' section at the bottom shows the client 'Training, Tester' selected.

**Important Note:** If this is a closed group where group facilitators and group members will not often change then we recommend that you select the “Create Immediately” checkbox. Clicking the “Create Immediately” checkbox will create the specified series of events on the staff calendar. Keep in mind that by doing this any changes that need to be made to this series would need to be made individually and will not be pushed to the group recurrence. If you anticipate this to be an open group with group member changes and/or staff member changes then you would want to leave this option unchecked. That way when you make changes it will be pushed to future events. In this case, a place holder will be on the staff calendar instead of the actual event.

c. Click OK.

Recurring Group Services

Date Range

Start 3/1/2023 End 4/30/2023

Recurrence Pattern

Daily Recur every 1 week(s) on:

Weekly  Sun  Mon  Tue

Monthly

Yearly  Wed  Thu  Fri  Sat

Create Immediately

Ok Cancel

You are finished and may now click the X icon to close.

## Documenting for Group Notes

1. On your Appointments for Today widget, click on the link for the time of the group you're documenting.

Appointments For Today

Client Name/Description	Time	Status
Training, Manual(T...	<a href="#">08:00 AM</a>	Scheduled
Testing, Jose(Ment...	<a href="#">09:00 AM</a>	Show
Lunch	<a href="#">12:00 PM</a>	
Process Group	<a href="#">02:00 PM</a>	Show
Paper Work	<a href="#">04:00 PM</a>	



- This opens the Group Service Detail screen. In the upper left, you'll see the group information. Confirm the information and **add any additional information regarding the entire group**.

Group Service Detail

**2**

**Group**

Group: Process Group  
 Date: 02/01/2023  
 Location: Community Mental Health  
 Status: Scheduled

**Staff**

Staff Name	Unit	Type	Start	End
X Clinician, Ro...	60	Minutes	2:00 PM	3:00 PM
X Supervisor, C...	60	Minutes	2:00 PM	3:00 PM

**Clients**

- X Asano, Jason
- X Bravo, Johnny
- X Childers, Cindy
- X Powers, Light
- X Test, Patient
- X Tommy, Max
- X White, Walter
- X Williams, Kyle

**Service Information**

Procedure: Group Psychotherapy (Other Than of a T...  
 Start: 2:00 PM  
 Status: Scheduled  
 Program: Outpatient MH Adult  
 Clinician: Clinician, Robert  
 Billable:

- In the upper right, you'll see the staff members that are set as facilitators for this group.
  - Make edits to which staff members were present.** For example, if a staff was only present for half of the group time, indicate this by editing the Unit (how many minutes they were present) and the Start Time to match what happened.
  - If a staff member was not present, click the Delete icon** next to their name to remove them from this service.
  - If an additional staff member was present who is not listed, click the Add Staff button.** This brings up the Group Service Staff Pop Up.
  - Select the staff member(s) you want to add and click OK.**

Group Service Detail

**3**

**Staff**

Staff Name	Unit	Type	Start	End
X Clinician, Ro...	60	Minutes	2:00 PM	3:00 PM
X Supervisor, C...	60	Minutes	2:00 PM	3:00 PM

**Group Service Staff Pop Up**

**d**

4. On the middle left side of the screen, you'll see the list of clients enrolled in this group. **Make edits to this list to confirm the group roster.**
  - a. **To remove a client from the roster, click the Delete Service icon.** DO NOT do this if they are simply a no-show. Only do this to remove them from this service's roster entirely. Remember if this is a reoccurring group removing the client from here will only remove them for this service and not from future services. **Please see below on how to remove a client from a reoccurring group.**
  - b. **To add a client who has already been enrolled in this group, click the Plus icon.**

The screenshot shows the 'Group Service Detail' window. On the left, the 'Clients' list is highlighted with a red box and a large orange '4'. A smaller orange 'a' is over the 'X' delete icon for 'Bravo, Johnny', and a smaller orange 'b' is over the '+' add icon. The right side shows service information for 'Group Psychotherapy' with various settings like 'Start', 'Status', and 'Program'.

- c. This will open up the Group Service Client Popup, which will list any additional clients that are enrolled in this group. **Select the client and then click Select** to add them to this service.

The screenshot shows the 'Group Service Client Popup' window. The title bar says 'Group Service Client Popup'. The main area is titled 'Group Service Clients' and 'Clients in Process Group'. It shows a search bar with 'Name' and a message 'No data to display'. At the bottom, there are 'Select' and 'Cancel' buttons, with a red circle 'c' over the 'Select' button.

- d. To add a client who is enrolled in this program but not yet enrolled in this group, click the List icon.

Clients		<input type="checkbox"/> Show Clients With Errors					
		Asano, Jason					
		Bravo, Johnny					
		Childers, Cindy					
		Powers, Light					
		Test, Patient					
		Tommy, Max					
		White, Walter					
		Williams, Kyle					

- e. This will open up the Group Service Client Popup, which will list any clients that are enrolled in this program but are not yet enrolled in this group. **Select the client(s) you want to add and click Select** to add them to this service.




Group Service Client Popup













































### Group Service Clients

Clients that are enrolled in the program



<input type="checkbox"/>	Name
<input type="checkbox"/>	Adair, Alice (1160)
<input type="checkbox"/>	Another, Test (1209)
<input type="checkbox"/>	Arambula, Maximo (1247)
<input type="checkbox"/>	Asano, Hiro (1111)
<input type="checkbox"/>	Asano, Kaito (1106)
<input type="checkbox"/>	Baizey, Test (1183)
<input type="checkbox"/>	Baizey2, Test1 (1204)
<input type="checkbox"/>	Banks, Tara (1078)
<input type="checkbox"/>	Barajas, Fabiola (1235)
<input type="checkbox"/>	Barnes, Kim (1093)
<input type="checkbox"/>	Barrington, Rosemary (1265)

- f. To add a client from another program, click on the Magnifying Glass icon.

**Clients**  Show Clients With Errors   

		Asano, Jason			ASAM		
		Bravo, Johnny					
		Childers, Cindy					
		Powers, Light					
		Test, Patient		ASAM			
		Tommy, Max		ASAM			
		White, Walter					
		Williams, Kyle					

- g. This will bring up the client search function. **Search for the client you want to add and click Select & Close.** If you want to add more than 1 client, you can simply click **Select** and then search for the next client you want to add.

**Client Search**  

**Clear**


**Name Search**  Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

**Broad Search** **Narrow Search** Type of Client  Individual  Organization

Last Name  Training First Name  Program

**Other Search Strategies**

SSN Search    Phone # Search

DOB Search   Master Client ID Search

Primary Clinician Search  Client ID Search

Authorization ID / #  Insured ID Search

**Records Found**

<input type="radio"/>	ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/>	1138	1138	Train, Test		3693	12/01/19...	Active	New York...	Tg, Sahana
<input type="radio"/>	1239	1239	Training, Manual		9999	06/07/20...	Active		
<input type="radio"/>	1268	1268	Training, Manuel		3545	09/01/20...	Active		

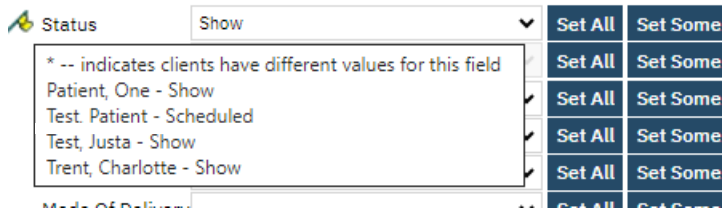
**Select** **Select & Close** **Cancel**

5. Once you have your group roster set up, move to the service information section. The first client will be highlighted. As you make changes, this will update that specific client only. This is where you can mark whether clients who were a no-show for the group, or who canceled and reason for cancelled.
  - a. If you want to set this information for all of the clients, click the “Set All” button. You can do this for each item in the service information section.
  - b. If you want to set this information for more than one client, but not all of them, click the “Set Some” button.

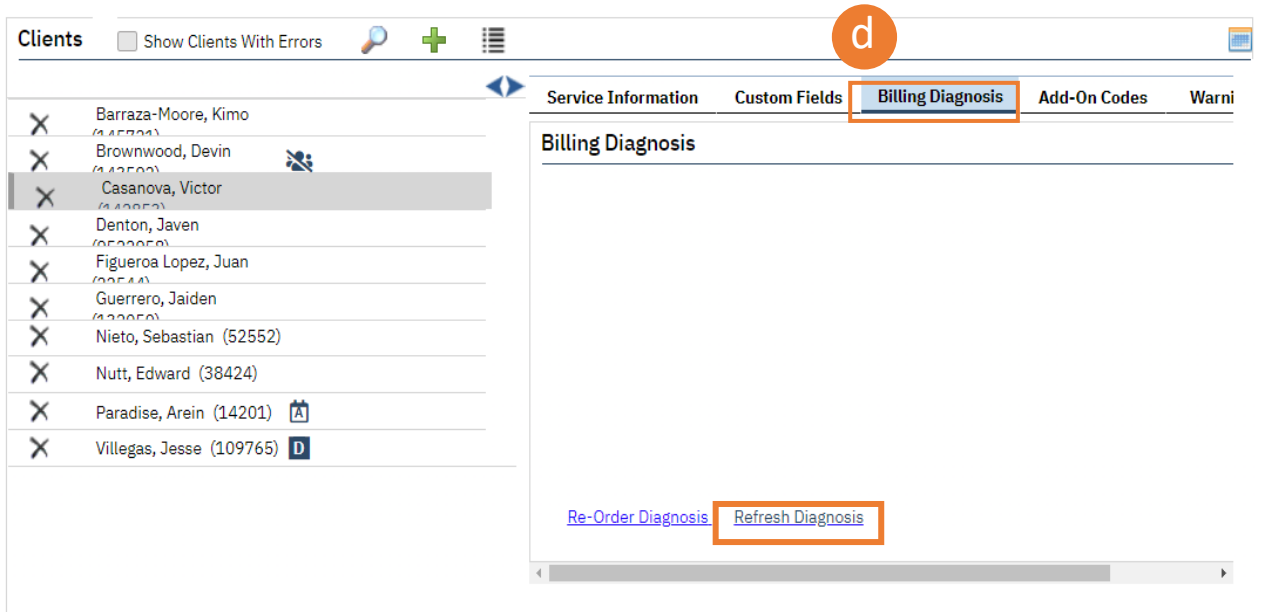
- c. This will bring up the Set Some pop-up window. Select the clients you want to include in this change (e.g. all the clients who you want to mark as “show”). Then click Set.

<input type="checkbox"/> All	Client Name	Current Value
<input checked="" type="checkbox"/>	Asano, Jason	Show (71)
<input type="checkbox"/>	Bravo, Johnny	Show (71)
<input checked="" type="checkbox"/>	Childers, Cindy	Show (71)
<input checked="" type="checkbox"/>	Powers, Light	Show (71)
<input checked="" type="checkbox"/>	Test, Patient	Show (71)
<input type="checkbox"/>	Tommy, Max	Show (71)
<input checked="" type="checkbox"/>	White, Walter	Show (71)
<input checked="" type="checkbox"/>	Williams, Kyle	Show (71)

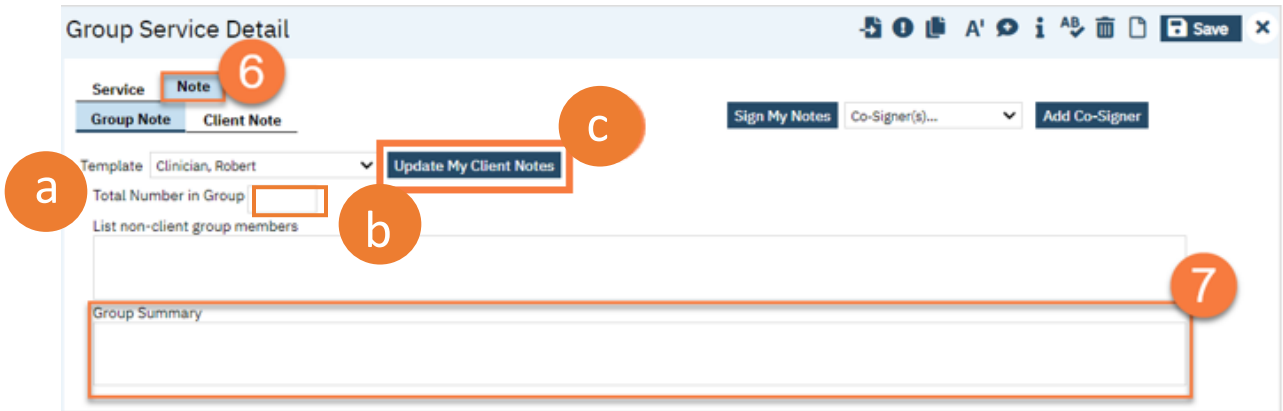
\*If you hover your arrow above the yellow flag you will be able to see the each client and their information.



- d. Verify Diagnosis for individuals using the Billing diagnosis tab on the Group Services Details page. Highlight each individual and click on Billing Diagnosis tab. If the diagnosis is not there but you have completed a diagnosis document with the correct effective date, click on refresh diagnosis.



6. Once you've completed the service information, **navigate to the Note tab.**



7. **Enter the group note summary.**

- a. Enter the Total Number in Group. (For STRTP's this will include all the youth that attended group, not just the Fresno County or Presumptively Transferred youth)

- b. List non-client group members or enter N/A if none. (For STRTP's, you will list the Non Fresno County/Presumptive Transferred youth as follows i.e. Riverside County 1, Riverside County 2, San Mateo County 1, Kern County 1. Do not list any PHI for the Non Fresno County/Presumptive Transferred youth(s).
- c. **Click the Update My Client Notes button after you complete the group note summary.** This will push the group summary to all the group member's notes.

8. **Navigate to the Client Note tab.**

9. On the left side of the screen, **select the client** you're individualizing the note for. Clients marked as "No-Show" or "Canceled" will still be on the list but no note will be generated.

- a. You can **click on the checkbox "Only Show clients where I am the Note Author"** to limit the clients on the list.

10. On the right side of the screen, **Add problems to the problem list as necessary.** See Problem List for more information. After adding any problems, make sure to click Save. **Select problems that were addressed in today's session.** If you've added any problems to the problem list during this note writing, click Refresh to update this list.

The screenshot shows the 'Group Service Detail' interface. At the top right, there is a 'Save' button (annotated with 10). Below the header, there are tabs for 'Service' and 'Note' (annotated with 8). Under the 'Note' tab, there are sub-tabs for 'Group Note' and 'Client Note'. A checkbox labeled 'Only Show clients where I am the Note Author' is present (annotated with 9). Below this is a list of client names: Asano, Jason; Bravo, Johnny; Childers, Cindy; Powers, Light; Test, Patient; Tommy, Max; White, Walter; Williams, Kyle. To the right of the client list are buttons for 'Hide Clients', 'Note', 'Treatment Plan Goals Addressed', and 'Co-Signers'. Below the client list is a 'Problem Details' section with search fields for 'Code' and 'Description', and date pickers for 'Start Date' and 'End Date'. Below that is a 'Problem List' table with columns for SNOMED Description, SNOMED CT Code, ICD 10 Code, Start Date, End Date, and Program. The table contains several rows of medical conditions with checkboxes for selection. At the bottom right of the problem list, there are 'Insert' and 'Clear' buttons.

11. Enter the individual client's note for this group service. The group summary note will be pulled into the note and you can individualize for each client by clicking on the client's name.

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

Asano, Jason

Johnny

Childers, Cindy

Powers, Light

Test, Patient

Tommy, Max

White, Walter

Williams, Kyle

Note Treatment Plan Goals Addressed Co-Signers

General

Perinatal depression

Primary degenerative dementia of the Alzheimer type, presenile onset, with depression (disorder)

Severe food insecurity on U.S. household food security survey module

Severe food insecurity on U.S. household food security survey module

Severe food insecurity on United States household food security survey module

Unhealthy alcohol drinking behavior

Information

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

12. To add Co-Signers as necessary, navigate to the Co-Signers tab.
  - a. Select the staff from the dropdown menu. This will add them to the list of people who will be asked to co-sign the note. This is not required.
13. Once you're finished with individualizing all your notes, click "Sign My Notes."

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

Asano, Jason

Bravo, Johnny

Childers, Cindy

Powers, Light

Test, Patient

Tommy, Max

White, Walter

Williams, Kyle

Note Treatment Plan Goals Addressed Co-Signers

Co-Signer

Clinician, SUD

Clinician, Robert

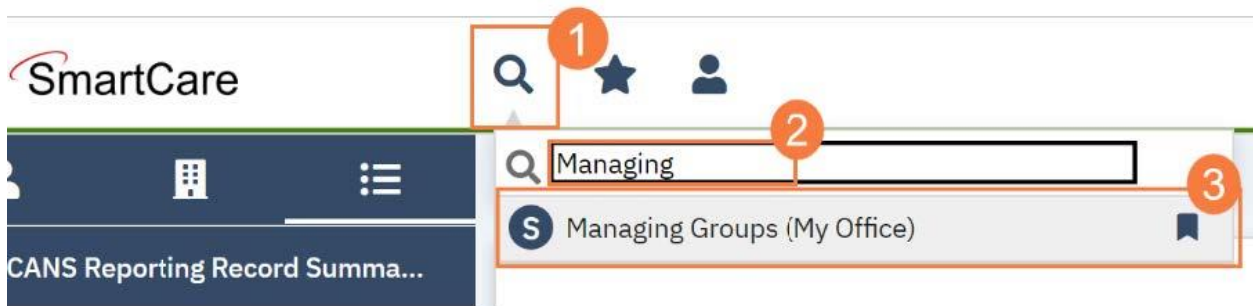
Clinician, SUD



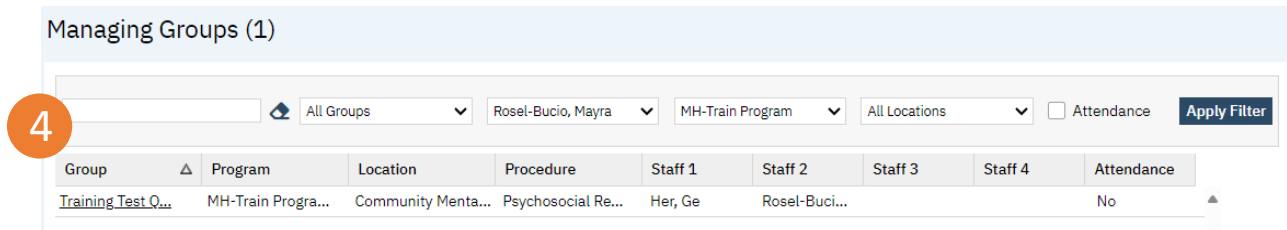
## How does the Co-Facilitator write their note (It is not a requirement for both facilitators to write a note.)

For a Co-Facilitator to write their note, the lead facilitator who was identified as lead in the set-up of the group by clicking the radio button in the staff information as “Is Clinician” will need to sign their note first.

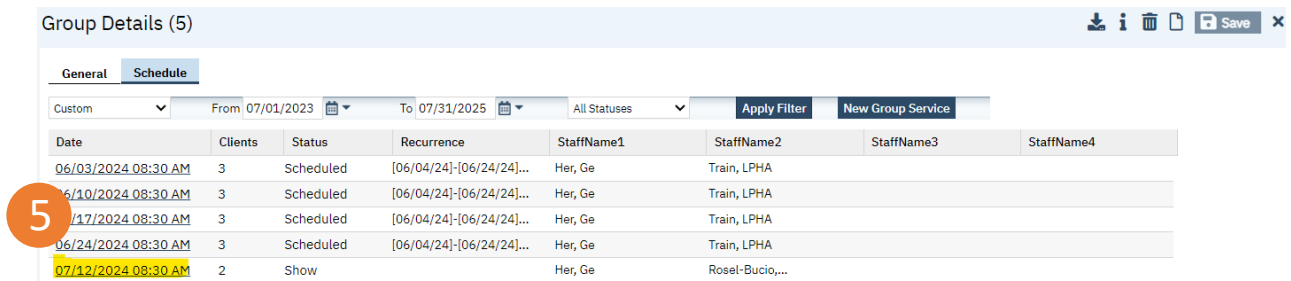
1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. Click to select the Group you will be completing the note for

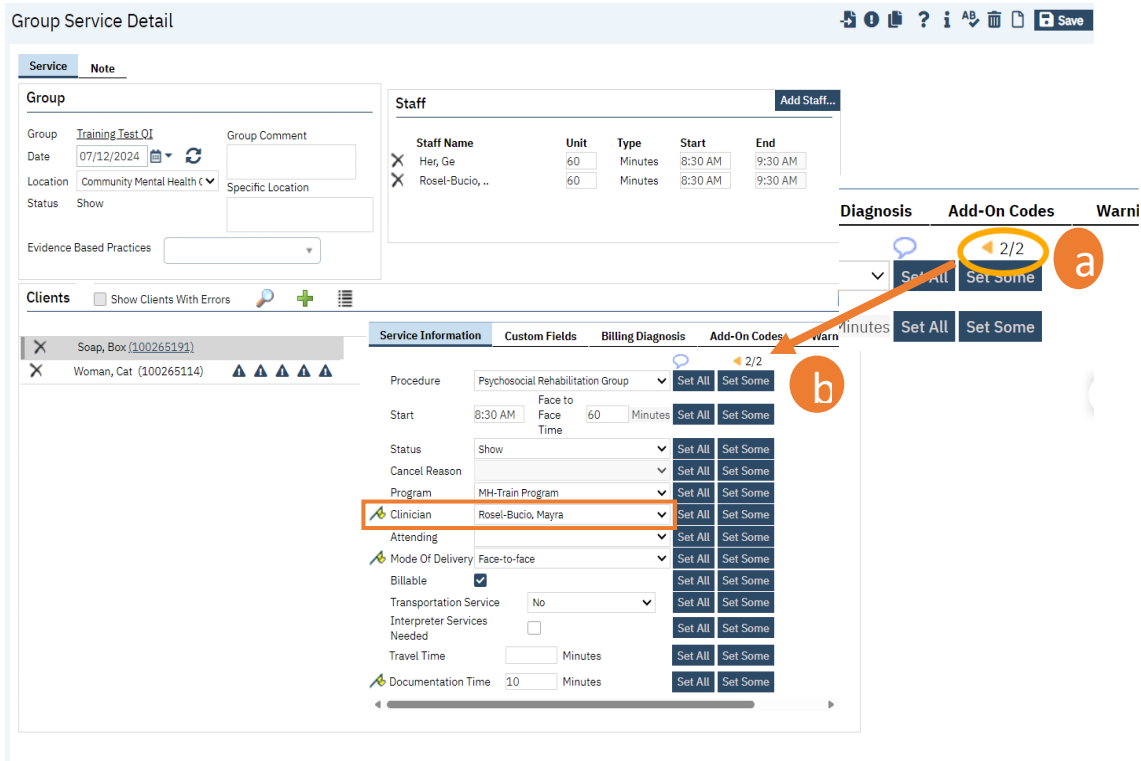


5. Click to select Schedule tab and select the date of service that you want to complete note for.



6. This will open the “Group Service Detail”, verify the group, staff and client information including that your name is in the clinician information.

a. You can also see the previous information entered by the lead facilitator by clicking on the small yellow triangle

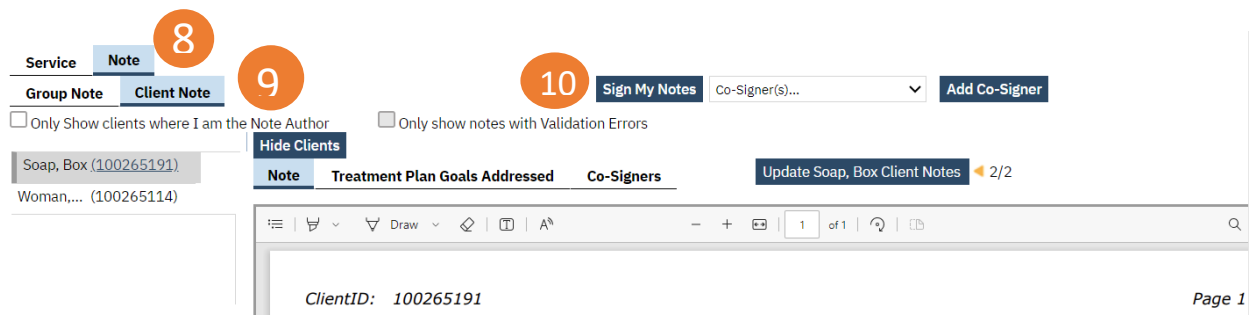


b. You can change Procedure code, enter mode of delivery, documentation and any other information needed. Verify that person served has a diagnosis in the Billing diagnosis tab. Save.

8. Click on the “Note tab”, under “Group Note” complete the group information.

9. Click on the “Client Note tab”, complete the client note for all clients

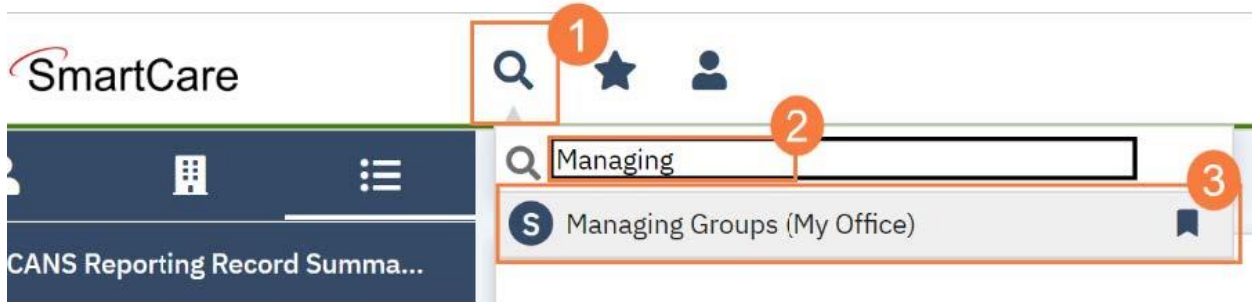
10. Click “Sign My Notes” and this will complete your notes. You will see your notes in PDF file. You can also view the other facilitator notes by clicking on the yellow triangle under the client note tab.



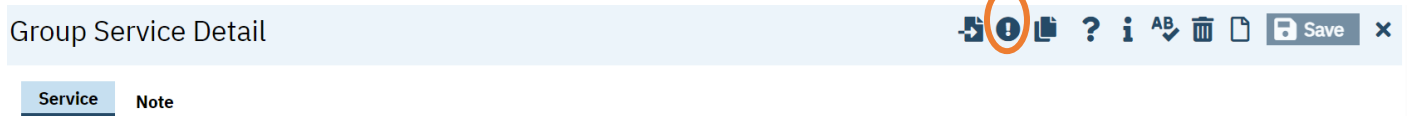
**How to edit Group note (by doing this process you will delete the note, at this time there is no other way to “edit” a note) You will need to copy the information to reenter the note without errors.)**

To edit a group note, follow the steps below:

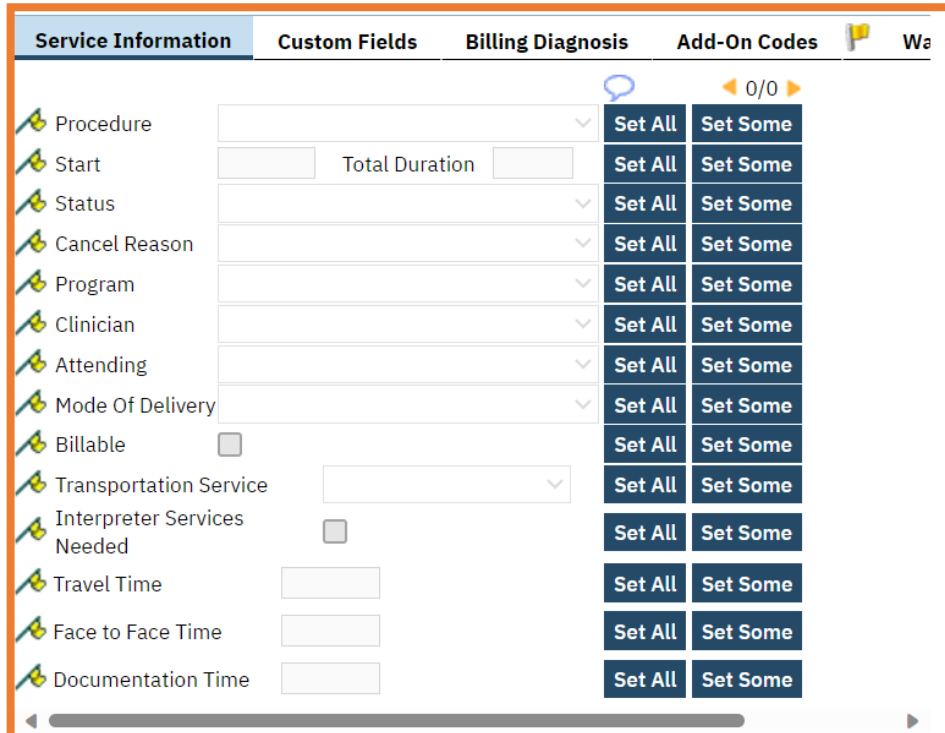
1. **Click the Search icon.**
2. **Type Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



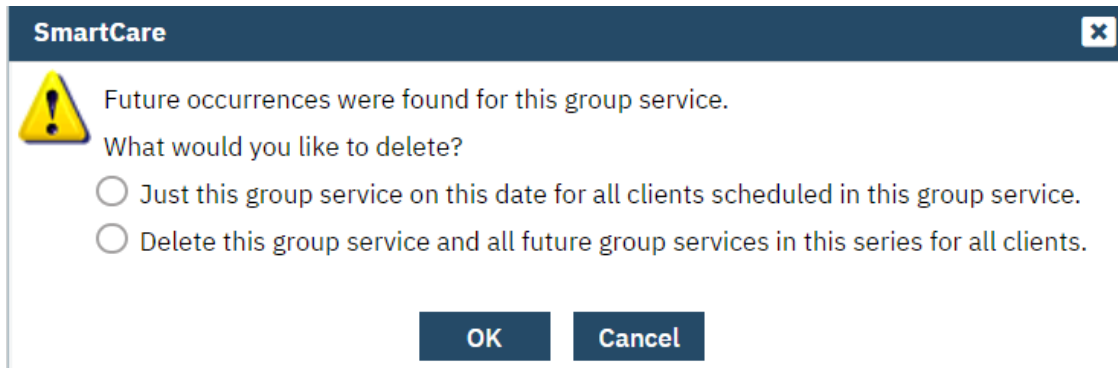
4. **Click to select the Group** you will be editing.
5. On the Group Service Detail click on the Error button that looks like an exclamation icon to mark it as error



6. This will remove the information on the Service Information field



7. From here you can click on the delete button that looks like a trash can. If the group is set as a reoccurring group, it will show you the message below. Make sure you mark the correct option for your need.

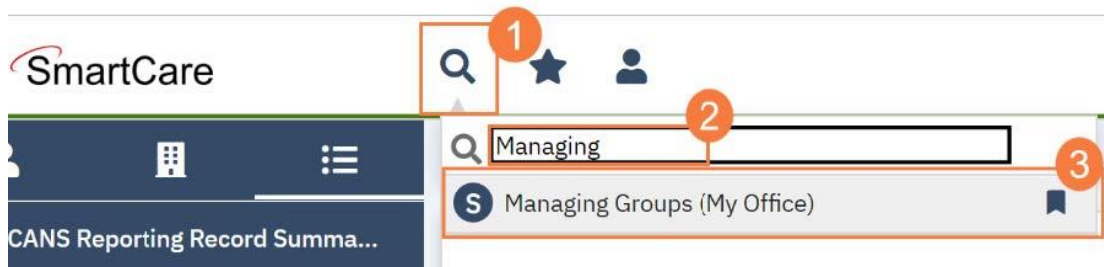


9. You will need to reenter the service note you just deleted. You will return to Managing Groups, select the group, click the Schedule tab and click New Group Service to start the new group note.

## How to Add a New Client to a Group (Remember if you click on the Date of Service for your group this will only make changes to that group service. If you want to make the change to all future services, you will need to make the changes by going to managing groups and select the group name.)

To add a new client to a Group, follow the steps below:

1. **Click the Search icon.**
2. **Type Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. Click to select the **Process Group** you will be adding the client to.

Managing Groups (1)

Active Groups | All Staff | All Programs | All Locations | Attendance | Apply Filter

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
Process Group	Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician,...	Supervisor...			No

5. Locate the Client section towards the bottom of the Group Details screen. Click **Add Clients**.

Group Details

**General** | Schedule

Type: [Dropdown]  
Group Note: Group Progress Note [Dropdown]  
Classroom: [Dropdown]  
Max.# of Client(s): [Text]  
Medicare G Code: [Text]  
Comment: [Text Area]

Program: Outpatient MH Adult [Dropdown]  
Procedure Code: Group Psychotherapy (Other Than of a Multiple-Famil [Dropdown]  
Duration: 60.00 Minutes  
Start Time: 3:00 PM

**Attendance**

Attendance | Schedule...  
Group Note Type: [Dropdown]  
 Add all clients enrolled in Program  
Default Procedure: [Dropdown] | Set Client Specific Default...

**Clients**  Automatically add clients from roster to new group service

Clients which may attend this group. **Add Clients...**

Client Name
X Asano, Jason
X Bravo, Johnny
X Powers, Light
X Thompson, Toby
X White, Walter
X Williams, Kyle

**Staff**

Staff that may lead this group. **Add Staff...**

Is Clinician	Staff Name
X <input checked="" type="radio"/>	Clinician, Robert
X <input type="radio"/>	Supervisor, Clinician

6. The Client Search window will open, **click in the Last Name and First Name fields** to enter the corresponding information. Select Enter on your Keyboard to populate search results.

a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.

- Click the radio button to left of the client you want to select.
- Click Select and Close. This client will be added to the group.

Client Search

Clear

Name Search  Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client  Individual  Organization

Last Name Test First Name Program

Other Search Strategies

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

Records Found

	ID	Master ID	Client Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input type="radio"/>	115	1015	Tesla, Jim	0000	01/01/1980	Active	Sacramento	
<input checked="" type="radio"/>	1091	1091	Test, Max	6345	01/01/1990	Active	Middle	Rapp, Chris
<input type="radio"/>	1080	1080	TestCH, Client	9999	01/20/2011	Active		

Select Select & Close Cancel

- Click Save. Click the X to close the screen.

Group Details

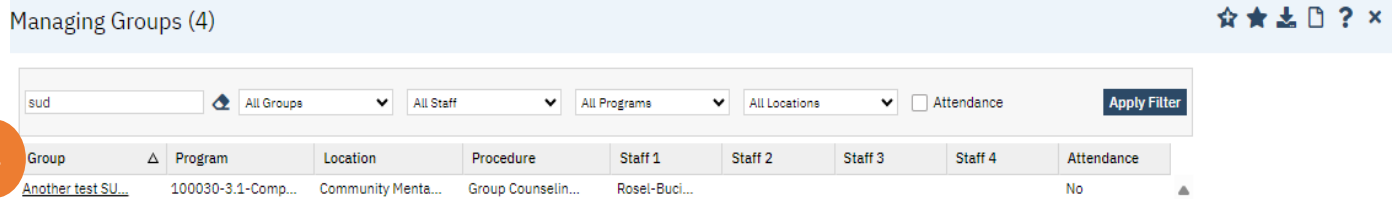
General Schedule


Type Program Outpatient MH Adult

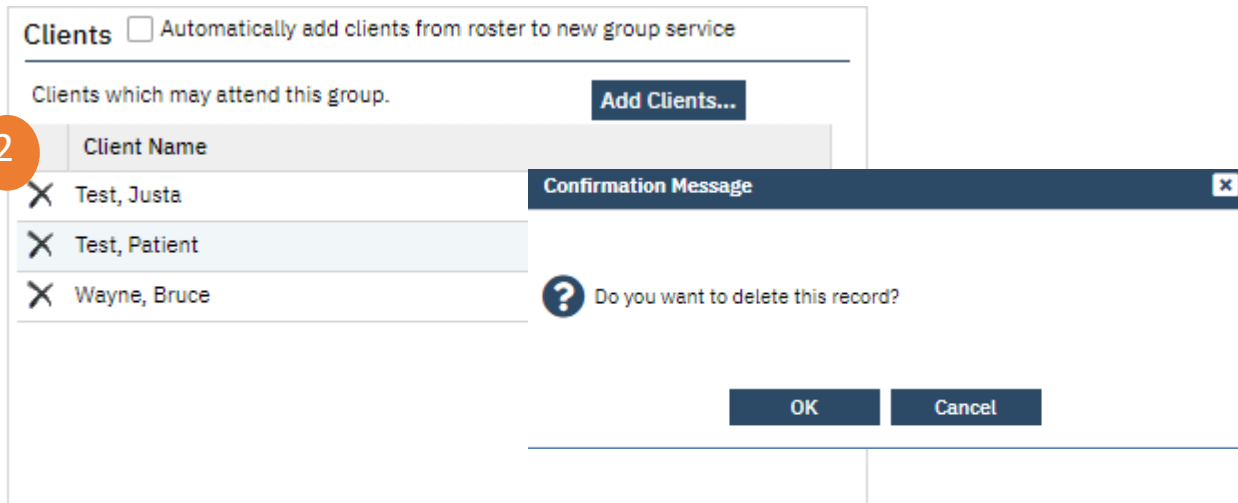
Save

# How to remove a client from a group (Removing from Managing Groups (My Office))

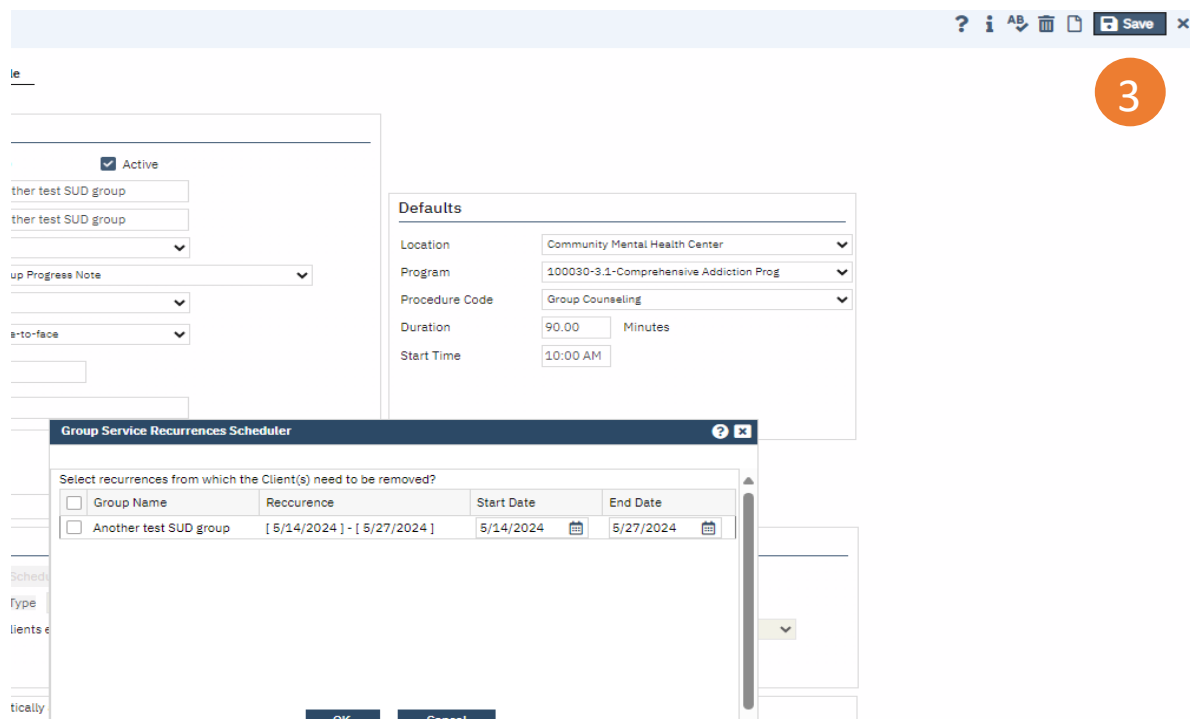
1. In the Managing Group screen, select the group you will be adding a client too.



2. On the Clients section of the Group Details screen you can click on the  icon next to the client you want to remove. A confirmation message will pop up to ask “Do you want to delete the record?” Select OK.

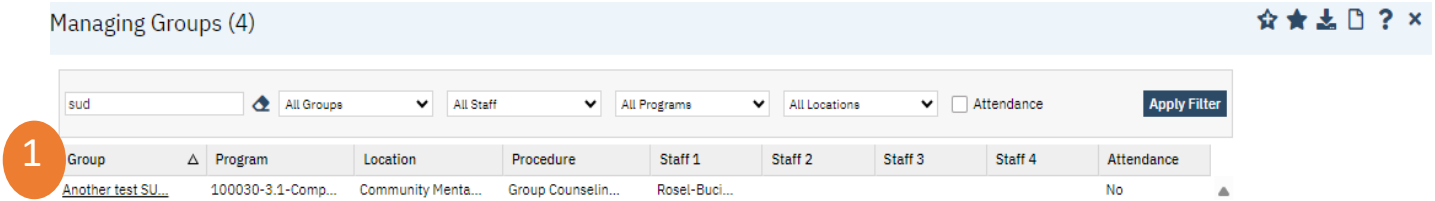



4. Click to Save on the Group Details. A pop-up window asking to Select recurrences from which the Client(s) need to be removed? Select the recurrence you would like the client to be removed from and click okay. This will remove the client from timeframe selected.

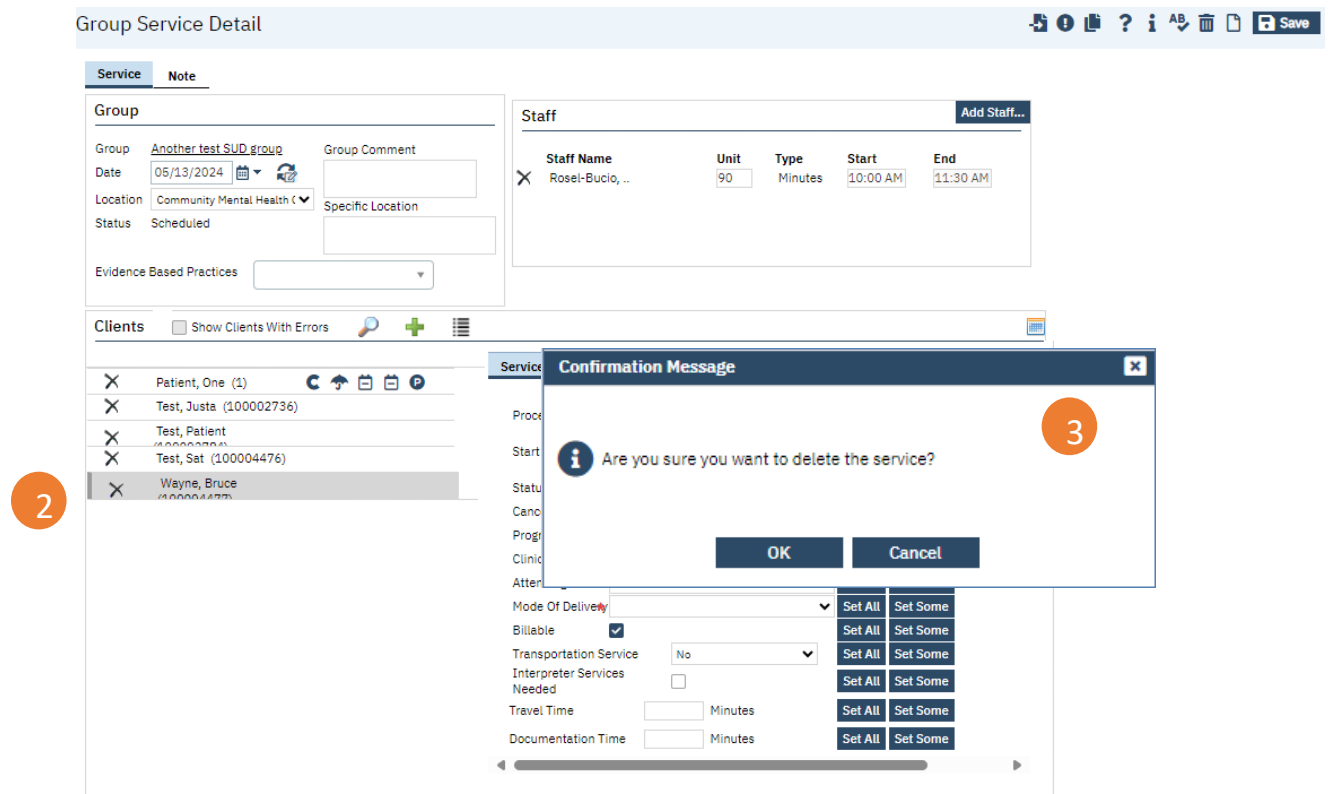


# How to remove a client from a group (Removing from group note)

1. Click on the date of service you will be editing



2. On the Clients section of the Group Service Detail screen click on the  icon next to the client you would like to remove from the group. A confirmation message will pop up to ask "Do you want to delete the record?" Select OK.

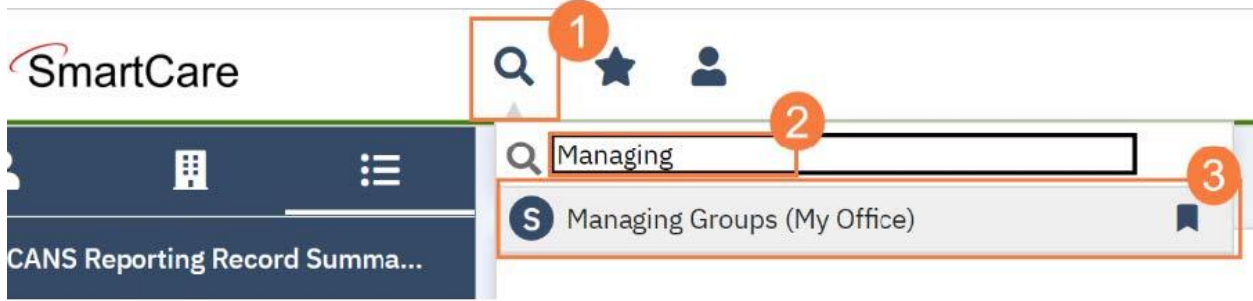


# How to Add or Change a Staff Member in a Group

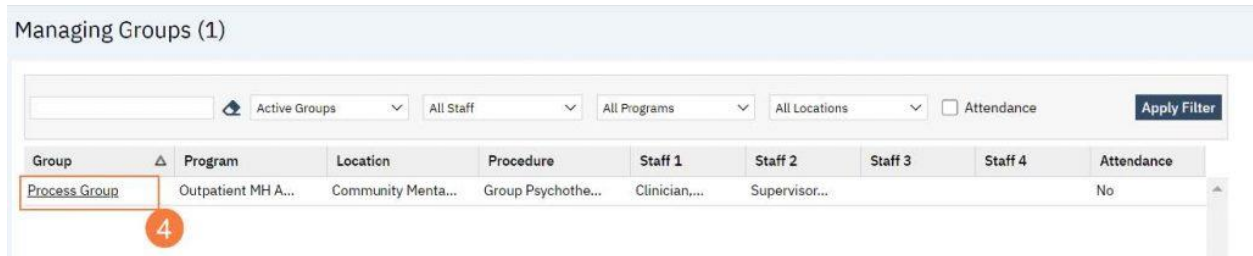
To add or change a staff member in a group, follow the steps below:

1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.

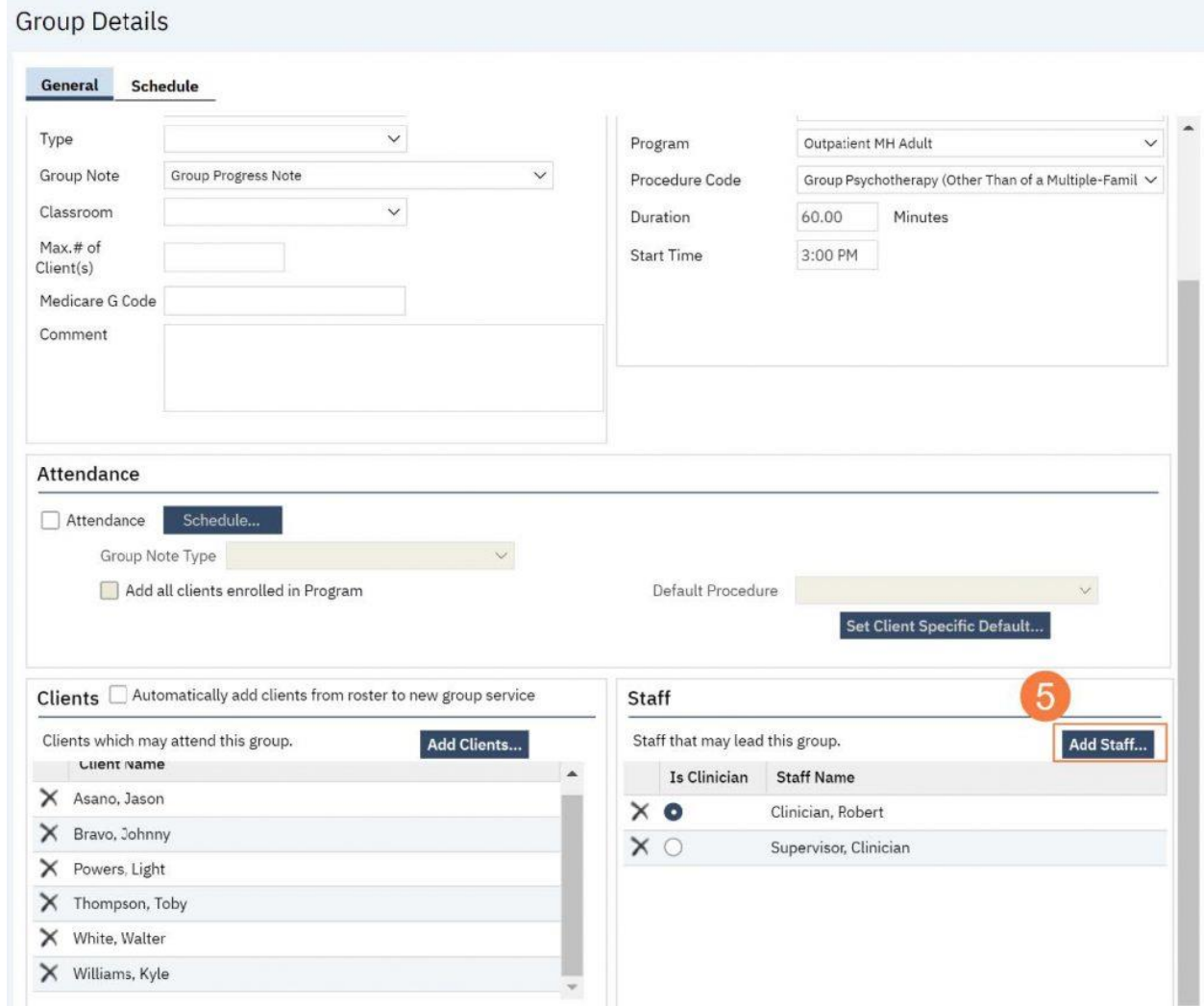




4. Click to select the Process Group you will be adding the client to.



5. Locate the Staff section towards the bottom of the Group Details screen. Click Add Staff.



6. Click to **select** the correct staff member to add.
7. Click **OK**.

Group Service Staff Pop Up

OK Cancel

<input type="checkbox"/>	Staff, Access
<input type="checkbox"/>	Staff, Billing
<input type="checkbox"/>	Staff, Clerical
<input type="checkbox"/>	Staff, Compliance
<input type="checkbox"/>	Staff, Nurse
<input checked="" type="checkbox"/>	Staff, Psychiatrist
<input type="checkbox"/>	Stephan, Khristy
<input type="checkbox"/>	Sullivan, Kevin

8. And/or, if you need to remove a staff member, click the X to the left of the staff member you want to remove.

Staff

Staff that may lead this group. Add Staff...

Remove	Role	Staff Name
<input checked="" type="checkbox"/>	Clinician	Clinician, Robert
<input type="checkbox"/>	Supervisor	Supervisor, Clinician
<input type="checkbox"/>	Staff	Staff, Psychiatrist

9. Click **Save**. Click the **X** to close the screen.

? i AB Save [document icon] [trash icon] X

## Procedure codes that may be used for DMC-ODS

Group Counseling	7	H0005	DMC, DMC-ODS	Group Counseling	Group counseling related to alcohol and/or drug services. 15 minutes	AOD, LCSW, PCC(LPCC), MFT(LMFT), NP, PA, PSY(PSYD), RN
Peer Support Services	19	H0025	DMC, DMC-ODS	Behavioral Health Prevention Education service	Skill building groups conducted by a Certified Peer Support Specialist.	Cert Peer
Therapy (MH), Family Therapy (DMC-ODS)	63	90849	MH, DMC-ODS	Multiple-Family Group Psychotherapy	A group therapy code that allows for documentation of groups that include multiple families vs. a single family. Therapy may be delivered to a beneficiary or group of beneficiaries and may include family therapy directed at improving the beneficiary's functioning and at which the beneficiary is present. 15 minutes	CNS, DO, LCSW, PCC(LPCC), MD, MFT(LMFT), NP, PA, PHD, PSY(PSYD)
Rehabilitation (MH), Recovery Services (DMC-ODS)	141	H2017	MH, DMC-ODS	Psychosocial Rehabilitation Group	For DMC-ODS, rehabilitation falls under Recovery Services and can document education related to mental health, substance abuse, independent living, social, coping and interpersonal skills, relapse prevention, etc.	AOD, Cert Peer, CNS, DO, LCSW, PCC(LPCC), LVN, MD, MFT(LMFT), MHRS, NP, OT, Other, PA, PHD, PSY(PSYD), PT, Pharm, RD