

Group Progress Notes User Guide



City and County of San Francisco

Introduction:

This document guides users through the “Group” progress notes pathway in Avatar.

For direction on writing Individual progress notes, go to “Individual Progress Notes User Guide v2013-12-23.pdf”

Usually, after completing a group session, the clinician will then write a group note (and then individualize). The form used for this purpose is “*Progress Notes (Group And Individual)*”.

The progress notes form has 2 sections, “Group” and “Individual”.

Work begins on the “Group” section and then continues on the “Individual” section.

Creating Group Progress Notes:

1. Go to “**Progress Notes (Group and Individual)**”.
Begin at **Group Default Notes** section.

2. At **Date of Group**, enter service date

3. At **Practitioner**,
enter clinician name “last,first”

8. At “**User To Send Scratch Note To-Do Item To**”,
select your own name.

9. At “**Note Type**”, select “Group” or other
appropriate code from drop-down list

4. At **Progress Note For**,
Select ONLY “New Service”.
Choose “New Service” for
billable or non-billable (no-
show or admin)

5. At **Group Name or Number**,
enter group and view names of group members
in grey box to the immediate right.

6. Do **NOT** click “**File Note**” button

7. In text box labeled “**Note**”, type initial
paragraph/s about group session

10. If intern, select **Note Type** code that
includes “cosign”.
Then select supervisor from
“User To Send Co-sign...” box)

The screenshot shows a web-based form titled "Progress Notes (Group and Individual)". The form is divided into several sections:

- Individual Progress Notes** (left sidebar): Includes "Group Default Notes" and a "Submit" button.
- Date Of Group**: A date field set to "03/05/2013" with a calendar icon.
- Practitioner**: A text field containing "HOM,KELLEE (000015)".
- Progress Note For**: Radio buttons for "Existing Service", "Existing Appointment", "Independent Note", and "New Service" (which is selected).
- Group Name Or Number**: A text field containing "Westside Bipolar Support Group W am (143)". To its right is a grey box listing group members: "TREY, GARRETT (281) Episode: 1", "LEWIS, JOHN (292) Episode: 1", and "MCCOURT, FRANK (981243889) Episode: 1".
- User To Send Scratch Note To-Do Item To**: A dropdown menu with "KHOM" selected.
- Note Type**: A dropdown menu with "Group" selected.
- User To Send Co-Sign To-Do Item To**: A dropdown menu.
- Note Addresses Which Existing Service/Appointment**: A dropdown menu.
- Group Service Member Information**: A scrollable list of group members.
- Note**: A text area containing "1st paragraph/s about the group sessio. Type in this box.".
- File Note**: A button.

Numbered callouts (1-10) are overlaid on the form, providing instructions for each step of the process.

11. At “**Service Program**” box, select desired program name. Do NOT select “EPISODE”

12. At “**Service Charge Code**”; Enter word/code (e.g. “DBT Group Therapy”). See Jan 2013 CPT Code changes.

13. At “**Location**”, select as appropriate.

14. Do NOT click “File Note”.

15. Enter the total number of clients attending "group session".

16. Enter “**Practitioner Face To Face Time (in minutes)**” for group. Enter total time without multiplying time by number of clients. In the example above, 63 minutes was time counted from first client arrival till last client departure from group session. Do NOT multiple “63 minutes” x (Number of clients). Avatar will automatically calculate individual client service charge. Then add “**Practitioner Doc and Travel Time (in minutes)**”. After filing group note – these numbers cannot be changed.

Adding walk-in and Removing the no-show client from group session:

Avatar 2011

Home Progress Notes Courses Preferences Lock Sign Out Switch Help JHEPWORTH

Progress Notes (Group and Individual)

Individual Progress Notes
Group Default Notes

Submit

Service Program Westside Outpatient Clinic (89052)

Practitioner Face to Face Time (minutes) 63

Service Charge Code

Practitioner Doc and Travel Time (minutes) 24

Co-Practitioner

Number Of Clients In Group

Add Client To Group

Client To Be Added To Group

Episode Number

Remove Client From Group

Removal Selection

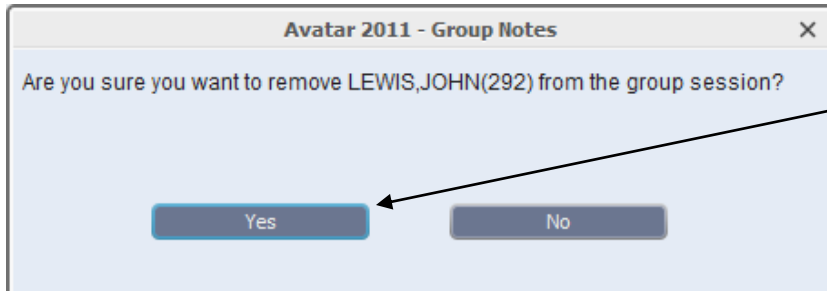
- LEWIS,JOHN(292)
- MCCOURT,FRANK(981243589)
- TREY,GARRETT(281)

AVCALPMLIVE (SAMPLE) 03/05/2013 10:01 AM 99%

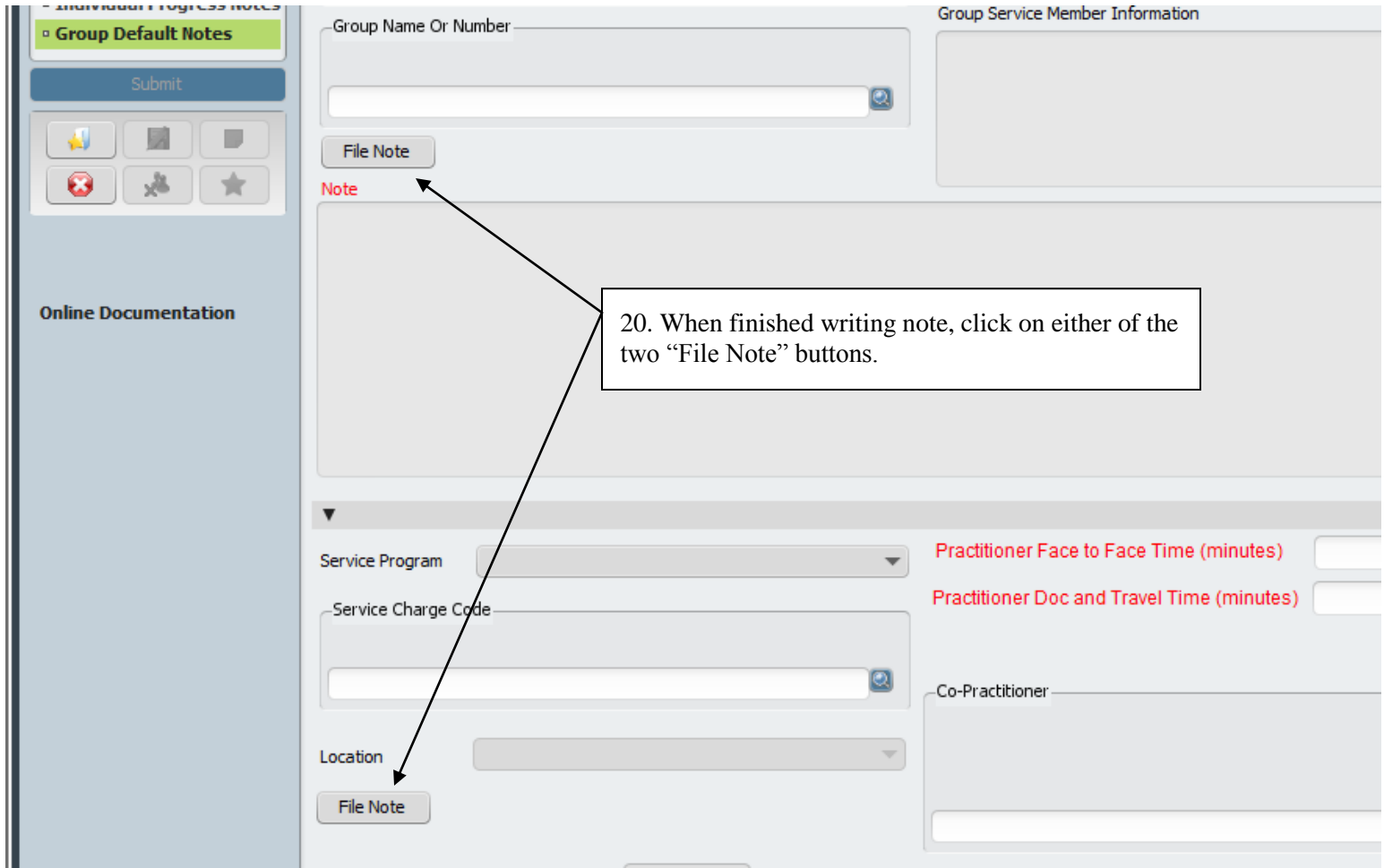
17. Click **“Add Client To Group”** button to add walk-in client to group session.

Note: Walk-in activity is independent of Group Membership. This means that it is not necessary for walk-in client to become an official group member.

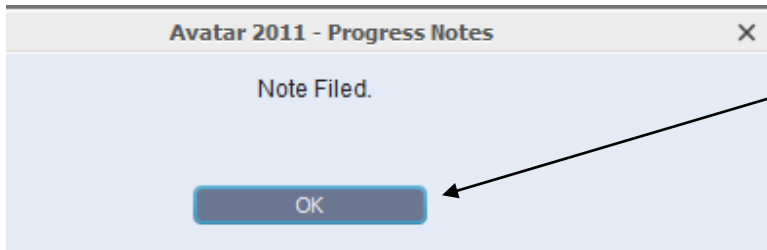
18. Click **“Remove Client From Group”** button to remove ‘no-show’ client (e.g., John Lewis) from group session



19 After selecting client name for removal (above), Dialogue box appears. This confirms your intent to remove client from this group session:

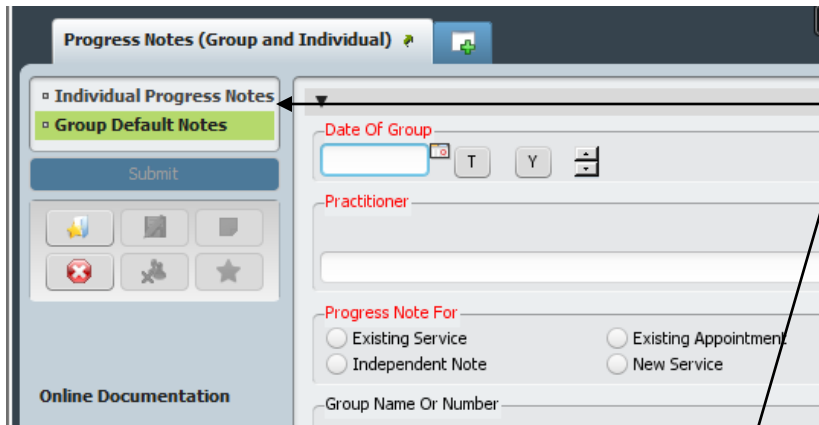


20. When finished writing note, click on either of the two "File Note" buttons.

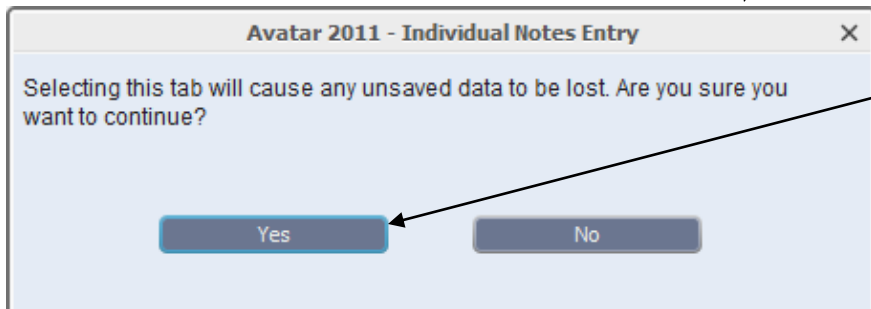


21. The “Note Filed” alert will appear. Click “OK” to complete the process. Now your work on the **Group Default Notes section** is done. You can close progress notes now and then resume instruction on the following page (8) at a later time. Or, you can continue the process right now by following steps 22 and 23.

Below is image of user leaving the **Group Default Notes** section and selecting **Individual Progress Notes** section



22. If you move to “Individual Progress Notes” section, in order to individualize notes per instructions that follow, Avatar will display a warning that unsaved data will be lost.



23. Go ahead and click “Yes” if you have already filed group note.

Individualize the Group Note:

After Group Note has been filed, go to “Individual Progress Notes” section to individualize the group note.

1. On right side of page, enter Group Name/Number.

2. Enter the correct “Note Date” (date that note was written).

3. Click on **Blue-outlined** grey box labeled “**Select Note To Edit**” and see your group note that Avatar has transformed into multiple individual notes - one for each group member. These individualized group notes are in limbo. The next step is to save each of these notes as draft or final.

In example, below – the individualized group note for client, Frank McCourt is selected.

Avatar 2011

Home Progress Notes Courses Preferences Lock Sign Out Switch Help JHEPWORTH

Progress Notes (Group and Individual)

Individual Progress Notes
Group Default Notes

Select Client

4. Selected note belongs to client Frank McCourt. Selection is **Green**.

5. Note that Avatar has re-coded **Progress Note For** as “**Existing Service**”.

Select Episode
Episode # 1 Admit : 06/19/2012 Discharge : None Program : W...

Progress Note Entry
Progress Note For
 Existing Service Existing Appointment
 Independent Note New Service

File Note [ADP Regulation for documenting progress towards treatment goals](#)

Notes Field
1st paragraph/s about the group sessio. Type in this box.

Select Note To Edit
Service Date: 03/05/2013 DBT GROUP THERAPY (H2015GD) MCCOURT,FRANK(981243589)
Service Date: 03/05/2013 DBT GROUP THERAPY (H2015GD) MCCOURT,FRANK(981243589)
Service Date: 03/05/2013 DBT GROUP THERAPY (H2015GD) TREY,GARRETT(281) HOM,KELI

Note Type
Group
User To Send Co-Sign To Do Item To

AVCALPMLIVE (SAMPLE) 03/05/2013 10:16 AM 99%

Avatar JHEPWORTH

Home Progress Notes

Progress Notes (Group and Individual)

Individual Progress Notes
Group Default Notes

Submit

Online Documentation

1st paragraph/g about the group sessio. Type in this box.
Type the 2nd paragraph about client Frank McCourt...

Date Of Service: 03/05/2013 T Y

Service Program: Westside Outpatient Clinic (89052)

Service Charge Code: DBT GROUP THERAPY (H2015GD)

Location: Office

Practitioner Face to Face Time (m inutes): []

Practitioner Doc and Travel Time (m inutes): []

Practitioner: HOM,KELLEE (000015)

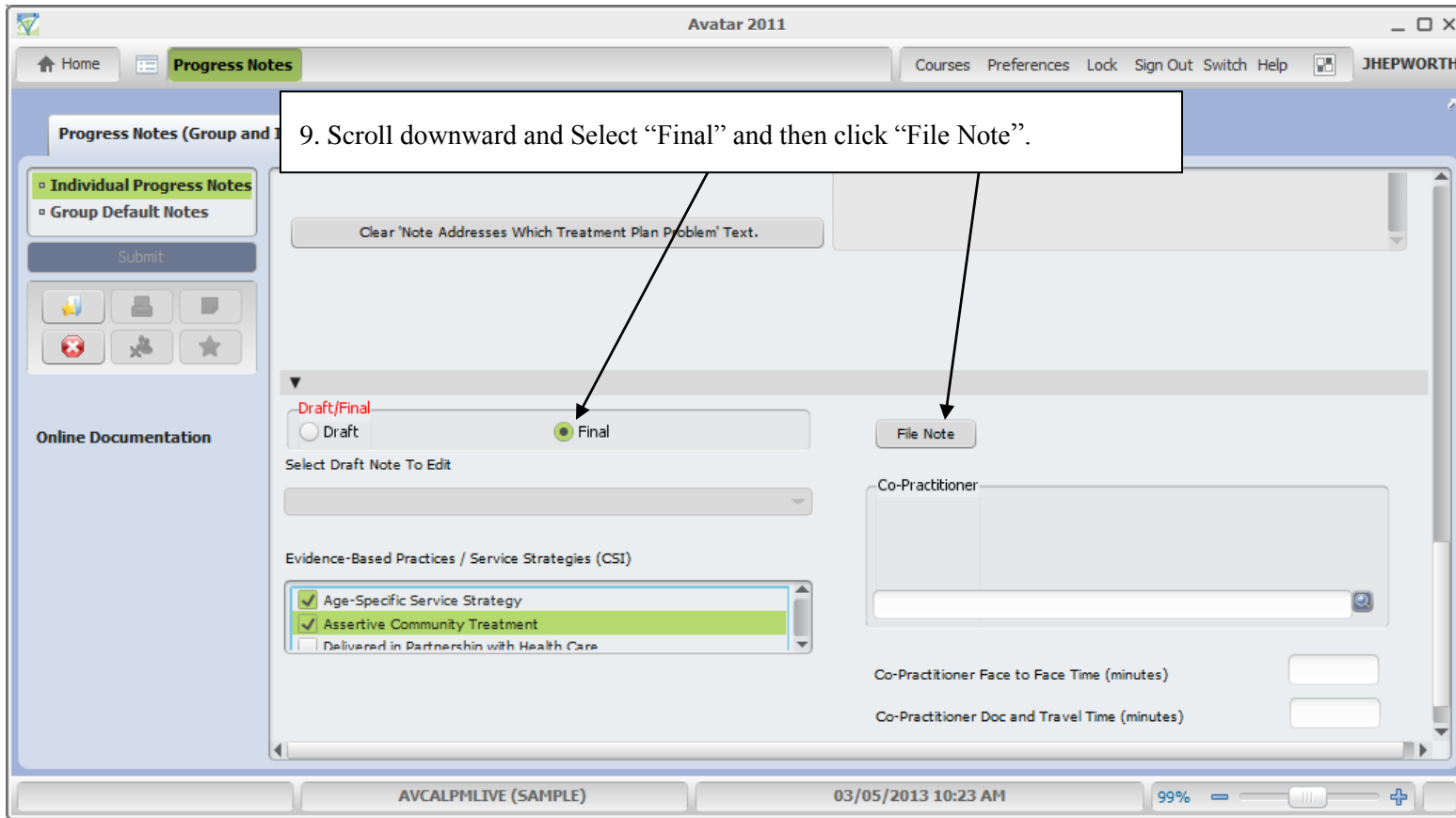
03/05/2013 10:20 AM 99%

6. After selecting note, edit the **Notes Field** by adding a 2nd paragraph relevant to client “Frank McCourt”.

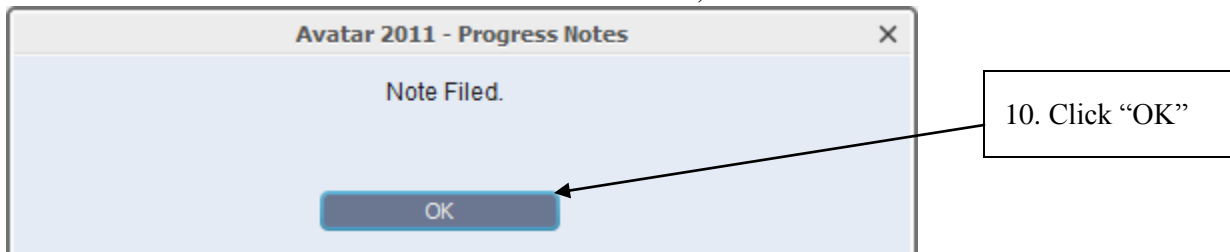
7. Scroll to bottom of page to see that Practitioner Face to Face Time and Doc/Travel Time boxes are empty. This data is not lost, but hidden from view. There is no need to re-enter time.

8. Select T.P. version to link to a children’s treatment plan. Note that adult treatment plans are not linkable to progress note via this mechanism.
For adults - scroll upward to type Tx Plan reference in “Notes Field”.

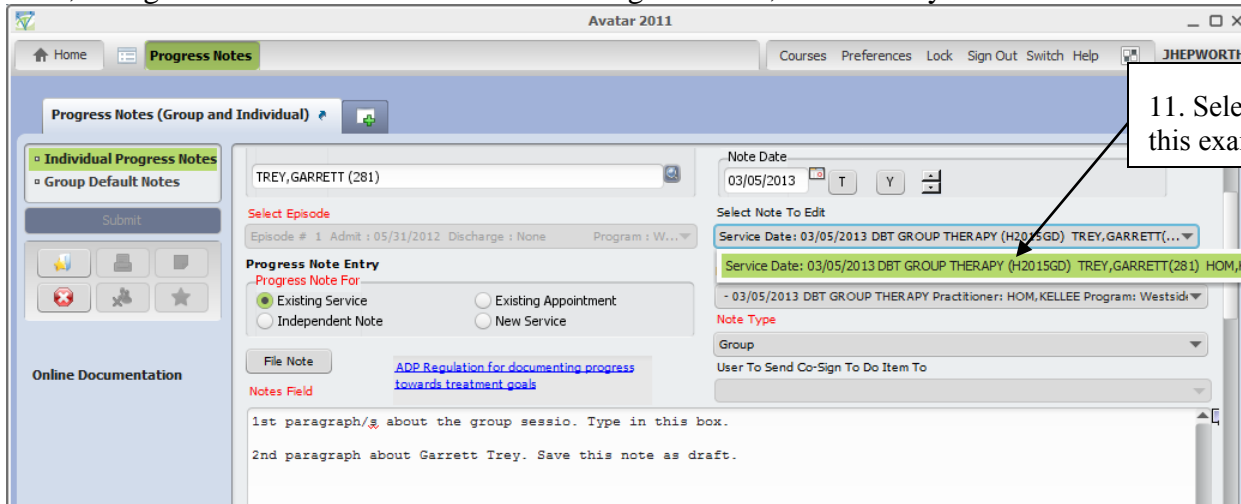
Finalizing the progress note:



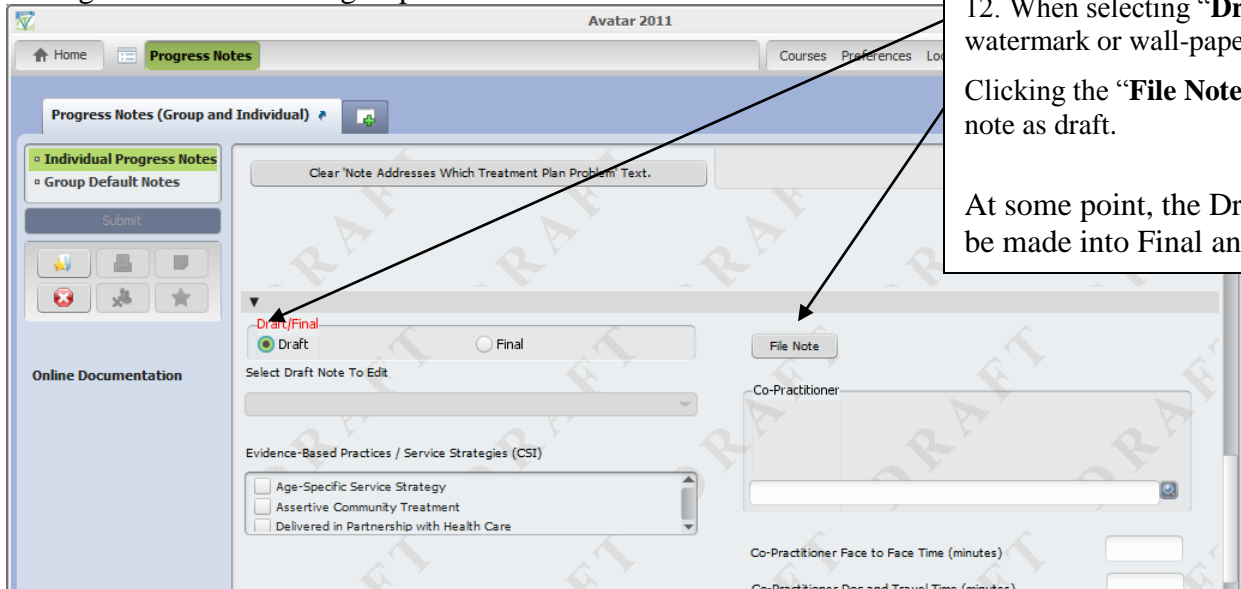
Box below confirms that note has been filed for client, Frank McCourt.



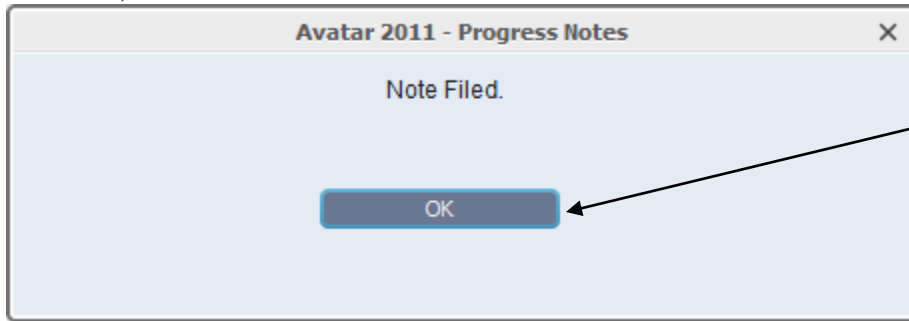
Now, a single note remains in limbo. Note belongs to client, Garrett Trey.



Saving the individualized group note as draft:

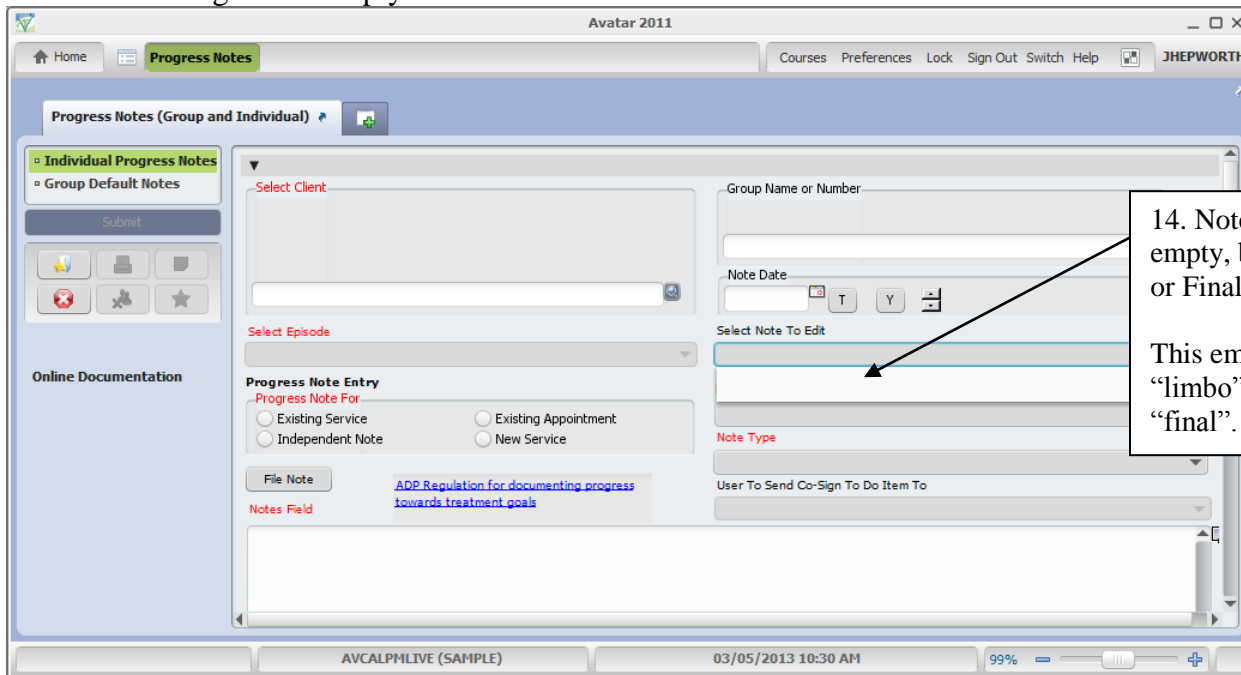


This box, below is confirmation that note was filed.



13. Click "OK"

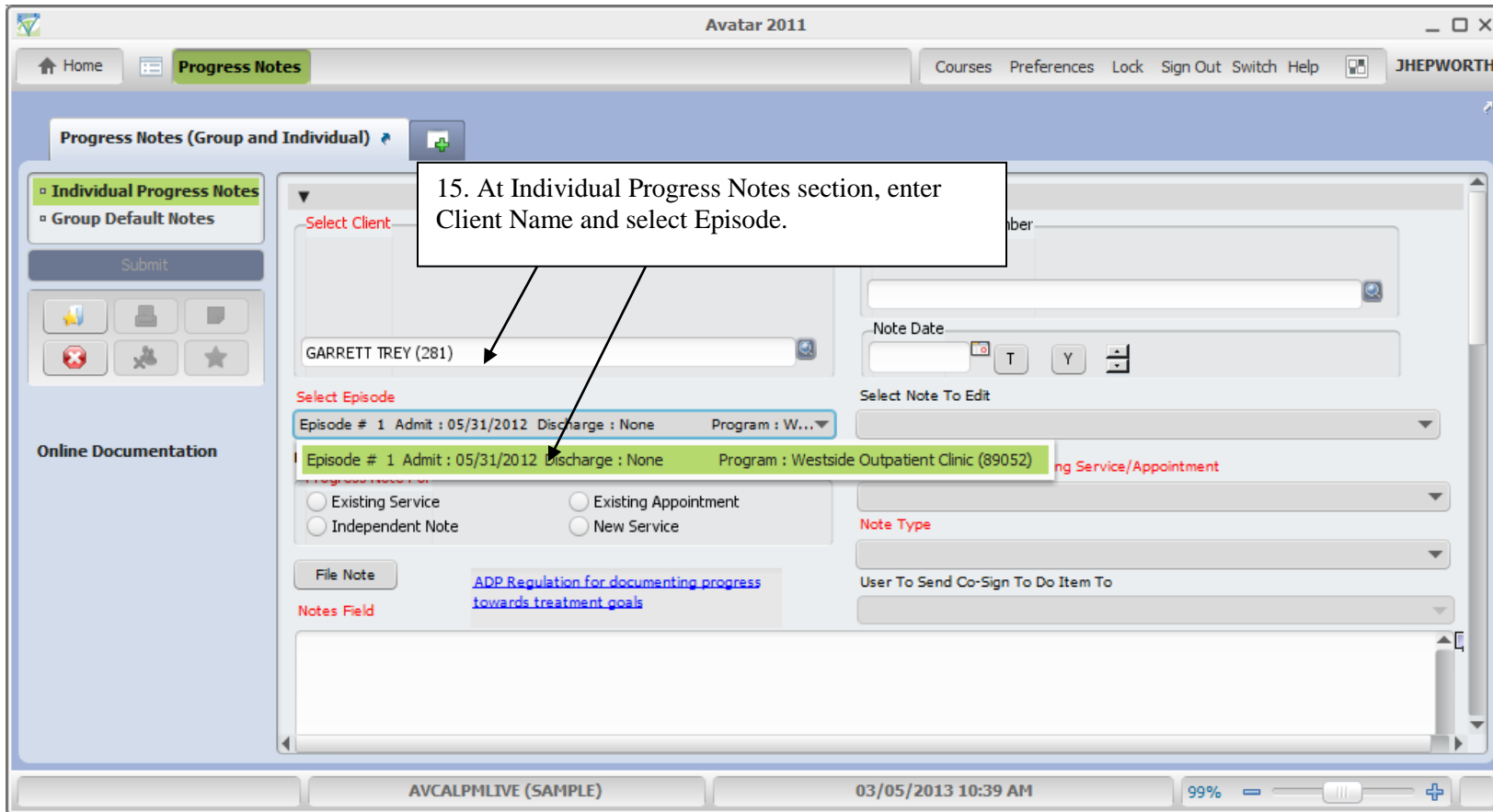
Below is an image of an empty "Select Note To Edit" box:

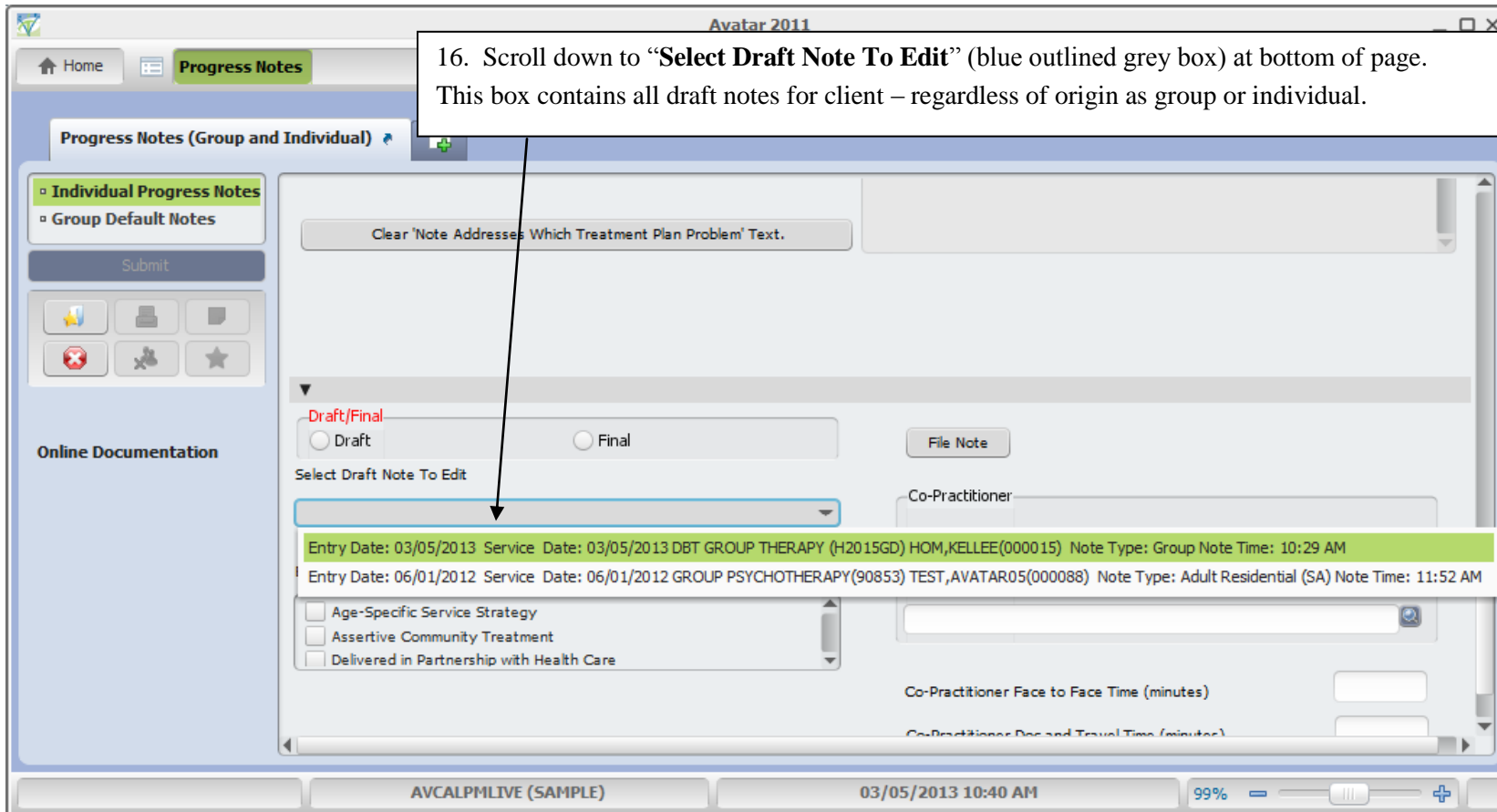


14. Note that the "Select Note To Edit" box is empty, because all notes have been saved as Draft or Final

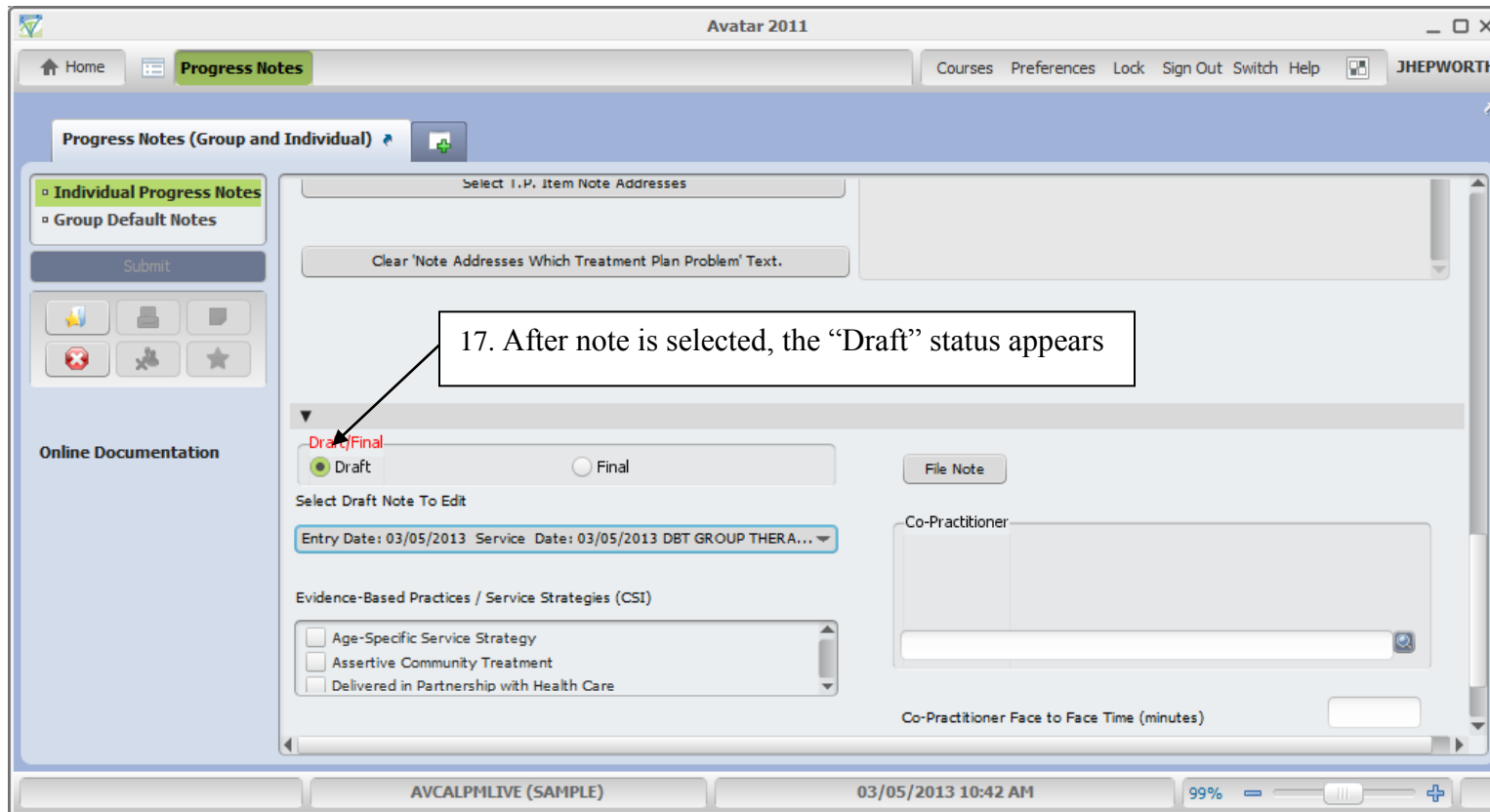
This empty box reveals that nothing remains in "limbo". All related notes are now "draft" or "final".

Retrieving draft note for Garrett Trey:





16. Scroll down to “Select Draft Note To Edit” (blue outlined grey box) at bottom of page. This box contains all draft notes for client – regardless of origin as group or individual.

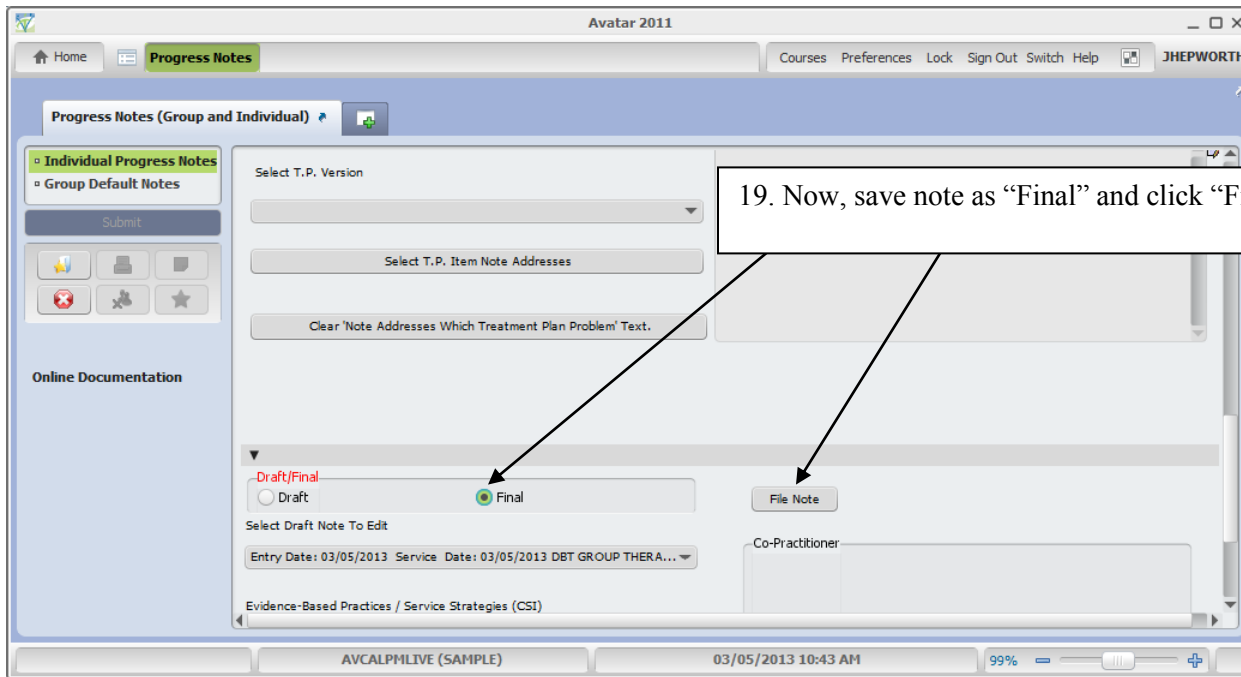


Making final edits. .

The screenshot shows the Avatar 2011 software interface. The main window is titled "Avatar 2011" and has a menu bar with "Home", "Progress Notes", "Courses", "Preferences", "Lock", "Sign Out", "Switch", and "Help". The "Progress Notes" menu is active. Below the menu bar, there is a "Progress Notes (Group and Individual)" section with a "Submit" button and several icons. The main form area is divided into several sections:

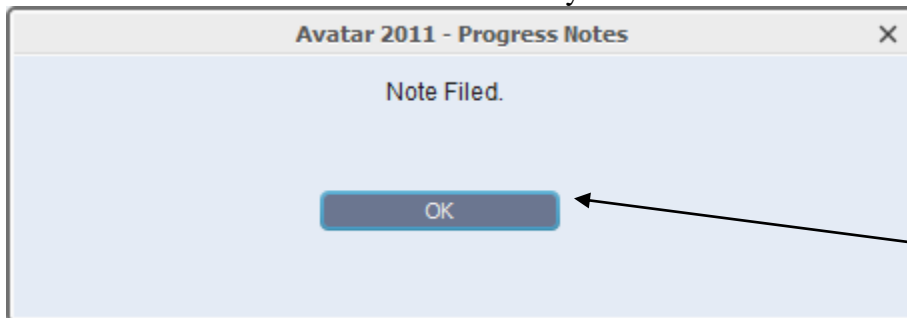
- Select Client:** A dropdown menu showing "TREY, GARRETT (281)".
- Group Name or Number:** An empty text field.
- Note Date:** A date and time picker showing "T Y".
- Select Episode:** A dropdown menu showing "Episode # 1 Admit : 05/31/2012 Discharge : None Program".
- Progress Note Entry:** A section with radio buttons for "Existing Service" (selected), "Independent Note", "Existing Appointment", and "New Service".
- File Note:** A button labeled "File Note".
- Notes Field:** A large text area containing the text: "1st paragraph/s about the group sessio. Type in this box." and "2nd paragraph about Garrett Trey. Save this note as draft. Now, |continue editing this note.".
- Note Type:** A dropdown menu showing "Group".
- User To Send Co-Sign To Do Item To:** An empty text field.

A callout box with a black border and white background points to the "Notes Field" with the text: "18. Make final edits. Remember that the Time (minutes) is saved in Avatar, but hidden from user's view." The status bar at the bottom shows "AVCALPMLIVE (SAMPLE)", "03/05/2013 10:43 AM", and "99%".



19. Now, save note as “Final” and click “File Note”

Confirmation that note has been successfully filed:



20. Click “OK” and you are finished.

Note: an “Intern” note that is final + approved by supervisor cannot be appended.