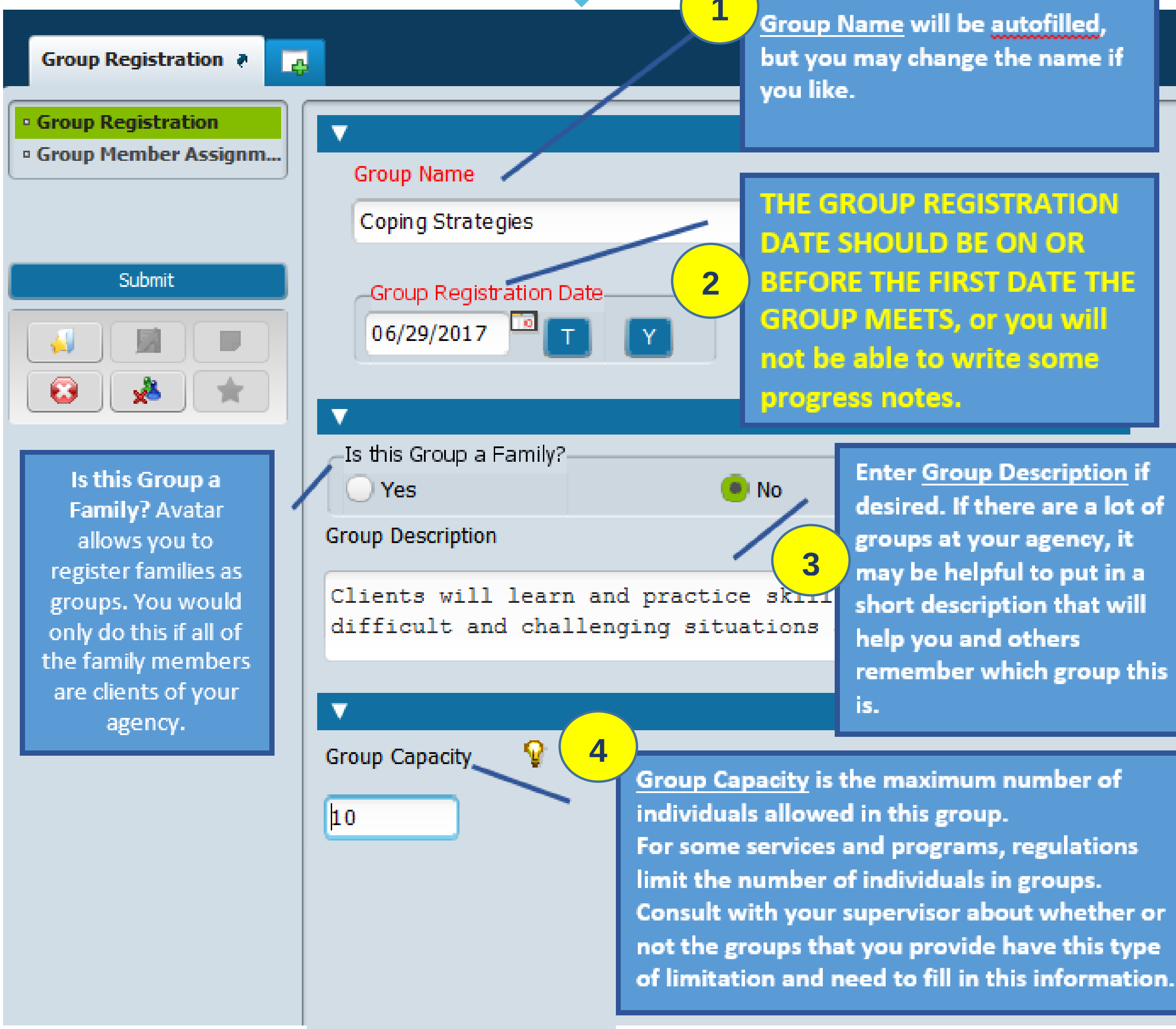
Santa Cruz Avatar Group Progress Notes Quick User Guide

STEPS

1. Register the group using the Group Registration form.
2. Optional: Create an Appointment in Your Scheduling Calendar for the Group.
3. Create the Group Intervention Scratch Note.
4. Complete the Notes in My To Do's.

Register the group using the Group Registration Form



1 Group Name will be autofilled, but you may change the name if you like.

2 THE GROUP REGISTRATION DATE SHOULD BE ON OR BEFORE THE FIRST DATE THE GROUP MEETS, or you will not be able to write some progress notes.

Is this Group a Family? Avatar allows you to register families as groups. You would only do this if all of the family members are clients of your agency.

3 Enter Group Description if desired. If there are a lot of groups at your agency, it may be helpful to put in a short description that will help you and others remember which group this is.

4 Group Capacity is the maximum number of individuals allowed in this group. For some services and programs, regulations limit the number of individuals in groups. Consult with your supervisor about whether or not the groups that you provide have this type of limitation and need to fill in this information.

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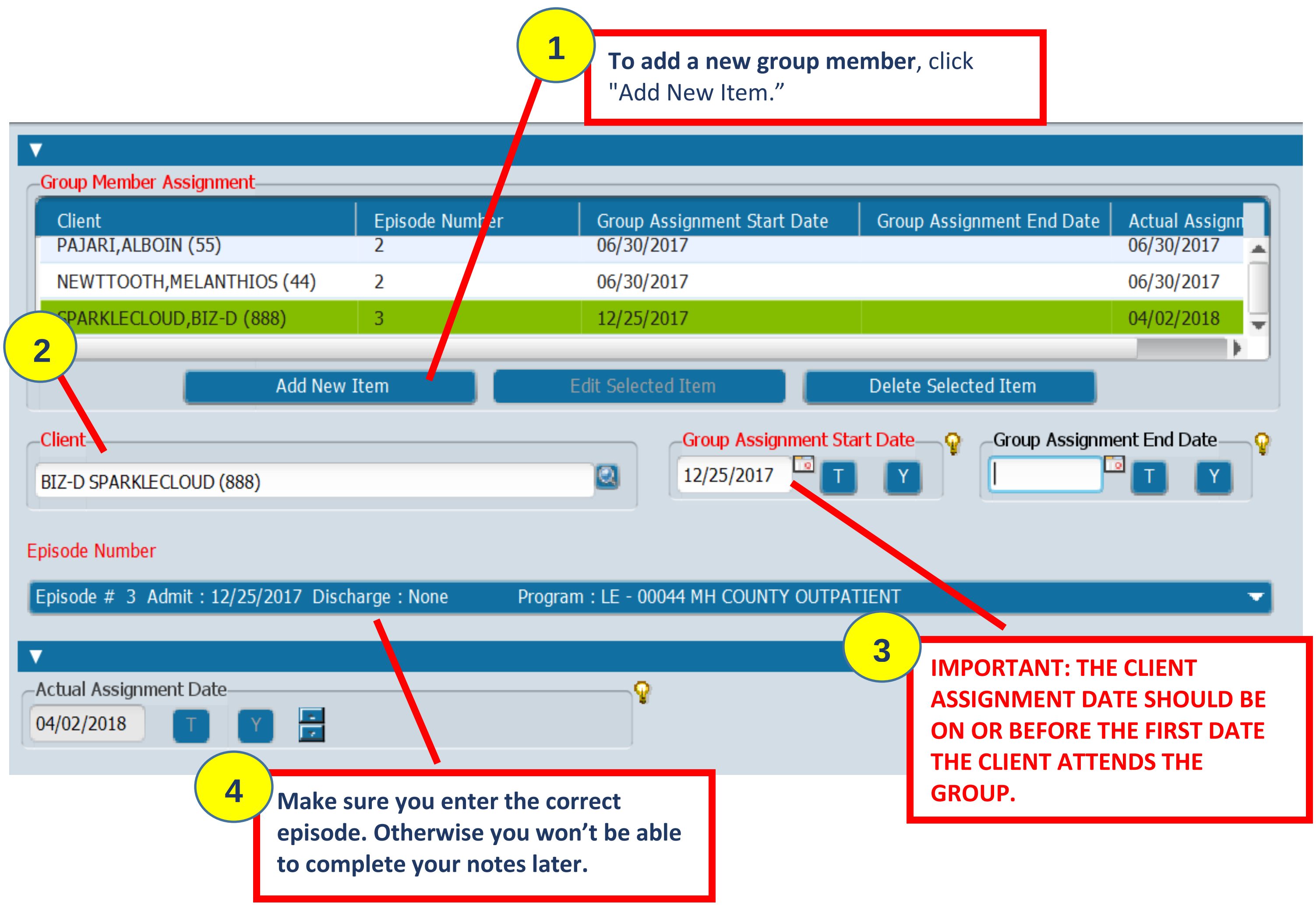
NEXT: Edit Your Group Membership Using the Group Registration Form

You will assign group members, one at a time, to a table. To add a client to the group, you must create a new line in the table.



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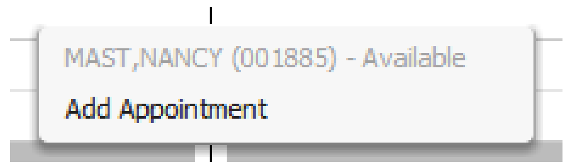
Optional: Create an Appointment in Your Scheduling Calendar for the Group.

*Use the **Scheduling Calendar and Appointment Scheduling forms** to **schedule a recurring appointment for your group.***

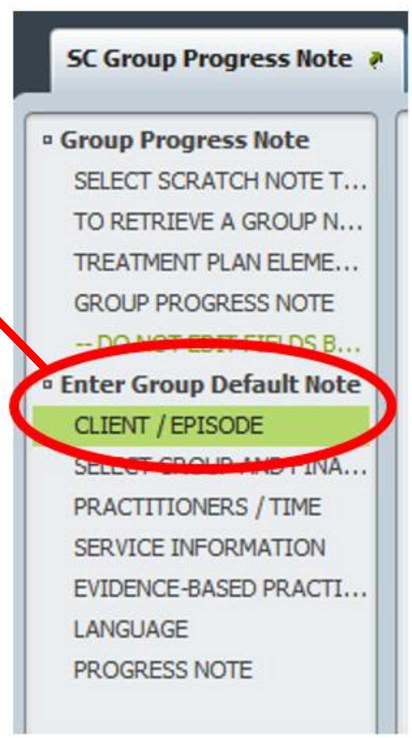
1. **Right Click on the calendar at the desired appointment time**
2. **Click Add Appointment**.
3. **Fill in appointment information and then click "Submit."**



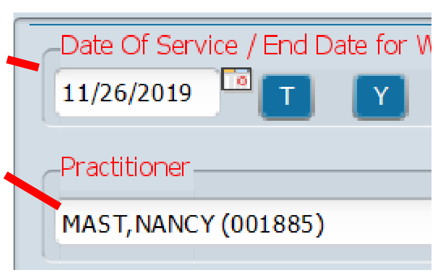
Create the Group Intervention Scratch Note.

1 **CLICK CLIENT/EPISODE**

1. **Enter the Start Time and End Time** for the group if applicable. SUD programs are required to enter this time.
2. Enter the **Group Name or Number.**



2 Enter the **Date of Group** and the **Practitioner** (you).



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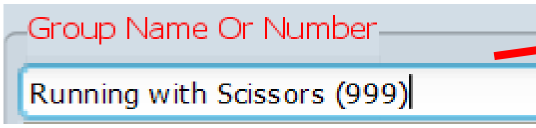
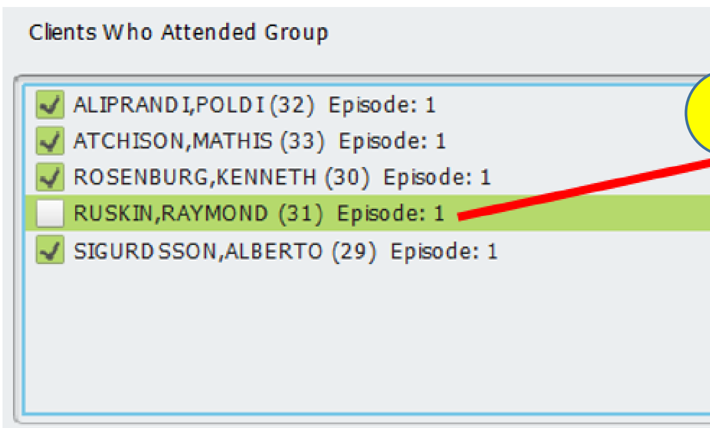
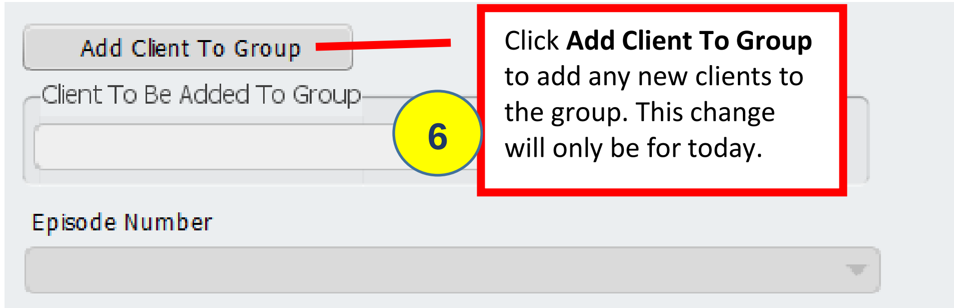


3 Enter the **Group Name or Number.**

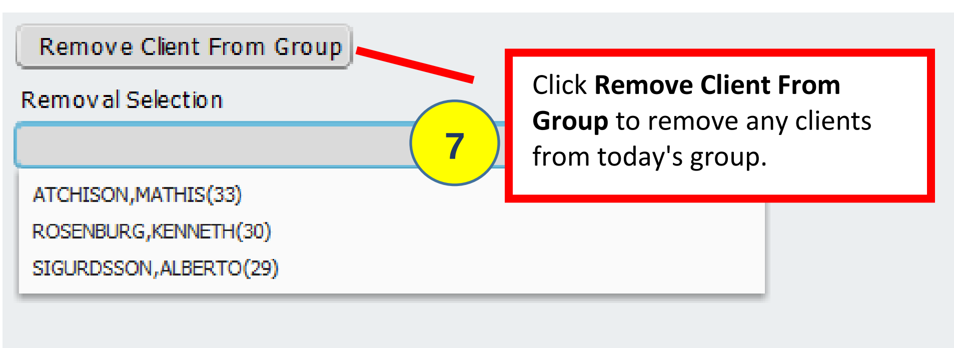
4 **Finalize Group Membership/Attendance**



5 Click on the check box to deselect the client and remove from today's group.



6 Click **Add Client To Group** to add any new clients to the group. This change will only be for today.



7 Click **Remove Client From Group** to remove any clients from today's group.

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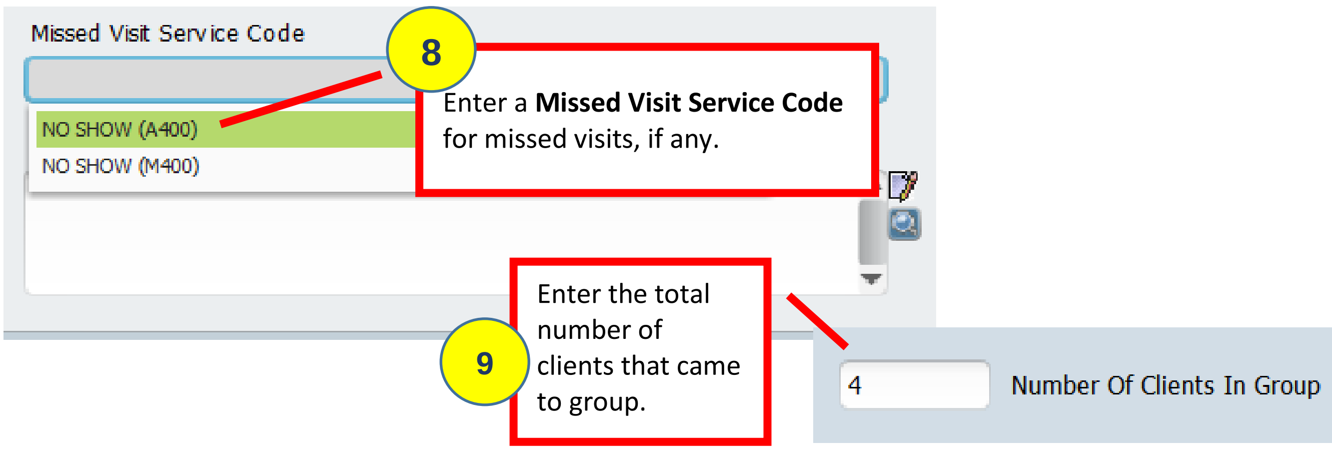
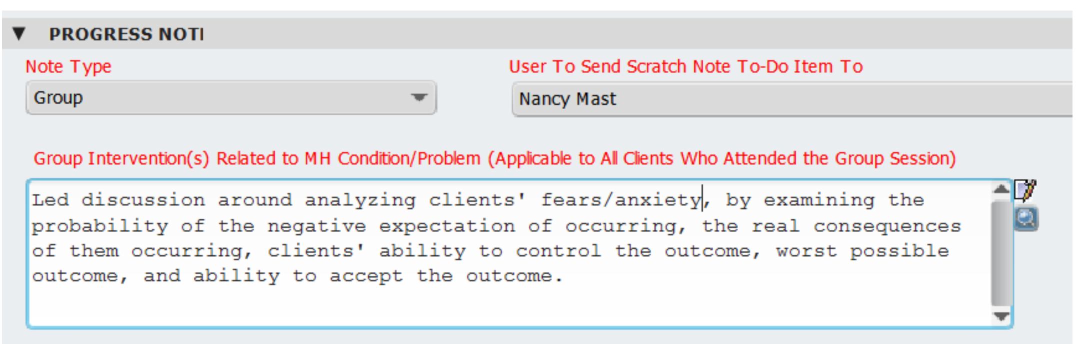


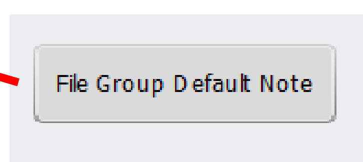
10 Enter information in the remaining fields as you would in a regular SC General Purpose Progress Note: **Practitioners / Time, Service Information, Evidence Based Practices** and **Service Strategies, Language**. (Face-To-Face time = time spent facilitating the group; Other Time = TOTAL time it takes to write all your notes for the group, plus any travel time. For example, if there are four people in your group, and it typically takes you about 10 minutes to write a progress note, then enter 4 x 10, or 40 minutes into your "Other Time" for documentation.

11 **Progress Note tab:**

a. **Note Type = Group**
b. Write your **Group Intervention**. You may customize/edit when you write the individual notes.

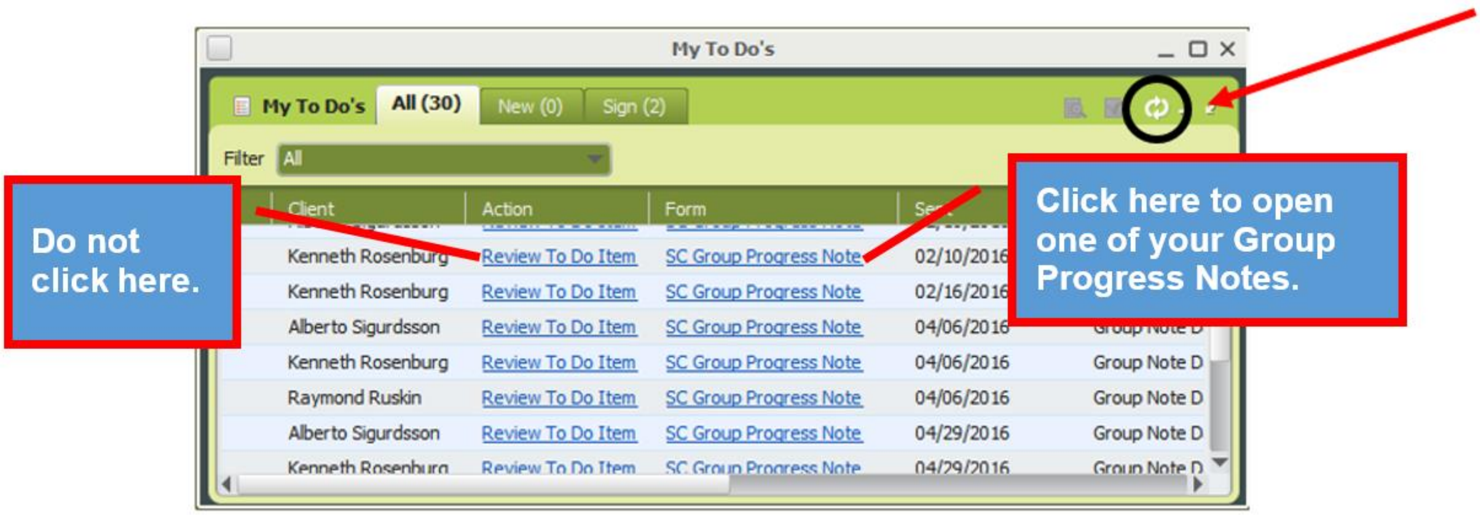


12 Click File Group Default Note to save and close.



13 Avatar will send an individual Scratch Note for each client in your group to your My To Do's.

Complete the Notes in My To Do's.



Once you complete the first note, finalize it, and then submit it, the next note from the group will open up for you to complete.

Complete all the notes for the group at one time.