

Santa Cruz Avatar Group Progress Notes Quick User Guide



Register the group using the Group Registration Form

The screenshot shows the 'Group Registration' form interface. It includes a sidebar with a 'Submit' button and various icons. The main form area contains several fields and options, each with a numbered callout (1-4) and an explanatory text box:

- 1** Callout to the 'Group Name' field. Text box: "Group Name will be autofilled, but you may change the name if you like." The form shows 'Coping Strategies' in this field.
- 2** Callout to the 'Group Registration Date' field. Text box: "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." The form shows '06/29/2017' with 'T' and 'Y' buttons.
- 3** Callout to the 'Group Description' field. Text box: "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." The form shows 'Clients will learn and practice skills difficult and challenging situations'.
- 4** Callout to the 'Group Capacity' field. Text box: "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." The form shows '10'.

Other form elements include: 'Group Registration' header, 'Group Member Assignm...' sidebar, 'Submit' button, 'Is this Group a Family?' with 'Yes' and 'No' radio buttons, and a 'Group Capacity' field with a lightbulb icon.

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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.

1 To add a new group member, click "Add New Item."

2

Client	Episode Number	Group Assignment Start Date	Group Assignment End Date	Actual Assignment
PAJARI,ALBOIN (55)	2	06/30/2017		06/30/2017
NEWTTOOTH,MELANTHIOS (44)	2	06/30/2017		06/30/2017
SPARKLECLOUD,BIZ-D (888)	3	12/25/2017		04/02/2018

3 **IMPORTANT: THE CLIENT ASSIGNMENT DATE SHOULD BE ON OR BEFORE THE FIRST DATE THE CLIENT ATTENDS THE GROUP.**

4 Make sure you enter the correct episode. Otherwise you won't be able to complete your notes later.

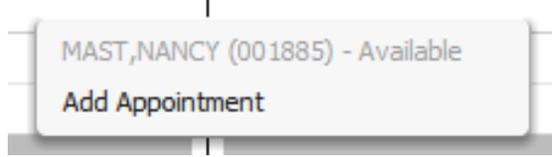
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Optional: Create an Appointment in Your Scheduling Calendar for the Group.

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."

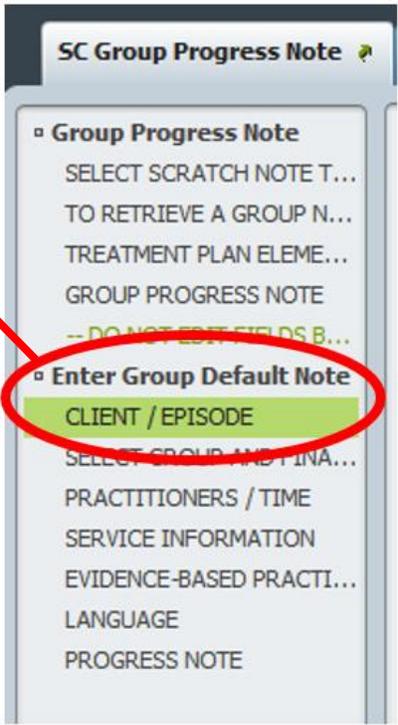


Create the Group Intervention Scratch Note.

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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Group Name Or Number

Running with Scissors (999)

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

4 Finalize Group Membership/Attendance

Clients Who Attended Group

- ALIPRANDI,POLDI (32) Episode: 1
- ATCHISON,MATHIS (33) Episode: 1
- ROSENBERG,KENNETH (30) Episode: 1
- RUSKIN,RAYMOND (31) Episode: 1
- SIGURDSSON,ALBERTO (29) Episode: 1

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

Add Client To Group

Client To Be Added To Group

Episode Number

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

Remove Client From Group

Removal Selection

- ATCHISON,MATHIS(33)
- ROSENBERG,KENNETH(30)
- SIGURDSSON,ALBERTO(29)

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.

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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.



Do not click here.

Client	Action	Form	See
Kenneth Rosenberg	Review To Do Item	SC Group Progress Note	02/10/2016
Kenneth Rosenberg	Review To Do Item	SC Group Progress Note	02/16/2016
Alberto Sigurdsson	Review To Do Item	SC Group Progress Note	04/06/2016
Kenneth Rosenberg	Review To Do Item	SC Group Progress Note	04/06/2016
Raymond Ruskin	Review To Do Item	SC Group Progress Note	04/06/2016
Alberto Sigurdsson	Review To Do Item	SC Group Progress Note	04/29/2016
Kenneth Rosenburg	Review To Do Item	SC Group Progress Note	04/29/2016

Click here to open one of your Group Progress Notes.

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.