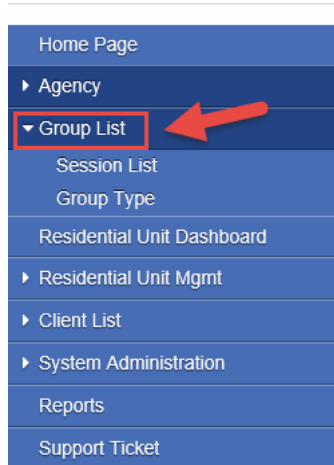


SanWITS Flow for Outpatient Providers

“Group List”

The Group Module was created specifically for ODS. Group Counseling for Outpatient Providers should only be created through the SanWITS Group List.

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



2. From the Group Profile Search screen, click on **“Add”** hyperlink.

A screenshot of the Group Profile Search screen. At the top, there are search filters for Type, Lead Staff, and Active. Below the filters is a table titled "Group Profile List". The table has columns for Actions, Group Name, Group Type, Lead Staff, Day of Week, Time of Day, Start Date, and End Date. The "Add" button is highlighted with a green circle and a green arrow.

Actions	Group Name	Group Type	Lead Staff	Day of Week	Time of Day	Start Date	End Date
	text text 1	IOT 3x weekly	Cook, LL		3:00 AM	1/1/2012	
	text text text 1	IOT 3x weekly	Cook, LL		10:00 AM	1/1/2015	
	Afternoon	Summer Mix Group	Emerson, Cynthia		1:00 PM	5/1/2018	
	Motivational	OS 2x weekly	Emerson, Cynthia		11:00 AM	5/1/2018	
	IOS & OS Group	ODS Group	Staff, Random	Tuesday	8:00 AM	7/1/2018	

SanWITS Flow for Outpatient Providers

“Group List”

- A Group Profile should be created for each existing Group in the Facility. A Group Profile must be unique to the Type of Group, Time and Counselor.** In the Group Profile screen, please complete all the required fields for the group profile. **Note:** The “Lead Staff” should be the person who provided the group session. After completing this information please click “Save”.

Group Profile

Group Name: August Group Start Date: 8/1/2018 End Date: [Calendar Icon]
Group Type: ODS Group Day of Week: [Dropdown] Time of Day: 9:00am
Lead Staff: Nunez, Janeth Room Location: [Text Field]
Facility: Main Facility

Co-Lead Staff: Adam, Kenneth; Ailshie, Douglas; Alcazar, Shirley; Altarejos, Isabel Selected Co-Lead Staff: [Dropdown]
Description: Motivational Group

Buttons: Cancel Save Finish (Save is highlighted with a blue arrow)

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

Administrative Actions: Create Group Session Print Sign-In Sheet

Roster: Show All Clients Edit Roster (Edit Roster is highlighted with a red arrow)

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

- From the Roster screen, click on “Add Member” hyperlink. **All Groups Rosters should have a minimum of 2 active members and a maximum of 12 active members.**

Roster

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

Add Member (highlighted with a red arrow)

Client Name: [Text Field] Program: [Text Field]
of Sessions Approved: [Text Field] Status: [Text Field]
of Sessions Attended: [Text Field] Status Effective Date: [Text Field]
Client Due: [Text Field] Reason: [Text Field]

Finish

SanWITS Flow for Outpatient Providers

“Group List”

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

The screenshot shows the 'Roster' screen with a table and a form below it. The table has columns for Actions, Client Name, Program, # of Approved Sessions, # of Sessions Attended, Status, and Status Effective Date. Below the table is an 'Add Member' button. The form has fields for Client Name (with a dropdown menu open), Program, Status, Status Effective Date, and Reason. A red arrow points to the Client Name dropdown menu, which lists several client names and dates.

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

Client Name: (dropdown menu open)

Program:

Status:

Status Effective Date:

Reason:

Buttons: Cancel, Save, Finish

- 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.**

The screenshot shows the 'Roster' screen with the form filled out. The Client Name field is set to 'DMC-2, ROBERT (2/2/1990)'. The Program field is set to 'DMC Billing Test Facility/OS : 3/1/2018'. The Status field is set to 'Active'. The Status Effective Date field is set to '3/15/2018'. A red arrow points to the 'Save' button.

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

Client Name:

Program:

Status:

Status Effective Date:

Reason:

Buttons: Cancel, Save, Finish

SanWITS Flow for Outpatient Providers

“Group List”

- After adding all your clients to the Roster, click Finish. **All Groups Rosters should have a minimum of 2 active members and a maximum of 12 active members.**

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/ODS 3.3 RES: 4/1/2018 -		0	Active	4/5/2018
	McDonald, Ronald	Main Facility33/ODS 3.1 RES: 5/24/2018 -		0	Active	5/25/2018

Add Member

Client Name	<input type="text"/>	Program	<input type="text"/>
# of Sessions Approved	<input type="text"/>	Status	<input type="text"/>
# of Sessions Attended	<input type="text"/>	Status Effective Date	<input type="text"/>
Client Due	<input type="text"/>	Reason	<input type="text"/>

 Finish


- From the Group Profile screen, click on “**Create Group Session**” hyperlink.

Group Profile

Group Name: August Group Start Date: 8/1/2018 End Date:
Group Type: ODS Group Day of Week: Time of Day: 9:00 AM
Lead Staff: Nunez, Janeth Room Location:
Facility: Main Facility

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

Motivational Group
Description:

Administrative Actions 
[Create Group Session](#) [Print Sign-In Sheet](#)

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/ODS 3.3 RES: 4/1/2018 -				0 Active	4/5/2018			
McDonald, Ronald	Main Facility33/ODS 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 individually in the Encounter screen.**
- If there was Travel Time, please add it to the Group Session Notes 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: October Group Session ID:

Group Type: ODS Group

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

Dilable: 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: Hanson, Stephanie, LMF-1, LMF-1 Total Duration: 90 Duration Type: Min

of Service Units/Sessions:

Location: Non-residential Substance Abuse TX Facility

Service: *Group ODS

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

Selected Co-Lead Staff:

Note: Motivational Group

Administrative Actions:

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 individually in the Encounter screen.**
- If there was Travel Time, please add it to the Group Session Notes 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: Start Time: 9:00 AM End Time: 10:30 AM

Billable: Yes

Calculate ODS units: Yes

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

Lead Staff: Hansen, Stephanie, LMFT, LMFT # of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: *Recovery Service Group

Co-Lead Staff: Abinales, 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, Giuseppa; 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’ll need to mark your group members as Present, No Show or Excused. **It is required to update the Status for All Group Members from the Roster including the members who were No Show.** Please select the names of the attendees first, then select the action.

- For the Group members who were “No Show” for the Group Session, select “Mark as No Show” then click on Perform Action.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attend
		Create	Create	Blueberry, Six	1
		Create	Create	Kitty, Halo	1

Attendees

Mark as No Show 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”

14. It is required to create an Encounter for the Group Members who were no show to the Group Session. For the clients that were “No Shows,” please click “**Create**” under the Encounter column. You need to do this individually for each client who was a No Show.

Attendees		Perform Action	Add Attendee			
Actions	Individual Note	Misc. Notes	Encounter	Client Name	EA/Enc	Status
			Create	DMC-2, ROBERT	3	Present
			Create	DMC-3, MATTHEW	3	Present
			Create	McDonald, Ronald	3	Present
			Create	Blueberry, Stk	1	No Show
			Create	Kitty, Helle	1	No Show

21. After selecting “**Create**” Encounter for each of the Group Members who were No Show, the Encounter screen will open.

- Note Type should be “Non Billable.”
- Contact Type should be “No Show.”
- Billable will pre-populate to “No” and will be grayed-out.
- Visit Type should be “GP-Group.”
- Please Finalize the Encounter.

Encounter

Note Type: **Non Billable**

ENC ID: _____ Group Session ID: _____ Created Date: _____

Program Name: **Main Facility/OS : 6/1/2018 -**

Service: **Group Counseling OS** Billable: **No**

Start Date: **9/15/2018** End Date: _____

Service Location: **Non-residential Substance Abuse TX Facility** Start Time: _____ End Time: _____

Travel Duration: _____ Documentation Duration: _____

Session Duration: _____ Total Duration: _____

Contact Type: **No Show**

Emergency: _____ # of Service Units/Sessions: _____

Visit Type: **GP-Group** Medi-Cal Billable: _____

Pregnant/Postpartum: _____ Was an interpreter used? _____ In what language was the service provided? _____

Which Evidence-Based Practices were used?

Evidence-Based Practices: None, Motivational Interviewing, Relapse Prevention, Other

Used Evidence-Based Practices: _____

Diagnoses for this Service

Primary: **F10.151-Alcohol abuse with alcohol-induced psychotic disorder with hallucinations(ICD)**

Secondary: _____

Tertiary: _____

Rendering Staff: **Hansen, Stephanie, LMFT,LMFT**

Supervising Staff: _____

Administrative Actions

Finalize Encounter

Cancel Save Finish >>

SanWITS Flow for Outpatient Providers

“Group List”

22. It is required to update the Status for All Group Members from the Roster including the members who were marked as Excused. Please select the names of the attendees first, then select the action.

- For the Group members that are “**Excused**” for the Group Session, select “**Mark as Excused**” then click on Perform Action.



Actions	Individual Note	Misc. Notes	Encounter	Client Name	P.Attnd	Status*
		Create	Create	<input checked="" type="checkbox"/> Cake, Chocolate	0	Excused
		Create	Create	<input checked="" type="checkbox"/> Cantaloupe, Five	0	Excused
		Create	Create	<input type="checkbox"/> Blueberry, Six	2	No Show
		Create	Create	<input type="checkbox"/> Kitty, Hello	2	No Show
		Create	Create	<input type="checkbox"/> DMC-2, ROBERT	5	Present
		Create	Create	<input type="checkbox"/> DMC-3, MATTHEW	5	Present
		Create	Create	<input type="checkbox"/> McDonald, Ronald	5	Present

23. It is required to create an Encounter for the Group Members who were Excused to the Group Session. For the clients that were “Excused” please click “**Create**” under the Encounter column. You need to do this individually for each client that was marked as Excused.



Actions	Individual Note	Misc. Notes	Encounter	Client Name	P.Attnd	Status*
		Create	Create	<input type="checkbox"/> Cake, Chocolate	0	Excused
		Create	Create	<input type="checkbox"/> Cantaloupe, Five	0	Excused
		Create	Create	<input type="checkbox"/> Blueberry, Six	2	No Show
		Create	Create	<input type="checkbox"/> Kitty, Hello	2	No Show
		Create	Create	<input type="checkbox"/> DMC-2, ROBERT	5	Present
		Create	Create	<input type="checkbox"/> DMC-3, MATTHEW	5	Present
		Create	Create	<input type="checkbox"/> McDonald, Ronald	5	Present

SanWITS Flow for Outpatient Providers

“Group List”

24. After selecting “Create” Encounter for each of the Group Members who were Excused, the Encounter screen will open.

- **Note Type should be “Non Billable.”**
- **Contact Type should be “No Show.”**
- Billable will pre-populate to “No” and will be grayed-out.
- Visit Type should be “GP-Group.”
- Please Finalize the Encounter.

Encounter

Note Type: **Non Billable**

ENC ID: [] Group Session ID: [] Created Date: []

Program Name: **Main Facility/OS - 6/1/2018 -**

Service: **Group Counseling OS** Billable: **No**

Start Date: **9/15/2018** End Date: []

Service Location: **Non-residential Substance Abuse TX Facility** Start Time: [] End Time: []

Travel Duration: [] Documentation Duration: []

Session Duration: [] Total Duration: []

Contact Type: **No Show**

Emergency: [] # of Service Units/Sessions: []

Visit Type: **GP-Group** Medi-Cal Billable: []

Pregnant/Postpartum: [] Was an interpreter used?: [] In what language was the service provided?: []

Which Evidence-Based Practices were used?

Evidence-Based Practices: None, Motivational Interviewing, Relapse Prevention, Other

Used Evidence-Based Practices: []

Diagnoses for this Service

Primary: **F10.151-Alcohol abuse with alcohol-induced psychotic disorder with hallucinations(ICD)**

Secondary: []

Tertiary: []

Rendering Staff: **Hansen, Stephanie, LMFT, LMFT**

Supervising Staff: []

Administrative Actions

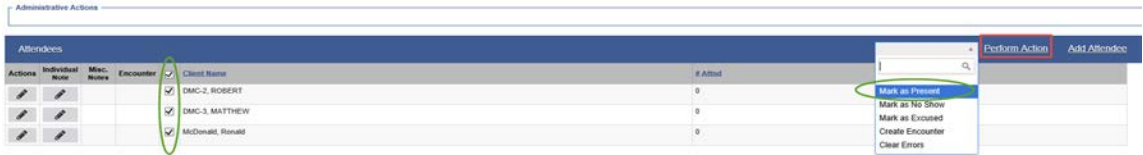
Finalize Encounter (indicated by a red arrow)

Cancel Save Finish

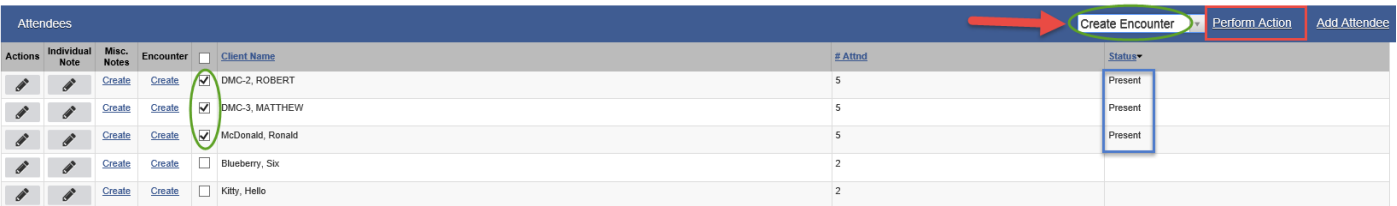
SanWITS Flow for Outpatient Providers

“Group List”

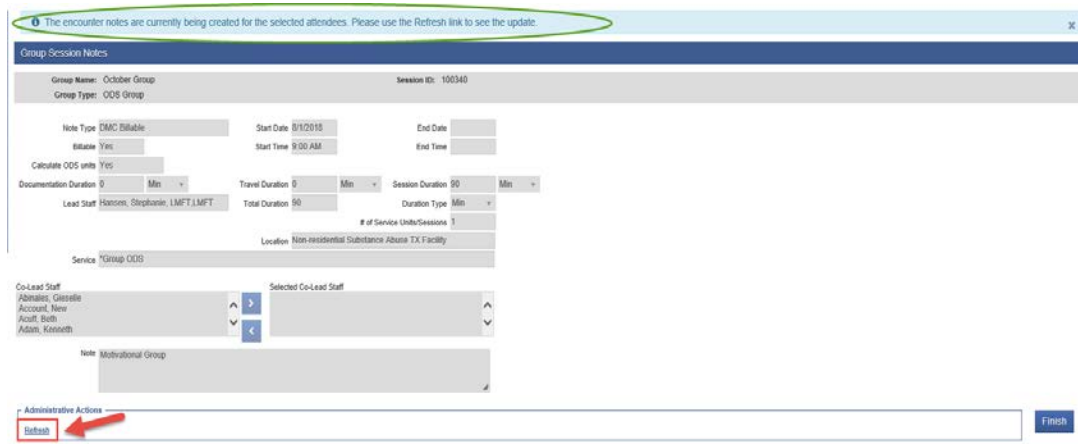
25. Please select the names of the attendees first, then select the action. For the group attendees that were **“Present”** in the Group Session, under the Action drop menu, select **“Mark as Present”** then click on **“Perform Action”** hyperlink.



26. 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.



27. 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.



SanWITS Flow for Outpatient Providers

“Group List”

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

Administrative Actions

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

29. 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 each individual Encounter.**
- The Start Time, End Time and Session Duration needs 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.

Encounter 15 of 15

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
Documentation Duration: 10 Min
Total Duration: 85 Min
Contact Type: Face To Face
Pregnant/Postpartum: Yes
Was an interpreter used?: No Interpreter Needed
In what language was the service provided?: English
Which Evidence-Based Practices were used?:
Evidence-Based Practices: Motivational Interviewing, Relapse Prevention, Other
Used Evidence-Based Practices: None
Diagnoses for this Service:
Primary: F11.11-Opioid abuse, in remission(CD)
Secondary:
Tertiary:
Rendering Staff: Harrison, Stephanie
Supervising Staff:
Administrative Actions: Release to Billing, Delete
Buttons: Cancel, Save, Finish