

OUTPATIENT/OTP PRACTICE GUIDE

1. PROGRAM ENROLLMENT (p. 7-8)

Activity List → Program Enroll → Add Enrollment

Save & Finish

2. ADD INDIVIDUAL ENCOUNTER (p. 14-18)

Activity List → Encounters → Add Encounters → Complete all yellow fields

Save & Finish

3. ADD GROUP PROFILE (p. 24-25)

Group List → Add → Create Group Name (add your initials and date)

Save

4. CREATE THE ROSTER (p. 25-26)

Edit Roster → Add Member → **Save**

(Add **both** clients)

Finish when all clients have been added

5. CREATE GROUP SESSION (p. 30-31)

From Group Profile → Administrative Actions → Create Group Session

Complete all yellow fields

Enter **Group Type** in the **white Note** field

Save (Do Not Finish)

6. CREATE BULK ENCOUNTERS (p. 32-33)

Place a check mark on all clients that were present → Mark As Present → Perform Action

Select all clients present → Create Encounter → Perform Actions

Continue to 'Refresh' until **Encounter column** shows **"View"**

7. UPDATING INDIVIDUAL ENCOUNTERS (p. 33-35)

Click **View** under Encounter → Review the Encounter

Review Hints: Enter Documentation Time, Replace **None** from Evidence Based Practice, Change

Rendering Staff if needed

Save & Finish