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 with have the same group note with their own individual. You will be able to create you 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 participates 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 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.

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: [▼]
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   View Tx Plans
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 an 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   View Tx Plans
Diagnosis:

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

[< Back]   [Statements] [Save] [Cancel]