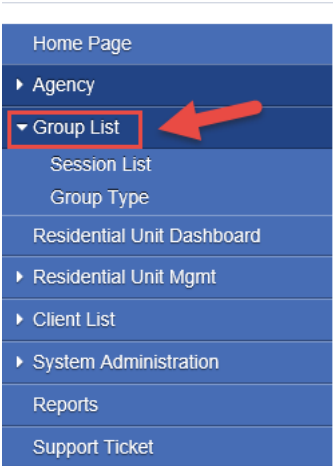


SanWITS Flow for Opioid Treatment Providers

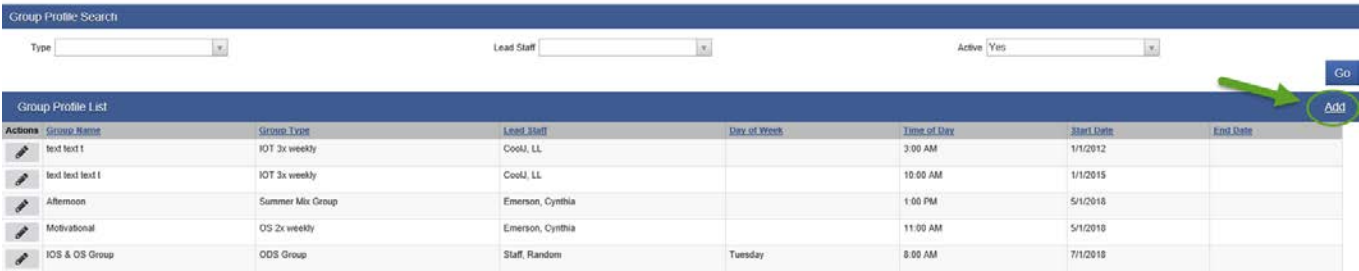
“Group List”

Group Counseling for OTP programs falls under pre-ODS guidelines and should only be created through the SanWITS Group List.

- 1. Go to Group List from the Navigation Pane.



- 2. From the Group Profile Search screen, click on “Add” hyperlink.



SanWITS Flow for Opioid Treatment Providers

“Group List”

- A Group Profile should be created for each existing Group in the Facility. A Group Profile must be unique to the Type of Group, Time and Counselor.** In the Group Profile screen, please complete all the required fields for the group profile. **Note:** The “Lead Staff” should be the person who provided the group session. After completing this information please click “Save”.

Group Profile

Group Name: August Group Start Date: 8/1/2018 End Date: [Calendar Icon]
Group Type: ODS Group Day of Week: [Dropdown] Time of Day: 9:00am
Lead Staff: Nunez, Janeth Room Location: [Text Field]
Facility: Main Facility

Co-Lead Staff: Adam, Kenneth; Ailshie, Douglas; Alcazar, Shirley; Altarejos, Isabel Selected Co-Lead Staff: [Dropdown]
Description: Motivational Group

Buttons: Cancel Save Finish

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

Administrative Actions: Create Group Session Print Sign-In Sheet

Client Name	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date

Buttons: Show All Clients Edit Roster

- From the Roster screen, click on “Add Member” hyperlink. **All Groups Rosters should have a minimum of 2 active members and a maximum of 12 active members.**

Roster

Actions	Client Name	Program	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date

Buttons: Add Member Finish

SanWITS Flow for Opioid Treatment Providers

“Group List”

6. From the roster screen, type in the name of the client on the “Client Name” field.

The screenshot shows the 'Roster' table with columns: Actions, Client Name, Program, # of Approved Sessions, # of Sessions Attended, Status, and Status Effective Date. Below the table is the 'Add Member' form. The 'Client Name' dropdown is open, showing a list of clients including 'McDonald, Ronald (10/15/1974)', 'One, Test (6/8/1987)', 'Orange, Two (1/1/1985)', 'Strawberry, One (1/1/1986)', 'test, christine (3/24/1995)', 'Test, Three (6/22/1984)', 'Test, Two (2/15/1984)', 'tme, test (1/1/1999)', and 'Uchiha, Sakura (3/24/2003)'. A red arrow points to 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.**

The screenshot shows the 'Roster' table with columns: Actions, Client Name, Program, # of Approved Sessions, # of Sessions Attended, Status, and Status Effective Date. Below the table is the 'Add Member' form. The 'Client Name' dropdown is set to 'DMC-2, ROBERT (2/2/1990)'. The 'Program' dropdown is set to 'DMC Billing Test Facility/OS - 3/1/2018'. The 'Status' dropdown is set to 'Active'. The 'Status Effective Date' is set to '3/15/2018'. A red arrow points to the 'Save' button.

SanWITS Flow for Opioid Treatment Providers

“Group List”

- After adding all your clients to the Roster, click Finish. **All Groups Rosters should have a minimum of 2 active members and a maximum of 12 active members.**

Actions	Client Name	Program	# of Associated Sessions	# of Sessions Attended	Status	Status Effective Date
	DMC-2, ROBERT	DMC Billing Tes/OS 3/1/2018 -		0	Active	3/1/2018
	DMC-3, MATTHEW	DMC Billing Tes/OS 3.3 RES: 4/1/2018 -		0	Active	4/5/2018
	McDonald, Ronald	Main Facility/3/005 3.1 RES: 5/24/2018 -		0	Active	5/25/2018

[Add Member](#)

Client Name <input type="text"/>	Program <input type="text"/>
# of Sessions Approved <input type="text"/>	Status <input type="text"/>
# of Sessions Attended <input type="text"/>	Status Effective Date <input type="text"/>
Client Due <input type="text"/>	Reason <input type="text"/>

- From the Group Profile screen, click on “**Create Group Session**” hyperlink.

Group Profile

Group Name	Rageel Group <input type="text"/>	Start Date	8/1/2018 <input type="text"/>	End Date	
Group Type	ODS Group <input type="text"/>	Day of Week		Time of Day	9:00 AM <input type="text"/>
Lead Staff	Nunaz, Janeth <input type="text"/>	Room Location			
Facility	Main Facility <input type="text"/>				

Co-Lead Staff	Selected Co-Lead Staff
<input type="text" value="Adam, Kenneth"/> <input type="text" value="Alshai, Douglas"/> <input type="text" value="Alcazar, Shirley"/> <input type="text" value="Atarop, Isabel"/>	<input type="text"/>

Description

Administrative Actions

[Create Group Session](#) [Print Sign-In Sheet](#)

Roster

Client Name	Program	Client Due	# of Associated Sessions	# of Sessions Attended	Status	Status Effective Date
DMC-2, ROBERT	DMC Billing Tes/OS 3/1/2018 -			0	Active	3/1/2018
DMC-3, MATTHEW	DMC Billing Tes/OS 3.3 RES: 4/1/2018 -			0	Active	4/5/2018
McDonald, Ronald	Main Facility/3/005 3.1 RES: 5/24/2018 -			0	Active	5/25/2018

SanWITS Flow for Opioid Treatment Providers

“Group List”

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.
 - **Calculate ODS units- should always be NO.**
 - The “Lead Staff” should be the person who provided the group session.
 - Please select ***Groups ODS** for the Service field always.
 - Please enter **zero** for the Documentation Duration Time.
 - Please enter **zero** for Travel Duration Time.
 - **Note: Documentation Duration and Travel Duration should always be zero.**
 - 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.

Group Session Notes

Group Name: October Group Session ID:

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date: Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM

Calculate ODS units: No

Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hansen, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min

of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: *Group ODS

Co-Lead Staff: Abinales, Gieselle; Account, New; Acuff, Beth; Adam, Kenneth

Selected Co-Lead Staff:

Note: Motivational Group

Administrative Actions

Cancel Save Finish

SanWITS Flow for Opioid Treatment Providers

“Group List”

11. After completing all the required fields in the Group Session Notes screen, click “Save.”

Group Session Notes

Group Name: October Group Session ID:

Group Type: ODS Group

Note Type: DMC Billable Start Date: 8/1/2018 End Date:

Billable: Yes Start Time: 9:00 AM End Time: 10:30 AM

Calculate ODS units: No

Documentation Duration: 0 Min Travel Duration: 0 Min Session Duration: 90 Min

Lead Staff: Hansen, Stephanie, LMFT, LMFT Total Duration: 90 Duration Type: Min

of Service Units/Sessions: 1

Location: Non-residential Substance Abuse TX Facility

Service: *Group ODS

Co-Lead Staff: Abinales, Gieselle; Account, New; Acuff, Beth; Adam, Kenneth

Selected Co-Lead Staff:

Note: Motivational Group

Administrative Actions

Cancel Save Finish

12. After creating the Group Session, you’ll need to mark your group members as Present, No Show or Excused. **It is required to update the Status for All Group Members from the Roster including the members who were No Show.** Please select the names of the attendees first, then select the action.
 - For the group attendees who were “No Show” in the Group Session, select “Mark as No Show” then click on “Perform Action” hyperlink.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd
		Create	<input checked="" type="checkbox"/>	Blueberry, Six	1
		Create	<input checked="" type="checkbox"/>	Kitty, Hello	1

Mark as No Show Perform Action Add Attendee

Mark as Present

Mark as No Show

Mark as Excused

Create Encounter

Clear Errors

SanWITS Flow for Opioid Treatment Providers

“Group List”

13. It is required to create an Encounter for the Group Members who were no show to the Group Session. For the clients that were “No Shows,” please click “**Create**” under the Encounter column. You need to do this individually for each client who was a No Show.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status
				DMC-2, ROBERT	3	Present
				DMC-3, MATTHEW	3	Present
				McDonald, Rowan	3	Present
				Blusberry, Sia	1	No Show
				Killy, Hello	1	No Show

14. After selecting “**Create**” Encounter for each of the Group Members who were No Show, the Encounter screen will open.

- Note Type should be “Non Billable.”
- Contact Type should be “No Show.”
- Billable will pre-populate to “No” and will be grayed-out.
- Visit Type should be “GP-Group.”
- Please Finalize the Encounter.

Encounter

Note Type: Non Billable

ENC ID: [] Group Session ID: [] Created Date: []

Program Name: Main Facility/OS - 6/1/2018 -

Service: Group Counseling OS Billable: No

Start Date: 9/15/2018 End Date: []

Service Location: Non-residential Substance Abuse TX Facility

Start Time: [] End Time: []

Travel Duration: [] Documentation Duration: []

Session Duration: [] Total Duration: []

Contact Type: No Show

Emergency: [] # of Service Units/Sessions: []

Visit Type: GP-Group

Medi-Cal Billable: []

Pregnant/Postpartum: []

Was an interpreter used?: [] In what language was the service provided?: []

Which Evidence-Based Practices were used?

Evidence-Based Practices: None, Motivational Interviewing, Relapse Prevention, Other

Used Evidence-Based Practices: []

Diagnoses for this Service

Primary: F10.151-Alcohol abuse with alcohol-induced psychotic disorder with hallucinations(ICD)

Secondary: []

Tertiary: []

Rendering Staff: Hansen, Stephanie, LMFT,LMFT

Supervising Staff: []

Administrative Actions

Finalize Encounter

Cancel Save Finish

SanWITS Flow for Opioid Treatment Providers

“Group List”

15. **It is required to update the Status for All Group Members from the Roster including the members who were marked as Excused.** Please select the names of the attendees first, then select the action.

- For the Group members that are “Excused” for the Group Session, select “Mark as Excused” then click on Perform Action

Actions	Individual Note	Misc. Notes	Encounter	Client Name	P.Allied	Status*
		Create	Create	<input checked="" type="checkbox"/> Cake, Chocolate	0	Excused
		Create	Create	<input checked="" type="checkbox"/> Cantaloupe, Five	0	Excused
		Create	Create	<input type="checkbox"/> Blueberry, Six	2	No Show
		Create	Create	<input type="checkbox"/> Killy, Hello	2	No Show
		Create	Create	<input type="checkbox"/> DMG-2, ROBERT	5	Present
		Create	Create	<input type="checkbox"/> DMG-3, MATTHEW	5	Present
		Create	Create	<input type="checkbox"/> McDonald, Ronald	5	Present

16. **It is required to create an Encounter for the Group Members who were Excused to the Group Session.** For the clients that were “Excused” please click “Create” under the Encounter column. You need to do this individually for each client that was marked as Excused.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	P.Allied	Status*
		Create	Create	<input type="checkbox"/> Cake, Chocolate	0	Excused
		Create	Create	<input type="checkbox"/> Cantaloupe, Five	0	Excused
		Create	Create	<input type="checkbox"/> Blueberry, Six	2	No Show
		Create	Create	<input type="checkbox"/> Killy, Hello	2	No Show
		Create	Create	<input type="checkbox"/> DMG-2, ROBERT	6	Present
		Create	Create	<input type="checkbox"/> DMG-3, MATTHEW	8	Present
		Create	Create	<input type="checkbox"/> McDonald, Ronald	6	Present

17.

SanWITS Flow for Opioid Treatment Providers

“Group List”

18. After selecting “Create” Encounter for each of the Group Members who were Excused, the Encounter screen will open.

- **Note Type should be “Non Billable.”**
- **Contact Type should be “No Show.”**
- Billable will pre-populate to “No” and will be grayed-out.
- Visit Type should be “GP-Group.”
- Please Finalize the Encounter.

The screenshot shows the 'Encounter' form with the following fields and values:

- Note Type: Non Billable
- ENC ID: [Empty]
- Group Session ID: [Empty]
- Created Date: [Empty]
- Program Name: Main Facility/OS : 6/1/2018 -
- Service: Group Counseling OS
- Billable: No
- Start Date: 9/15/2018
- End Date: [Empty]
- Service Location: Non-residential Substance Abuse TX Facility
- Start Time: [Empty]
- End Time: [Empty]
- Travel Duration: [Empty]
- Documentation Duration: [Empty]
- Session Duration: [Empty]
- Total Duration: [Empty]
- Contact Type: No Show
- Emergency: [Empty]
- # of Service Units/Sessions: [Empty]
- Visit Type: GP-Group
- Medi-Cal Billable: [Empty]
- Pregnant/Postpartum: [Empty]
- Was an interpreter used?: [Empty]
- In what language was the service provided?: [Empty]
- Which Evidence-Based Practices were used?: [Empty]
- Evidence-Based Practices: None, Motivational Interviewing, Relapse Prevention, Other
- Used Evidence-Based Practices: [Empty]
- Diagnoses for this Service:
 - Primary: F10.151-Alcohol abuse with alcohol-induced psychotic disorder with hallucinations(ICD)
 - Secondary: [Empty]
 - Tertiary: [Empty]
- Rendering Staff: Hansen, Stephanie, LMFT, LMFT
- Supervising Staff: [Empty]
- Administrative Actions: Finalize Encounter (highlighted with a red arrow)

Buttons at the bottom: Cancel, Save, Finish, and a blue arrow button.

SanWITS Flow for Opioid Treatment Providers

“Group List”

19. Please select the names of the attendees first, then select the action. For the group attendees that were **“Present”** in the Group Session, under the Action drop menu, select **“Mark as Present”** then click on **“Perform Action”** hyperlink.



The screenshot shows the 'Attendees' table with columns: Actions, Individual Note, Misc. Notes, Encounter, Client Name, and # Attnd. Three rows are visible, each with a checked checkbox in the 'Encounter' column. A dropdown menu is open over the first row, with 'Mark as Present' selected. The 'Perform Action' button is highlighted in red.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd
			<input checked="" type="checkbox"/>	DMC-2, ROBERT	0
			<input checked="" type="checkbox"/>	DMC-3, MATTHEW	0
			<input checked="" type="checkbox"/>	McDonald, Ronald	0

20. 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.



The screenshot shows the 'Attendees' table with columns: Actions, Individual Note, Misc. Notes, Encounter, Client Name, # Attnd, and Status. Three rows are visible, each with a checked checkbox in the 'Encounter' column. A dropdown menu is open over the first row, with 'Create Encounter' selected. The 'Perform Action' button is highlighted in red.

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status
		Create	<input checked="" type="checkbox"/>	DMC-2, ROBERT	5	Present
		Create	<input checked="" type="checkbox"/>	DMC-3, MATTHEW	5	Present
		Create	<input checked="" type="checkbox"/>	McDonald, Ronald	5	Present
		Create	<input type="checkbox"/>	Blaeberry, Sk	2	
		Create	<input type="checkbox"/>	Kitty, Hello	2	

SanWITS Flow for Opioid Treatment Providers

“Group List”

21. 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.

The screenshot shows the 'Group Session Notes' form. At the top, a message box states: "The encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update." Below this, the form contains various fields for group details, including Name, Type, Start/End dates, and Lead Staff. A 'Refresh' button is visible at the bottom of the form. Below the form is the 'Administrative Actions' section, which includes a 'Refresh' button highlighted with a red arrow.

Administrative Actions

Misc. Notes	Encounter	Client Name	# Attnd	Status
	<input type="checkbox"/>	DMC-2, ROBERT	1	Present
	<input type="checkbox"/>	DMC-3, MATTHEW	1	Present
	<input type="checkbox"/>	McDonaid, Ronald	1	Present

22. Once the Encounters were created, “View” hyperlink will become available under the Encounter column.

The screenshot shows the 'Attendees' table with a 'View' hyperlink highlighted by a red arrow in the 'Encounter' column for the row 'DMC-2, ROBERT'.

Attendees

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status
		Create	View	DMC-2, ROBERT	1	Present

SanWITS Flow for Opioid Treatment Providers

“Group List”

23. For the Group Members 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 should always be zero.**
- **Travel Duration should always be zero.**
- The Start Time, End Time and Session Duration needs 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.

The screenshot shows the SanWITS Encounter screen for a Group Counseling session. The form is pre-populated with the following information:

- Encounter: 1 of 2
- Note Type: DMC Billable
- ENC ID: 528549
- Program Name: OTP Facility/OTP : 5/1/2018 -
- Service: Group Counseling OTP
- Group Session ID: 100079
- Created Date: 10/31/2018 10:02 AM
- Service Location: Non-residential Substance Abuse TX Facility
- Start Date: 8/1/2018
- Start Time: 11:00 AM
- End Time: 12:30 PM
- Travel Duration: 0 Min
- Documentation Duration: 0 Min
- Session Duration: 90 Min
- Total Duration: 90 Min
- Contact Type: Face To Face
- Emergency: No
- Visit Type: GP-Group
- # of Service Units/Sessions: 1
- Medi-Cal Billable: Yes
- Pregnant/Postpartum: No
- Was an interpreter used?: No Interpreter Needed
- In what language was the service provided?: English

Which Evidence-Based Practices were used?

Evidence-Based Practices	Used Evidence-Based Practices
Motivational Interviewing	None
Relapse Prevention	
Other	

Diagnoses for this Service

Diagnosis
Primary: F11.21-Opioid dependence, in remission(ICD)
Secondary:
Tertiary:

Rendering Staff: Hansen, Stephanie; Counselor

Supervising Staff:

Administrative Actions: Release to Billing, Delete

Buttons: Cancel, Save, Finish