Groups Module Guide

Use the Groups Module to manage treatment groups, including keeping a group roster and tracking individual sessions. Then create Encounter Notes or Misc Notes for each attendee at a group session.

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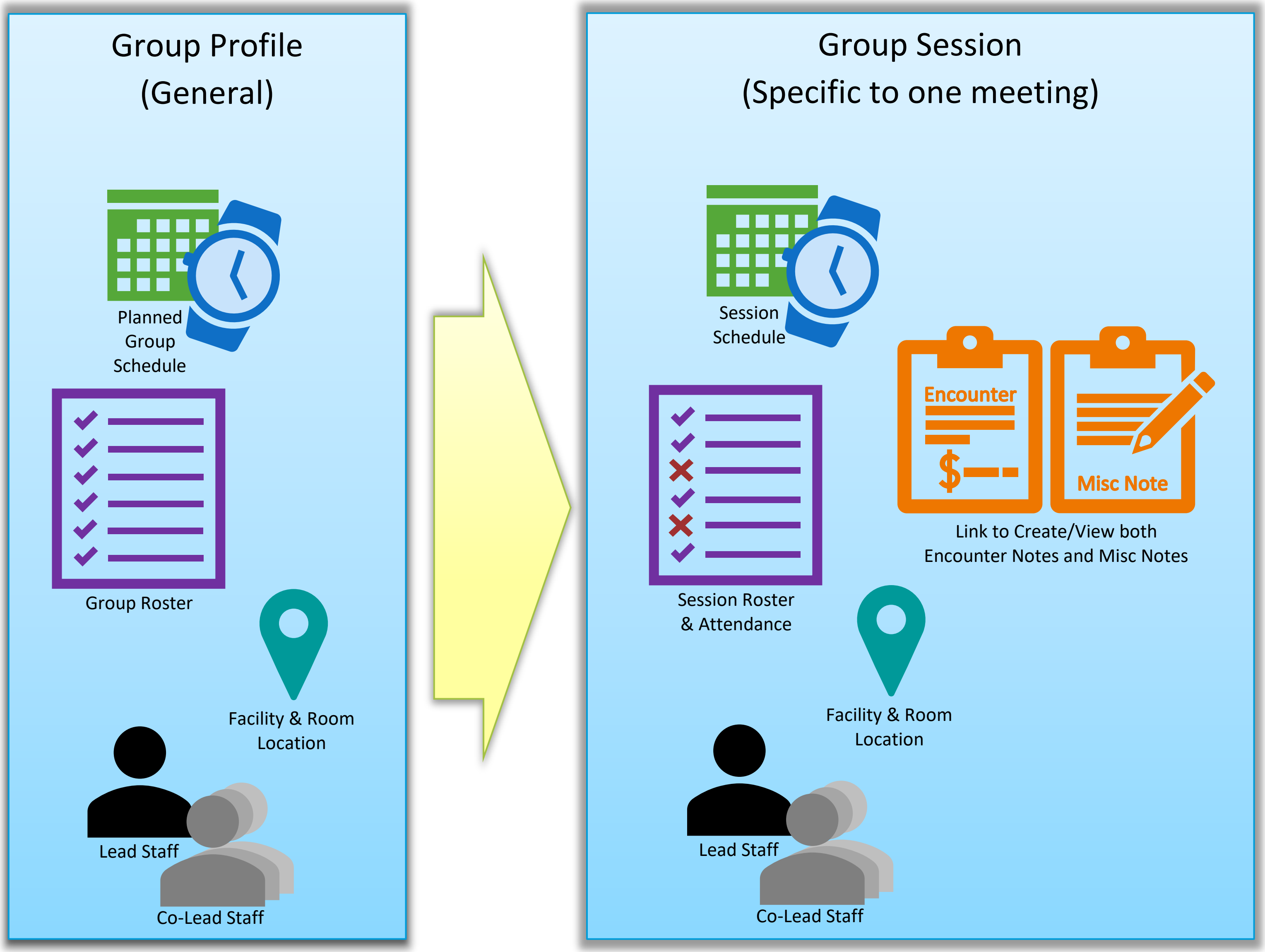
Introducing UWITS Groups

The UWITS Groups module can be used to manage treatment groups.

A **Group Profile** is created to document general information about the group. This general information includes when and where the group plans to meet, the clients who are to attend and so forth.

A **Group Session** is created to document the specific details about each time that the group meets. As a Group Session is created, it is automatically populated with the general information from the Group Profile. It can then be customized to show the details for that specific meeting, including **attendance** at the meeting. A special feature enables an **Encounter Note** and/or a **Misc Note** to be created for each attendee.

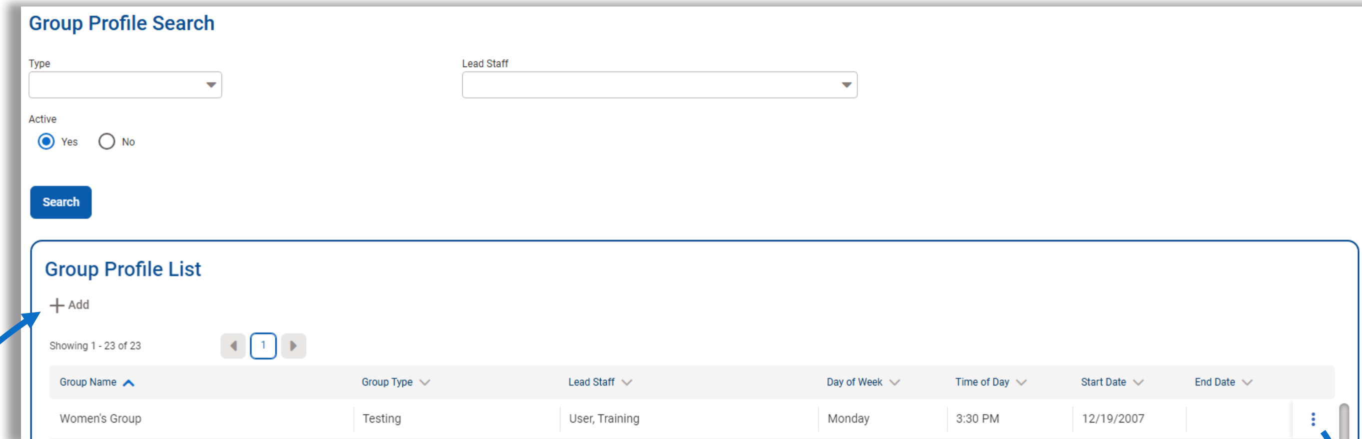
Group Types allow an agency to organize Groups into a list of categories which can be customized by the agency.



Group Profile Search screen

Navigate to the **Group Profile Search** screen by clicking on **Group List** in the blue Navigation bar to the left.

To find an existing Group Profile, use the available search filters then click on the Search button.



To setup a brand-new Group, click on the **+ Add** link.

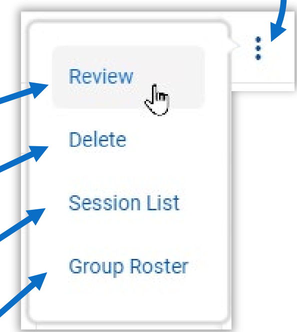
Tip! Sort the table by any column by clicking on the column heading for that column. Click again to sort in the opposite order.

To review the **Group Profile** hover over the action button (⋮) then click on the **Review** option. (See page 4.)

To delete a **Group Profile** hover over the action button (⋮) then click on the **Delete** option.

To review the **Session List** hover over the action button (⋮) then click on the **Session List** option. (See page 6.)

To review the **Group Roster** hover over the action button (⋮) then click on the **Group Roster** option. (See page 5.)



Group Profile

Update each required field in the **Group Profile** screen.

To select Co-Lead Staff member(s), click on a name listed in the **Co-Lead Staff** box then click on the > button to move the selection to the **Selected Co-Lead Staff** box.

Tip! To select more than one **Co-Lead Staff** at once, hold down the Ctrl key while clicking on names in the **Co-Lead Staff** box.

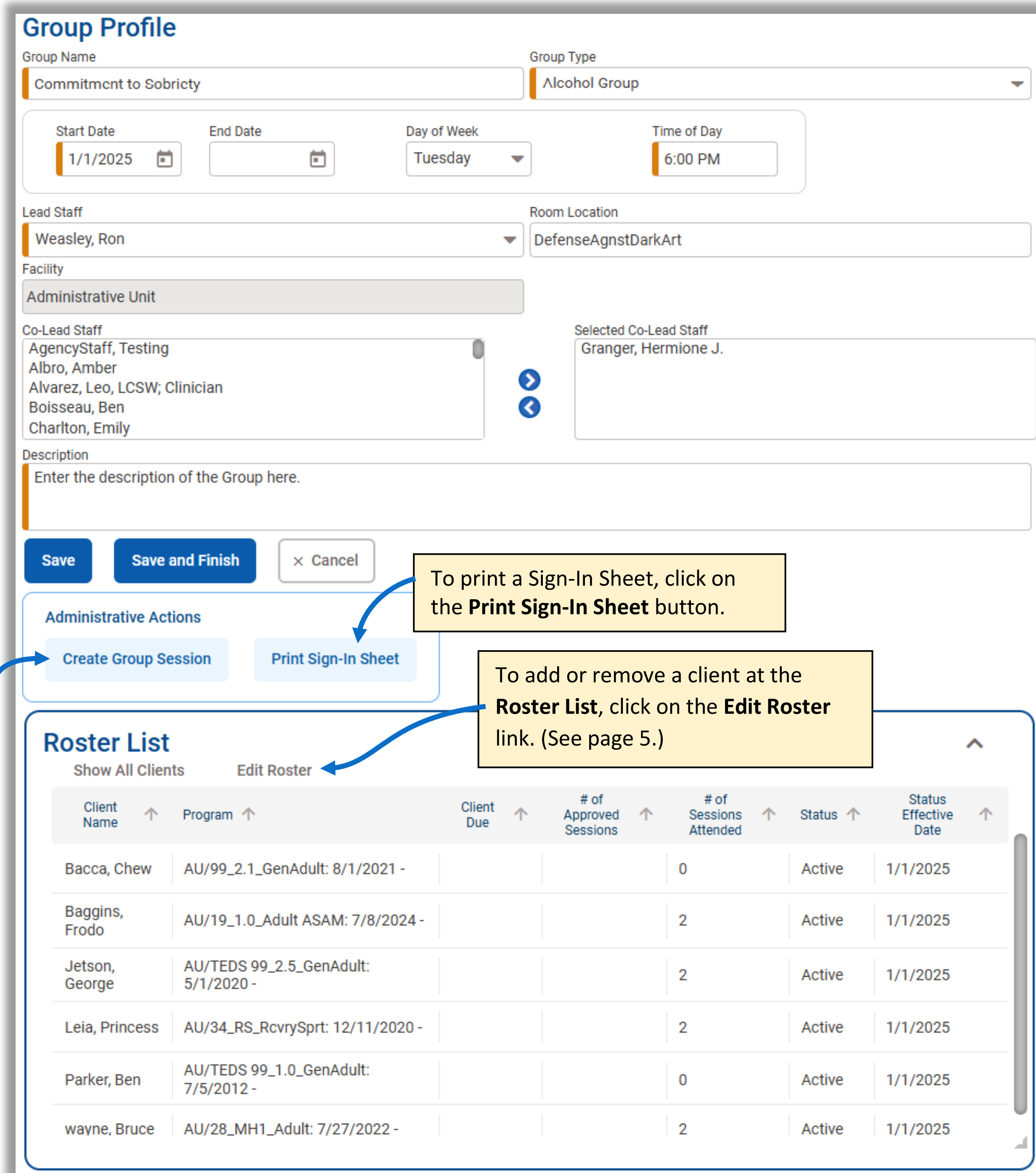
Click the **Save** or the **Save and Finish** button to save the **Group Profile**.

A **Group Session** refers to one specific meeting of the **Group**.

To create a group session, click on the **Create Group Session** button.

Caution!

Keep the roster in the Group Profile updated. New Group Members cannot be added to a Group Session. Whenever a client arrives to attend a Group Session before they have been added to the roster in the Group Profile then it means extra work for the Lead Staff.



To print a Sign-In Sheet, click on the **Print Sign-In Sheet** button.

To add or remove a client at the **Roster List**, click on the **Edit Roster** link. (See page 5.)

Edit Group Roster

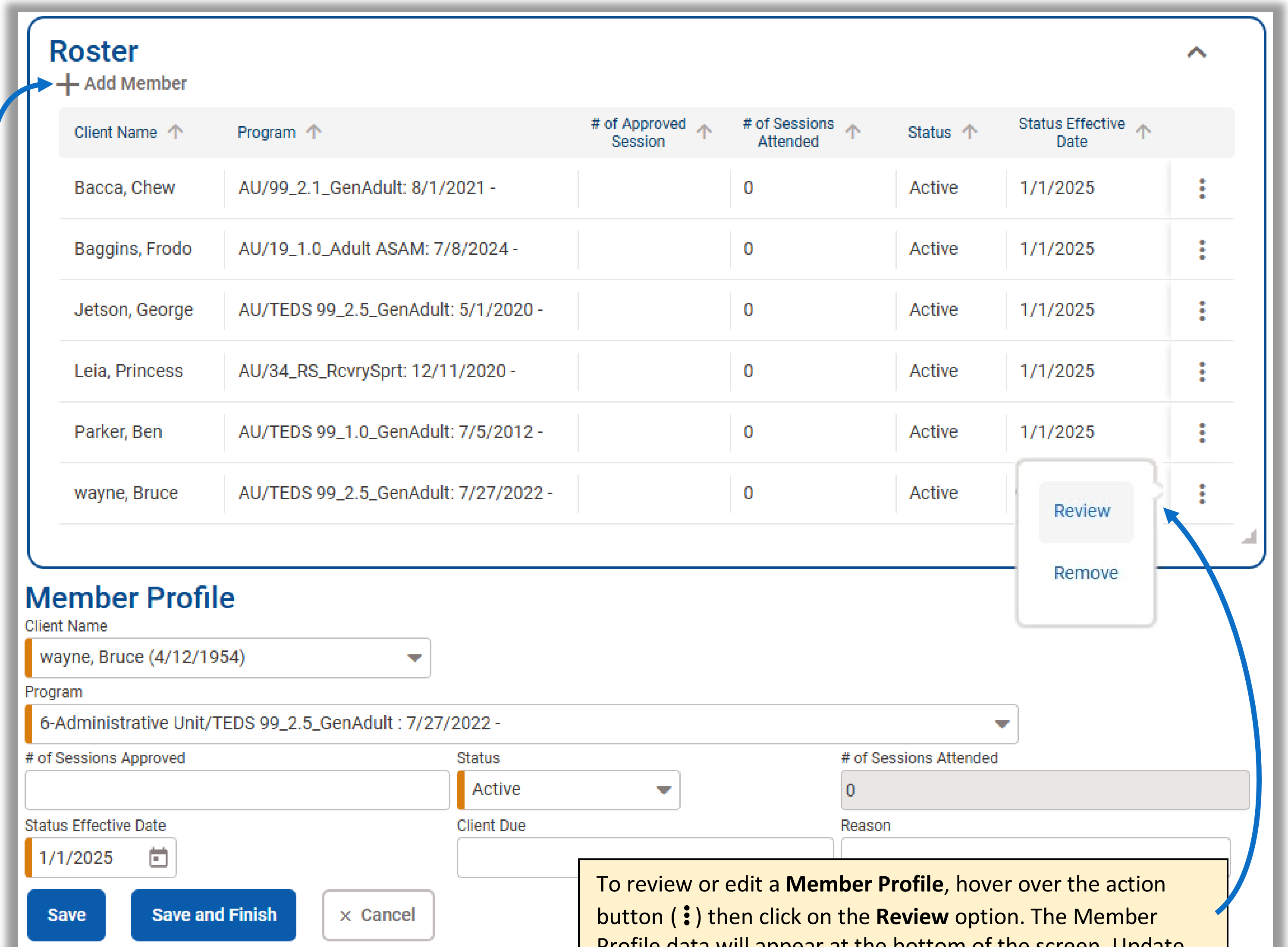
Participants in the Group must be included in the Roster for the Group before they can be noted as having attended a Group Session.

To add a new client to the Roster, click on the **+ Add Member** link.

Complete all required fields in the **Member Profile** at the bottom of the screen. Click on the **Save** or **Save and Finish** buttons to save.

Caution!

Encounters created for attendance at sessions of this group will correspond with the **Program** selected on this screen at the time that the Group Session was created. Errors here mean extra work later.



To review or edit a **Member Profile**, hover over the action button (⋮) then click on the **Review** option. The Member Profile data will appear at the bottom of the screen. Update as needed then click on the **Save** or the **Save and Finish** button to save changes.

To remove a client from the Roster, hover over the action button (⋮) then click on the **Remove** option.

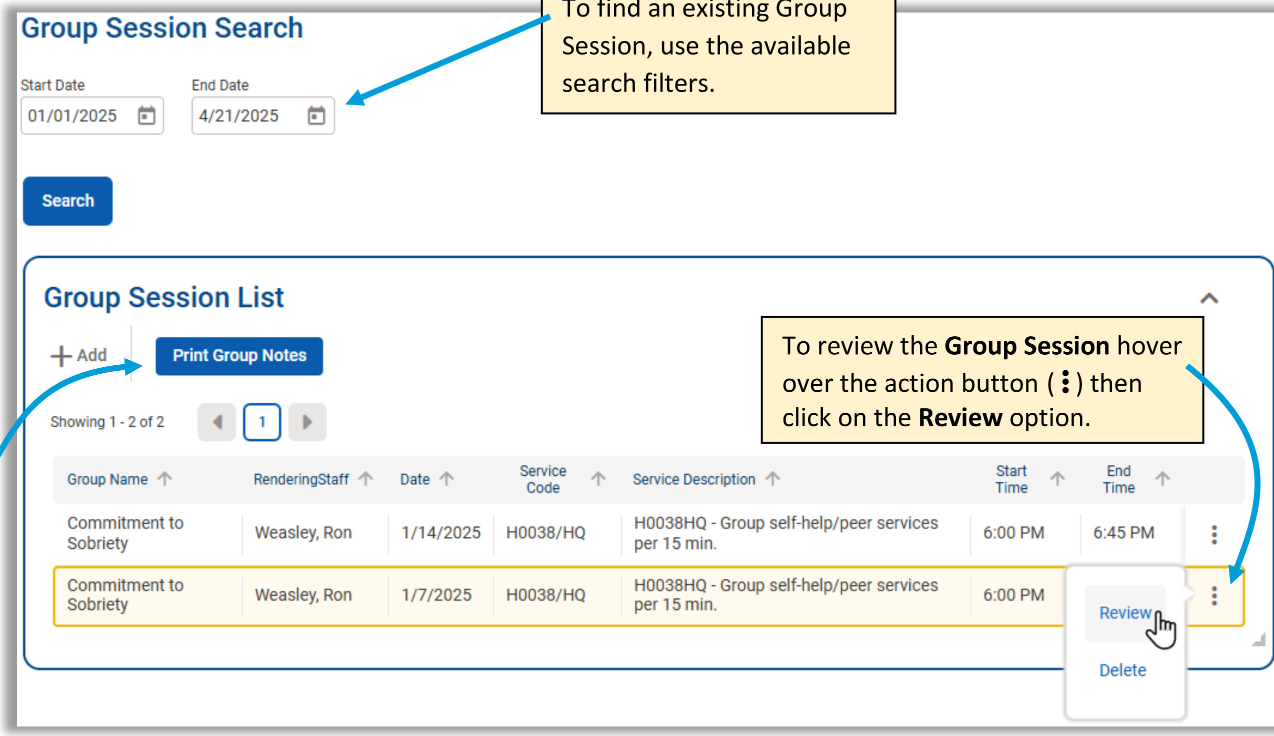
Group Session Search screen

Navigate to the **Group Session Search** screen by clicking on Group List in the blue Navigation bar to the left of the screen. Once at the Group Profile Search screen, to view a Session List for any Group, hover over the action button (⋮) then click on the **Session List** option. To find an existing Group Session, use the available search filters then click on the Search button.

Tip! Participants in the Group must be included in the Roster for the Group before they can be noted as having attended a Group Session.

To add a new **Group Session**, click on the **+ Add** link.

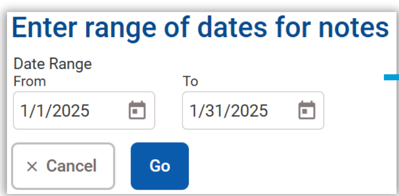
To find an existing Group Session, use the available search filters.



To review the **Group Session** hover over the action button (⋮) then click on the **Review** option.

Print Group Notes

To print a list of the Group Notes for several Group Sessions in one screen, click on the **Print Group Notes** button.

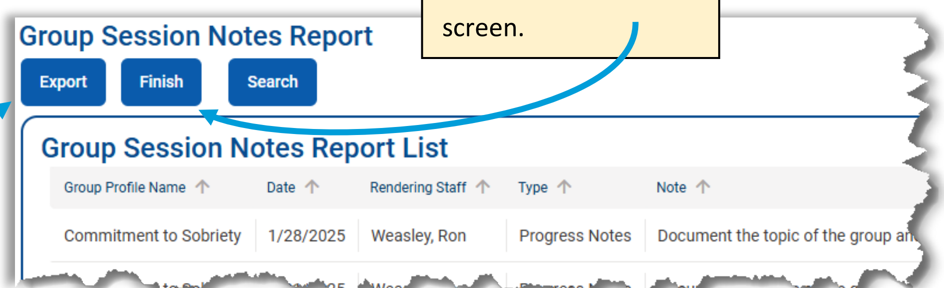


Enter a date range then click on the **Go** button.

Click on the **Search** button to change the date range then click on the **Search** button again to apply the adjustment.

Click on the **Finish** button to close the screen.

Click on the **Export** button to export the data.



Group Session

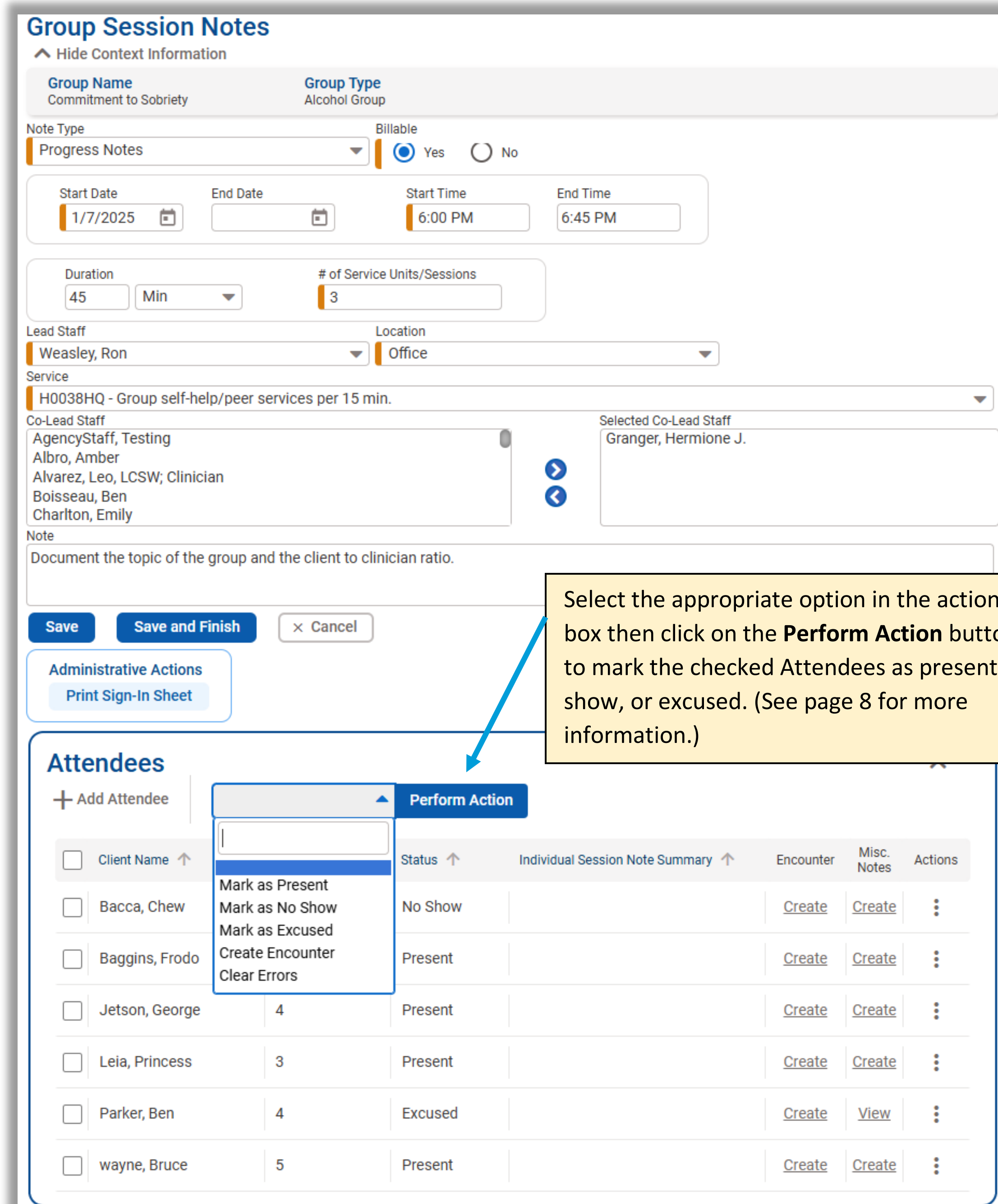
Complete each required field in the Group Session screen.

To select Co-Lead Staff member(s), click on a name listed in the **Co-Lead Staff** box then click on the > button to move the selection to the **Selected Co-Lead Staff** box.

Tip! To select more than one **Co-Lead Staff** at once, hold down the Ctrl key while clicking on names in the **Co-Lead Staff** box.

Enter the notes that are applicable to the entire Group Session into the **Notes** box.

Click the **Save** or the **Save and Finish** button to save the **Group Profile**.



Select the appropriate option in the action box then click on the **Perform Action** button to mark the checked Attendees as present, no show, or excused. (See page 8 for more information.)

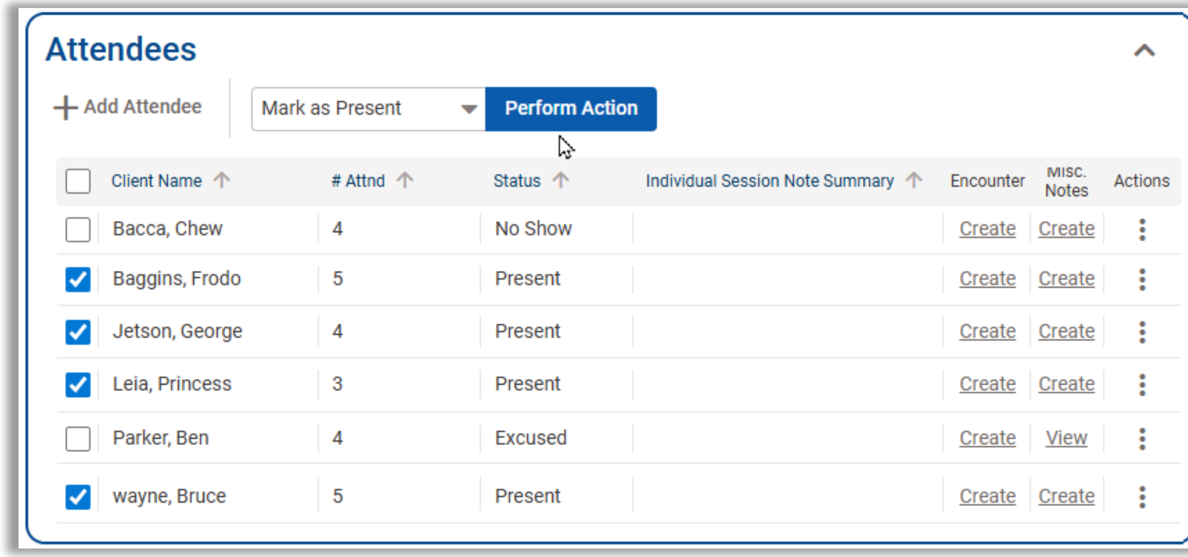
Marking Attendance at a Group Session

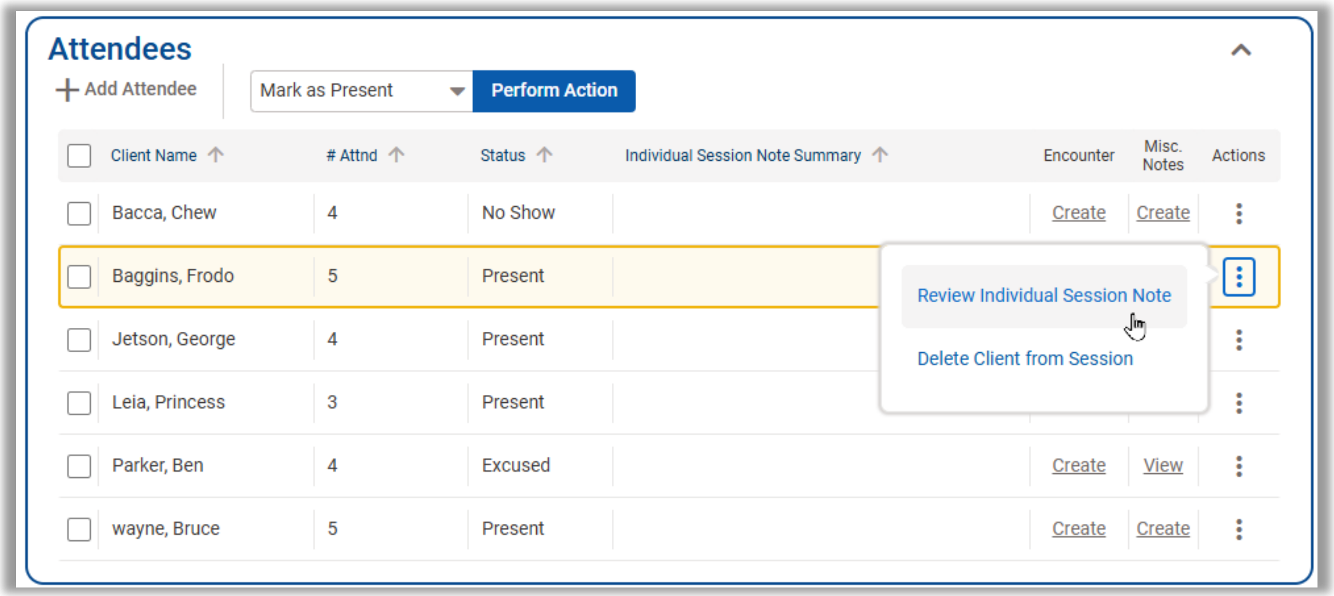
To mark attendees as **Present**, check the box to the left of each Client Name, then select the **Mark as Present** option from the action box then click on the **Perform Action** button.

To mark attendees as **No Show**, check the box to the left of each Client Name, then select the **Mark as No Show** option from the action box then click on the **Perform Action** button.

To mark attendees as **Excused**, check the box to the left of each Client Name, then select the **Mark as Excused** option from the action box then click on the **Perform Action** button.

Save the Attendance by clicking on the **Save** or the **Save and Finish** button.





Add Individual Session Notes

For each client who attended the meeting, hover over the action button (⋮) then click on the **Individual Session Note** option. Enter and save the notes specific to that individual.

Repeat for all clients who attended the meeting.

Creating Encounter Notes for a Group Session

There are two methods available to create Encounter Notes for a Group Session. Encounters may be created one client at a time, or they may be created all at once for all clients who have an Individual Session Note and have been marked Present at that session. Both methods require preparation in advance.

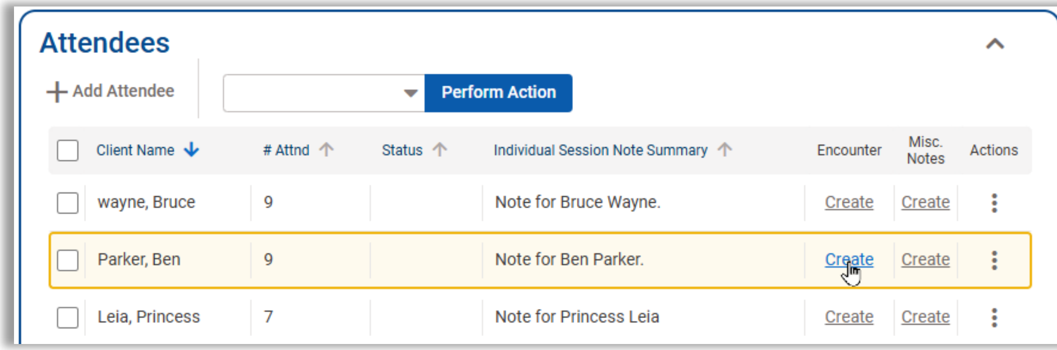
Before Creating Encounter Notes from a Group Session:

1. Verify that each Individual Session Note <u>**only**</u> includes details for the specific client whose name is listed on the same row.
2. Verify that the client attended the meeting and has been marked as Present. (See page 8.)

Before Creating Encounter Notes from a Group Session

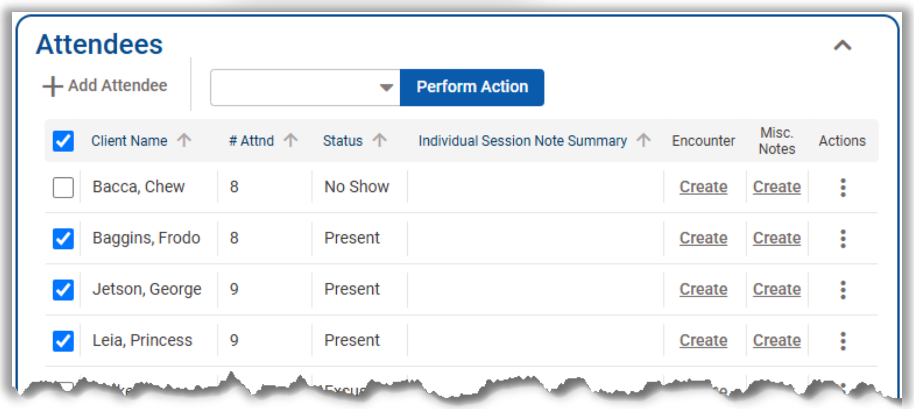
Before creating any **Encounter Notes** from a Group Session, mark **Attendance** and add an **Individual Session Note** for every client.

See page 8 for assistance with marking attendance.



Creating a Single Encounter Note from a Group Session

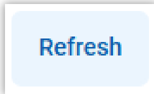
To create a single Encounter, hover over the **Create** link in the **Encounter** column for a client. Verify that their **Individual Session Note** is for the correct client and that the client has been marked as **Present**. Click on the **Create** link to create an Encounter.



Creating Encounter Notes for All Clients Marked Present

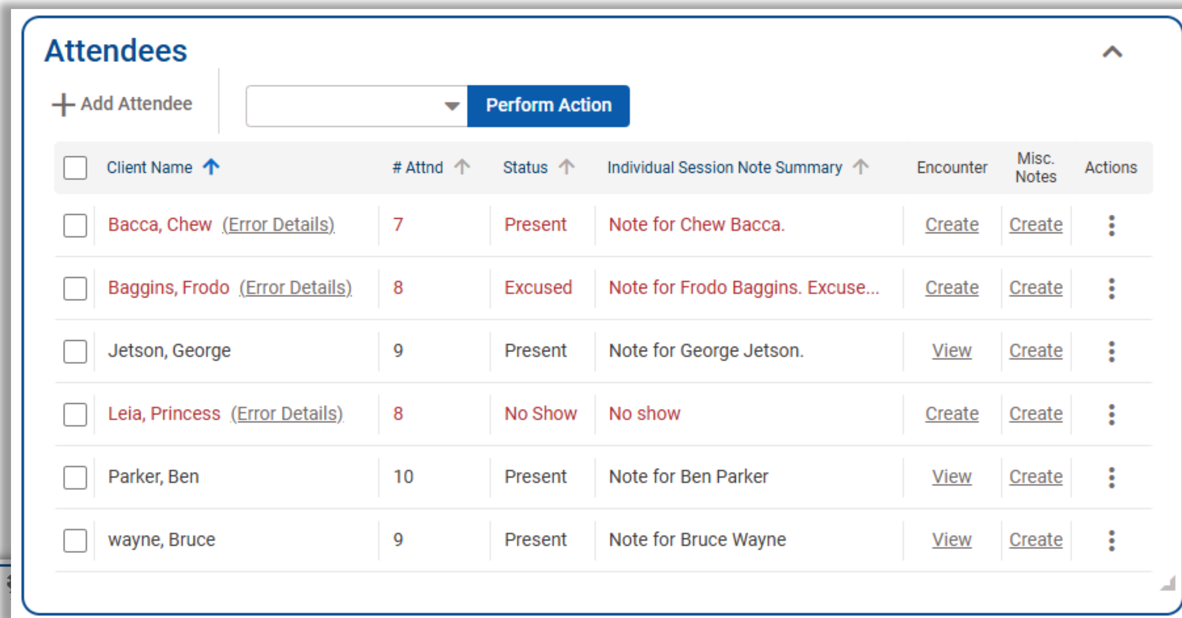
To create Encounter Notes for all Clients who have attended a Group Session, first verify that an **Individual Session Note** has been created for each client and only includes details for the specific client whose name is listed on the same row. Next, verify that all clients who attended that session have been marked as **Present**.

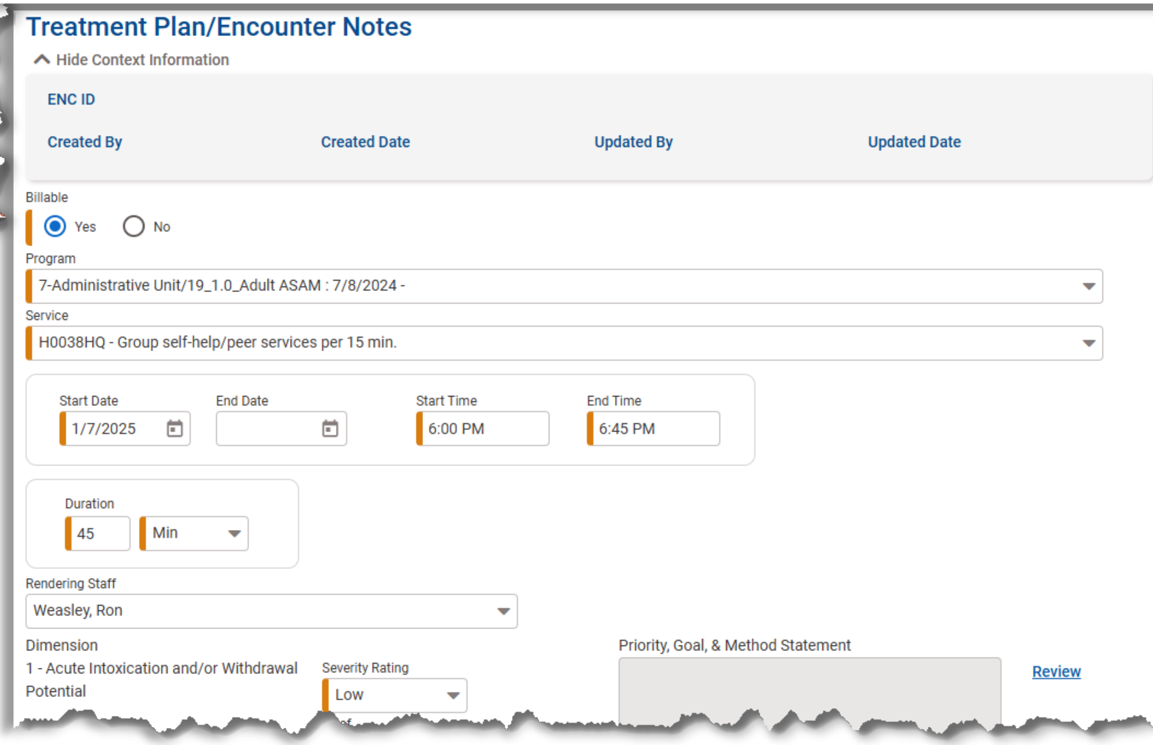
Finally, check the box to the left of each Client Name, then select the **Create Encounter** option from the action box then click on the **Perform Action** button. This will start a background process which will temporarily lock the Group Session screen for that Group Session as it creates and signs each Encounter Note.



Once the background process is complete, please refresh the screen.

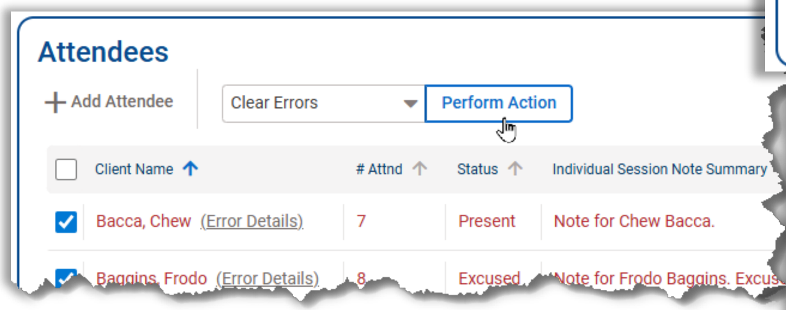
After an Encounter has been created for a client, the **Create** link will be replaced with a **View** link. Click on the **View** link to see the Encounter for that client.





Next, check for errors. Errors will appear for any client for whom the background process does not have valid information. For example, any client who has not been marked as Present will have an error message to that effect.

Click on the **Error Details** link to see each error message. Please read all errors and take any actions indicated by the content of the error message.



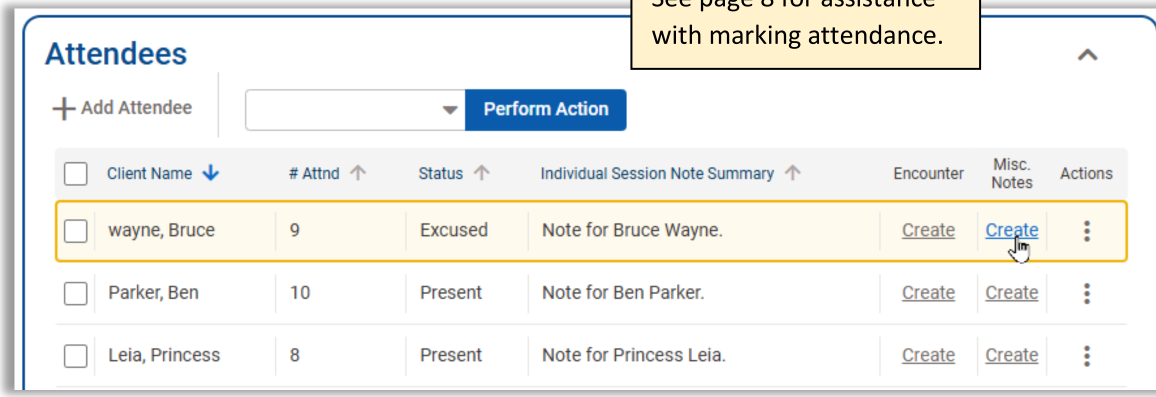
To clear the error messages, check the box to the left of each Client Name, then select the **Mark as Clear Errors** option from the action box then click on the **Perform Action** button.

Tip! It is recommended that you do not create an Encounter Note if the client did not attend the group meeting. Please create a Misc Note instead. (See page 11.)

Creating a Misc Note from a Group Session

Before creating a **Misc Note** from a Group Session, please mark Attendance then save your changes by clicking on the **Save** or the **Save and Finish** button.

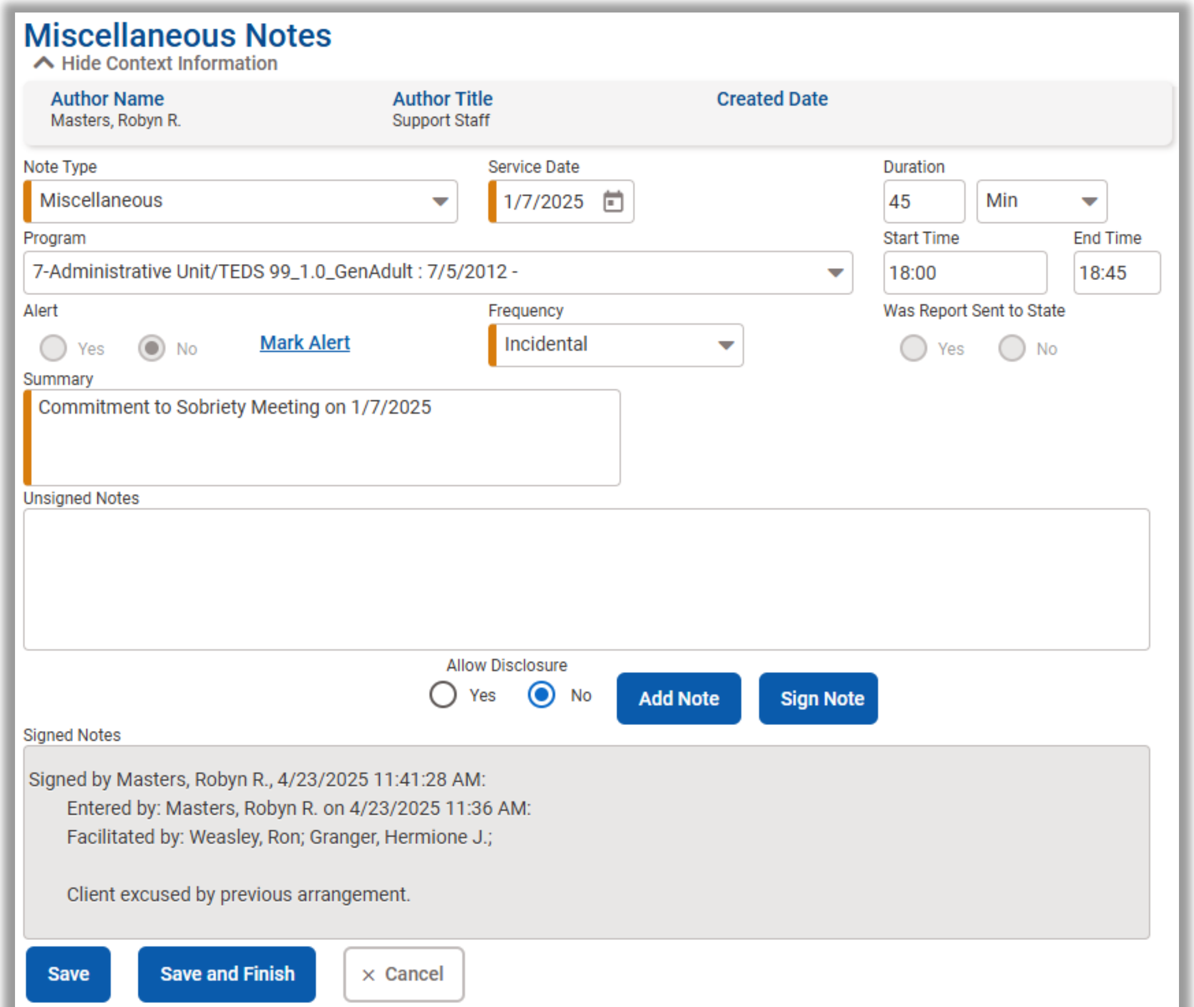
See page 8 for assistance with marking attendance.



Once Attendance has been marked, hover over the **Create** link in the **Misc Notes** column for the selected client. Before clicking on the link, verify that the yellow highlight is highlighting the correct client. Then, click on the **Create** link to create the Misc Note.

Complete all required fields then click on the **Save** or **Save and Finish** button to save.

Once a **Misc Note** has been created for that client, the **Create** link will be replaced with a **View** link. Click on the **View** link to see the **Misc Note** for that client.



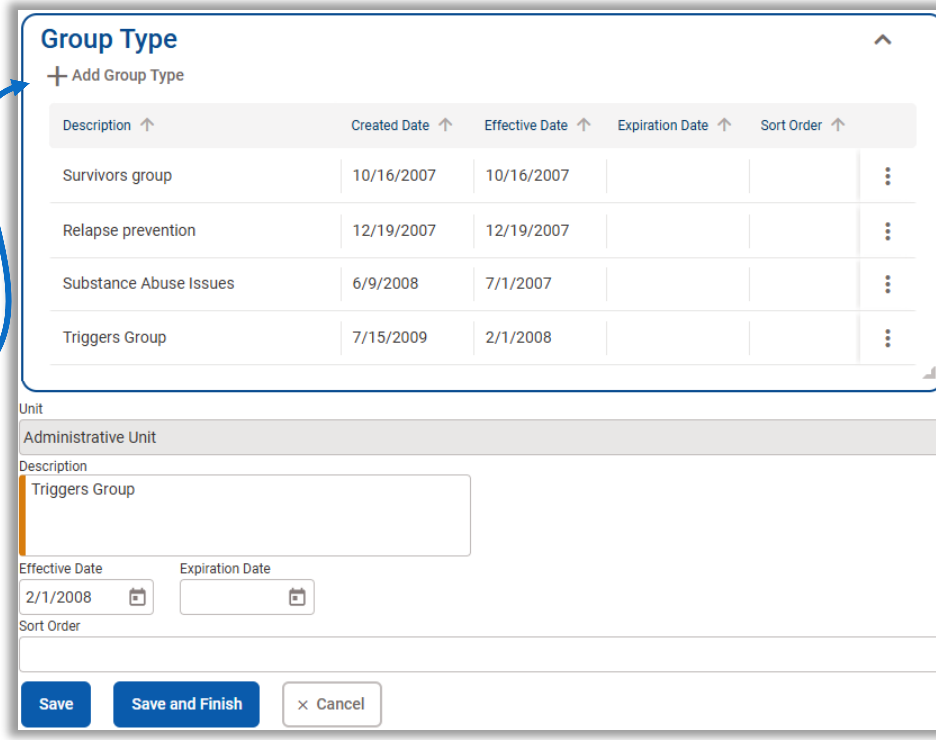
Tip! When the client did not attend the meeting, erase the group section of the note. It is not relevant to this client and will only be a distraction.

Please see the **Notes Guide** for assistance in creating quality Misc Notes.

Appendix: Setup Group Types (For Navigator Use Only)

Navigate to the **Group Type** screen by clicking on **Group List** then selecting the **Group Type** option. **Group Types** allow an agency to organize Groups into categories.

Proceed with Caution! After a Group Type has been edited, it may appear to other staff that the Group Type has disappeared. **Please communicate with all applicable staff when changes are made.**



Add a new Group Type

To add a new **Group Type**, click on the **+ Add Group Type** button. Complete all required fields then click on the **Save** or **Save and Finish** button to save.

Edit a Group Type

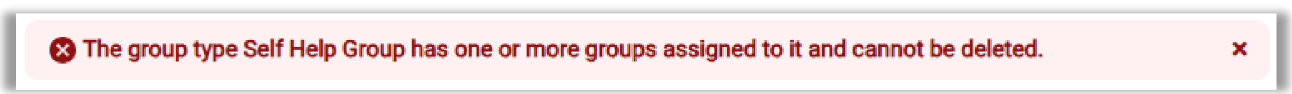
To edit a **Group Type**, hover over the action button (**⋮**) then click on the **Edit** option. The bottom of the screen will be populated with the data for the selected **Group Type**. Update as needed then click on the **Save** or **Save and Finish** button to save.

To Expire a Group Type

To expire a **Group Type**, hover over the action button (**⋮**) then click on the **Edit** option. Next, enter a date in the **Expiration Date** box. Click on the **Save** or **Save and Finish** button to save.

Note: A future date may be entered into the **Expiration Date** box. Once that date has passed, groups assigned to that **Group Type** will continue to appear in the list, but the **Group Type** will no longer be an option in drop-down boxes.

To Remove a Group Type



To remove a **Group Type**, you must first reassign each group which is currently assigned to that **Group Type** to another **Group Type**. Once no groups are assigned to that **Group Type**, it can be removed. To do so, hover over the action button (**⋮**) then click on the **Remove** option. There is no prompt to ask you to verify that this action is desired. When no groups are assigned to that **Group Type** then it will simply be removed.