SanWITS Flow for Outpatient Providers

“Group List”

The Group Module is being required specifically for DMC ODS to ensure that Group Counseling encounter notes are created and billed appropriately. Group Counseling Encounters (H0005) for Outpatient Providers should only be created using the SanWITS Group List.

1. Go to Group List from the Navigation Pane.

2. To create a new Group Profile, click on “Add” hyperlink.
3. **A Group Profile should be created as needed for different types of groups.** In the Group Profile screen, please complete all the required fields for the group profile. **Note:** The “Lead Staff” and “Time of Day” fields are required for the profile; however, these fields should be edited to the appropriate lead staff and start time on each group session as needed. After completing this information please click “Save”.

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

5. From the Roster screen, click on “Add Member” hyperlink. **All DMC Billable Counseling Groups should have a minimum of 2 present attendees and a maximum of 12 present attendees.**
6. From the roster screen, type in the name of the client on the “Client Name” field.

7. After selecting your client’s name, please select the correct Program Enrollment for your client.
   - Client must have an active program enrollment. Please select “Active” for the Status field, then enter the Status Effective Date (the date the client joined the group).
   - Status Date cannot be prior to Program Enrollment Date. After completing all the required fields, click Save.
   - You’ll need to repeat this step for each of the clients you need to add to the roster.
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8. After adding all your clients to the Roster, click Finish.

9. Each time this Group meets, from the Group Profile screen, click on “Create Group Session” hyperlink.
10. In the **Group Session Notes** screen, please complete all the required fields.

- If you have at least **one** DMC client, Note Type should be “DMC Billable.” If you selected DMC Billable for Note type, please enter YES in the Billable field.
- If the **entire** Group is County Billable, Note Type should be “County Billable.” If you selected County Billable for the Note Type, please enter NO for the Billable field.
- **Calculate ODS should always be YES.**
- The “Lead Staff” should be the person who provided the group session.
- Please select *Groups ODS* for the Service field for **Outpatient Services (OS)** clients and **Intensive Outpatient Services (IOS)** clients.
- **Please enter zero for the Documentation Duration Time.**

**Documentation time should be added to the individual’s Encounter screen.**

- If there was Travel Time, please add it to the Group Session screen under Travel Duration. Travel time should not be added to the individual’s encounter screen.
- Please enter the GROUP TYPE in the “Note” Box even though this box is showing as an optional field. The Group Note Box is a required field needed to create Encounters.
11. **Recovery Services clients should have their own group.** Recovery Services clients cannot be mixed with Outpatient Services (OS) clients or Intensive Outpatient Services (IOS) clients.

- If you have at least one DMC client, Note Type should be “DMC Billable.” If you selected DMC Billable for Note type, please enter YES in the Billable field.
- If the entire Group is County Billable, Note Type should be “County Billable.” If you selected County Billable for the Note Type, please enter NO for the Billable field.
- **Calculate ODS should always be YES.**
- The “Lead Staff” should be the person who provided the group session.
- Please select *Recovery Service Group* for the Service field.
- Please enter **zero** for the Documentation Duration Time. Documentation time should be added to the individual’s Encounter screen.
- If there was Travel Time, please add it to the Group Session screen under Travel Duration. Travel time should not be added to the individual’s encounter screen.
- Please enter the GROUP TYPE in the “Note” Box even though this box is showing as an optional field. The Group Note Box is a required field needed to create Encounters.
12. After completing all the required fields in the Group Session Notes screen, click “Save.”

13. After creating the Group Session, you will need to mark your group members as Present if they attended the session. Please select the names of the members first, then select the appropriate action. If your provider agency would like to use the session status to track No Show or Excused clients, you may do so, but this will not be required at this time.

14. Please select the names of the Group members who were Present for the Session, then under the Action drop menu select “Mark as Present” and then click on “Perform Action” hyperlink.
15. Please select the names of the Group Members who were Present, under the Action drop menu, select “Create Encounter”, then click on “Perform Action” hyperlink. After doing this, the system will create Bulk Encounters for the selected clients. **All DMC Billable Counseling Groups should have a minimum of 2 present attendees and a maximum of 12 present attendees.**

16. After performing the action “Create Encounter” for the Group members who were marked as Present, you’ll receive this message: “The Encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update.” Please click on “Refresh” hyperlink from the Administrative Action box. **Note:** You may need to click “Refresh” more than 2 times.

17. Once the Encounters are created, the “View” hyperlink will become available under the Encounter column.
18. For the Group Members who were “Present”, from which Bulk Encounters were created, all the information in the Encounter screen will be pre-populated except for the Pregnant/Postpartum question for female clients only.

- Group Counseling Encounters will have a Group Session ID.
- Service field will pre-populate. Please do not change the Service name.
- Documentation Duration needs to be added to the individual’s Encounter.
- The Start Time, End Time and Session Duration need to be adjusted if client arrives late to the session or leaves early.
- The “Used Evidence-Based Practices” will auto-populate to None. Please change to the Evidence-Based Practice that was used for the Group: Motivational Interviewing, Relapse Prevention, or both.