

How to Create a Group Progress Note

Adding group note offers you the ability to give everyone within your group the same note (group note) and include an individual personal note for each person. Once created and saved everyone will have the same group note with their own individual. You will be able to create your notes quickly and effectively.

**** An Important step to remember once a group note has been started is it should be completed within this one action. This insures all participants in the group have received both the group and individual note.**

First select your group by select the group radio button then choose your group. This of names in this group will show up to right of you list. To start click the [Add Group Note] button.

The screenshot shows the 'Progress Notes' interface. At the top left, there is a 'File > Progress Notes' menu. Below it, the 'Select by:' section has two radio buttons: 'Client' and 'Group'. A red circle with the number '1' points to the 'Group' radio button. Below this, a 'Group:' dropdown menu is open, showing a list of groups including 'Art Therapy Group', 'Adult Group', 'After Hours Group', 'Anger Control', 'Art Therapy Group', 'Carrie Weds Group', 'Gambling', and 'Level 3'. A red circle with the number '2' points to the 'Art Therapy Group' option in the dropdown. To the right of the dropdown is a table with three columns: 'Name', 'SSN', and 'Client Reference #'. The table contains the following data:

Name	SSN	Client Reference #
Appleseed, Johnny	849445464	2342343223
Doe, Jane	123456789	
Hatter, Charles	060419520	
Marks, Paul	053120040	
Marshal, Kelly	080520050	

A red circle with the number '3' points to the 'Client Reference #' column. Below the table is a section with columns for 'Code', 'Description', 'File/Sign Status', and 'Print/File Selection'. Below this is a search bar with 'Clear', 'Enter Date', and 'Apply Filters' buttons. Below the search bar, it says 'No records to display.' A red circle with the number '4' points to the 'Add Group Note' button at the bottom of the interface.

The next dialog box presents you a list of all clients within this group you either:

- 1) Accept this list by clicking the [Next] button to continue
- 2) Exclude a client or clients from receiving the note by un-checking the corresponding box
- 3) Add a new client to the list by selecting the [Group Setup] button to add a new client to your group.

File > Progress Notes > Group Notes

Choose a Group: Art Therapy Group

Group Setup

Client Name	SSN	Client Reference #	Select All
Appleseed, Johnny	849445464	2342343223	<input checked="" type="checkbox"/>
Doe, Jane	123456789		<input checked="" type="checkbox"/>
Hatter, Charles	060419520		<input checked="" type="checkbox"/>
Marks, Paul	053120040		<input checked="" type="checkbox"/>
Marshal, Kelly	080520050		<input checked="" type="checkbox"/>

Cancel

Next >

The group note is similar to the individual note when created with the added bonus adding a note for the entire group.

- 1) Fill out the top portion as you would for an individual note
- 2) Type in the group note
- 3) Type in the individual note include Diagnosis and Treatment Plan (**if they have been added this client's record**)
- 4) Click the [Save] button to create a note for everyone in you group.

File > Progress Notes > Add Note

Note Info

Group: Art Therapy Group **1** Fill out the top which is the same as an individual note

Clinician: Ron Alai Co-Facilitator: [dropdown]

Session Type: 1425 - Group -IOP Sort by Description

Session Date: 06/12/2018 Time: Start: 10:00 AM to End: 11:00 AM Duration: 1:00

Group Note:

2 The Group Note would go into this dialog box. Whatever is typed in this dialog will be add to everyone's individual note

Enter Individual Note for Group Members:

Appleseed, Johnny
Level of Care: [No Episode Assigned]

Diagnosis:

As explained in "How to Create an Individual Note" you can add the Diagnosis and Treatment Plan (**if they have been added this client's record**) then type in a unique individual note in this dialog box **3**

Doe, Jane
Level of Care: [- Level I - Outpatient treatment: (RL - SA) Nicasa Round Lake - SA - Admitt...]

Diagnosis:

Repeat the same steps as above for each individual note **4** **3**

< Back Statements Save Cancel