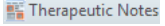





This Quick Reference Guide (QRG) reviews documenting a therapeutic group note.

## Common Buttons & Icons

	<b>Therapeutic Notes</b> button
	Drop-down arrow
	Expand icon
	<b>Goals</b> 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 participants 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:** **Freertext** 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**, **freertext**, 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.

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**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.