

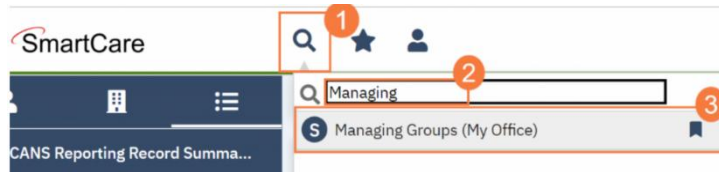
## Group User Guide

### 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.

Managing Groups (9)

Active Groups All Staff All Programs All Locations Attendance Apply Filter

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
123	CalMHSA Admin	Community Menta...	Group Psychothe...	Stephan, K...				No
cb7881testdivto...	Access Unit	Ambulance - Ai...	Alcohol and/or...	Zunjarwad,...				No
Managing Stress	Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician,...				No
Process Group	Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician,...	Vencill, K...			No
Steps in Recove...	SUD Outpatient...	Office	Alcohol and/or...	Clinician,...				No
Test Group	Access Unit	Ambulance - Ai...	Alcohol and/or...	Test, Aish...				No
Test1111	G_Pro1	Ambulance - Ai...	Multiple-Family...					No
testcb7881	Test Program	Ambulance - Ai...	Alcohol and/or...	Zunjarwad,...				No
testgroupdiv	Access Unit	Ambulance - Ai...	Alcohol and/or...	Zunjarwad,...				No

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

Group Details

General Schedule

**General**

Group ID ☐ Active

**Group Name** Training Group SetUp

Display As Training Group SetUp

Type

**Group Note** Group Progress Note

Classroom

**Mode of Delivery** Face-to-face

Max.# of Client(s)

Medicare G Code

Comment

**Defaults**

Location Community Mental Health Center

Program Outpatient MH Adult

Procedure Code Group Psychotherapy (Other Than of a Multiple-Famili

Duration 90 Minutes

Start Time 10:00 AM

9. Add Clients to the client Transfer only 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 Manual 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
1239	1239	Training, Manuel		9999	06/07/20...	Active	Sacrame...	
1268	1268	Training, Manuel		3545	09/01/20...	Active		

**Select** **Select & Close** **Cancel**

- 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.**
- Click “Select.”**
- When you’ve finished adding all clients, you can **click “Select & Close”.**
- 

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

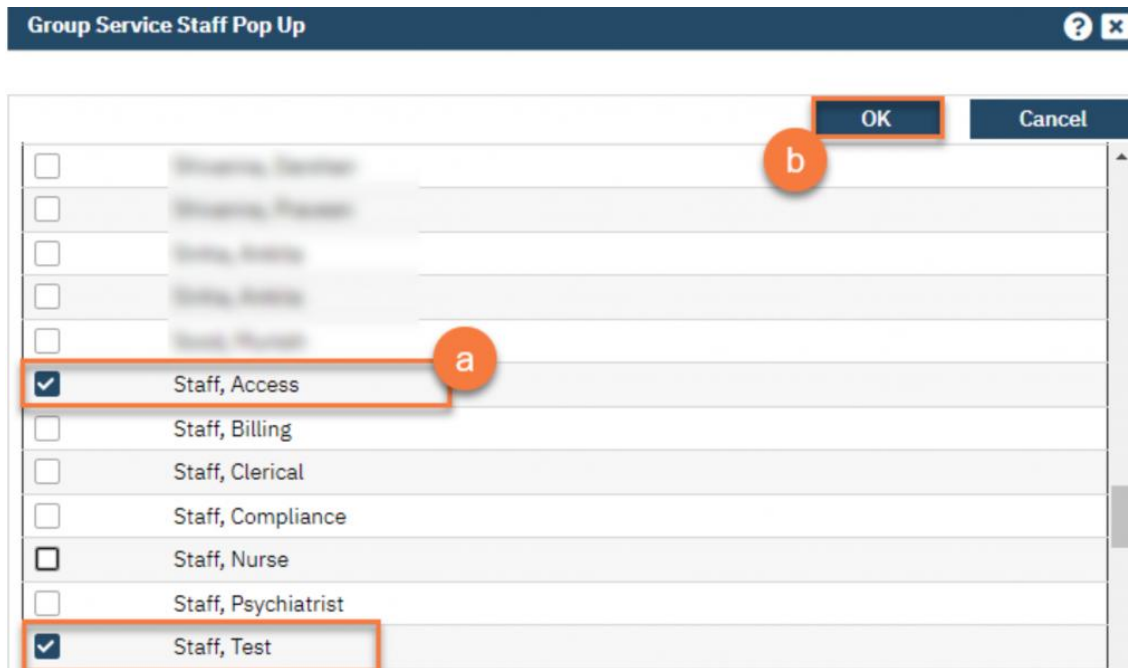
**Staff**

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

Is Clinician Staff Name

No data to display

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



The image shows a 'Group Service Staff Pop Up' dialog box. It has a title bar with a question mark and a close button. Below the title bar are 'OK' and 'Cancel' buttons. The main area is a list of staff roles with checkboxes. The roles are: Staff, Access (checked), Staff, Billing, Staff, Clerical, Staff, Compliance, Staff, Nurse, Staff, Psychiatrist, and Staff, Test (checked). Callout 'a' points to the 'Staff, Access' row, and callout 'b' points to the 'OK' button.

Role	Selected
Staff, Access	Yes
Staff, Billing	No
Staff, Clerical	No
Staff, Compliance	No
Staff, Nurse	No
Staff, Psychiatrist	No
Staff, Test	Yes

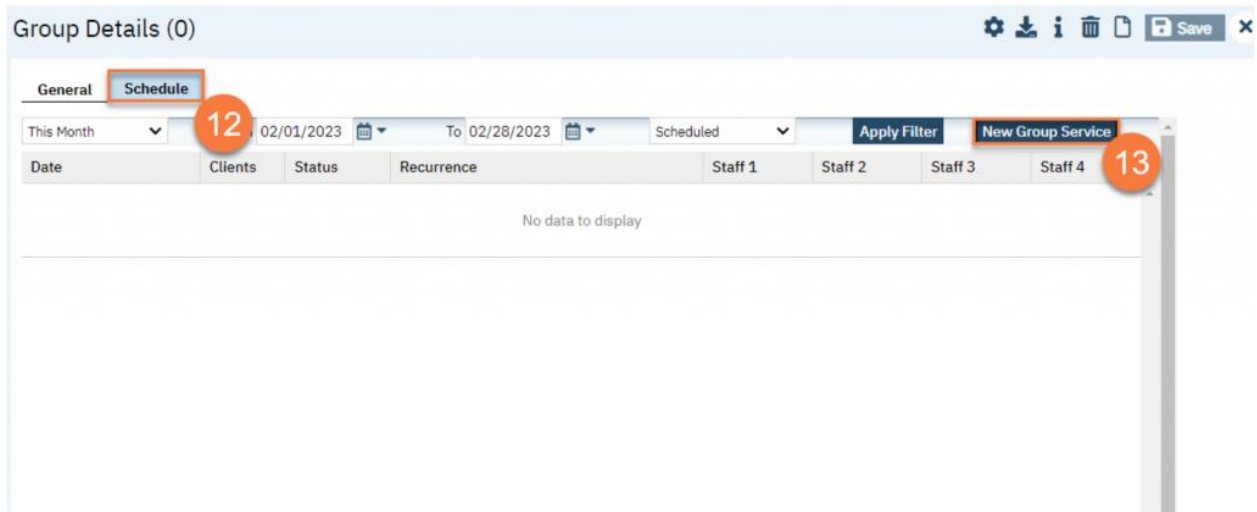
- c. This takes you back to the Group Details page. **Select the primary staff member** by selecting them under “Is Clinician”.

11. **Click Save.**



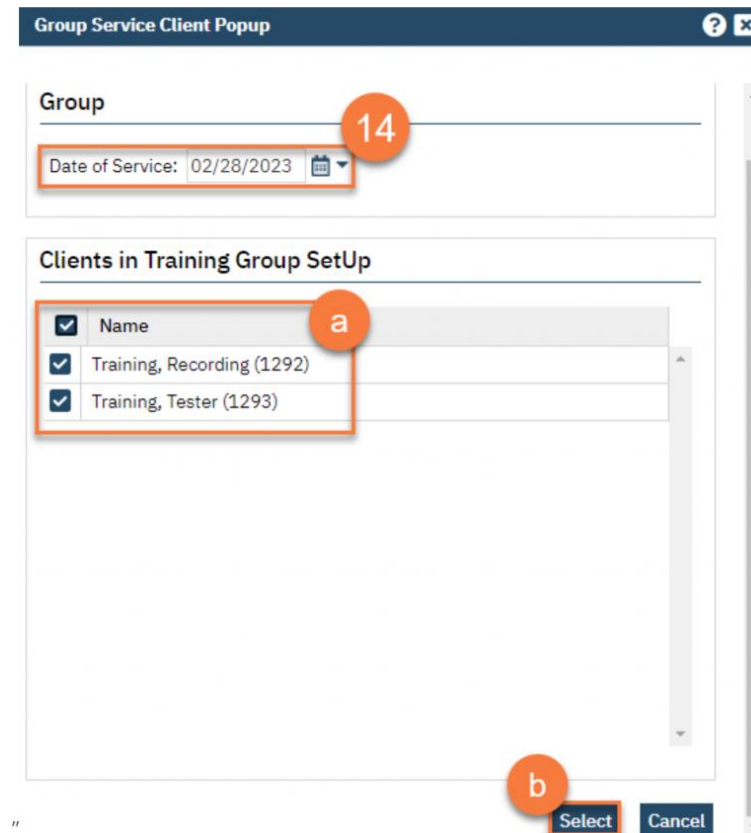
12. **Navigate to the Schedule tab.**

13. **Click “New Group Service”**



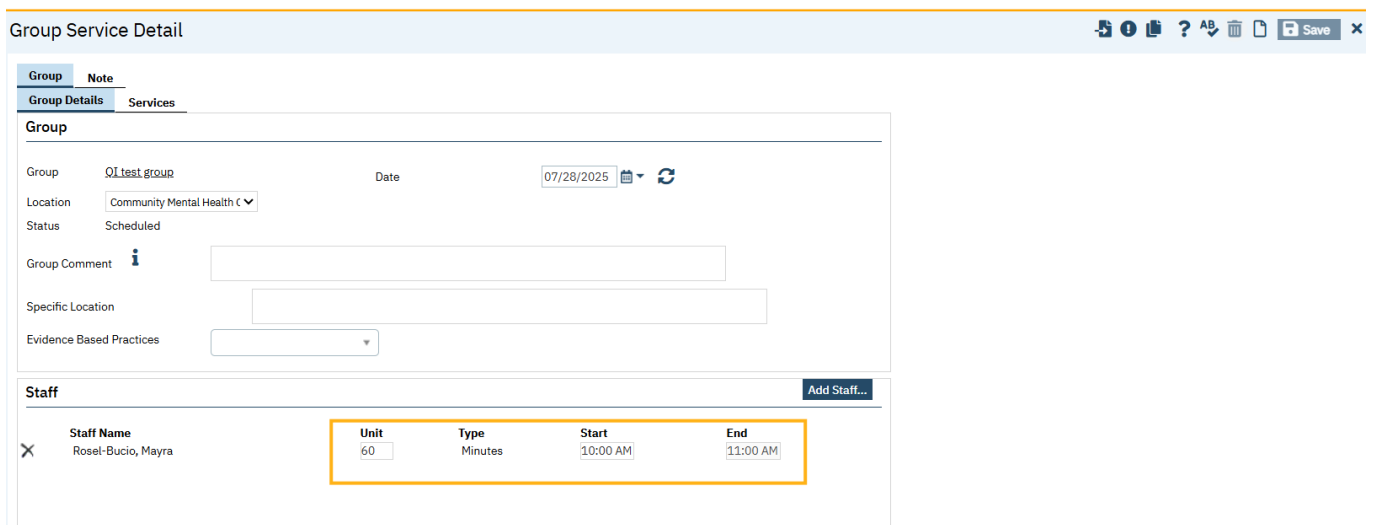
The image shows the 'Group Details (0)' page. It has a title bar with a question mark, a close button, and a 'Save' button. Below the title bar are tabs for 'General' and 'Schedule'. The 'Schedule' tab is selected. Below the tabs is a date range selector showing 'This Month' and '02/01/2023' to '02/28/2023'. There is a 'Scheduled' dropdown and an 'Apply Filter' button. A 'New Group Service' button is highlighted with a red box and a callout '13'. Below this is a table with columns: Date, Clients, Status, Recurrence, Staff 1, Staff 2, Staff 3, and Staff 4. The table is empty, with a message 'No data to display' below it. Callout '12' points to the 'Schedule' tab.

14. This brings up the Group Service Client Popup window. Enter the first date of the group.
- Select the clients you're expecting to attend. You can click the top-most checkbox to select all the clients.
  - Click "Select."



The image shows a 'Group Service Client Popup' window. At the top, there's a title bar with a question mark and a close button. Below the title bar, there's a 'Group' section with a text input field containing '01 test group' and a date picker set to '02/28/2023'. A red circle with the number '14' is next to the date picker. Below this is a 'Clients in Training Group SetUp' section. It contains a table with three rows: a header row with a checked checkbox and the text 'Name', and two data rows: 'Training, Recording (1292)' and 'Training, Tester (1293)', both with checked checkboxes. A red circle with the letter 'a' is next to the first data row. At the bottom right of the popup, there are 'Select' and 'Cancel' buttons. A red circle with the letter 'b' is next to the 'Select' button.

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 image shows the 'Group Service Detail' screen. At the top, there's a title bar with a question mark, a help icon, and a 'Save' button. Below the title bar, there's a 'Group' section with a 'Group Details' tab and a 'Services' tab. The 'Group Details' tab is active. It contains a form with the following fields: 'Group' (text input with '01 test group'), 'Date' (date picker with '07/28/2025'), 'Location' (dropdown menu with 'Community Mental Health C'), 'Status' (text input with 'Scheduled'), 'Group Comment' (text input with an information icon), 'Specific Location' (text input), and 'Evidence Based Practices' (dropdown menu). Below the 'Group' section is a 'Staff' section with an 'Add Staff...' button. It contains a table with the following columns: 'Staff Name', 'Unit', 'Type', 'Start', and 'End'. The table has one row with the following data: 'Rosel-Bucio, Mayra', '60', 'Minutes', '10:00 AM', and '11:00 AM'. A red box highlights the 'Unit', 'Type', 'Start', and 'End' columns.

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

Group Service Detail

Group

Group: QI test group Date: 07/28/2025

Location: Community Mental Health

Status: Scheduled

Group Comment:

Specific Location:

Evidence Based Practices:

Staff

Staff Name	Unit	Type	Start	End
Roset-Bucio, Mayra	50	Minutes	10:00 AM	10:50 AM

Add Staff...

**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
- How often you would like to make the reoccurrence
- 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

☐ Yearly ☐ 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.

Appointments For Today					
Client Name/Description	Time	Status			
<a href="#">Training, Manual(T...</a>	<a href="#">08:00 AM</a>	Scheduled			
<a href="#">Testing, Jose(Ment...</a>	<a href="#">09:00 AM</a>	Show			
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**.

Group Service Detail

Group Note

Group Details Services


2

Group

Group  Date

Location

Status


Group Comment 

Specific Location

Evidence Based Practices

Staff

Add Staff...

Staff Name	Unit	Type	Start	End
 Rosel-Buclo, Mayra	<input type="text" value="50"/>	Minutes	<input type="text" value="10:00 AM"/>	<input type="text" value="10:50 AM"/>

3. In the same Group, Group Details, you'll see the staff members that are set as facilitators for this group.
  - a) **Make edits to which staff members were present.** For example, if a staff was only present for half of the group time, indicate this by editing the Unit (how many minutes they were present) and the Start Time to match what happened.
  - b) **If a staff member was not present, click the Delete icon** next to their name to remove them from this service.
  - c) **If an additional staff member was present who is not listed, click the Add Staff button.** This brings up the Group Service Staff Pop Up.

The screenshot shows the 'Group Service Detail' form. Annotations are as follows:

- a**: Points to the 'Staff' section header.
- b**: Points to the 'Add Staff...' button.
- c**: Points to the 'Add Staff...' button.
- d**: Points to the 'Group Service Staff Pop Up' dialog box.

- Group Service Detail**

Group Note

Group Details Services

List of Clients

Show Clients With Errors

X Patient, One (1)

X Two, Patient (10001912)

Service Information	Custom Fields	Billing Diagnosis	Add-On Codes	Warnings and Errors
Procedure	Group Therapy			Set All Set Some
Start	10:00 AM Total Duration 60 Minutes			Set All Set Some
Status	Scheduled			Set All Set Some
Cancel Reason				Set All Set Some
Program	2230C-Youth Services Outpatient			Set All Set Some
Clinician	Rosel-Bucio, Mayra			Set All Set Some
Attending				Set All Set Some
Mode Of Delivery				Set All Set Some
Billable	<input checked="" type="checkbox"/>			Set All Set Some
Transportation Service	No			Set All Set Some
Interpreter Services Needed	<input type="checkbox"/>			Set All Set Some
Travel Time				Set All Set Some
Documentation Time				Set All Set Some



- c. This will open up the Group Service Client Popup, which will list any additional clients that are enrolled in this group. **Select the client and then click Select** to add them to this service.

Group Service Client Popup

Group Service Clients

Clients in Process Group

☐ Name

No data to display

Select Cancel

- d. To add a client who is enrolled in this program but not yet enrolled in this group, click the List icon.

Clients ☐ Show Clients With Errors

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

- 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













































☐ Name

- ☐ Adair, Alice (1160)
- ☐ Another, Test (1209)
- ☐ Arambula, Maximo (1247)
- ☐ Asano, Hiro (1111)
- ☐ Asano, Kaito (1106)
- ☐ Baizey, Test (1183)
- ☐ Baizey2, Test1 (1204)
- ☐ Banks, Tara (1078)
- ☐ Barajas, Fabiola (1235)
- ☐ Barnes, Kim (1093)
- ☐ Barrington, Rosemary (1265)



Select Cancel

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

**Clients** ☐ Show Clients With Errors   

		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**

<b>SSN Search</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<b>Phone # Search</b>	<input type="text"/>
<b>DOB Search</b>	<input type="text"/>			<b>Master Client ID Search</b>	<input type="text"/>
<b>Primary Clinician Search</b>	<input type="text"/>			<b>Client ID Search</b>	<input type="text"/>
<b>Authorization ID / #</b>	<input type="text"/>			<b>Insured ID Search</b>	<input type="text"/>

**Records Found**

	ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
	1138	1138	Train, Test		3693	12/01/19...	Active	New York...	Tg, Sahana
	1239	1239	Training, Manual		9999	06/07/20...	Active		
	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. **Replace screenshot, look information**
  - a. 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.
  - b. 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 Group Comment:

Date: 02/01/2023 Specific Location:

Location: Community Mental Health C

Status: Scheduled

Evidence Based Practices:

**Staff** **Add Staff...**

Staff Name	Unit	Type	Start	End
X Clinician, Ro..	60	Minutes	2:00 PM	3:00 PM
X Supervisor, C..	60	Minutes	2:00 PM	3:00 PM

**Clients** ☐ Show Clients With Errors

X Asano, Jason	
X Bravo, Johnny	
X Childers, Cindy	
X Powers, Light	
X Test, Patient	
X Tommy, Max	
X White, Walter	
X 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**

-----  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**.

SmartCare

**Set Some**

Status New Value = Show

**Set** **Cancel**

<input type="checkbox"/> All	Client Name	Current Value
<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.

Status	Show	Set All	Set Some
* -- indicates clients have different values for this field		Set All	Set Some
Patient, One - Show		Set All	Set Some
Test, Patient - Scheduled		Set All	Set Some
Test, Justa - Show		Set All	Set Some
Trent, Charlotte - Show		Set All	Set Some

- 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.

Service Information	Custom Fields	Billing Diagnosis	Add-On Codes	Warni
Procedure	Group Counseling	Set All	Set Some	
Start	10:00 AM Face to Face Time 60 Minutes	Set All	Set Some	
Status	Show	Set All	Set Some	
Cancel Reason		Set All	Set Some	
Program	101020-3.1-Westcare MLK	Set All	Set Some	
Clinician		Set All	Set Some	
Attending	100050-3.1-Fresno County Hispanic Comm	Set All	Set Some	
Mode Of Delivery	100050-RS-Fresno County Hispanic Comm	Set All	Set Some	
Billable	101003-OTP-Aegis	Set All	Set Some	
Transportation Se	101003-RS-Aegis	Set All	Set Some	
Interpreter Servic	101018-3.1-WestCare Bakersfield	Set All	Set Some	
Needed		Set All	Set Some	
Travel Time	101018-3.5-WestCare Bakersfield	Set All	Set Some	
Documentation T	101020-3.1-Westcare MLK	Set All	Set Some	
	101020-3.2-Westcare Withdrawal Mangement			
	101020-3.5-Westcare MLK			
	101020-RS-Westcare MLK			
	101027-OTP-ART-Cartwright			
	101028-OTP-ART E Street			
	101030-1.0-Pathways			
	101030-2.1-Pathways			
	101030-RS-Pathways			
	101042.1.0-Mental Health Systems JJC			
	101044-1.0-Promesa			
	101044-RS-Promesa			
	101050-RS-Mental Health Systems FYA			

- e. 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 with checkboxes and names (partially obscured by a black redaction box). On the right, there is a panel with tabs: 'Service Information', 'Custom Fields', 'Billing Diagnosis' (selected), 'Add-On Codes', and 'Warni'. The 'Billing Diagnosis' tab is active, showing a 'Billing Diagnosis' section with a text area and two links at the bottom: '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' form. The 'Note' tab is selected, indicated by a red circle with the number 6. The 'Update My Client Notes' button is highlighted with a red circle and the letter 'c'. The 'Total Number in Group' field is highlighted with a red circle and the letter 'a'. The 'List non-client group members' field is highlighted with a red circle and the letter 'b'. The 'Group Summary' field is highlighted with a red circle and the number 7. The form also includes a 'Sign My Notes' button, a 'Co-Signer(s)...' dropdown, and an 'Add Co-Signer' button.

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' interface. On the left, a list of clients is shown, with 'Asano, Jason' selected. A checkbox 'Only Show clients where I am the Note Author' is checked. The main area displays the 'Problem List' with columns for SNOMED Description, SNOMED CT Code, ICD 10 Code, Start Date, End Date, and Program. The 'Save' button is in the top right corner.

	SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program
X	Subchronic schizophrenia with ...	111482003	F20.3	11/18/2022		Access Unit
X	Perinatal depression	10211000132109	F32.9	11/18/2022		Access Unit
X	Primary degenerative dementia...	10532003	F32.9	11/18/2022		Outpatient MH Adult
X	Severe food insecurity on U.S. h...	470951000124105	Z59.41	11/18/2022		Access Unit
X	Severe food insecurity on U.S. h...	470951000124105	Z59.41	11/18/2022		Access Unit
X	Severe food insecurity on Unite...	470951000124105	Z59.41	11/18/2022		Access Unit
X	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' interface with the 'Client Note' tab selected. The 'Asano, Jason' client is selected. The 'Information' section is visible, containing a text area for the note. The 'Save' button is in the top right corner.

**Information**

Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).

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

Note Treatment Plan Goals Addressed Co-Signers

Co-Signer

Clinician, SUD

Clinician, Robert

Clinician, SUD

a

12

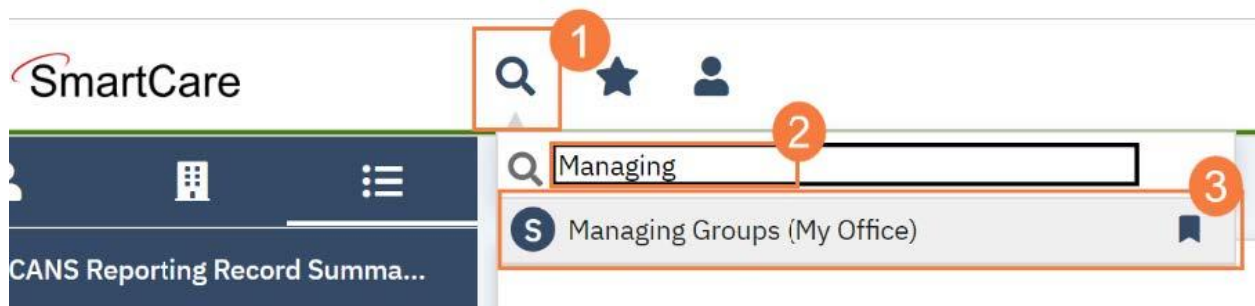
13

Save

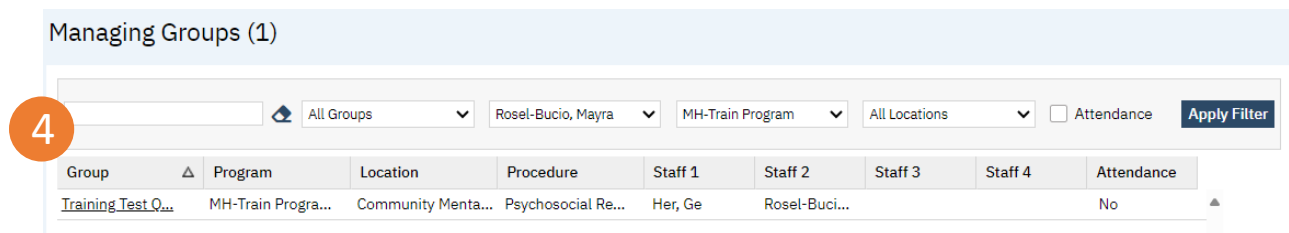
## How does the Co-Facilitator write their note (It is not a requirement for both facilitators to write a note.)

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.

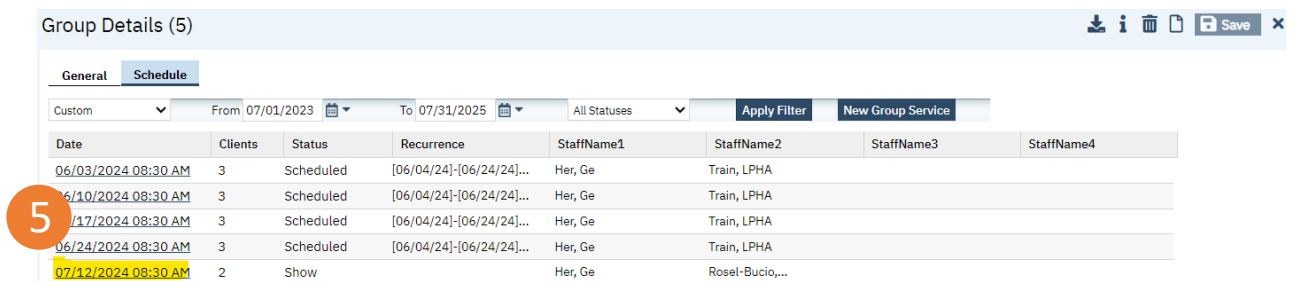
1. Click the Search icon.
2. Type **Managing** into the search bar.
3. Click to select **Managing Groups (My Office)**.



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.
- a. You can also see the previous information entered by the lead facilitator by clicking on the small yellow triangle

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

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

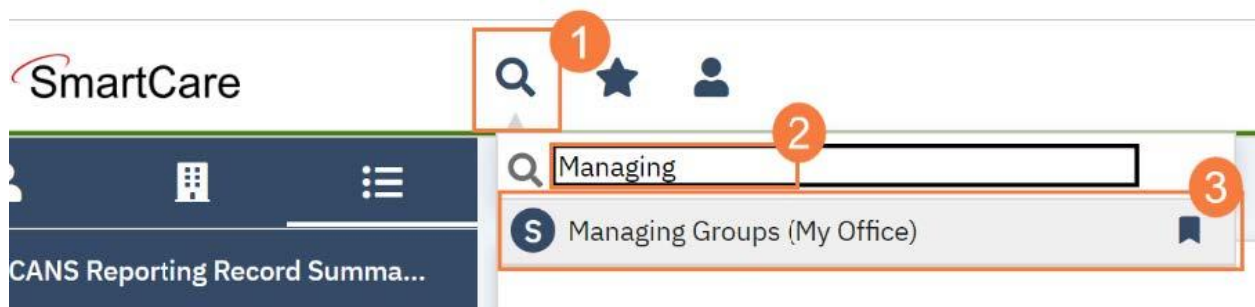
9. Click on the “Client Note tab”, complete the client note for all clients

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.

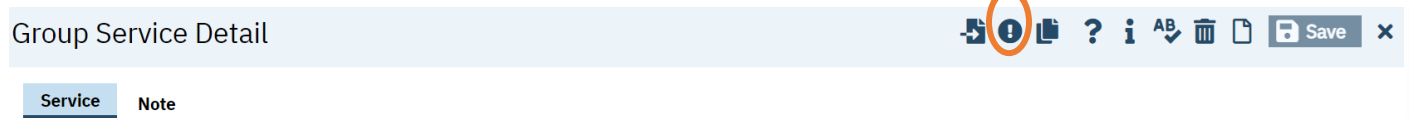
**How to edit Group note** (by doing this process you will delete the note, at this time there is no other way to “edit” a note) You will need to copy the information to reenter the note without errors.)

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)**.



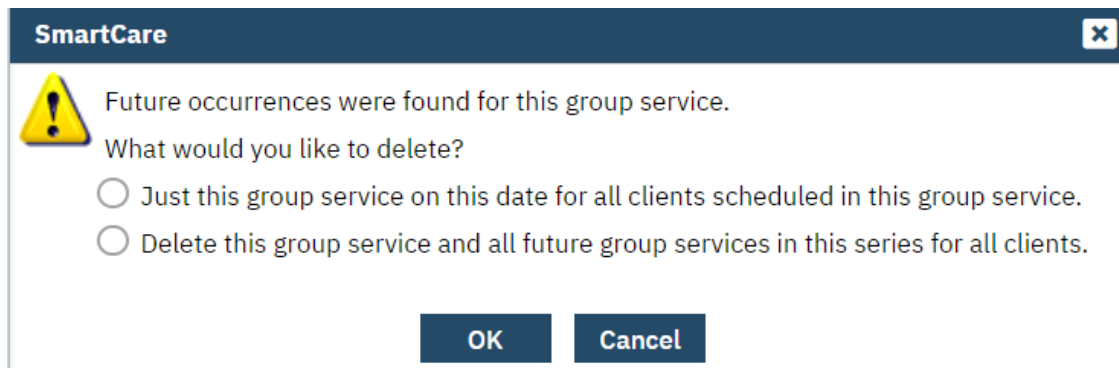
4. **Click to select the Group** you will be editing.
5. On the Group Service Detail click on the Error button that looks like an exclamation icon to mark it as error



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

Service Information	Custom Fields	Billing Diagnosis	Add-On Codes	Wa
Procedure			Set All	Set Some
Start	Total Duration		Set All	Set Some
Status			Set All	Set Some
Cancel Reason			Set All	Set Some
Program			Set All	Set Some
Clinician			Set All	Set Some
Attending			Set All	Set Some
Mode Of Delivery			Set All	Set Some
Billable	<input type="checkbox"/>		Set All	Set Some
Transportation Service			Set All	Set Some
Interpreter Services Needed	<input type="checkbox"/>		Set All	Set Some
Travel Time			Set All	Set Some
Face to Face Time			Set All	Set Some
Documentation Time			Set All	Set Some

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.

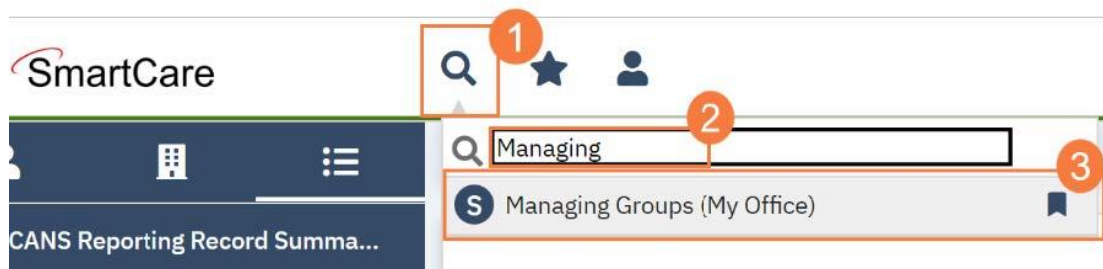


9. You will need to reenter the service note you just deleted. You will return to Managing Groups, select the group, click the Schedule tab and click New Group Service to start the new group note.

## 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.

Managing Groups (1)

Active Groups All Staff All Programs All Locations Attendance Apply Filter

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
Process Group	Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician,...	Supervisor...			No

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

Group Details

General Schedule

Type Group Note Classroom Max.# of Client(s) Medicare G Code Comment

Program Procedure Code Duration Start Time

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
X Asano, Jason
X Bravo, Johnny
X Powers, Light
X Thompson, Toby
X White, Walter
X Williams, Kyle

Staff

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

Is Clinician	Staff Name
X	Clinician, Robert
X	Supervisor, Clinician

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 Test 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"/>	15	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 Outpatient MH Adult

Save

# 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

4. 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

g-to-face

Defaults

Location Community Mental Health Center

Program 100030-3.1-Comprehensive Addiction Prog

Procedure Code Group Counseling

Duration 90.00 Minutes

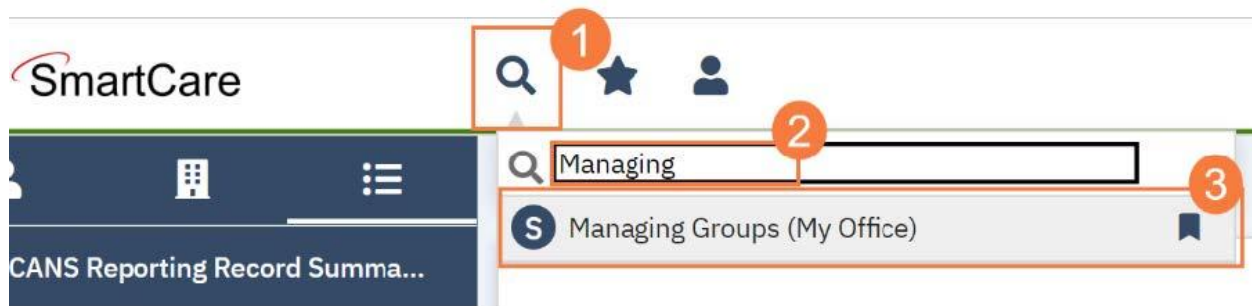
Start Time 10:00 AM

Group Service Recurrences Scheduler

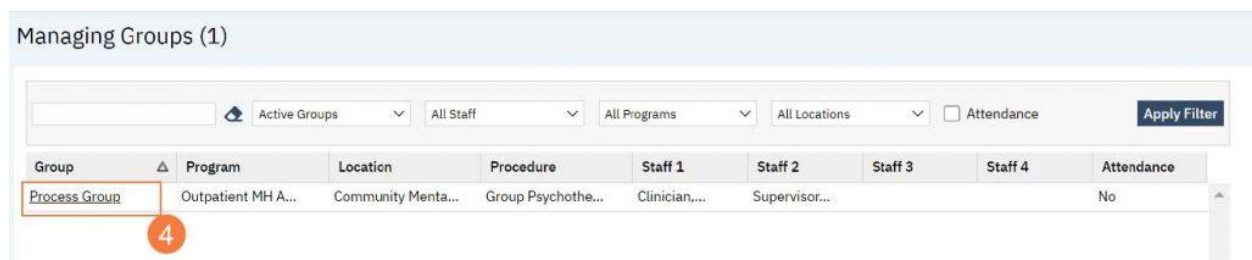
Select recurrences from which the Client(s) need to be removed?

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

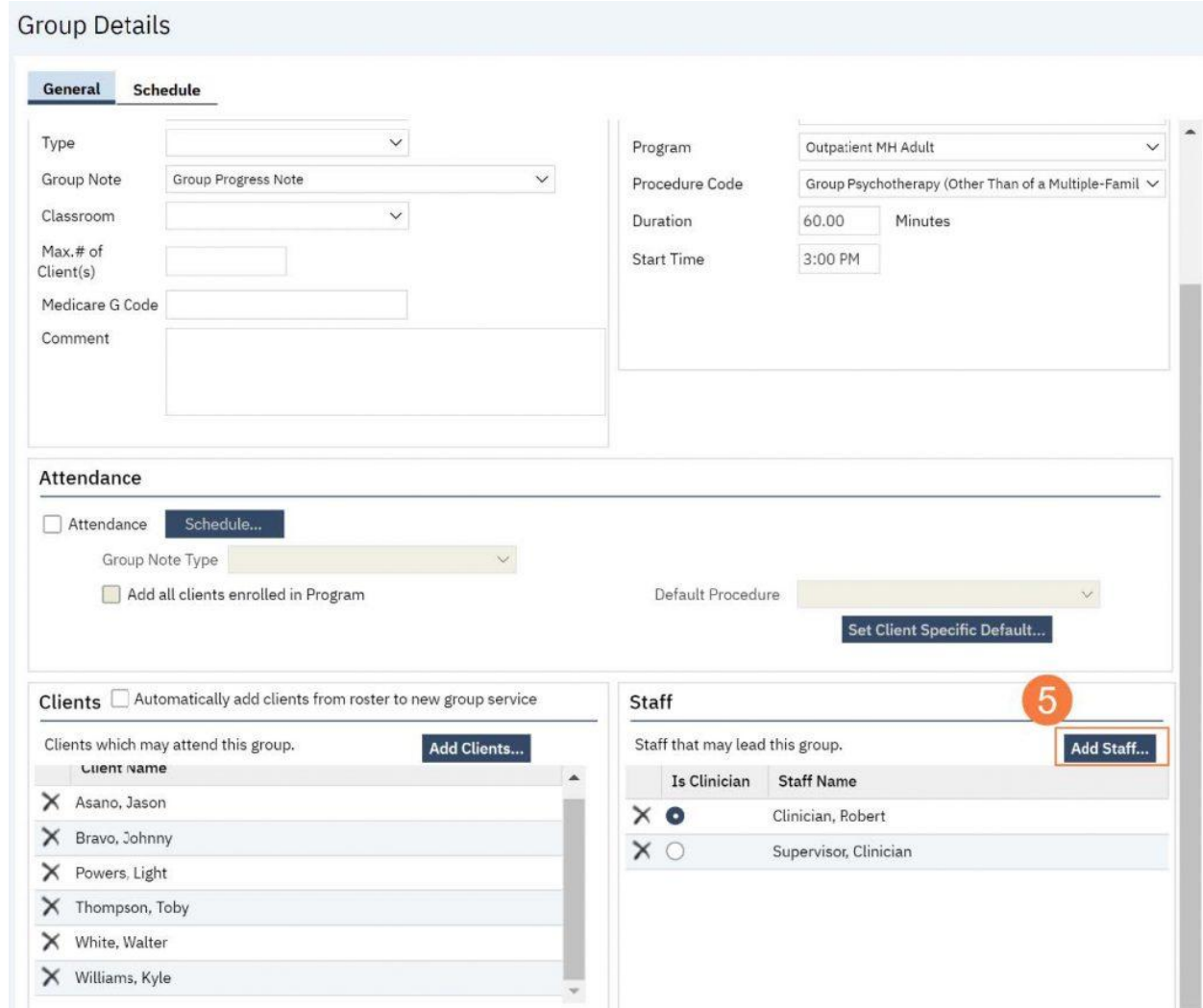




4. Click to select the Process Group you will be adding the client to.



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**.

**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 checked="" type="checkbox"/>	Staff, Psychiatrist
<input type="checkbox"/>	Stephan, Khristy
<input type="checkbox"/>	Sullivan, Kevin

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.

**Staff**

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

Staff Role	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.

? i AB Save [Print] [Delete] X

**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	<p>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.</p> <p>For DMC-ODS, rehabilitation falls under Recovery Services and can document education</p>	AOD, Cert Peer, CNS, DO, LCSW, PCC(LPCC), LVN, MD, MFT(LMFT), MHRS, NP, OT, Other, PA, PHD, PSY(PSYD), PT, Pharm, RD

					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)