OWITS Reference Manual

Volume 7

Groups and Group Notes

Revision 1-2

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Description

"Groups and Group Notes" describes the Group List module in OWITS. Group sessions can be recorded, including attendance and notes.

Purpose

To illustrate the steps necessary for creating and using group records.

Definitions / Abbreviations

- Agency: The collective locations and offices of a company, corporation, or organization that provides addiction recovery or mental health treatment and services. See also *Facility*.
- AMH: The Addictions and Mental Health division of the Oregon Health Authority.
- Box: A general term for a square or rectangle that appears on a web page and is generally used for data entry. See also *Field*, *Option Transfer Box*, and *Text Box*.
- Browser: Computer software used to locate, retrieve, and display content on the World Wide Web.
- Button: An image or icon on a computer screen that executes a command when clicked, such as “the OK button” or “the Cancel button.”
- Character: A single unit of information, including letters, numerical digits, punctuation marks, spaces, and symbols.
- Click: To press a button on a computer mouse. “Click” refers to pressing the left mouse button once. “Double-click” refers to pressing the left mouse button twice in rapid succession. “Right-click” refers to pressing the right mouse button once.
- Client: An individual who is receiving, has received, or will receive treatment or services.
- Data / Dataset: Pieces of information or groups of pieces of information.
- Dialogue Box: A type of window that appears in specific circumstances that allows users to perform a command, asks users a question, or providers users with information.
- Drop-Down Menu: A list of options in a data entry field that allows users to select only one item.
- Environment: A subdivision of the overall OWITS system containing all available aspects of the program but resulting in a different final result.
- Facility: The individual locations or offices of a company, corporation, or organization that provides addiction recovery or mental health treatment and services. Multiple facilities may exist within a single agency. See also *Agency*.
- Field: A general term for an individual point of data entry on a web page or in a database application, usually a smaller piece of data from a larger collection or a record.
- File: A self-contained block of information or resource for storing information—such as a document, spreadsheet, or image—stored in or used by a computer or related device.
- Heading / Subheading: The title of an OWITS module or of divisions and screens within OWITS modules. See also *Module*.
- Key: A button on a computer keyboard, such as “the Enter key” or “the CTRL key.”
- Link: Short for “hyperlink,” a connection to another web site or document.
- Module: A smaller component of a larger system.
- Navigate / Navigation: Movement through a series of data entry screens.
- Navigation Pane / Navigation View: The OWITS menu system, located on the left side of each OWITS page.
- Option Transfer Box: A pair of boxes on a web page that allow options to be selected and moved from one box to another. Also known as a “Mover Box.”
- OWITS: Oregon Web-Infrastructure for Treatment Services – an electronic behavioral health record program as modified for Oregon.

- Pop-up: A new browser window that opens to display additional information without disrupting the page currently open.
- Roster: A list of names.
- Screen: A specific informational view that can be displayed in OWITS at one time.
- Table: A grid of information with rows of information divided into categorical columns.
- Text Box: A bordered square or rectangle in a web page into which users can type text.
- User: A person who interacts with the OWITS system.
- Value: A specific data point for a given data type, such as one option in a drop-down menu.
- WITS: Web-Infrastructure for Treatment Services – an electronic behavioral health record program.

1.0 Purpose of Groups and Group Sessions

1.1 The Group List module allows providers to create and schedule group meetings, print rosters, and track client attendance.

1.2 By definition, group meetings should consist of at least one client and at least one agency or facility staff member.

1.3 Group meetings may include, but are not limited to, the following:

1.3.1 Agency-specific groups, such as registration, orientation, and community service.

1.3.2 Expressive Therapy groups, such as dance or music therapy, recreation therapy, or projective psychotherapy.

1.3.3 Mutual Aid groups, such as Alcoholics Anonymous or Narcotics Anonymous, grief and loss support groups, and coping with change.

1.3.4 Prevention and education groups covering topics such as alcohol and drug education, DUII education, and general health education.

1.3.5 Relapse Prevention groups including topics such as symptom management, medication management, smoking cessation, and withdrawal management.

1.3.6 Self-Improvement courses on topics such as critical thinking, emotional regulation, life skills, parenting skills, and personal finances.

1.3.7 Social Improvement courses on topics such as anger management, interpersonal communication, family dynamics, and driving skills.

1.4 In the OWITS system hierarchy, group records are saved at the agency level

1.4.1 Groups are specific to a single facility and can only be modified within the facility in which they were created.

1.4.2 Group Rosters can only include clients who have intake records in the facility in which the group was created.

1.5 Providers are encouraged to use the Group List module as needed.

1.5.1 Group meeting records are not required by any state or federal reporting standards.

1.5.2 Individual provider agency and facility business practices will dictate the use of the Group List module.

1.6 The Group List module contains:

1.6.1 Group Types – Categorical descriptions of groups.

1.6.2 Group Profiles – Records of individual groups.

1.6.3 Group Sessions – Records of the meetings of individual groups.

1.6.4 Group Rosters – Lists of the clients attending each group session.

1.6.5 Group Notes – Descriptions of the group's activities and the clients' participation.

1.7 The Group List module can be used at any time after the agency, facility, and staff records have been completed (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

1.7.1 Clients cannot be added to group rosters until their Client Profile, Intake, Admission, and Program Enrollment records have been completed.

1.7.2 Clients cannot be added to group rosters unless they haven an open Program Enrollment record.

1.7.3 For details regarding these required records, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

1.8 In the sections below, independent text and field labels quoted from OWITS will be *italicized*.

2.0 Configuring Groups

2.1 Log into the appropriate OWITS environment and select the agency and facility in which the groups will be recorded (see OWITS Reference Manual, Volume 1: OWITS Basics).

2.2 In the Navigation View, open the Group List module.

2.2.1 The Group List screen will display.

2.2.2 In a new agency or facility, empty fields and an empty table will be displayed.

2.2.3 No data will be displayed on this screen until at least one Group Type (2.3) has been recorded.

2.3 Create group types.

2.3.1 In the Navigation View, click the "Group Type" subheading (Group List > Group Type).

2.3.1.1 The Group Type screen will display.

2.3.1.2 In a new agency or facility, an empty table will be displayed.

2.3.2 Click the "Add Group Type" link on the right side of the screen.

2.3.3 Complete the available fields.

2.3.3.1 *Unit*

2.3.3.1.1 This read-only field will automatically populate with the name of the current ("context") facility.

2.3.3.2 *Description*

2.3.3.2.1 Enter a description of the group type.

2.3.3.2.2 This description should be categorical, not specific.

2.3.3.2.2.1 Example: A provider agency has developed and uses a group therapy method, called "Free Speech," in which clients meet to discuss their progress through their treatment goals, sharing advice and encouragement. Clients are assigned to these groups based on their primary substance. The Group Type would be entered as "Free Speech" or "Discussion Therapy" without mention of the substances, which would be identified later (see 2.4.3.1.2.1).

2.3.3.2.2.2 Example: A provider agency offers a variety of classes to help recovering inpatient mental health clients readjust to independent living, such as personal finances, basic cooking, public transportation use, interpersonal communications, etc. The Group Type would be entered as "Independent Living" without mention of the specific topics, which would be identified later (see 2.4.3.1.2.2).

2.3.3.2.2.3 Example: A provider agency offers a specific group for clients on DUII diversions. Clients attend the group based on the time of day that best fits their schedules. The Group Type would be entered as "DUII Diversion" without mention of the time of day the sessions occur (see 2.4.3.1.2.3).

2.3.3.2.3 This description will appear in the Type field on the Group Profile screen (2.4.3.2).

2.3.3.2.4 Although the text box is large and will accept up to 256 characters (including spaces and punctuation), the Type field on the Group Profile screen will only display the first 30 characters.

2.3.3.2.4.1 If the description of the group type must be more than 30 characters long, ensure that the group type can be identified by the first 30 characters.

2.3.3.3 *Effective Date*

2.3.3.3.1 Enter the date on which this group type was created.

2.3.3.3.2 This date cannot be in the future.

2.3.3.3.3 Clients cannot be added to the roster for groups of this group type prior to this date.

2.3.3.3.4 This field is not required, and leaving it blank will not place restrictions on the group sessions or roster.

2.3.3.4 *Expiration Date*

2.3.3.4.1 Enter the date on which groups of this group type will no longer be created, scheduled, or attended.

2.3.3.4.2 Clients cannot be added to the roster for groups of this group type after this date.

2.3.3.4.3 This field is not required, and leaving it blank will not specify when the group type will no longer be used.

2.3.3.5 *Sort Order*

2.3.3.5.1 If desired, enter a number that will instruct OWITS where to display the Group Type in the Type field on the Group Profile screen (2.4.3.2).

2.3.3.5.2 If no sort order is entered, group types will be sorted alphabetically.

2.3.3.5.3 OWITS reads a blank Sort Order value as less than zero and will sort those group types above all group types with a Sort Order value greater than or equal to zero.

2.3.4 Click Save to record the group type.

2.3.5 Repeat steps (2.3.2) through (2.3.4) to continue to add group types as needed.

2.3.6 To modify an existing group type, click the "Edit" link in the Actions column of the Group Type screen.

2.3.6.1 Edit the fields described above (2.3.3.1 through 2.3.3.5) as needed.

2.3.6.2 Click Save to apply the changes.

2.3.7 To delete an existing group type, click the "Remove" link in the Actions column of the Group Type screen.

2.3.7.1 If at least one group profile (2.4) has been created using the selected group type, OWITS will not allow it to be removed.

2.3.7.2 OWITS will not confirm this action.

2.3.7.3 This action cannot be undone.

2.3.8 Click Finish to return to the Group Profile screen.

2.4 Create group profiles.

2.4.1 Ensure that the group profile to be created does not already exist.

2.4.1.1 Using the Type, Lead Staff, and Active fields under the Group Profile Search heading, search for existing group profiles.

2.4.1.2 Group profiles matching the search criteria will appear under the Group Profile List heading.

2.4.1.3 Do not create an exact duplicate of an existing group.

2.4.1.3.1 Multiple similar groups can be created, but multiple records for a single group can cause confusion and errors.

2.4.1.4 If necessary, modify existing group profiles (see 2.3.6).

2.4.2 Click the "Add" link in the Group Profile List bar on the Group Profile screen.

2.4.3 Complete the available fields.

2.4.3.1 *Group Name*

2.4.3.1.1 Enter the specific name of the group.

2.4.3.1.2 This name should be specific.

2.4.3.1.2.1 Example (continued from 2.3.3.2.2.1): A provider agency has developed and uses a group therapy method, called "Free Speech," in which clients meet to discuss their progress through their treatment goals, sharing advice and encouragement. Clients are assigned to these groups based on their primary substance. The Group Type was entered as "Discussion Therapy." The Group Names might be "Alcohol Free Speech," "Meth Free Speech," "Marijuana Free Speech," etc.

2.4.3.1.2.2 Example (continued from 2.3.3.2.2.2): A provider agency offers a variety of classes to help recovering inpatient mental health clients readjust to independent living, such as personal finances, basic cooking, public transportation use, interpersonal communications, etc. The Group Type was entered as "Independent Living." The

Group Names might be "Cooking for Myself," "Money Management," "Another One Rides the Bus," etc.

2.4.3.1.2.3 Example (continued from 2.3.3.2.2.3): A provider agency offers a specific group for clients on DUII diversions. Clients attend the group based on the time of day that best fits their schedules. The Group Type was entered as "DUII Diversion." The Group Names might be "Diversion – AM," "Diversion – Afternoon," "Diversion – PM," etc.

2.4.3.1.3 Limit group names to no more than 50 characters, including spaces.

2.4.3.2 *Group Type*

2.4.3.2.1 Select the categorical group type that best describes the group.

2.4.3.2.2 Available group types will be those entered into the Group Type section of the Group List module (2.3).

2.4.3.2.3 If group types have not been created, this field will not have any available options to select.

2.4.3.3 *Lead Staff*

2.4.3.3.1 Select the name of the staff member primarily responsible for conducting sessions for this group.

2.4.3.3.2 The names available in this field will be those assigned to the current facility (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

2.4.3.4 *Facility*

2.4.3.4.1 This read-only field will automatically populate with the name of the current facility.

2.4.3.5 *Start Date*

2.4.3.5.1 Enter the date on which this group was organized.

2.4.3.5.2 This date cannot be in the future.

2.4.3.5.3 Clients cannot be added to this group prior to this date.

2.4.3.5.4 Sessions for this group cannot be recorded for dates prior to this date.

2.4.3.5.5 The start date of the group profile does not need to match the date of the first group session.

2.4.3.6 *End Date*

2.4.3.6.1 Enter the date after which this group will no longer meet and after which notes from this group will no longer be added to client records.

2.4.3.6.2 Clients cannot be added to this group after this date.

2.4.3.6.3 Sessions for this group cannot be recorded for dates after this date.

2.4.3.6.4 The end date of the group profile must be on or after the date of the last group session.

2.4.3.7 *Day of Week*

2.4.3.7.1 Select the day of the week on which the group meets.

2.4.3.7.2 If the group meets with the same clients on multiple days in one week, create additional group profiles for each day the group meets.

2.4.3.7.2.1 Example: An anger management group meets on Mondays, Wednesdays, and Fridays. Clients in the group are expected to attend all three sessions. Group profiles would be created for "Anger Management – Monday," "Anger Management – Wednesday," and "Anger Management – Friday."

2.4.3.8 *Time of Day*

2.4.3.8.1 Enter the time of day at which the group meets.

2.4.3.8.2 If the group meets with the same clients at multiple times during one day, create additional group profiles for each time of day the group meets.

2.4.3.8.2.1 Example: A music therapy group meets once in the morning and once in the evening one day a week. Clients in the group are expected to attend both sessions. Group profiles would be created for "Music Therapy – AM" and "Music Therapy – PM."

2.4.3.9 *Room Location*

2.4.3.9.1 Enter the room number or a brief description of where the group usually meets.

2.4.3.10 *Co-Lead Staff*

2.4.3.10.1 If additional staff members are or may be responsible for conducting sessions for this group, use this option transfer box to select their names.

2.4.3.10.2 The names available in this field will be those assigned to the current facility (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

2.4.3.11 *Description*

2.4.3.11.1 Enter a general description of the group.

2.4.3.11.2 This might include the goals and objectives of the group, a detailed group schedule, and other relevant details.

2.4.4 When all the required fields (and others as appropriate) have been filled, click Save.

2.4.5 Repeat steps 2.4.2 through 2.4.4 to continue adding group profiles as needed.

2.4.6 Click Finish to return to the Group List screen.

2.5 Modify or close group profiles as needed.

2.5.1 Navigate to the Group List screen.

2.5.2 In the Group Profile List table, click the "Review" link in the Actions column for the desired group profile.

2.5.3 Edit the Group Profile fields described above (2.4.3.1 through 2.4.3.11) as needed.

2.5.4 To close the group profile, enter a date in the End Date field (2.4.3.6).

2.5.5 Click Finish to apply the changes and return to the Group List screen.

2.6 Group profiles can be deleted.

2.6.1 Navigate to the Group List screen.

2.6.2 In the Group List table, click the "Delete" link in the Actions column

2.6.2.1 Group profiles cannot be deleted if any client names appear on the group's roster (see 3.0).

2.6.2.2 Group profiles cannot be deleted if any sessions have been recorded (see 4.0 and 5.0).

2.6.3 OWITS will confirm the delete command.

2.6.4 This action cannot be undone.

3.0 Group Rosters

3.1 In the Navigation View, open the Group List module.

3.1.1 The Group List screen will display.

3.1.2 Existing group profiles will display in the Group Profile List table.

3.2 Open the Roster screen.

3.2.1 This screen can be opened in one of two ways.

3.2.2 Route 1: On the Group List screen, click the "Group Roster" link in the Actions column for the desired group profile.

3.2.3 Route 2: On the Group List screen, click the "Review" link in the Actions column for the desired group profile, then click the "Edit Roster" link in the Roster heading.

3.2.4 The Roster screen will display, including a table that lists the names of the clients attending or signed up to attend the group.

3.3 Add clients to the group roster as needed.

3.3.1 On the Roster screen, click the "Add Member" link in the blue bar beneath the Roster table.

3.3.2 Complete the available fields.

3.3.2.1 *Client Name*

3.3.2.1.1 Select the name of the client to be added to the group roster.

3.3.2.1.2 Only the names of clients with open program enrollments in the current facility will be available (see 1.7.2 and 3.3.2.5.4).

3.3.2.2 *# of Sessions Approved*

3.3.2.2.1 If applicable, enter the number of group sessions that the client is permitted or required to attend.

3.3.2.2.2 OWITS will not prevent clients from attending more sessions than the number for which he or she is approved or required to attend.

3.3.2.3 *# of Sessions Attended*

3.3.2.3.1 This read-only field will display how many sessions of the selected group (group profile) the client has attended.

3.3.2.4 *Client Due*

3.3.2.4.1 If applicable, enter a dollar amount, indicating an amount of money the client is expected to pay for each group session.

3.3.2.4.2 OWITS will automatically format any number into a dollar amount, such as changing "75" to "$75.00."

3.3.2.5 *Program*

3.3.2.5.1 Select the program in which the client is enrolled that is associated with his or her participation in this group.

3.3.2.5.2 The values in this field will display with the program name, the enrollment date, and the disenrollment date.

3.3.2.5.3 Only clients currently enrolled in a program (no disenrollment date) can be added to the group roster.

3.3.2.5.4 If a client must be added to the group roster and is not currently enrolled in a program, enroll the client in a program (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

3.3.2.6 *Status*

3.3.2.6.1 Select the option that describes the client's current participation in the group and group sessions.

3.3.2.6.2 Select "Active" to indicate that the client is attending or is expected to attend group sessions.

3.3.2.6.3 Select "Completed" to indicate that the client has met all of the requirements (if any) associated with his or her participation in this group.

3.3.2.6.4 Select "Inactive" to indicate that the client is not currently attending or expected to attend group sessions but has not actually left the group.

3.3.2.6.5 Select "Waiting" to indicate that the client wants or needs to be part of the group but currently cannot participate due to a lack of capacity, schedule conflicts, time limitations, etc.

3.3.2.7 *Status Effective Date*

3.3.2.7.1 Enter the first or earliest date that applies to the option selected in the Status field above (3.3.2.6).

3.3.2.7.2 This date cannot be in the future.

3.3.2.8 *Reason*

3.3.2.8.1 Enter an explanation for the client's most recent status change.

3.3.2.8.2 Example: If the client is arrested and jailed, change the value in the Status field from "Active" to "Inactive" (3.3.2.6) and enter "Client is incarcerated" in this field.

3.3.3 Click Save to add the client's name to the group roster.

3.3.4 Repeat steps 3.3.1 through 3.3.3 to continue to add clients to the group roster as needed.

3.4 Modify group rosters as needed.

3.4.1 On the Roster screen, click the "Review" link in the Actions column for the desired client.

3.4.2 Edit the Group Roster fields described above (3.3.2.1 through 3.3.2.8) as needed.

3.4.3 To avoid errors, edits to the Group Roster should be made prior to creating Group Session records (see 4.0 and 5.0).

3.4.4 Click Save to apply the changes.

3.5 Remove clients from the group roster as needed.

3.5.1 On the Roster screen, click the "Remove" link in the Actions column for the desired client.

3.5.1.1 OWITS will not confirm the action.

3.5.1.2 This action cannot be undone.

3.5.2 Clients can still be removed from the roster even after attending group sessions.

3.5.2.1 Agencies and facilities must determine if and when to remove clients from group rosters.

3.5.2.2 For historical purposes, some agencies or facilities may choose to change the client's status to "Completed" (3.3.2.6.3) or "Inactive" (3.3.2.6.4) instead of removing the client from the roster.

3.5.3 Records of sessions approved and sessions attended will be removed from the roster.

3.5.3.1 Past group session records (5.4) will still show whether the client was present, excused, etc.

3.5.3.2 Encounter Notes and Miscellaneous Notes created from the group sessions (6.0) will still indicate the client's participation in the group.

3.6 When the group roster accurately displays all of the group's clients, click Finish to return to the Group Profile or Group List screen.

3.7 When the group roster has been completed, sign-in sheets can be printed.

3.7.1 On the Group List screen, click the "Review" link in the Actions column for the desired group.

3.7.2 Click the "Print Sign-In Sheet" link in the Administrative Actions box.

3.7.3 A pop-up window will appear with details about the group and a list of client names with space for the client to sign.

3.7.3.1 If desired, enter the date of the group session in the Session Date field.

3.7.3.2 Other fields can be modified if necessary.

3.7.3.3 Any changes made to the fields in this pop-up window will not be reflected in any other part of the group records.

3.7.4 To print the sign-in sheet, right click in a blank space in the pop-up window and select the Print option.

3.7.4.1 Internet Explorer will provide printing options.

3.7.5 Close the pop-up window when finished.

4.0 Creating Group Session Records

4.1 Group sessions record the individual meetings held for each group profile.

4.1.1 It is possible to schedule group sessions in the future, but managing the group's roster is generally more efficient if the group session records are created at or around the time that the group session occurs.

4.2 Clients must be added to the group's roster before a group session can be scheduled or recorded (see 3.0).

4.3 In the Navigation View, open the Group List module.

4.3.1 The Group List screen will display.

4.3.2 Existing group profiles will display in the Group Profile List table.

4.4 Create new sessions for a group.

4.4.1 Access the Group Session Notes screen.

4.4.1.1 This screen can be opened in one of two ways.

4.4.1.2 Route 1: On the Group List screen, click the "Session List" link in the Actions column for the desired group profile, then click the "Add" link in the Group Session List heading.

4.4.1.3 Route 2: On the Group List screen, click the "Review" link in the Actions column for the desired group profile, then click the "Create Group Session" link in the Administrative Actions box.

4.4.2 Much of the data entered on this screen will copy to the Encounter Notes screen or the Miscellaneous Notes screen if an encounter or a note is created from the group session (see 6.0).

4.4.3 Complete the available fields.

4.4.3.1 *Group Name*

4.4.3.1.1 This read-only field will display the name of the selected group.

4.4.3.1.2 If the group name is not correct, click Cancel to return to the Group List screen and select a different group (see 4.4.1).

4.4.3.2 *Group Type*

4.4.3.2.1 This read-only field will display the group type associated with the selected group name.

4.4.3.3 *Note Type*

4.4.3.3.1 Select the option that best describes the note that may be entered about the clients' participation in this group session.

4.4.3.3.2 This selection will determine the template that may be used for entering this note.

4.4.3.3.2.1 Additional note templates can be requested by sending the desired text to owits.support@state.or.us.

4.4.3.3.3 Notes affected by this selection include the individual group note (see 5.5) as well as Encounter and Miscellaneous notes created from the group session (6.0).

4.4.3.4 *Billable*

4.4.3.4.1 Indicate whether the clients can be billed for their participation in this group session.

4.4.3.4.2 The purpose of this field is to notify clinicians whether the session was billable and whether billable encounters should be recorded.

4.4.3.4.3 This field does not directly affect OWITS billing functions.

4.4.3.5 *Lead Staff*

4.4.3.5.1 Select the name of the staff member responsible for conducting this group session.

4.4.3.5.2 The names available in this field will be those assigned to the current facility (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

4.4.3.6 *Date*

4.4.3.6.1 Enter the date on which the group session occurred or is scheduled to occur.

4.4.3.6.2 This date may be in the future.

4.4.3.6.3 Notes cannot be added to client records from this group session (6.0) prior to this date.

4.4.3.7 *Start Time*

4.4.3.7.1 Enter the time at which the session started or is scheduled to start.

4.4.3.8 *End Time*

4.4.3.8.1 Enter the time at which the session concluded or is scheduled to end.

4.4.3.9 *Duration*

4.4.3.9.1 Enter a number that can be used to describe the amount of time between the start and end of the session.

4.4.3.9.2 Example: If the session was two hours long, enter 2.

4.4.3.10 *Duration Type*

4.4.3.10.1 Select the unit of measure that fits with the number entered in the "Duration" field (4.4.3.9).

4.4.3.10.2 Example: If the session was two hours long, select "Hrs" to denote hours.

4.4.3.11 *Location*

4.4.3.11.1 Select the option that best describes where the session was conducted.

4.4.3.12 *Service*

4.4.3.12.1 Select the option that best describes the service that was rendered to the client(s) during this group session.

4.4.3.12.2 Carefully read the details of the service descriptions to ensure the correct option is selected.

4.4.3.12.2.1 Do not select a service with "ATR" at the beginning of its description.

4.4.3.12.3 The services in this field will match the services available in the Encounters screens for the current facility (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

4.4.3.13 *Co-Lead Staff*

4.4.3.13.1 If additional staff members were or may be responsible for conducting this group session, use this option transfer box to select their names.

4.4.3.13.2 The names available in this field will be those assigned to the current facility (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

4.4.3.14 *Note*

4.4.3.14.1 This field is for general notes about the entire group session that apply to all attendees.

4.4.3.14.1.1 Unless the group consists of only one client, this should not include notes about a specific client's participation.

4.4.3.14.2 Enter a description of the activities completed or topics discussed during this group session.

4.4.3.14.3 If Encounter or Miscellaneous Notes records are created from this group session (6.0), the text entered in this field will appear following the phrase "and discussed the following:" in the editable Unsigned Notes field.

4.4.4 Click Save.

4.4.4.1 Seriously, click Save now.

4.4.4.2 Skipping this step may result in frustrating errors and lost data as further steps are completed.

4.5 Click Finish to return to the Session List or Group List screen.

5.0 Recording Completed Sessions

5.1 In the Navigation View, open the Group List module.

5.1.1 The Group List screen will display.

5.1.2 Existing group profiles will display in the Group Profile List table.

5.2 In the Group Profile List table, click the "Session List" link for the desired group profile.

5.2.1 The Group Session List table will display.

5.2.2 Past completed sessions and scheduled sessions will be included in this table.

5.3 Open the Group Session Notes screen.

5.3.1 If recording notes and attendance for a scheduled session that has been previously recorded, click the "Review" link in the Actions column for the desired session.

5.3.1.1 The Group Session Notes screen will display.

5.3.1.2 Most of the data fields will already be filled.

5.3.1.3 Edit the existing fields as needed.

5.3.2 If recording notes and attendance for a session that has been completed but was not previously recorded as a session scheduled for a future date, click the "Add" link in the Group Session Link heading.

5.3.2.1 Complete the available fields (see 4.4.3.1 through 4.4.3.14 for detailed instructions).

5.4 Record attendance and general group notes.

5.4.1 Complete the Note field based on activities completed and topics of conversation discussed 4.4.3.14.

5.4.1.1 When the Note field is filled, click Save.

5.4.1.2 Failing to click Save at this point may cause frustrating errors when attempting to create notes (6.0).

5.4.2 The Attendees table in the lower section of the Group Session Notes screen lists clients on the group roster and their attendance at this group session.

5.4.2.1 The "# Attnd" column displays the total number of sessions of this group that the client has attended.

5.4.2.1.1 This column will display a historical count of sessions attended.

5.4.2.1.2 After marking clients as present for this session (see 5.4.3) and clicking Save, this column will update to include the current session.

5.4.2.2 The white boxes next to the client names are check boxes.

5.4.2.2.1 Clicking a box next to a client name once will add a check mark.

5.4.2.2.2 Clicking a checked box next to a client name will remove the check mark.

5.4.2.2.3 Clicking the box at the top of the first column will add a check mark to all of the check boxes below.

5.4.2.2.4 Clicking the checked box at the top of the first column will remove all check marks below.

5.4.3 Indicate which clients were present at this session.

5.4.3.1 Add a check mark next to the name of each present client.

5.4.3.2 Select the "Mark as Present" option in the drop-down menu in the Attendees heading.

5.4.3.3 Click the "Perform Action" link in the Attendees heading.

5.4.3.4 "Present" will appear in the Status column for each selected client.

5.4.3.5 Check marks may need to be cleared if additional attendance details will be recorded.

5.4.4 Indicate which clients were excused from attending this session.

5.4.4.1 Add a check mark next to the name of each excused client.

5.4.4.2 Select the “Mark as Excused” option in the drop-down menu in the Attendees heading.

5.4.4.3 Click the “Perform Action” link in the Attendees heading.

5.4.4.4 “Excused” will appear in the Status column for each selected client.

5.4.4.5 Check marks may need to be cleared if additional attendance details will be recorded.

5.4.5 Indicate which clients should have been present at this session but did not attend.

5.4.5.1 Add a check mark next to the name of each unexcused absent client.

5.4.5.2 Select the “Mark as No Show” option in the drop-down menu in the Attendees heading.

5.4.5.3 Click the “Perform Action” link in the Attendees heading.

5.4.5.4 “No Show” will appear in the Status column for each selected client.

5.4.5.5 Check marks may need to be cleared if additional attendance details will be recorded.

5.4.6 Click Save.

5.4.6.1 Seriously, click Save now.

5.4.6.2 Failing to click Save at this point will result in lost attendance data.

5.5 If desired, add individual notes about each client.

5.5.1 Click the “Review” link in the Actions column of the Attendees table for the desired client.

5.5.1.1 The Individual Notes screen will display, which includes five read-only fields that will automatically populate with data from the Group Session Notes screen:

5.5.1.1.1 *Client Name*

5.5.1.1.2 *Delivered Service*

5.5.1.1.3 *# of Sessions Attended*

5.5.1.1.4 *Billed?*

5.5.1.1.5 *Status*

5.5.1.2 The Individual Notes screen also includes one text box labeled Individual Note.

5.5.1.2.1 This text box will automatically populate with a template based on the Note Type selected on the Group Session Notes screen (4.4.3.3).

5.5.1.2.2 The template is designed to assist clinicians and other OWITS users in capturing the necessary information.

5.5.1.2.3 Replace or add to the template text as needed to record a note about the client’s individual participation in this group session.

5.5.1.2.4 The text recorded in this field will copy to the notes for Miscellaneous Notes or Encounters created from this group session (6.0).

5.5.1.3 Click Finish to save these notes and return to the Group Session Notes screen.

5.5.1.3.1 If the Individual Note field is left blank, clicking Finish will produce an error message.

5.5.1.3.2 If the template text in the Individual Note field has not been changed or added to, clicking Finish will produce an error message.

5.5.1.4 The first 20-30 characters of the text entered in the Individual Note field will display in the "Individual Note Summary" column of the Attendees table.

5.5.1.5 Repeat steps 5.5.1 through 5.5.1.3 to continue to add individual notes for other clients as needed.

5.5.1.5.1 Individual notes can also be edited by clicking the "Review" link in the Actions column of the Attendees table.

5.5.2 If necessary, add the names of clients who attended this session but whose names do not appear in the Attendees table.

5.5.2.1 This includes only clients who were added to the Group Roster (3.0) with an "Active" status (3.3.2.6.2) *after* the Group Session Notes record was originally created and saved.

5.5.2.1.1 It may be necessary to return to the Group Roster screen and add the client (see 3.3.1).

5.5.2.2 Click the "Add Attendee" link in the Attendees heading.

5.5.2.3 The Individual Notes screen will display (5.5.1.1).

5.5.2.4 The Client Name field (5.5.1.1.1) will be a drop-down menu consisting of the names of clients whose names are on the Group Roster with an "Active" status but whose names do not appear on the Attendees table.

5.5.2.5 Select the name of the client to be added to the Attendees table.

5.5.2.6 Complete this screen (for detailed instructions, see 5.5.1.1 through 5.5.1.2.4).

5.5.2.7 Click Finish to save these notes and return to the Group Session Notes screen.

5.5.2.8 The added client's name will now appear in the Attendees table.

5.5.3 When finished, click Save.

5.5.3.1 Seriously, click Save now.

5.5.3.2 Failing to click Save at this point may result in lost notes.

5.6 Click Finish to return to the Group Session List screen.

6.0 Creating Notes from Group Sessions

6.1 Miscellaneous Notes and Encounters can be created from the group sessions for individual clients.

6.1.1 One Miscellaneous Note record can be created per group session attendee per session.

6.1.2 One Encounter record can be created per group session attendee per session.

6.1.3 Attendees may have both a Miscellaneous Note and an Encounter created from each group session.

6.1.4 For a complete explanation of the purpose and use of the Miscellaneous Notes and Encounters modules, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

6.2 In the Navigation View, open the Group List module.

6.2.1 The Group List screen will display.

6.2.2 Existing group profiles will display in the Group Profile List table.

6.3 In the Group Profile List table, click the "Session List" link for the desired group profile.

6.3.1 The group session record must be completed before creating notes.

6.3.2 If the desired session has not yet been recorded, add it (see 5.0).

6.4 In the Group Session List table, click the "Review" link for the desired group session.

6.4.1 The Group Session Notes screen will display.

6.4.2 If the Note field is blank, it may be necessary to add general group session notes (4.4.3.14).

6.4.3 If the Individual Note Summary column of the Attendees table is blank, it may be necessary to add client-specific notes (5.5).

6.5 Create Miscellaneous Notes as needed for clients.

6.5.1 Click the "Create" link in the Misc. Notes column for the desired client in the Attendees table.

6.5.2 The Miscellaneous Notes screen will display.

6.5.3 Complete the available fields as appropriate.

6.5.3.1 For full instructions regarding the Miscellaneous Notes screen, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

6.5.4 Most of the available fields will automatically populate with data from the Group Session Notes screen and the Group Roster, including:

6.5.4.1 *Program*

6.5.4.2 *Service Date*

6.5.4.3 *Duration*

6.5.4.4 *Start Time*

6.5.4.5 *End Time*

6.5.5 The Summary field will populate with the name of the group and the date of the group session.

6.5.5.1 Example: If the group name was "Money Management" and the group session occurred on May 5, "Money Management Meeting on 05/05/2012" would display in the Summary field.

6.5.5.2 Example: If the group name was "DUII Diversion – AM" and the group session occurred on July 14, "DUII Diversion – AM Meeting on 07/14/2012" would display in the Summary field.

6.5.6 The Unsigned Notes field will populate with text from the Note field on the Group Session Notes screen and with text from the Individual Note field accessed from the Attendees table on the Group Session Notes screen.

6.5.6.1 The first line of the Unsigned Notes field will contain the text "Entered by:" followed by the name of the current user along with his or her professional credentials a date and timestamp indicating when the text was copied from the Group Session Notes screen to the Miscellaneous Notes screen.

6.5.6.2 The second line of the Unsigned Notes field will contain the text "Facilitated by:" followed by the names of the staff members selected in the Lead Staff (4.4.3.5) and Co-Lead Staff (4.4.3.13) fields on the Group Session Notes screen.

6.5.6.3 The third line of the Unsigned Notes field will be the text "and discussed the following:"

6.5.6.4 Starting on the fourth line of the Unsigned Notes field will be the text entered into the Note field on the Group Session Notes screen (4.4.3.14).

6.5.6.5 Following the text from the Note field will be the text from the Individual Note field accessed from the Attendees table on the Group Session Notes screen (5.5.1.2).

6.5.6.6 Example:
Entered by: Wilder, David L, Ph.D, on 091/15/2012 2:15 PM:
Facilitated by: Wilder, David L, Ph.D.; Carson, Michelle N, LCSW;
and discussed the following:
A review of the methods for dealing with amphetamine withdrawal symptoms as discussed last week. Clients reported successes, failures, and lessons learned as they applied these methods.
Client reported some success with one method but general frustration with the whole situation. Client participated willingly if not happily.

6.5.7 If needed, add to the Unsigned Notes field.

6.5.7.1 Type directly into the Unsigned Notes field.

6.5.7.2 To use a template based on the option selected in the Note Type field, click the Add Note button.

6.5.7.3 Details regarding the Note Type field and the Add Note functionality can be found in OWITS Reference Manual, Volume 5: Client Activity and Contact.

6.5.8 Click the Sign Note button in the lower right corner to move the contents of the Unsigned Notes field to the Signed Notes field and apply an electronic signature.

6.5.8.1 It is possible to save the Miscellaneous Note without signing the notes.

6.5.8.2 Some users may enter the notes and save the record for supervisors, clinicians, or other users to open and sign at a later time.

6.5.9 When all of the required fields (and others as appropriate) have been filled, click Save.

6.5.10 Click Finish to return to the Group Session Notes screen.

6.5.10.1 Using the Navigation View links to navigate away from the Miscellaneous Notes screen when accessed from the Group List module may result in the loss of unsaved data.

6.5.11 Repeat steps 6.5.1 through 6.5.10 to create additional Miscellaneous Note records for group session attendees as needed.

6.6 Create individual Encounter Notes as needed for clients (see 6.7 for creating multiple Encounter Notes at once).

6.6.1 Click the "Create" link in the Encounter column for the desired client in the Attendees table.

6.6.2 The Encounter screen will display.

6.6.3 Complete the available fields as appropriate.

6.6.3.1 For full instructions regarding the Encounter screen, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

6.6.4 Most of the available fields will automatically populate with data from the Group Session Notes screen and the Group Roster, including:

6.6.4.1 *Note Type*

6.6.4.2 *Service*

6.6.4.3 *Program Name*

6.6.4.4 *Start Date*

6.6.4.5 *End Date*

6.6.4.6 *Start Time*

6.6.4.7 *End Time*

6.6.4.8 *Duration*

6.6.4.9 *Service Location*

6.6.4.10 *# of Service Units/Sessions*

6.6.4.11 *Rendering Staff*

6.6.5 The Unsigned Notes field will populate with text from the Note field on the Group Session Notes screen and with text from the Individual Note field accessed from the Attendees table on the Group Session Notes screen.

6.6.5.1 The first line of the Unsigned Notes field will contain the text "Entered by:" followed by the name of the current user along with his or her professional credentials a date and timestamp indicating when the text was copied from the Group Session Notes screen to the Encounter screen.

6.6.5.2 The second line of the Unsigned Notes field will include the name of the group, the group type, and the date and time of the group session.

6.6.5.3 The third line of the Unsigned Notes field will contain the text "Facilitated by:" followed by the names of the staff members selected in the Lead Staff (4.4.3.5) and Co-Lead Staff (4.4.3.13) fields on the Group Session Notes screen.

6.6.5.4 The fourth line of the Unsigned Notes field will be the text “and discussed the following:”

6.6.5.5 Starting on the fifth line of the Unsigned Notes field will be the text entered into the Note field on the Group Session Notes screen (4.4.3.14).

6.6.5.6 Following the text from the Note field will be the text from the Individual Note field accessed from the Attendees table on the Group Session Notes screen (5.5.1.2).

6.6.5.7 Example:
Entered by: Wilder, David L, Ph.D., on 09/15/2012 2:15 PM
The Money Management, a Independent Living group, met on 09/15/2012 at 10:00 AM:
Facilitated by: Wilder, David L, Ph.D.; Carson, Michelle N, LCSW;
and discussed the following:
The session reviewed last week’s discussion about sticking to a prepared grocery list and budgeting for emergency expenses, then moved on to a collaborative conversation about how to manage or avoid impulse buys. Client expressed concern about her personal shopping habits and her ability to create a list. Client reported some success in saving money for emergencies since the previous session. Client participated enthusiastically in the impulse buy conversation.

6.6.6 If needed, add to the Unsigned Notes field.

6.6.6.1 Type directly into the Unsigned Notes field.

6.6.6.2 To use a template based on the option selected in the Note Type field, click the Add Note button.

6.6.6.3 Details regarding the Note Type field and the Add Note functionality can be found in OWITS Reference Manual, Volume 5: Client Activity and Contact.

6.6.7 Click the Sign Note button below the Unsigned Notes field to move the contents of the Unsigned Notes field to the Signed Notes field and apply an electronic signature.

6.6.7.1 It is possible to save the Encounter without signing the notes.

6.6.7.2 Some users may enter the notes and save the record for supervisors, clinicians, or other users to open and sign at a later time.

6.6.8 When all of the required fields (and others as appropriate) have been filled, click Save.

6.6.9 Click Finish to return to the Group Session Notes screen.

6.6.9.1 Using the Navigation View links to navigate away from the Encounter screen when accessed from the Group List module may result in the loss of unsaved data.

6.6.10 Repeat steps 6.6.1 through 6.6.9 to create additional Encounter records for group session attendees as needed.

6.7 It is also possible to create a single Encounter Note for multiple clients at once.

6.7.1 Add a check mark next to the name of each client for whom a note will be created.

6.7.2 Select the "Create Encounter" option in the drop-down menu in the Attendees heading.

6.7.3 Click the "Perform Action" link in the Attendees heading.

6.7.3.1 The screen will enter a read-only state and will display the message, "The encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update."

6.7.3.2 OWITS will process the encounter creation in the Activity List for each selected client.

6.7.3.3 To see whether the process has finished, click the "Refresh" link that has appeared in the Administrative Actions box or click Finish to leave this screen and return later to see the results.

6.7.4 If the encounter was created successfully, "View" will appear in the Encounter column of the Attendees table.

6.7.5 If the encounter was not created, the client's line in the Attendees table will turn yellow, and an "Error Details" link will appear next to the client's name.

6.7.5.1 Click the "Error Details" link to see what is preventing the encounter from being created.

6.7.5.2 A pop-up window will appear with an "Error Details" box.

6.7.5.3 Correct the conditions that caused the error and attempt to create the encounter again.

6.7.5.4 Close the pop-up window when finished.

6.8 Click Finish to return to the Group Session List screen.

6.9 Existing Miscellaneous Notes and Encounters can be reviewed one of two ways.

6.9.1 Route 1: On the Group Session Notes screen click the "View" link in the Misc. Notes column or the Encounter column for the desired client in the Attendees table.

6.9.2 Route 2: Navigate to the client's Activity List and use the Navigation View links or the "Review" links in the Actions column to open the desired note.

7.0 Group Notes Summary

7.1 OWITS can generate and display a summary of all the notes recorded for each group session.

7.1.1 This does not include notes entered for individual clients.

7.1.2 For instructions on viewing specific client notes, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

7.1.3 For instructions on viewing reports of client notes, see OWITS Reference Manual, Volume 10: Running Reports.

7.2 In the Navigation View, open the Group List module.

7.2.1 The Group List screen will display.

7.2.2 Existing group profiles will display in the Group Profile List table.

7.3 In the Group Profile List table, click the "Session List" link for the desired group profile.

7.3.1 The Group Session List table will display.

7.4 Click the "Print Group Notes" link in the Group Session List heading.

7.4.1 A notes search screen will display with date fields.

7.5 Enter a range of dates in which to search for group session notes.

7.5.1 In the From field, enter the first or earliest date of the group session notes to be displayed.

7.5.2 In the To field, enter the last or latest date of the group session notes to be displayed.

7.5.3 Leaving these fields blank will cause the search function to ignore date ranges and will display all notes all notes for the selected session.

7.6 Click Go.

7.7 The search results will display in a Group Session Notes table, consisting of the following columns:

7.7.1 *Group Profile Name*

7.7.2 *Date*

7.7.2.1 This column indicates the date of the session (see 4.4.3.6).

7.7.3 *Rendering Staff*

7.7.3.1 This column indicates the session's lead staff (see 4.4.3.5).

7.7.4 *Type*

7.7.4.1 This column indicates the type of note (see 4.4.3.3).

7.7.5 *Note*

7.7.5.1 This column displays the text entered into the "Note" field on the corresponding Group Session Notes screen (4.4.3.14).

7.8 The Group Session Notes table can be exported for us outside OWITS.

7.8.1 Press and hold the CTRL key.

7.8.1.1 Do not release the CTRL key until the export process is complete.

7.8.2 Click the Export button.

7.8.3 A dialogue box will appear asking, "Do you want to open or save this file?"

7.8.3.1 Click "Open" to view the file in the pop-up browser window without saving it.

7.8.3.1.1 Release the CTRL key.

7.8.3.1.2 Close the pop-up browser window when finished.

7.8.3.2 Click "Save" to save a copy of the file to the computer.

7.8.3.2.1 A "Save As" dialogue box will appear.

7.8.3.2.2 Release the CTRL key.

7.8.3.2.3 Select the location to which the file will be saved.

7.8.3.2.4 If desired, change the file name.

7.8.3.2.5 Click "Save".

7.8.3.2.6 The file can now be opened and modified as needed.

7.8.3.3 Click "Cancel" to stop this process.

7.9 Click Finish to return to the Group Session List screen.

Appendix A – OWITS Reference Manual Volume Titles

- OWITS Reference Manual, Volume 1: OWITS Basics
- OWITS Reference Manual, Volume 2: Client Records Overview
- OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records
- OWITS Reference Manual, Volume 4: Client Profile
- OWITS Reference Manual, Volume 5: Client Activity and Contact
- OWITS Reference Manual, Volume 6: Screenings and Assessments
- *OWITS Reference Manual, Volume 7: Groups and Group Notes*
- OWITS Reference Manual, Volume 8: Consent and Referrals
- OWITS Reference Manual, Volume 9: Client Discharge
- OWITS Reference Manual, Volume 10: Running Reports
- OWITS Reference Manual, Volume 11: Billing
- OWITS Reference Manual, Volume 12: Troubleshooting
- OWITS Reference Manual, Volume 13: Tier 1 System Administration
- OWITS Reference Manual, Volume 14: Tier 2 System Administration
- OWITS Reference Manual, Volume 15: AMH Policies for OWITS Records and Users

Appendix B – Navigation View Map

A map of the navigation pane links can be found here (OWITS Navigation Map).
Due to its size, printing this document is **not** recommended.

Revision History

Revised By	Date	Description
Justin D. King	May 3, 2012	Reference manual created.
Justin D. King	June 25, 2012	Revision History table added.
Justin D. King	October 8, 2012	Definitions updated; Description and Purpose added.
Justin D. King	December 24, 2012	Corrected formatting and added clarifying text.
Justin. D. King	January 2, 2014	Added link to Navigation Map. Added instructions for creating encounters from a group session in bulk.