From the Office of Health Informatics

Quick Reference Guide Document a Therapeutic Group Note

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This Quick Reference Guide (QRG) demonstrates documenting a Therapeutic Group Note.

Common Buttons & Icons

Therapeutic Notes	**Therapeutic Notes** button
⌄	Dropdown 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** dropdown arrow.

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

NOTE: **If a relationship has not already been established with the patients, address the Establish Relationship pop-up 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 not required.

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

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

STEP 9: **Update** the **Facilitated By** as needed; it is auto populated with 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 free text, voice to text recognition, or auto text.

Complete Patient Specific Note Documentation

Charge Code and Time fields automatically populate based on the group level documentation. Once the group note is done, updates can be completed on individual patients.

- **From the Therapeutic Notes page:**

STEP 1: Click the **Expand** icon for the desired patient 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: Free text the new outcome as it relates to this patient only.

STEP 8: Click the **Status** dropdown arrow.

STEP 9: Click the appropriate status.

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

NOTE: **As before, auto text, free text, or voice to text can be used.**

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

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

NOTE: **If documentation is incomplete use the Save All option. 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** dropdown arrow.

STEP 2: Select the appropriate patient list.

STEP 3: Click the **Expand** icon for the patient to be removed.

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 dropdown arrow.

STEP 2: Select the appropriate patient list.

STEP 3: Click **Signed Notes**.

STEP 4: Select the desired note 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 typing.**

STEP 9: Select the appropriate provider.

STEP 10: Click the **Comment** field and free text 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** dropdown.

STEP 2: Select the appropriate patient list.

STEP 3: Select the note 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 pop-up.

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