

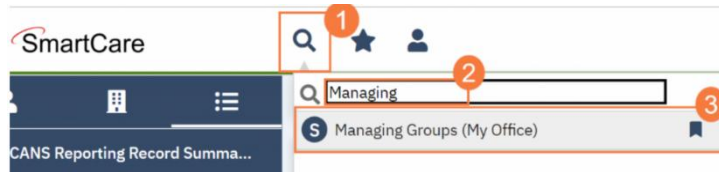
## Group User Guide

### CalMHSA Documentation Guide: Required Progress Note Service Information

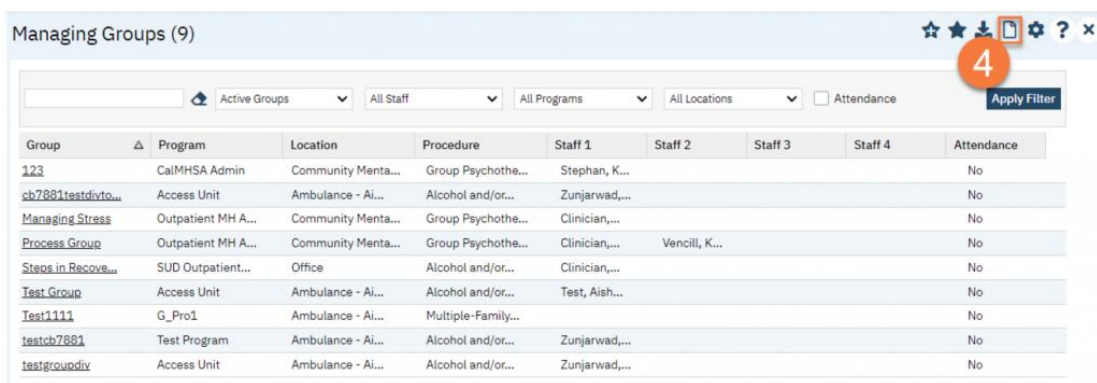
- The type of service rendered
- A narrative describing the service, including how the service addressed the person's behavioral health need (e.g., symptom, condition, diagnosis and/or risk factors).
- The date that the service was provided to the beneficiary.
- Duration of the service, including travel and documentation time, which should be documented separately.
- Location of the person in care at the time of receiving the service.
- A typed or legibly printed name, signature for the service provided and date of signature.
- ICD 10 code.<sup>44</sup>
- Current procedural terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) code.
- The plan, or next steps, including but not limited to, planned action steps by the provider or by the person in care, collaboration with the person in care, collaboration with other provider(s) and any update to the problem list as appropriate.
- For groups facilitated by multiple practitioners, a single progress note signed by one of the practitioners can be used to document the group service provided.
- Information about the specific involvement and specific amount of time of involvement of each practitioner in the group activity. Travel and documentation time should be captured separately
- A list of group participant names needs to be maintained. Please note, due to confidentiality standards, the full list of group participants must not be kept in any single participant's personal health records: instead the MHP or practitioner must maintain the full participant list outside of any participant's health records.

## How to Set up a Group in SmartCare

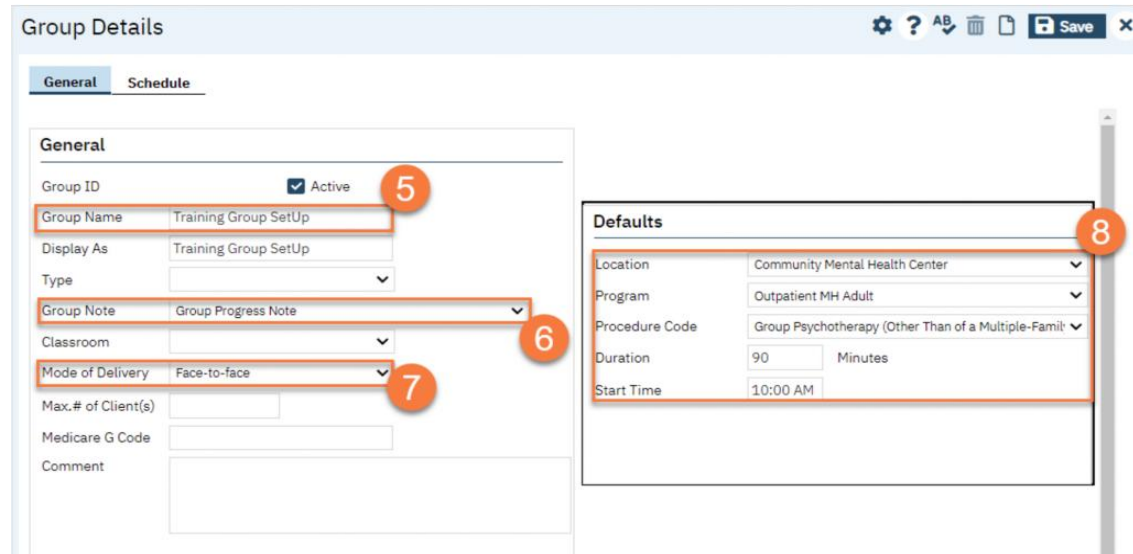
1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. This takes you to the Managing Groups list page. Click the New icon.



5. This takes you to the Group Details screen. It is best to complete this screen from top to bottom. You will also not be allowed to move on to the Note tab until the Service time is completed. The following fields in bold are required. **Enter the group's name.** This will auto-populate the "Display As" field, which you can change if necessary.
6. **In the Group Note drop-down, select "Group Progress Note".**
7. **Enter the mode of delivery.**
8. **Enter the service information about the group in the Defaults section**



9. Add Clients, as applicable. For some groups that are drop-in, you may not have any clients to include. If this is a closed group, or an ongoing group, we recommend adding the clients here. For STRTP's, if this group has a mix of Fresno County, Presumptive Transfer and Out of County Placement youth (Non-Presumptive Transfer), you would only add clients that are Fresno County or Presumptive Transfers. **Click Add Clients.**

**Attendance**

☐ Attendance [Schedule...](#)

Group Note Type ▼

☐ Add all clients enrolled in Program

Default Procedure ▼ [Set Client Specific Default...](#)

**Clients** ☐ Automatically add clients from roster to new group service

Clients which may attend this group. [Add Clients...](#)

Client Name
No data to display

**Staff**

Staff that may lead this group. [Add Staff...](#)

Is Clinician	Staff Name
No data to display	

- a. This brings up the client search pop-up. Search for the client you want to add to the group. **Select the client from the Records Found section.**
- b. **Click “Select.”**
- c. When you’ve finished adding all clients, you can **click “Select & Close”.**

**Client Search**

[Clear](#)

**Name Search** ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

[Broad Search](#) [Narrow Search](#) Type of Client ☒ Individual ☐ Organization

Last Name  Training First Name  Manual Program ▼

**Other Search Strategies**

[SSN Search](#)

[DOB Search](#)  ▼

[Primary Clinician Search](#) ▼

[Authorization ID / #](#)

[Phone # Search](#)

[Master Client ID Search](#)

[Client ID Search](#)

[Insured ID Search](#)

**Records Found**

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/> 1239	1239	Training, Manuel		9999	06/07/20...	Active	Sacrame...	
<input type="radio"/> 1268	1268	Training, Manuel		3545	09/01/20...	Active		

[Select](#) [Select & Close](#) [Cancel](#)

10. Add the group facilitators. You can have more than one facilitator. **Click Add Staff.**

**Attendance**

☐ Attendance **Schedule...**

Group Note Type ▼

☐ Add all clients enrolled in Program

Default Procedure ▼ **Set Client Specific Default...**

**Clients** ☐ Automatically add clients from roster to new group service

Clients which may attend this group. **Add Clients...**

Client Name
No data to display

**Staff**

Staff that may lead this group. **Add Staff...**

Is Clinician	Staff Name
No data to display	

- This brings up the Group Services Staff Pop Up. **Select the facilitator(s) from the list.**
- Click OK.**

**Group Service Staff Pop Up** ? ×

**OK** **Cancel**

<input type="checkbox"/>	Staff, Access
<input type="checkbox"/>	Staff, Billing
<input type="checkbox"/>	Staff, Clerical
<input type="checkbox"/>	Staff, Compliance
<input type="checkbox"/>	Staff, Nurse
<input type="checkbox"/>	Staff, Psychiatrist
<input checked="" type="checkbox"/>	Staff, Test

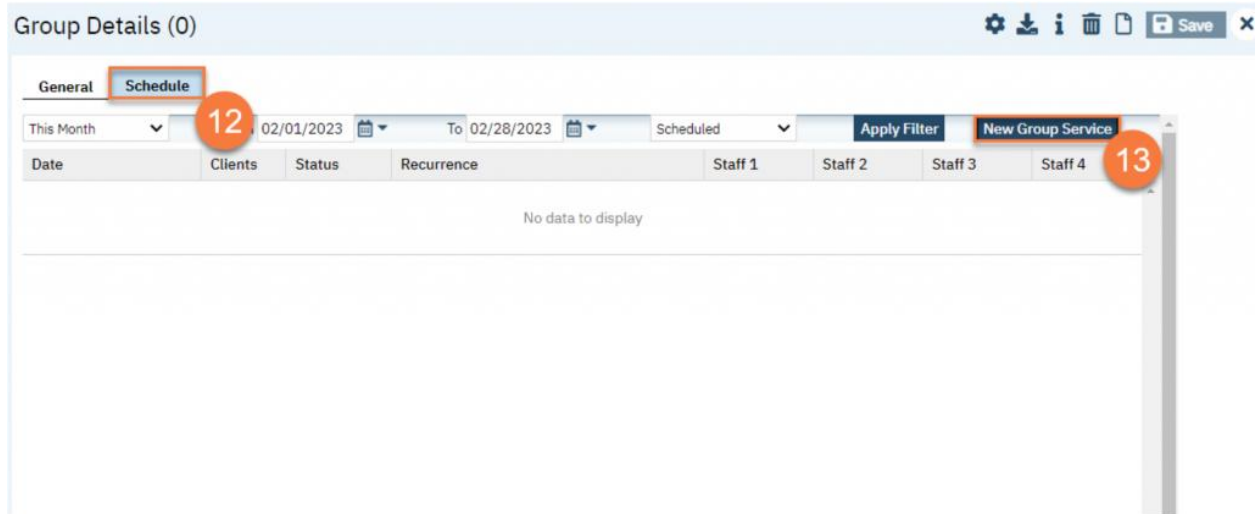
- This takes you back to the Group Details page. **Select the primary staff member** by selecting them under “Is Clinician”.

11. **Click Save.**



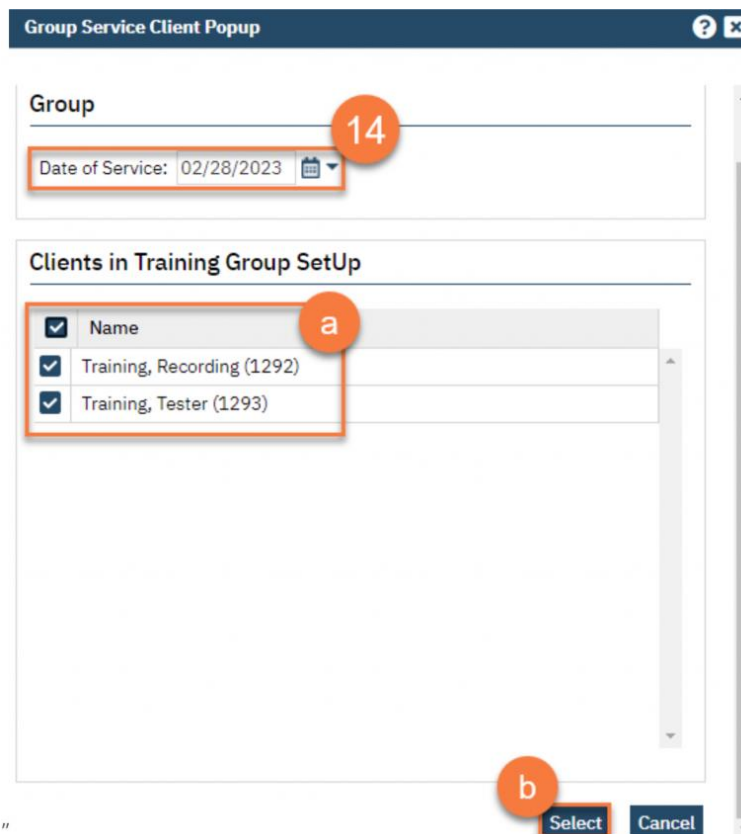
12. Navigate to the Schedule tab.

13. Click “New Group Service”



14. This brings up the Group Service Client Popup window. Enter the first date of the group.

- a. Select the clients you’re expecting to attend. You can click the top-most checkbox to select all the clients.
- b. Click “Select.”



15. This takes you to the Group, Group Detail screen. **Confirm the group information. The time and staff start time will default, confirm or change information and save if needed.** This is a required field.

The screenshot shows the 'Group Service Detail' form. At the top, there are tabs for 'Group' and 'Note'. Below these are 'Group Details' and 'Services' tabs. The 'Group Details' tab is active. The form contains the following fields:

- Group:** A dropdown menu with 'OI test group' selected.
- Date:** A date picker showing '07/28/2025' with a calendar icon and a refresh icon.
- Location:** A dropdown menu with 'Community Mental Health C' selected.
- Status:** A dropdown menu with 'Scheduled' selected.
- Group Comment:** A text input field with an information icon.
- Specific Location:** A text input field.
- Evidence Based Practices:** A dropdown menu.

Below the group details is a 'Staff' section with an 'Add Staff...' button. It contains a table with the following data:

Staff Name	Unit	Type	Start	End
Rosel-Bucio, Mayra	60	Minutes	10:00 AM	11:00 AM

16. To set this up as a recurring group service, **click the recurrence icon, your service date will need to be a future date.**

This screenshot is similar to the previous one, but the recurrence icon (a circular arrow) next to the date field is highlighted with an orange box. The 'Unit' field in the staff table is now '50'.

**Important Note:** If this is a closed group where group facilitators and group members will not often change then we recommend that you select the “Create Immediately” checkbox. Clicking the “Create Immediately” checkbox will create the specified series of events on the staff calendar. Keep in mind that by doing this any changes that need to be made to this series would need to be made individually and will not be pushed to the group recurrence. If you anticipate this to be an open group with group member changes and/or staff member changes then you would want to leave this option unchecked. That way when you make changes it will be pushed to future events. In this case, a place holder will be on the staff calendar instead of the actual event.

- Identify the dates for reoccurrence timeframe

- b. How often you would like to make the reoccurrence
- c. **Click OK.**

**Recurring Group Services**

**Date Range**

Start: 3/1/2023 End: 4/30/2023

**Recurrence Pattern**

☐ Daily Recur every 1 week(s) on:

☒ Weekly ☐ Sun ☐ Mon ☒ Tue

☐ Monthly ☐ Wed ☒ Thu ☐ Fri ☐ Sat





☒ Create Immediately

Ok Cancel

You are finished and may now **click the X icon** to close.

## Documenting for Group Notes

1. On your **Appointments for Today** widget, click on the link for the time of the group you're documenting.

Client Name/Description	Time	Status	
<a href="#">Training, Manual(T...</a>	<a href="#">08:00 AM</a>	Scheduled	ATP  
<a href="#">Testing, Jose(Ment...</a>	<a href="#">09:00 AM</a>	Show	ATP  
Lunch	<a href="#">12:00 PM</a>		
Process Group	<a href="#">02:00 PM</a>	Show	
Paper Work	<a href="#">04:00 PM</a>		

2. This opens the Group Service Detail screen. In the Group Details tab, you'll see the group information. Confirm the information and **add any additional information regarding the entire group**.





- [illegible]

- Group Service Client PopUp

?

✕

Group Service Clients

Clients in Process Group

☐

Name

No data to display

Select

Cancel

- | Clients |                 | <input type="checkbox"/> Show Clients With Errors |  |      |   |
|---------|-----------------|---|--|------|---|
| X       | Asano, Jason    |   |  | ASAM | i |
| X       | Bravo, Johnny   |   |  |      | i |
| X       | Childers, Cindy |   |  |      |   |

- e. This will open up the Group Service Client Popup, which will list any clients that are enrolled in this program but are not yet enrolled in this group. **Select the client(s) you want to add and click Select** to add them to this service.

Group Service Client Popup




Group Service Clients

Clients that are enrolled in the program













































<input type="checkbox"/>	Name
<input type="checkbox"/>	Adair, Alice (1160)
<input type="checkbox"/>	Another, Test (1209)
<input type="checkbox"/>	Arambula, Maximo (1247)
<input type="checkbox"/>	Asano, Hiro (1111)
<input type="checkbox"/>	Asano, Kaito (1106)
<input type="checkbox"/>	Baizey, Test (1183)
<input type="checkbox"/>	Baizey2, Test1 (1204)
<input type="checkbox"/>	Banks, Tara (1078)
<input type="checkbox"/>	Barajas, Fabiola (1235)
<input type="checkbox"/>	Barnes, Kim (1093)
<input type="checkbox"/>	Barrington, Rosemary (1265)

**e**

- f. To add a client from another program, click on the Magnifying Glass icon.

Clients ☐ Show Clients With Errors   

**f**

		Asano, Jason			ASAM		
		Bravo, Johnny					
		Childers, Cindy					
		Powers, Light					
		Test, Patient		ASAM			
		Tommy, Max		ASAM			
		White, Walter					
		Williams, Kyle					

- g. This will bring up the client search function. **Search for the client you want to add and click Select & Close.** If you want to add more than 1 client, you can simply click **Select** and then search for the next client you want to add.

**Client Search**

Clear

**Name Search** ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

**Broad Search** **Narrow Search** Type of Client ☒ Individual ☐ Organization

Last Name Training First Name Program

**Other Search Strategies**

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

**Records Found**

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/> 1138	1138	Train, Test		3693	12/01/19...	Active	New York...	Tg, Sahana
<input type="radio"/> 1239	1239	Training, Manual		9999	06/07/20...	Active		
<input type="radio"/> 1268	1268	Training, Manuel		3545	09/01/20...	Active		

Select Select & Close Cancel

5. Once you have your group roster set up, move to the service information section. The first client will be highlighted. As you make changes, this will update that specific client only. This is where you can mark whether clients who were a no-show for the group, or who canceled and reason for cancelled.
- If you want to **set this information for all of the clients**, click the **“Set All”** button. You can do this for each item in the service information section.
  - If you want to **set this information for more than one client, but not all of them**, click the **“Set Some”** button.

**Group Service Detail**

**Service** **Note**

**Group**

Group Process Group

Date 02/01/2023

Location Community Mental Health

Status Scheduled

Evidence Based Practices

**Staff**

Staff Name Unit Type Start End

Clinician, Ro.. 60 Minutes 2:00 PM 3:00 PM

Supervisor, C.. 60 Minutes 2:00 PM 3:00 PM

**Clients** ☐ Show Clients With Errors

Asano, Jason

Bravo, Johnny

Childers, Cindy

Powers, Light

Test, Patient

Tommy, Max

White, Walter

Williams, Kyle

**Service Information** **Custom Fields** **Billing Diagnosis** **Warnings and Errors**

Procedure Group Psychotherapy (Other Than a t) Set All Set Some

Start 2:00 PM Face to Face Time 60.00 Minutes Set All Set Some

Status Scheduled Set All Set Some

Cancel Reason Set All Set Some

Program Outpatient MH Adult Set All Set Some

Clinician Clinician, Robert Set All Set Some

Attending Set All Set Some

Mode Of Delivery Set All Set Some

Billable Set All Set Some

Transportation Service No Set All Set Some

Interpreter Services Needed Set All Set Some

Travel Time Minutes Set All Set Some

Documentation Time Minutes Set All Set Some

- c. This will bring up the Set Some pop-up window. **Select the clients you want to include in this change** (e.g. all the clients who you want to mark as “show”). Then **click Set**.

The image shows the 'Set Some' pop-up window in SmartCare. At the top, it says 'Status New Value = Show'. There are 'Set' and 'Cancel' buttons. A table lists clients with checkboxes in the first column, their names in the second, and their current values in the third. An orange circle with a 'C' is over the 'Set' button. An orange arrow points to the checkbox for 'Asano, Jason'.

	Client Name	Current Value
<input type="checkbox"/>	All	
<input checked="" type="checkbox"/>	Asano, Jason	Show (71)
<input type="checkbox"/>	Bravo, Johnny	Show (71)
<input checked="" type="checkbox"/>	Childers, Cindy	Show (71)
<input checked="" type="checkbox"/>	Powers, Light	Show (71)
<input checked="" type="checkbox"/>	Test, Patient	Show (71)
<input type="checkbox"/>	Tommy, Max	Show (71)
<input checked="" type="checkbox"/>	White, Walter	Show (71)
<input checked="" type="checkbox"/>	Williams, Kyle	Show (71)

\*If you hover your arrow above the yellow flag you will be able to see the each client and their information.

The image shows the 'Status' dropdown menu. It has a search bar with 'Show' entered. Below the search bar, there is a list of clients with their current values. To the right of the list are 'Set All' and 'Set Some' buttons for each client.

Status	Set All	Set Some
* -- indicates clients have different values for this field		
Patient, One - Show	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test, Patient - Scheduled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test, Justa - Show	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trent, Charlotte - Show	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- d. If you set this group for one program but you will have person served from different programs make sure you change the person served program to match the program they are enrolled in.

The image shows the 'Service Information' tab in SmartCare. It has a search bar with 'Group Counseling' entered. Below the search bar, there is a list of services with their start times, status, and program. To the right of the list are 'Set All' and 'Set Some' buttons for each service. An orange circle with a 'd' is over the 'Program' field. The 'Program' field is highlighted with an orange box, and its dropdown menu is open, showing a list of programs.

Procedure	Start	Status	Program	Set All	Set Some
Group Counseling	10:00 AM	Show	101020-3.1-Westcare MLK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Face to Face Time	60 Minutes			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cancel Reason				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clinician				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attending				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mode Of Delivery				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billable				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transportation Service				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Interpreter Service Needed				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Travel Time				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documentation Time				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- e. When setting up a group with two facilitators make sure that the procedure code used in the group is one that can be used by both facilitators for example, if a LPHA and Case Manager co facilitate a group the procedure code would be Psychosocial Rehabilitation Group.
- f. Verify Diagnosis for individuals using the Billing diagnosis tab on the Group Services Details page. Highlight each individual and click on Billing Diagnosis tab. If the diagnosis is not there but you have completed a diagnosis document with the correct effective date, click on refresh diagnosis.

The screenshot shows a web application interface for managing clients. On the left, there is a list of clients, each represented by a small 'X' icon. The right side of the interface has several tabs: 'Service Information', 'Custom Fields', 'Billing Diagnosis' (which is highlighted with an orange box), 'Add-On Codes', and 'Warni'. Below the 'Billing Diagnosis' tab, there is a section titled 'Billing Diagnosis' with a large empty area for text. At the bottom of this section, there are two links: 'Re-Order Diagnosis' and 'Refresh Diagnosis'.

6. Once you've completed the service information, **navigate to the Note tab.**

The screenshot shows the 'Group Service Detail' page. At the top, there is a toolbar with various icons and a 'Save' button. Below the toolbar, there are two tabs: 'Service' and 'Note' (which is highlighted with an orange box and labeled '6'). Under the 'Note' tab, there are two sub-tabs: 'Group Note' and 'Client Note'. To the right of these tabs, there are buttons for 'Sign My Notes', 'Co-Signer(s)...', and 'Add Co-Signer'. Below the tabs, there is a 'Template' dropdown menu set to 'Clinician, Robert', with an 'Update My Client Notes' button (labeled 'c') next to it. Below the template, there is a 'Total Number in Group' input field (labeled 'a') and a 'List non-client group members' text area (labeled 'b'). At the bottom, there is a large 'Group Summary' text area (labeled '7').

7. **Enter the group note summary.**

- a. Enter the Total Number in Group. (For STRTP's this will include all the youth that attended group, not just the Fresno County or Presumptively Transferred youth)
- b. List non-client group members or enter N/A if none. (For STRTP's, you will list the Non Fresno County/Presumptive Transferred youth as follows i.e. Riverside County 1, Riverside County 2, San Mateo County 1, Kern County 1. Do not list any PHI for the Non Fresno County/Presumptive Transferred youth(s).

- c. **Click the Update My Client Notes button after you complete the group note summary.** This will push the group summary to all the group member's notes.
8. **Navigate to the Client Note tab.**
9. On the left side of the screen, **select the client** you're individualizing the note for. Clients marked as "No-Show" or "Canceled" will still be on the list but no note will be generated.
  - a. You can **click on the checkbox "Only Show clients where I am the Note Author"** to limit the clients on the list.
10. On the right side of the screen, **Add problems to the problem list as necessary.** See Problem List for more information. After adding any problems, make sure to click Save. **Select problems that were addressed in today's session.** If you've added any problems to the problem list during this note writing, click Refresh to update this list.

The screenshot shows the 'Group Service Detail' window. The 'Note' tab is active, and the 'Client Note' sub-tab is selected. A list of clients is on the left, with 'Asano, Jason' highlighted. The 'Problem List' table is visible on the right.

		SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program
X	<input type="radio"/>	Subchronic schizophrenia with ...	111482003	F20.3	11/18/2022		Access Unit
X	<input type="radio"/>	Perinatal depression	10211000132109	F32.9	11/18/2022		Access Unit
X	<input type="radio"/>	Primary degenerative dementia...	10532003	F32.9	11/18/2022		Outpatient MH Adult
X	<input type="radio"/>	Severe food insecurity on U.S. h...	470951000124105	Z59.41	11/18/2022		Access Unit
X	<input type="radio"/>	Severe food insecurity on U.S. h...	470951000124105	Z59.41	11/18/2022		Access Unit
X	<input type="radio"/>	Severe food insecurity on Unite...	470951000124105	Z59.41	11/18/2022		Access Unit
X	<input type="radio"/>	Unhealthy alcohol drinking beh...	1093988100011...	F10.10	12/21/2022		Access Unit

11. **Enter the individual client's note** for this group service. The group summary note will be pulled into the note and you can individualize for each client by clicking on the client's name.

The screenshot shows the 'Group Service Detail' window with the 'Client Note' sub-tab selected. The client 'Asano, Jason' is selected from the list. The 'General' tab is active, showing a list of medical conditions with checkboxes.

General
<input type="checkbox"/> Perinatal depression
<input type="checkbox"/> Primary degenerative dementia of the Alzheimer type, presenile onset, with depression (disorder)
<input type="checkbox"/> Severe food insecurity on U.S. household food security survey module
<input type="checkbox"/> Severe food insecurity on U.S. household food security survey module
<input type="checkbox"/> Severe food insecurity on United States household food security survey module
<input type="checkbox"/> Unhealthy alcohol drinking behavior

12. To add Co-Signers as necessary, **navigate to the Co-Signers tab.**
  - a. **Select the staff from the dropdown menu.** This will add them to the list of people who will be asked to co-sign the note. This is not required.
13. Once you're finished with individualizing all your notes, **click "Sign My Notes."**

Group Service Detail

Service Note

Group Note Client Note

☐ Only Show clients where I am the Note Author ☐ Only show notes with Validation Errors

Hide Clients

Asano, Jason

Bravo, Johnny

Childers, Cindy

Powers, Light

Test, Patient

Tommy, Max

White, Walter

Williams, Kyle

Sign My Notes Co-Signer(s)... Add Co-Signer

13

12

Note Treatment Plan Goals Addressed Co-Signers

Co-Signer

a

Clinician, SUD

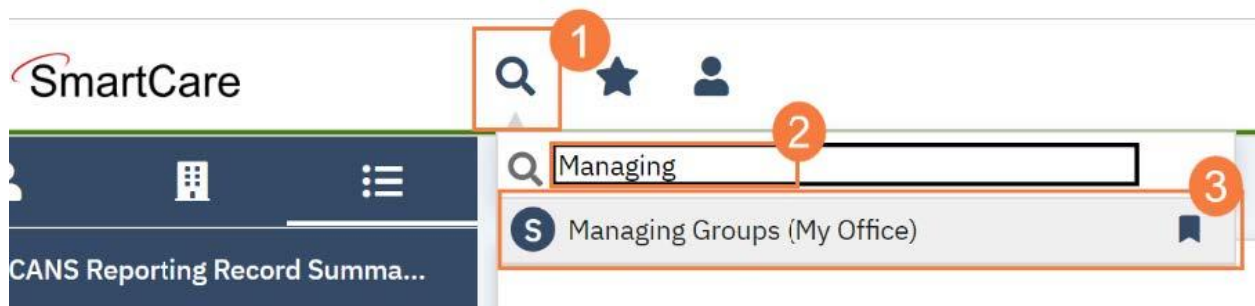
X Clinician, Robert

Clinician, SUD

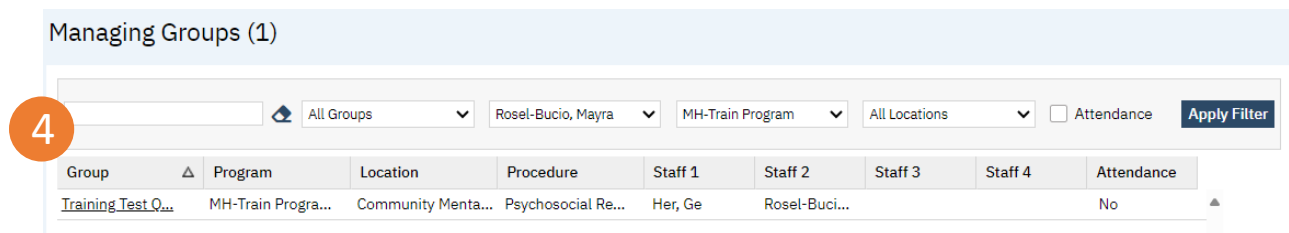
## How does the Co-Facilitator write their note (It is not a requirement for both facilitators to write a note.)

For a Co-Facilitator to write their note, the lead facilitator who was identified as lead in the set-up of the group by clicking the radio button in the staff information as “Is Clinician” will need to sign their note first.

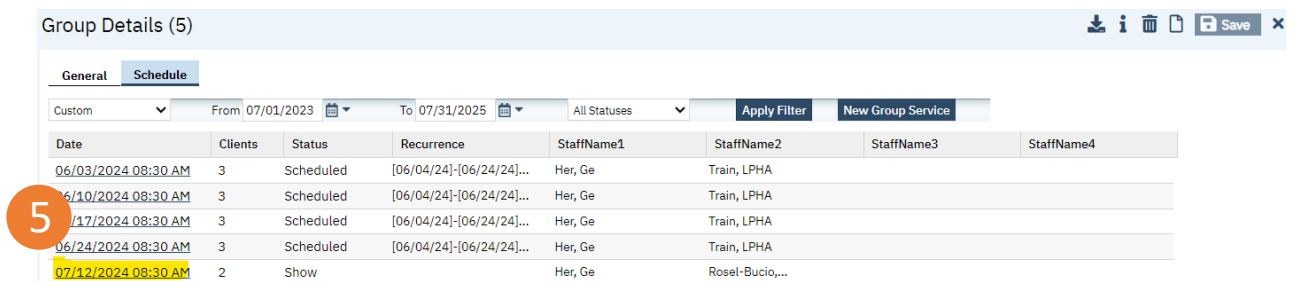
1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. Click to select the Group you will be completing the note for



5. Click to select Schedule tab and select the date of service that you want to complete note for.





6. This will open the “Group Service Detail”, verify the group, staff and client information including that your name is in the clinician information.
- You can also see the previous information entered by the lead facilitator by clicking on the small yellow triangle

- You can enter mode of delivery, documentation and any other information needed. Verify that person served has a diagnosis in the Billing diagnosis tab. Save.

c. When setting up a group with two facilitators make sure that the procedure code used in the group is one that can be used by both facilitators for example, if a LPHA and Case Manager co facilitate a group the procedure code would be Psychosocial Rehabilitation Group.

7. Click on the “Note tab”, under “Group Note” complete the group information.

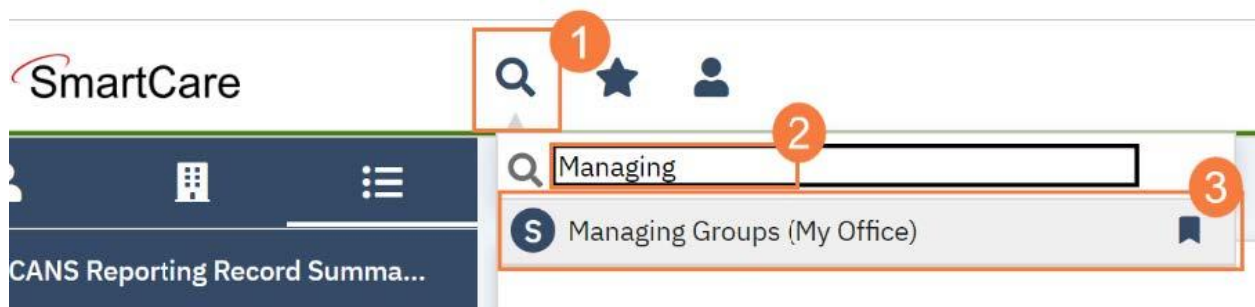
8. Click on the “Client Note tab”, complete the client note for all clients

10. Click “Sign My Notes” and this will complete your notes. You will see your notes in PDF file. You can also view the other facilitator notes by clicking on the yellow triangle under the client note tab.

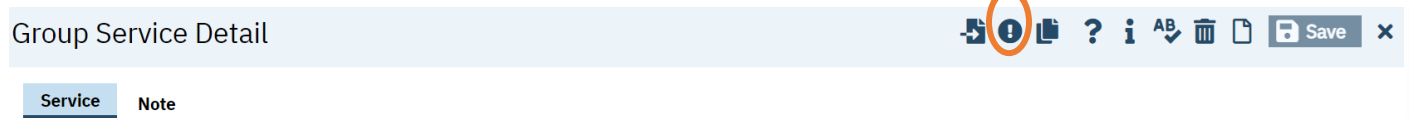
**How to edit Group note** (by doing this process you will delete the note, at this time there is no other way to “edit” a note) You will need to copy the information to reenter the note without errors.)

To edit a group note, follow the steps below:

1. **Click the Search icon.**
2. **Type Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



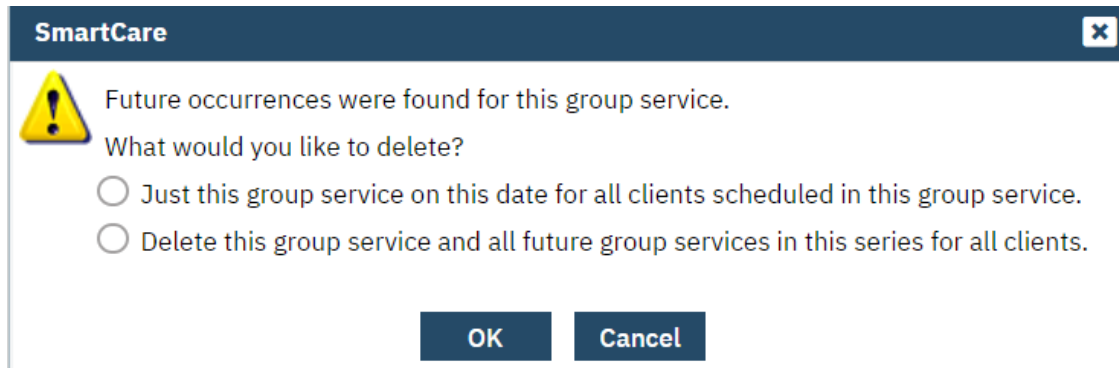
4. **Click to select the Group** you will be editing.
5. On the Group Service Detail click on the Error button that looks like an exclamation icon to mark it as error



6. This will remove the information on the Service Information field

The screenshot shows the 'Service Information' tab in the 'Group Service Detail' page. The tab is highlighted with a red box. The form contains various fields for service information, including 'Procedure', 'Start', 'Status', 'Cancel Reason', 'Program', 'Clinician', 'Attending', 'Mode Of Delivery', 'Billable', 'Transportation Service', 'Interpreter Services Needed', 'Travel Time', 'Face to Face Time', and 'Documentation Time'. Each field has a dropdown menu or a text input field. To the right of each field are two buttons: 'Set All' and 'Set Some'. The 'Error' button (exclamation mark icon) is also visible in the top right corner of the form area.

7. From here you can click on the delete button that looks like a trash can. If the group is set as a reoccurring group, it will show you the message below. Make sure you mark the correct option for your need.

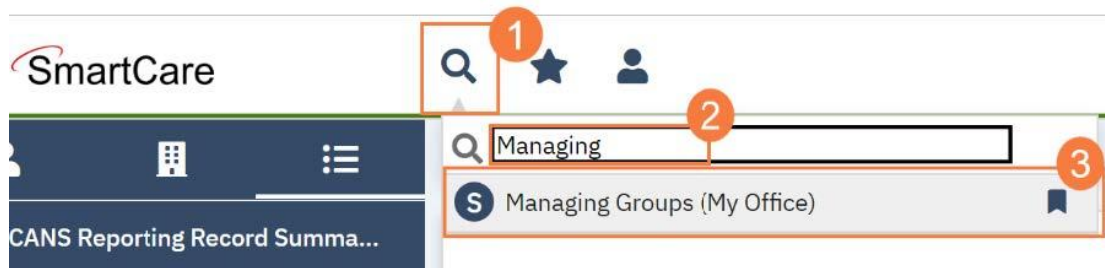


9. You will need to reenter the service note you just deleted. You will return to Managing Groups, select the group, click the Schedule tab and click New Group Service to start the new group note.

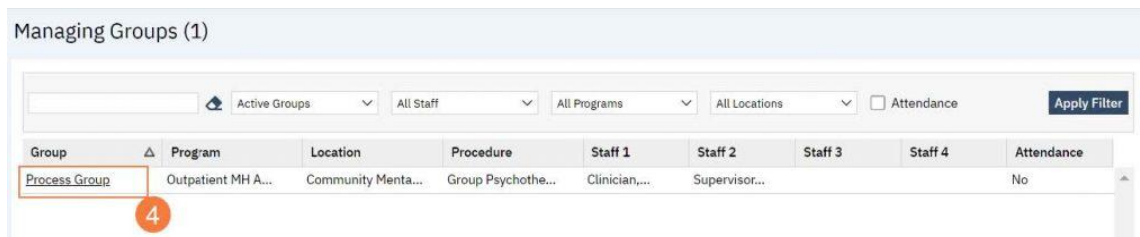
# How to Add a New Client to a Group (Remember if you click on the Date of Service for your group this will only make changes to that group service. If you want to make the change to all future services, you will need to make the changes by going to managing groups and select the group name.)

To add a new client to a Group, follow the steps below:

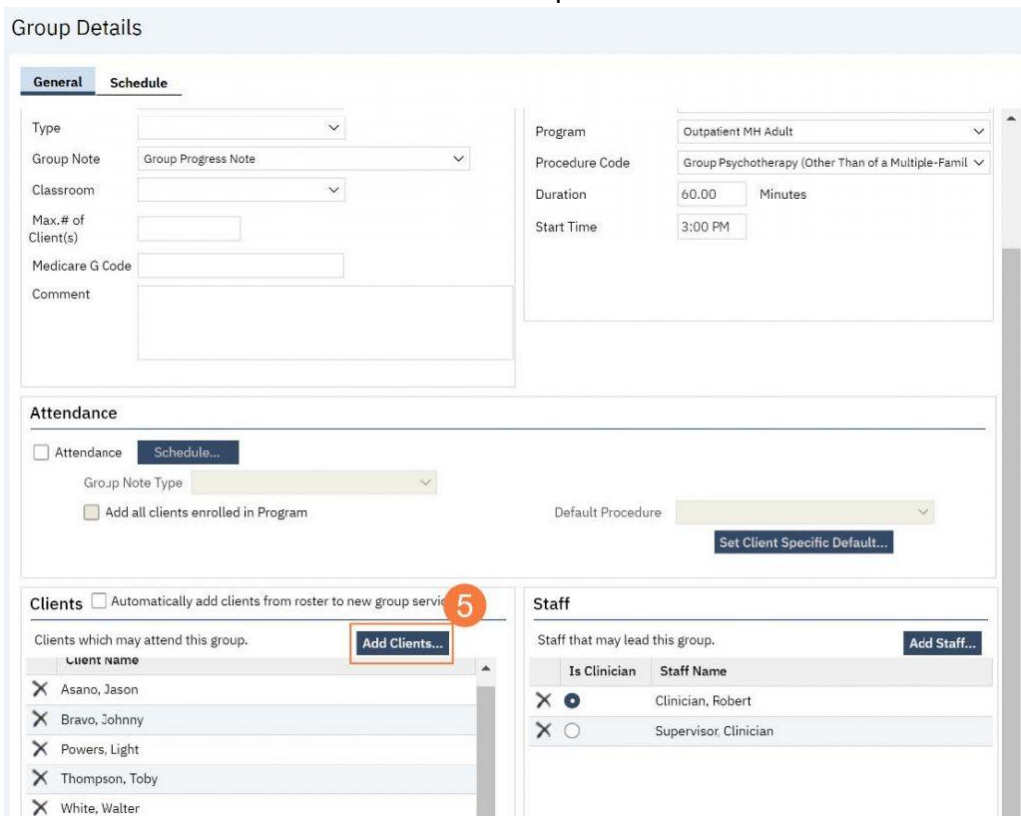
1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. Click to select the **Process Group** you will be adding the client to.



5. Locate the Client section towards the bottom of the Group Details screen. Click **Add Clients**.



6. The Client Search window will open, **click in the Last Name and First Name fields** to enter the corresponding information. Select Enter on your Keyboard to populate search results.
  - a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.
7. **Click the radio button** to left of the client you want to select.
8. **Click Select and Close.** This client will be added to the group.

**Client Search**

Clear

**Name Search** ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

**Broad Search** **Narrow Search** Type of Client ☒ Individual ☐ Organization

Last Name  First Name  Program

**Other Search Strategies**

**SSN Search**    **Phone # Search**

**DOB Search**   **Master Client ID Search**

**Primary Clinician Search**  **Client ID Search**

**Authorization ID / #**  **Insured ID Search**

**Records Found**

	ID	Master ID	Client Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input type="radio"/>	1015	1015	Tesla, Jim	0000	01/01/1980	Active	Sacramento	
<input checked="" type="radio"/>	1091	1091	Test, Max	6345	01/01/1990	Active	Middle	Rapp, Chris
<input type="radio"/>	1080	1080	TestCH, Client	9999	01/20/2011	Active		

Select Select & Close Cancel

9. **Click Save. Click the X** to close the screen.

**Group Details**

General Schedule

Type  Program

Save X

# How to remove a client from a group (Removing from Managing Groups (My Office))

1. In the Managing Group screen, select the group you will be adding a client too.

Managing Groups (4) ☆ ★ ⬇ 📄 ? ✕

sud All Groups All Staff All Programs All Locations Attendance Apply Filter

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
Another test SU...	100030-3.1-Comp...	Community Menta...	Group Counselin...	Rosel-Buci...				No

2. On the Clients section of the Group Details screen you can click on the ✕ icon next to the client you want to remove. A confirmation message will pop up to ask “Do you want to delete the record?” Select OK.

Clients ☐ Automatically add clients from roster to new group service

Clients which may attend this group. Add Clients...

Client Name
✕ Test, Justa
✕ Test, Patient
✕ Wayne, Bruce

Confirmation Message

? Do you want to delete this record?

OK Cancel

3. Click to Save on the Group Details. A pop-up window asking to Select recurrences from which the Client(s) need to be removed? Select the recurrence you would like the client to be removed from and click okay. This will remove the client from timeframe selected.

? i AB 🗑 📄 Save ✕

le

☒ Active

ther test SUD group

ther test SUD group

up Progress Note

ento-face

Defaults

Location Community Mental Health Center

Program 100030-3.1-Comprehensive Addiction Prog

Procedure Code Group Counseling

Duration 90.00 Minutes

Start Time 10:00 AM

Group Service Recurrences Scheduler

Select recurrences from which the Client(s) need to be removed?

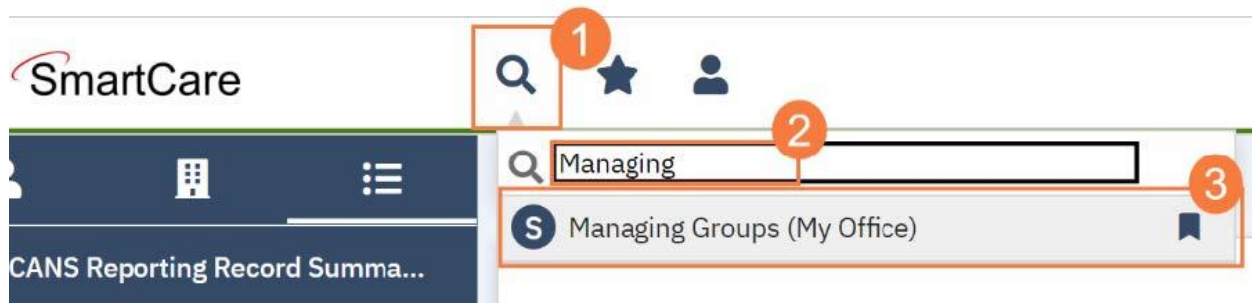
Group Name	Recurrence	Start Date	End Date
<input type="checkbox"/> Another test SUD group	[ 5/14/2024 ] - [ 5/27/2024 ]	5/14/2024	5/27/2024

1. Click on the date of service you will be editing

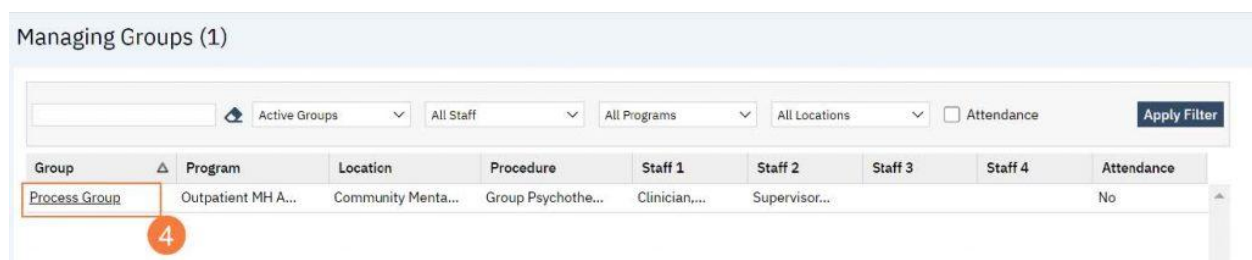
# How to Add or Change a Staff Member in a Group

To add or change a staff member in a group, follow the steps below:

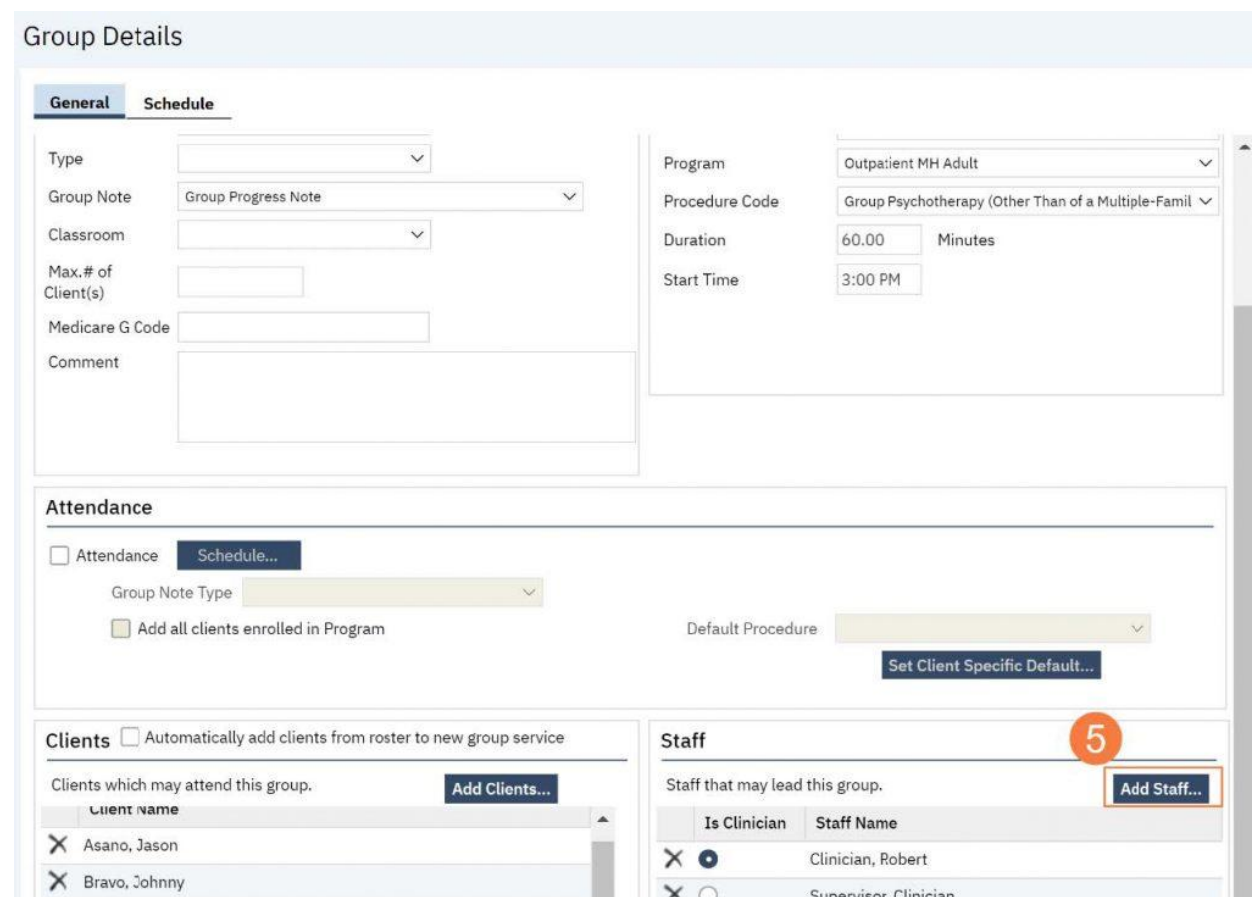
1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



4. Click to select the **Process Group** you will be adding the client to.



5. Locate the Staff section towards the bottom of the Group Details screen. Click **Add Staff**.





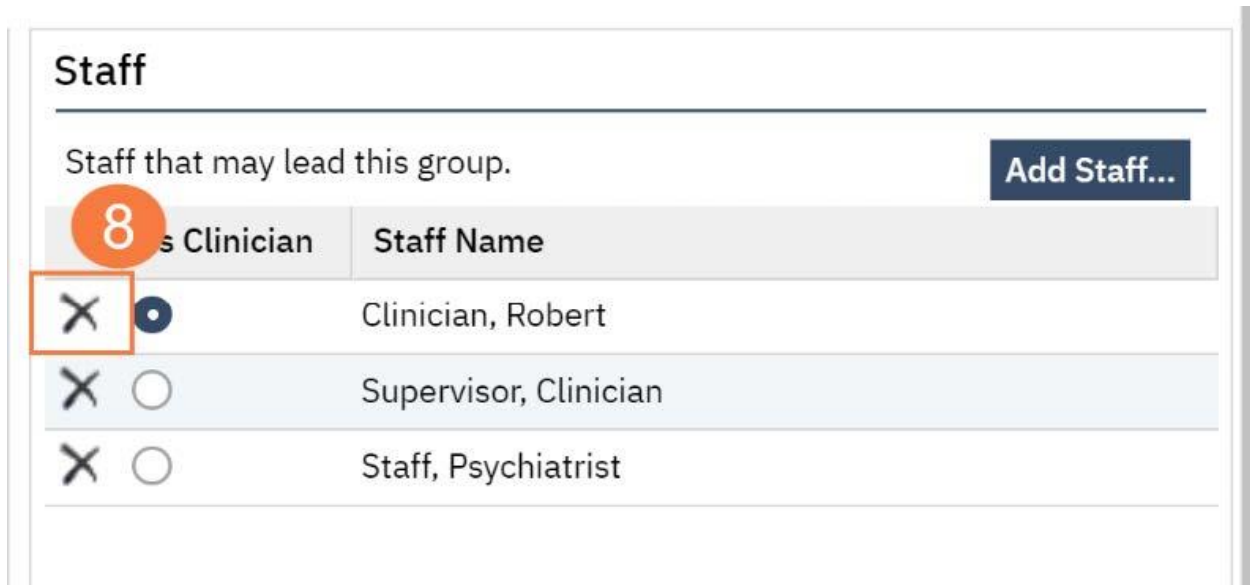
6. Click to **select** the correct staff member to add.
7. Click **OK**.



The image shows a 'Group Service Staff Pop Up' dialog box. At the top right, there is a close button (X) and a help button (?). Below the title bar, there are 'OK' and 'Cancel' buttons. A list of staff roles is displayed with checkboxes. The 'Staff, Psychiatrist' option is selected and highlighted with a red box. A red circle with the number 6 is next to it. The 'OK' button is also highlighted with a red box, with a red circle containing the number 7 next to it.

Staff Role	Selected
Staff, Access	<input type="checkbox"/>
Staff, Billing	<input type="checkbox"/>
Staff, Clerical	<input type="checkbox"/>
Staff, Compliance	<input type="checkbox"/>
Staff, Nurse	<input type="checkbox"/>
Staff, Psychiatrist	<input checked="" type="checkbox"/>
Stephan, Khristy	<input type="checkbox"/>
Sullivan, Kevin	<input type="checkbox"/>

8. And/or, if you need to remove a staff member, click the X to the left of the staff member you want to remove.



The image shows a 'Staff' management interface. It has a title 'Staff' and a subtitle 'Staff that may lead this group.' with an 'Add Staff...' button. Below this is a table with columns 'Staff Name' and 'Remove' (indicated by an X icon). The first row is 'Clinician, Robert' with a red circle containing the number 8 next to the X icon. The second row is 'Supervisor, Clinician' and the third is 'Staff, Psychiatrist'. Each row has an X icon to its left.

Remove	Staff Name
<input checked="" type="checkbox"/>	Clinician, Robert
<input type="checkbox"/>	Supervisor, Clinician
<input type="checkbox"/>	Staff, Psychiatrist

9. Click **Save**. Click the **X** to close the screen.



The image shows a bottom bar with several icons: a question mark, an information icon, a download icon, a 'Save' button, a document icon, a trash icon, and a close button (X). The 'Save' button and the close button are highlighted with red boxes. A red circle with the number 9 is next to the 'Save' button.

### Procedure codes that may be used for Group

Code Type	CalMHSA procedure ID	CPT/ HCPCS	DMC, DMC-ODS or MH	Procedure code name in SmartCare	Procedure code description	Degrees/Roles
Group Counseling	7	H0005	DMC, DMC-ODS	Group Counseling	Group counseling related to alcohol and/or drug services. 15 minutes	AOD, LCSW, PCC(LPCC), MFT(LMFT), NP, PA, PSY(PSYD), RN
Peer Support Services	19	H0025	DMC, DMC-ODS	Behavioral Health Prevention Education service	Skill building groups conducted by a Certified Peer Support Specialist.	Certified Peer Support Specialist
Therapy (MH), Family Therapy (DMC-ODS)	63	90849	MH, DMC-ODS	Multiple-Family Group Psychotherapy	A group therapy code that allows for documentation of groups that include multiple families vs. a single family. Therapy may be delivered to a beneficiary or group of beneficiaries and may include family therapy directed at improving the beneficiary's functioning and at which the beneficiary is present.	CNS, DO, LCSW, PCC(LPCC), MD, MFT(LMFT), NP, PA, PHD, PSY(PSYD)
Rehabilitation (MH), Recovery Services (DMC-ODS)	141	H2017	MH, DMC-ODS	Psychosocial Rehabilitation Group	For SMHS, "Rehabilitation" means a service activity which includes, but is not limited to assistance in improving, maintaining, or restoring a beneficiary's or group of beneficiaries' functional skills, daily living skills, social and leisure skills, grooming and personal hygiene skills, meal preparation skills, and support resources; and/or medication education.  For DMC-ODS, rehabilitation falls under	AOD, Cert Peer, CNS, DO, LCSW, PCC(LPCC), LVN, MD, MFT(LMFT), MHRs, NP, OT, Other, PA, PHD, PSY(PSYD), PT, Pharm, RD

					Recovery Services and can document education related to mental health, substance abuse, independent living, social, coping and interpersonal skills, relapse prevention, etc.	
Therapy	36	90853	MH	Group Therapy	Documents provision of "typical" group therapy services that include multiple beneficiaries. Therapy may be delivered to a beneficiary or group of beneficiaries and may include family therapy directed at improving the beneficiary's functioning and at which the beneficiary is present.	CNS, DO, LCSW, ASW, PCC(LPCC), MD, MD Intern, MFT(LMFT), NP, PA, PHD, PSY(PSYD)