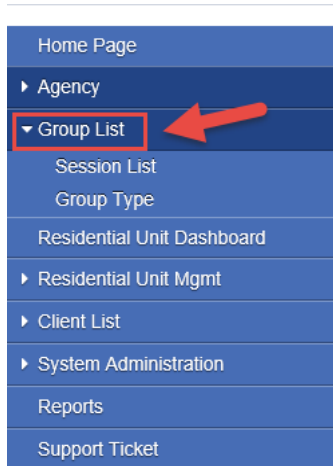


SanWITS Flow for Outpatient Providers

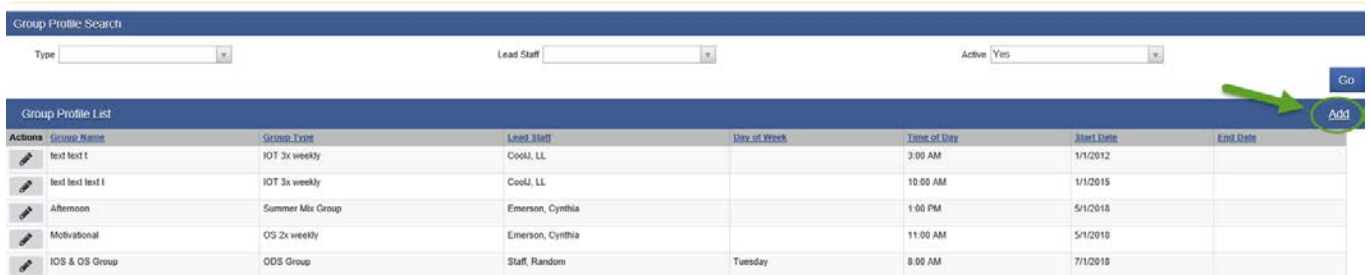
“Group List”

The Group Module is being required specifically for DMC ODS to ensure that Group Counseling encounter notes are created and billed appropriately. Group Counseling Encounters (H0005) for Outpatient Providers should only be created using the SanWITS Group List.

1. Go to **Group List** from the Navigation Pane.



2. To create a new Group Profile, click on “Add” hyperlink.



SanWITS Flow for Outpatient Providers

“Group List”

- A Group Profile should be created as needed for different types of groups.** In the Group Profile screen, please complete all the required fields for the group profile. **Note:** The “Lead Staff” and “Time of Day” fields are required for the profile; however, these fields should be edited to the appropriate lead staff and start time on each group session as needed. After completing this information please click “Save”.

Group Profile

Group Name: August Group Start Date: 8/1/2018 End Date: Day of Week: Time of Day: 9:00am

Group Type: ODS Group Lead Staff: Nunez, Janeth Room Location: Facility: Main Facility

Co-Lead Staff: Adam, Kenneth, Ailshie, Douglas, Alcazar, Shirley, Altarejos, Isabel Selected Co-Lead Staff:

Description: Motivational Group

Buttons: Cancel, Save, Finish

- After saving the Group Profile, click on the hyperlink “Edit Roster.”

Administrative Actions: Create Group Session, Print Sign-in Sheet

Roster

| Client Name | Program | Client Due | # of Approved Sessions | # of Sessions Attended | Status | Status Effective Date |
|-------------|---------|------------|------------------------|------------------------|--------|-----------------------|
| | | | | | | |
| | | | | | | |

Buttons: Show All Clients, Edit Roster

- From the Roster screen, click on “Add Member” hyperlink. **All DMC Billable Counseling Groups should have a minimum of 2 present attendees and a maximum of 12 present attendees.**

SanWITS Flow for Outpatient Providers

“Group List”

| Actions | Client Name | Program | # of Approved Sessions | # of Sessions Attended | Status | Status Effective Date |
|---------|-------------|---------|------------------------|------------------------|--------|-----------------------|
| | | | | | | |
| | | | | | | |

Client Name: _____ Program: _____
of Sessions Approved: _____ Status: _____
of Sessions Attended: _____ Status Effective Date: _____
Client Due: _____ Reason: _____

Add Member **Finish**

6. From the roster screen, type in the name of the client on the “Client Name” field.

Client Name: Program: _____
of Sessions Approved: _____ Status: _____
of Sessions Attended: _____ Status Effective Date: _____
Client Due: _____ Reason: _____

Add Member **Cancel** **Save** **Finish**

7. After selecting your client’s name, please select the correct Program Enrollment for your client.

- Client must have an active program enrollment. Please select “Active” for the Status field, then enter the Status Effective Date (the date the client joined the group).
- Status Date cannot be prior to Program Enrollment Date. After completing all the required fields, click Save.
- **You’ll need to repeat this step for each of the clients you need to add to the roster.**

SanWITS Flow for Outpatient Providers

“Group List”

| Roster | | | | | | |
|---------|-------------|---------|------------------------|------------------------|--------|-----------------------|
| Actions | Client Name | Program | # of Approved Sessions | # of Sessions Attended | Status | Status Effective Date |
| | | | | | | |
| | | | | | | |

Add Member

Client Name:

Program:

Status:

Status Effective Date:

Reason:

of Sessions Approved:

of Sessions Attended:

Client Due:

8. After adding all your clients to the Roster, click Finish.

| Roster | | | | | | |
|---------|------------------|--|------------------------|------------------------|--------|-----------------------|
| Actions | Client Name | Program | # of Approved Sessions | # of Sessions Attended | Status | Status Effective Date |
| | DMC-2, ROBERT | DMC Billing Tes/OS: 3/1/2018 - | | 0 | Active | 3/15/2018 |
| | DMC-3, MATTHEW | DMC Billing Tes/OOS 3.3 RES: 4/1/2018 - | | 0 | Active | 4/5/2018 |
| | McDonald, Ronald | Main Facility/3/OOS 3.1 RES: 5/24/2018 - | | 0 | Active | 5/25/2018 |

Add Member

Client Name:

Program:

Status:

Status Effective Date:

Reason:

of Sessions Approved:

of Sessions Attended:

Client Due:

9. Each time this Group meets, from the Group Profile screen, click on “Create Group Session” hyperlink.

Group Profile

Group Name: Start Date: End Date:

Group Type: Day of Week: Time of Day:

Lead Staff: Room Location:

Facility:

Co-Lead Staff: Selected Co-Lead Staff:

Description:

Administrative Actions:

| Roster | | | | | | | | Show All Clients | Edit Roster |
|------------------|--|------------|------------------------|------------------------|----------|-----------------------|--|------------------|-------------|
| Client Name | Program | Client Due | # of Approved Sessions | # of Sessions Attended | Status | Status Effective Date | | | |
| DMC-2, ROBERT | DMC Billing Tes/OS: 3/1/2018 - | | | | 0 Active | 3/15/2018 | | | |
| DMC-3, MATTHEW | DMC Billing Tes/OOS 3.3 RES: 4/1/2018 - | | | | 0 Active | 4/5/2018 | | | |
| McDonald, Ronald | Main Facility/3/OOS 3.1 RES: 5/24/2018 - | | | | 0 Active | 5/25/2018 | | | |

SanWITS Flow for Outpatient Providers

“Group List”

10. In the **Group Session Notes** screen, please complete all the required fields.

- If you have at least one DMC client, Note Type should be “DMC Billable.” If you selected DMC Billable for Note type, please enter YES in the Billable field.
- If the entire Group is County Billable, Note Type should be “County Billable.” If you selected County Billable for the Note Type, please enter NO for the Billable field.
- **Calculate ODS should always be YES.**
- The “Lead Staff” should be the person who provided the group session.
- Please select ***Groups ODS** for the Service field for **Outpatient Services (OS)** clients and **Intensive Outpatient Services (IOS)** clients.
- **Please enter zero for the Documentation Duration Time.**
Documentation time should be added to the individual’s Encounter screen.
- If there was Travel Time, please add it to the Group Session screen under Travel Duration. Travel time should not be added to the individual’s encounter screen
- Please enter the GROUP TYPE in the “Note” Box even though this box is showing as an optional field. The Group Note Box is a required field needed to create Encounters.

The screenshot shows the 'Group Session Notes' form. Key fields and their values are: Group Name: October Group; Group Type: ODS Group; Note Type: DMC Billable; Start Date: 8/1/2018; End Date: (empty); Dillable: Yes; Start Time: 9:00 AM; End Time: (empty); Calculate ODS units: Yes; Documentation Duration: 0 Min; Travel Duration: 0 Min; Session Duration: 90 Min; Lead Staff: Hanson, Stephanie, LMF-I, LMF-I; Total Duration: 00; Duration Type: Min; # of Service Units/Sessions: 1; Location: Non-residential Substance Abuse TX Facility; Service: *Group ODS; Co Lead Staff: Abinales, Giselle; Account, New; Acuff, Beth; Adam, Kenneth; Selected Co Lead Staff: (empty); Note: Motivational Group; Administrative Actions: Cancel, Save, Finish.

SanWITS Flow for Outpatient Providers

“Group List”

11. **Recovery Services clients should have their own group.** Recovery Services clients cannot be mixed with Outpatient Services (OS) clients or Intensive Outpatient Services (IOS) clients.

- If you have at least one DMC client, Note Type should be “DMC Billable.” If you selected DMC Billable for Note type, please enter YES in the Billable field.
- If the entire Group is County Billable, Note Type should be “County Billable.” If you selected County Billable for the Note Type, please enter NO for the Billable field.
- **Calculate ODS should always be YES.**
- The “Lead Staff” should be the person who provided the group session.
- Please select ***Recovery Service Group** for the Service field.
- **Please enter zero for the Documentation Duration Time.**

Documentation time should be added to the individual’s Encounter screen.

- If there was Travel Time, please add it to the Group Session screen under Travel Duration. Travel time should not be added to the individual’s encounter screen
- Please enter the GROUP TYPE in the “Note” Box even though this box is showing as an optional field. The Group Note Box is a required field needed to create Encounters.

Group Session Notes

Group Name: Motivational Group Session ID:

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date:

Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM

Calculate ODS units: Yes

Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hansen, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min

of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: *Recovery Service Group

Co-Lead Staff: Abrantes, Gieselle, Account, New, Acuff, Beth, Adam, Kenneth

Selected Co-Lead Staff:

Note: Motivational Group

Administrative Actions: Cancel Save Finish

SanWITS Flow for Outpatient Providers

“Group List”

12. After completing all the required fields in the Group Session Notes screen, click “Save.”

Group Session Notes

Group Name: October Group Session ID:

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date:

Billable: Yes Start Time: 9:00 AM End Time:

Calculate ODS units: Yes

Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hansen, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min

of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: Group ODS

Co-Lead Staff: Abinales, Giselle; Account, New; Acuff, Beth; Adam, Kenneth

Selected Co-Lead Staff:

Note: Motivational Group

Administrative Actions: Cancel Save Finish

13. After creating the Group Session, you will need to mark your group members as Present if they attended the session. Please select the names of the members first, then select the appropriate action. If your provider agency would like to use the session status to track No Show or Excused clients, you may do so, but this will not be required at this time.

14. Please select the names of the Group members who were Present for the Session, then under the Action drop menu select “Mark as Present” and then click on “Perform Action” hyperlink.

| Actions | Individual Note | Encounter | Client Name | # Attnd |
|---------|-----------------|-----------|------------------|---------|
| | | | DMC-2, ROBERT | 0 |
| | | | DMC-3, MATTHEW | 0 |
| | | | McDonald, Ronald | 0 |

Attendees

Perform Action Add Attendee

Mark as Present
Mark as No Show
Mark as Excused
Create Encounter
Clear Errors

SanWITS Flow for Outpatient Providers

“Group List”

15. Please select the names of the Group Members who were **Present**, under the Action drop menu, select **“Create Encounter”**, then click on **“Perform Action”** hyperlink. After doing this, the system will create Bulk Encounters for the selected clients. **All DMC Billable Counseling Groups should have a minimum of 2 present attendees and a maximum of 12 present attendees.**

| Actions | Individual Note | Misc. Notes | Encounter | Client Name | # Attnd | Status |
|---------|-----------------|-------------|-------------------------------------|------------------|---------|---------|
| | | | <input checked="" type="checkbox"/> | DMC-2, ROBERT | 5 | Present |
| | | | <input checked="" type="checkbox"/> | DMC-3, MATTHEW | 5 | Present |
| | | | <input checked="" type="checkbox"/> | McDonald, Ronald | 5 | Present |
| | | | <input type="checkbox"/> | Blueberry, Six | 2 | |
| | | | <input type="checkbox"/> | Kitty, Hello | 2 | |

16. After performing the action **“Create Encounter”** for the Group members who were marked as **Present**, you’ll receive this message: **“The Encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update.”** Please click on **“Refresh”** hyperlink from the Administrative Action box. **Note:** You may need to click **“Refresh”** more than 2 times.

The encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update.

Group Session Notes

Group Name: October Group Session ID: 100340

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date: []

Billable: Yes Start Time: 9:00 AM End Time: []

Calculate ODS units: Yes

Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hannon, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min

of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: *Group ODS

Co-Lead Staff: Adminis, Giselle; Account, New; Acost, Keith; Adam, Kenneth

Selected Co-Lead Staff: []

Note: Motivational Group

Administrative Actions: Refresh Finish

17. Once the Encounters are created, the **“View”** hyperlink will become available under the Encounter column.

| Actions | Individual Note | Misc. Notes | Encounter | Client Name | # Attnd | Status |
|---------|-----------------|-------------|----------------------|---------------|---------|---------|
| | | | View | DMC-2, ROBERT | 1 | Present |

SanWITS Flow for Outpatient Providers

“Group List”

18. For the Group Members who were “Present”, from which Bulk Encounters were created, all the information in the Encounter screen will be pre-populated **except** for the Pregnant/Postpartum question for female clients only.

- Group Counseling Encounters will have a Group Session ID.
- Service field will pre-populate. Please do **not** change the Service name.
- **Documentation Duration needs to be added to the individual’s Encounter.**
- The Start Time, End Time and Session Duration need to be adjusted if client arrives late to the session or leaves early.
- The “Used Evidence-Based Practices” will auto-populate to None. Please change to the Evidence-Based Practice that was used for the Group: Motivational Interviewing, Relapse Prevention, or both.

The screenshot shows the SanWITS Encounter screen for a Group Counseling OS service. The form is pre-populated with the following information:

- Note Type: DMC Billable
- ENG ID: 527351
- Program Name: DMC Billing Test Facility/OS : 8/20/2018
- Service: Group Counseling OS
- Start Date: 8/1/2018
- Start Time: 9:00 AM
- End Date: 10:00 AM
- Service Location: Non-residential Substance Abuse TX Facility
- Travel Duration: 15 Min
- Session Duration: 60 Min
- Documentation Duration: 10 Min
- Total Duration: 85 Min
- Contact Type: Face To Face
- Emergency: No
- Visit Type: GP-Group
- Medi-Cal Billable: Yes
- Pregnant/Postpartum: Yes
- Was an interpreter used?: No Interpreter Needed
- In what language was the service provided?: English
- Which Evidence-Based Practices were used?: Motivational Interviewing, Relapse Prevention, Other
- Diagnoses for this Service: Primary F11.11-Opioid abuse, in remission(ICD)
- Rendering Staff: Hanson, Stephanie
- Supervising Staff: [Empty]
- Administrative Actions: Release to Billing, Delete

Buttons at the bottom: Cancel, Save, Finish, and a home icon.