Northern Light Health

From the Office of Clinical Informatics

Quick Reference Guide
Document a Therapeutic Group Note

August 10, 2020

This Quick Reference Guide (QRG) reviews documenting a therapeutic group note.

Common Buttons & Icons

Therapeutic Notes	**Therapeutic Notes** button
	Drop-down arrow
	Expand icon
Goals	**Goals** Add icon

Create a Therapeutic Group Note

- **From the Message Center:**

STEP 1: Click **Therapeutic Notes** in the toolbar.

STEP 2: Click **the Patient List** drop-down arrow.

STEP 3: **Select** the appropriate patient list for the group.

NOTE: If you have not already established a relationship with the patients, you will need to address the Establish Relationship popup window.

STEP 4: **Click Edit** above the list group level documentation.

STEP 5: **Record** appropriate information within the documentation window as it applies to all participates in the group session.

NOTE: Yellow fields with an asterisk indicate required documentation.

STEP 6: **Document** the **Category** and **Topic** fields as a best practice, though they are not required.

STEP 7: **Update** the auto-populated date and time fields to the actual date and time of the session date and times.

STEP 8: **Update** the **Verified By** as needed; it is auto populated with your information.

STEP 9: **Update** the **Facilitated By** as needed; it is auto populated with your information.

STEP 10: **When** all appropriate fields are updated, click **OK**.

STEP 11: **Click** the **Group note** field to enter the appropriate narrative information that will flow to each patient's chart using freetext, voice to text recognition, or autotext.

Complete Patient Specific Note Documentation

- **Charge Code and Time fields automatically populate based on the group level documentation. Once the group note is done you can update an individual patient. From the Therapeutic Notes page:**

STEP 1: Click the **Expand** icon for the patient you want to update individually.

STEP 2: Use **the** right pane to update patient specific information.

NOTE: The Override Charge Items button can be used to select a different charge if the Group Level Charge selected is not appropriate for that specific patient's session attendance.

STEP 3: **Click Diagnosis and Problems** and select the appropriate items to update documentation.

STEP 4: **Click Save** once complete.

STEP 5: **Click** the **Goals Add** icon to add goals for this patient only.

STEP 6: **Click** the **Add Outcome** field.

STEP 7: **Freetext** the new outcome as it relates to this patient only.

STEP 8: Click the **Status** drop-down arrow.

STEP 9: Click the appropriate status.

STEP 10: Use **the** Narrative Notes field to document specific narrative from the session.

NOTE: As before, you can autotext, freetext, or use voice to text.

STEP 11: **Document** other pertinent information within this pane using the respective field drop-down arrows.

STEP 12: Once completed for all patients, click **Sign All.**

NOTE: If you have not completed your documentation use the Save All option. Remember that once a note is saved it cannot be deleted.

STEP 13: Click **OK** when prompted by the Note Signed popup.

Remove Patient from a Group Therapy Session Note

- **From the Therapeutic Notes page:**

STEP 1: Click the **Patient List** drop-down arrow.

STEP 2: Select the appropriate patient list.

STEP 3: Click the **Expand** icon for the patient you wish to remove.

STEP 4: Click the **Remove Patient** icon in the right pane.

STEP 5: Click **Remove** for the Remove Patient popup.

NOTE: Removing a patient from within the session note does not remove them from the patient list permanently, just for the session note.

Forward Session Notes

- **From the Therapeutic Notes page:**

STEP 1: Click the **Patient** List drop-down arrow.

STEP 2: Select the appropriate patient list.

STEP 3: Click **Signed Notes**.

STEP 4: Select the note you wish to forward from the left-side pane.

STEP 5: Click the **Forward** button.

STEP 6: Click the appropriate radio button for **Sign** or **Review**.

STEP 7: Click the **Forward** to field.

STEP 8: Search for the provider.

NOTE: A list will start to populate as you type.

STEP 9: Select the appropriate provider.

STEP 10: Click the **Comment** field and freetext information, as appropriate.

STEP 11: Click **Send**.

STEP 12: Click **OK** in the Note Forwarded popup.

Discard a Session Note

- **From the Therapeutic Notes page:**

STEP 1: Click the **Patient List** drop-down.

STEP 2: Select the appropriate patient list.

STEP 3: Select the note you wish to discard from the left-side pane.

STEP 4: Click the **Discard Note** button below the patient names.

STEP 5: Click **Continue** for the Discard Warning popup.

NOTE: Each patient within the session will then display with a strikethrough indicating that the note has been discarded.