

# Santa Cruz Avatar

## Avatar Group Progress Notes

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*This document assumes you have basic knowledge of how the SC General Purpose Progress Note functions in Santa Cruz Avatar. If you are not familiar with the SC General Purpose Progress Note, you may want to review the [Santa Cruz Avatar Clinicians Manual](#) on this topic.*

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## Group Progress Notes Overview

### Register the group using the Group Registration form.

Use the Group Registration form to create your group and assign clients to the group. You will decide on a name for the group and then add your group to Avatar. You may choose how long the group runs, i.e. set an end date for the group. You will also use this form to assign clients to the group. Note that prior to writing the group notes for each session, you will have an opportunity to finalize the group attendance, adding/removing clients from the group as needed, for that day only.



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

If you use the Avatar Scheduling Calendar, create an appointment for your group.



### Create the Group Intervention Scratch Note.

Avatar gives you the opportunity to write the intervention and service information for the entire group once, rather than duplicating the work for each client. After completing the **group** scratch note, **individualized** scratch notes, one for each client, will appear in your My To Do's. The intervention field in each of these notes is editable. You can customize the intervention for each client.



### Complete the Notes in My To Do's.

From your My To Do's, you can open your scratch notes and complete them, one after another. Once you submit your first note from the group, the next note will open up automatically, so you can easily complete the notes for the entire group.

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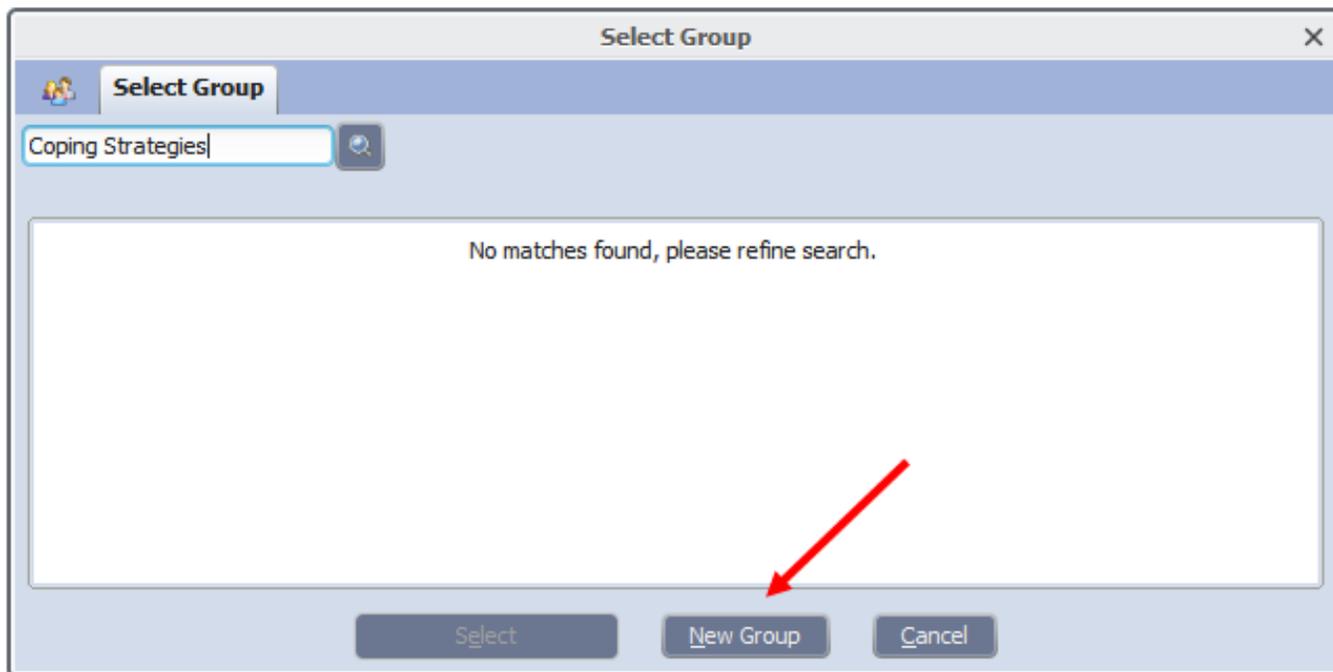
## Group Registration

Use the Group Registration form to set up a new group and to permanently add or remove clients from your group.

1. **Open the Group Registration form** using the Forms & Data Widget. If you do not see the form in your widget, use the Search Forms field to type in the first few letters of the form to see a pop-up list of forms. Double-click on the form you want.
2. **Name Your Group:** A popup window will open asking you to select a group. Type in your group title and click **New Group**.

### - EACH GROUP IS UNIQUE -

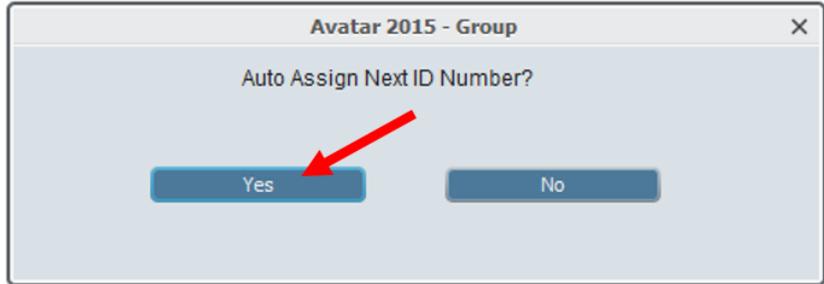
It is possible the group title you decided on was already selected by someone else. This is OK. Groups are all assigned unique numbers, so two groups may have the same title. You should consult with your supervisor, workgroup or agency to learn about group title conventions. If you discover someone else already has used your group name, you can still click **New Group**. If you do this, a group will be created with a duplicate title, but a different ID number. (This is similar to how two clients may have the same name in Avatar, but different ID numbers.)



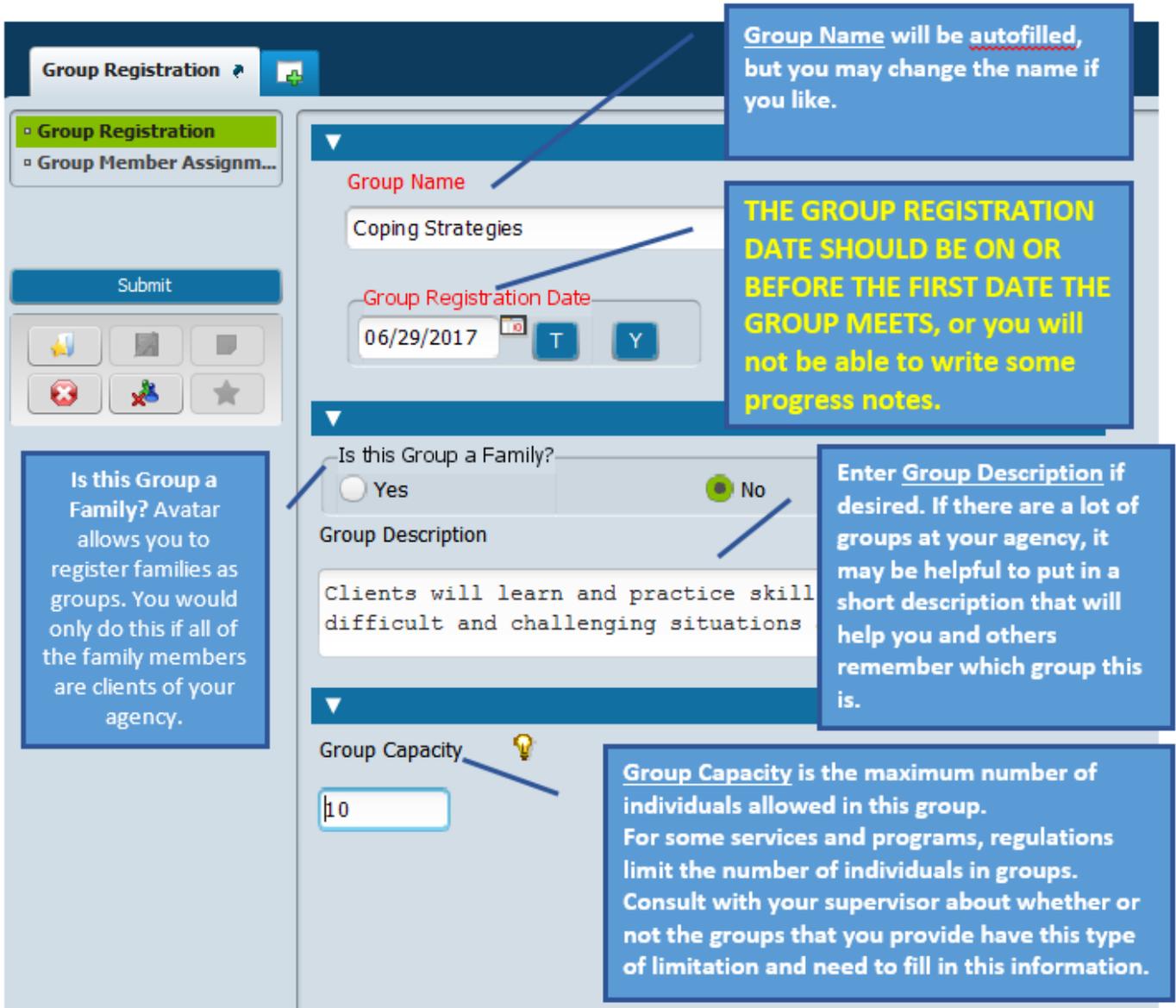
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Avatar will ask if you want to assign Next ID Number to the group. **Click Yes.**

The Group Registration form will open.



### 3. Fill Out the Group Registration Form: Group Registration tab.



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

**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.

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.

**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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## 4. Group Member Assignment tab

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.

**IMPORTANT: THE CLIENT ASSIGNMENT DATE SHOULD BE ON OR BEFORE THE FIRST DATE THE CLIENT ATTENDS THE GROUP.** For example, your client first came to the group on Tuesday. You sit down to write your note on Thursday. Be careful to make your assignment date for the client be on Tuesday. If the client assignment date is on Thursday, you won't be able to write your note on this client for the Tuesday group. This is because, according to Avatar, the client was not registered for the group on Tuesday.

Client	Episode Number	Group Assignment Start Date	Group Assignment End Date	Actual Assignment Date
				12/08/2015

Buttons: Add New Item, Edit Selected Item, Delete Selected Item

### Steps:

- Click Add New Item** to create a new line in the table.
- Add the client name in the **Client** field.
- Select the **Episode Number** for the client. For example, For Santa Cruz County Mental Health clients, the Episode will be LE - 00044 MH COUNTY OUTPATIENT.
- In the **Group Assignment Start Date** field, enter the first date the client attended the group.
- Group Assignment End Date:** Typically, you will leave this date blank. Once you add an end date, the client will no longer appear in the progress notes for the group after the end date. For most groups, there will not be a defined end date. If a client drops out of the group, enter a date to remove the client from the group roster.

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- f. Note the disabled, **Actual Assignment Date** field at the end of the tab. This is today's date, the day that you add the client to the group. It cannot be changed and may be different than the Group Assignment Start Date, which is the first date the client attends the group.

Client	Episode Number	Group Assignment Start Date	Group Assignment End Date	Actual Assignment Date
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

Client: BIZ-D SPARKLECLOUD (888)

Group Assignment Start Date: 12/25/2017

Group Assignment End Date: [Empty]

Episode Number: Episode # 3 Admit : 12/25/2017 Discharge : None Program : LE - 00044 MH COUNTY OUTPATIENT

Actual Assignment Date: 04/02/2018

## Editing Your Group Membership Using the Group Registration Form

You may, at any time **permanently** add and remove group members using the Group Registration form.

Although you can edit group members for any single appointment by using the Group Progress Note form, to make permanent changes to your group membership, you will want to use the Group Registration form.

Simply reopen the form and type in the name or number of your group in the "Select Group" field. You can then add or remove members from the group.

**To permanently add a new group member**, click "Add New Item" and proceed as described previously.

**To permanently delete a group member**, first, click on the group member in the Group Assignment table. Then click, "Delete Selected Item."

Alternately, you can add a Group Assignment End Date and the client will be taken off the group roster when you create a group scratch note. You might want to use this method when you want to keep track

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of all the people who have been in your group, past and present, but don't want to have them all appear when you create your scratch notes.

**IMPORTANT:** When discharging clients, make sure to remove them from any groups. The reason why is that any “no show” services generated by the group progress notes will prevent you from closing the episode.

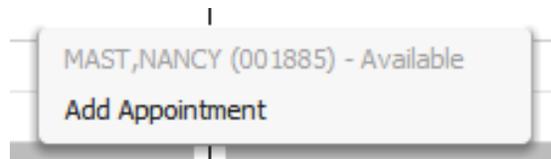
## Scheduling a Recurring Group Appointment

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

*This is required for county staff and optional for contractor staff.*

### Steps:

1. Open your **Scheduling Calendar** under My Forms, in the Forms & Data widget on the Home View.
2. **Right Click on the calendar at the desired appointment time.** (If you are doing this as part of a training, make sure that the date/time of the appointment is not in the future, otherwise you will not be able to write a progress note. Avatar won't let you write notes for a therapy appointment that hasn't happened yet.)
3. **Click Add Appointment.** The **Add New Appointment** form will open.
4. **Appointment Information tab:** The **Practitioner** Name will be auto-populated with your name, as well as the **Appointment Site, Appointment Date and Start time.** If needed, update the **Duration** and the **End Time** will automatically adjust.



Practitioner  
NANCY MAST (001885)

Appointment Site  
FQ Therapy - 1400 Emeline

Appointment Date  
12/01/2015

Start Time  
09:30 AM

Duration  
90

End Time  
11:00 AM

Appointment Status  
Scheduled

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## 5. Service Tab:

- a. Select **Program**, **Service** and **Location** codes.
- b. **Group #:** Type in the name or number of your group. Avatar will search for the group if you type in a word that is part of the group name. If you have a group that has the same or a similar name to another group, make sure you have selected the correct group.

▼ SERVICE

Program: County - North FQHC Therapy Services

Location: Office

Service Code: GROUP THERAPY-FQ (F451)

Group #: ANGER MANAGEMENT (99)

- c. Enter the Service Code for your group. Note that you must enter information into these fields in order, as each one informs what pops up in the next one. This is because the Service Program and the location determine what Service codes are available.

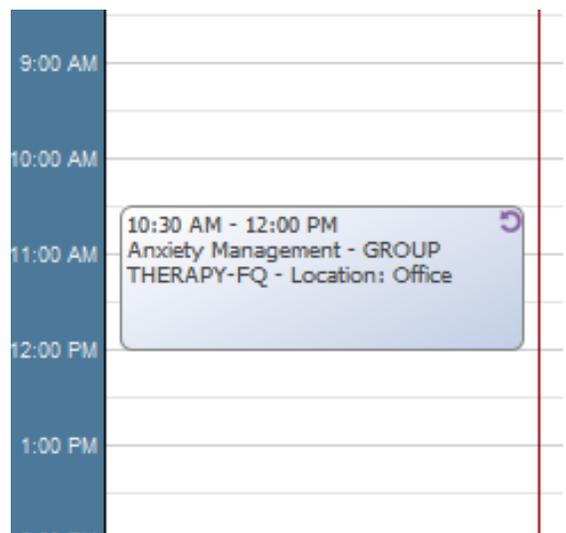
6. **Client Tab:** Skip this tab. Notice that the fields of the tab are disabled. Because you are scheduling a group appointment, you will not enter the client name or episode here. This information is already attached to your group name and number.

▼ CLIENT

Client: [disabled field]

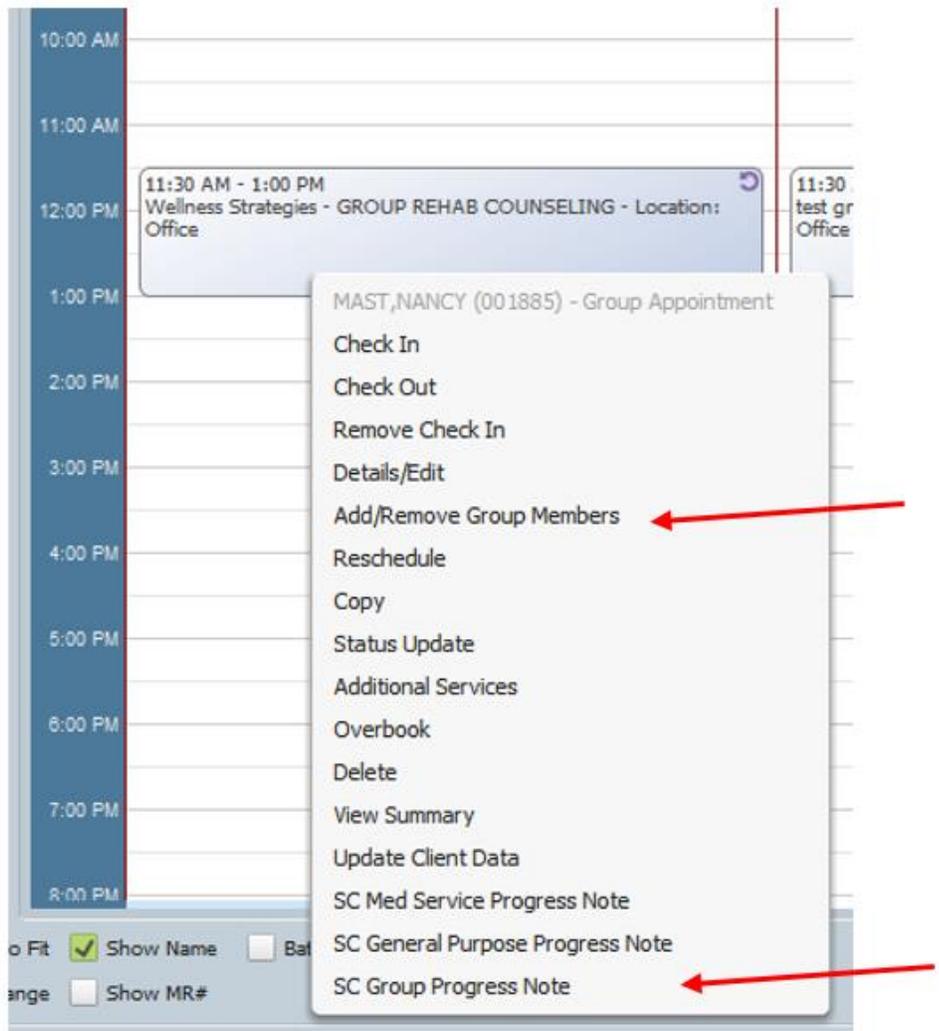
Episode: [disabled field]

7. **Recurring Appointment tab:** Set up your recurrence schedule as applicable.
8. Click the **Submit** button on the left side of the screen to save your appointment and return to the Scheduling Calendar.
9. Notice that the new appointment is now listed on your Scheduling Calendar. The circular arrow at the upper right of the appointment indicates that this is a recurring appointment.

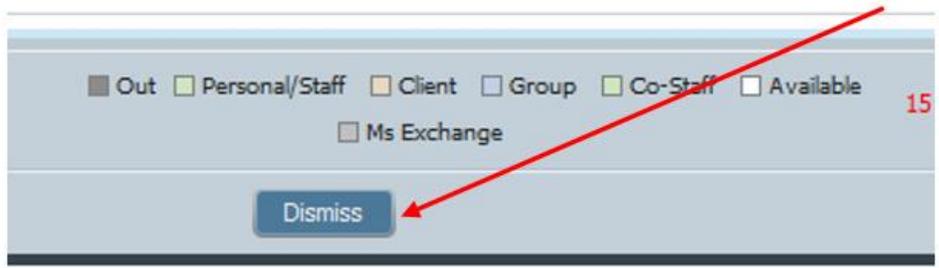


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10. At this point you can right click within the appointment to see additional options. One of the options is to Add or Remove Group Members from a single appointment. Another option is to open up a progress note.



11. When you are finished with the Scheduling Calendar, click on Dismiss at the bottom of the form.



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## Writing the Group Progress Note “Scratch Note”

**IMPORTANT:** You must enter information and click items in order, or the form may not function correctly.

If you are working from your Scheduling Calendar, right click on the appointment and **Open a Group Progress Note**. You may also open a blank note by double-clicking the **Group Progress Note** form in the Forms & Data Widget.

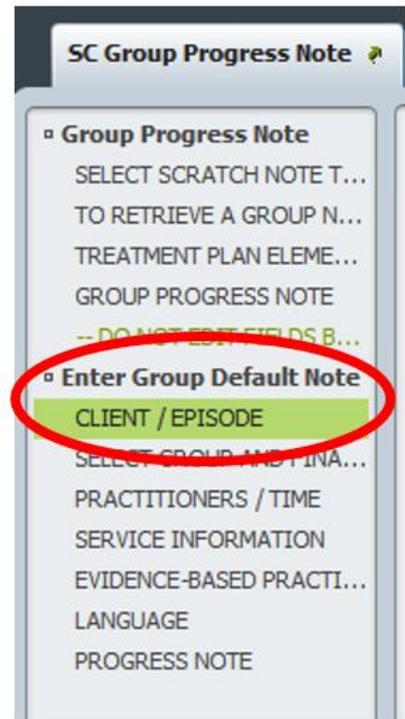
1. **Click Enter Group Default Note** and you will be at correct tab.

You will begin writing your group notes by creating a Group Default Note. The default note has your intervention, billing information and other data that is carried through into all the notes for your group members.

**YOU MUST START IN THE MIDDLE OF THE NOTE.**

**DO NOT START AT THE TOP.** Clicking Enter Group Default Note will automatically move you to the Client/Episode tab.

**CLICK CLIENT/EPIISODE**



2. **Client/Episode tab:** Enter the **Date of Group** and the **Practitioner** (you).
3. **Enter the Start Time and End Time** for the group if applicable. SUD programs are required to enter this time.

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4. Click **New Service in the Progress Note For** field. (If you are using a pre-existing appointment, enter day date of the group and then click “Existing Appointment” to find your group appointment.)

The screenshot shows a form with three main sections. The top section is titled "Date Of Service / End Date for Weekly Summary" and contains a date field with "03/23/2018", a dropdown menu with "T" selected, and a "Y" button. To the right are two time fields: "Service Start Time" with "10:00 AM" and "Service End Time" with "11:30 AM". The middle section is titled "Practitioner" and contains a search field with "MAST,NANCY (001885)" and a magnifying glass icon. The bottom section is titled "Progress Note For" and contains two radio buttons: "Existing Appointment" (unselected) and "New Service" (selected).

5. **Select the Group**

Enter the **Group Name or Number**. As with other search fields in Avatar, the field will dynamically search for your group.

The screenshot shows a search field titled "Group Name Or Number" with the text "Support Group (106)" entered. Below the search field is a section titled "Clients Who Attended Group" with a large empty box below it.

6. **Finalize Group Membership/Attendance.** Here, you are only editing your group members for today's appointment. This does not permanently change the group members.

You now have the opportunity to finalize the attendance for your group on a particular day. (To add or remove clients from your group permanently, use the Group Registration form to edit your group members.)

**IMPORTANT: Make sure you note group attendance correctly or you may end up with unfinished drafts for people who did not attend or no note for people who did. If this happens you will end up having to rewrite all of the notes for the group.**

**Clients Who Attended Group:** The default for this section is for all group members to be checked, which means they attended the group. If anyone did not attend, click the box next to the client's name to deselect. For the clients you deselect, a service will be filed, noting the missed visit.

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Clients Who Attended Group

<input checked="" type="checkbox"/>	ALIPRANDI,POLDI (32) Episode: 1
<input checked="" type="checkbox"/>	ATCHISON,MATHIS (33) Episode: 1
<input checked="" type="checkbox"/>	ROSENBERG,KENNETH (30) Episode: 1
<input type="checkbox"/>	RUSKIN,RAYMOND (31) Episode: 1
<input checked="" type="checkbox"/>	SIGURDSSON,ALBERTO (29) Episode: 1

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

7. Click **Add Client To Group** to add any new clients to the group. This change will only be for today. To permanently add a client to the group, use the Group Registration form to edit the group members.

Add Client To Group

Client To Be Added To Group

Episode Number

8. Click **Remove Client From Group** to remove any clients from today's group. To permanently remove the client from the group use the Group Registration Form.

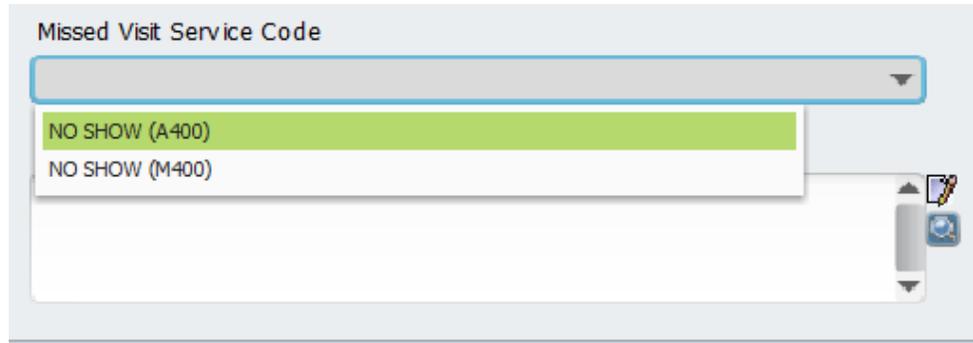
Remove Client From Group

Removal Selection

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

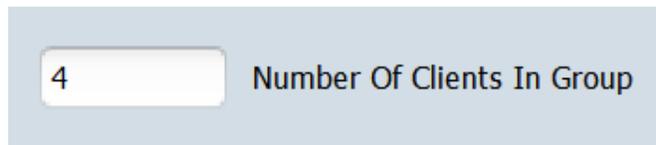
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9. Enter a **Missed Visit Service Code** for missed visits, if any. This applies to any group members that were “unchecked” in the “Clients Who Attended Group,” box. After you complete your notes, if you look in the client's Service History Widget, you will see the missed visit service code for that group. Do not enter any text for the missed visit as this function is not active in Santa Cruz Avatar.



The screenshot shows a dropdown menu titled "Missed Visit Service Code". The menu is open, showing two options: "NO SHOW (A400)" and "NO SHOW (M400)". The "NO SHOW (A400)" option is highlighted in green. The dropdown is set against a light blue background.

10. Enter the number of clients that came to group. This is the total number that **attended** the group, not the total that are registered for the group.



The screenshot shows a text input field with the number "4" entered. To the right of the input field is the label "Number Of Clients In Group". The entire field is set against a light blue background.

11. **Practitioners / Time tab:** Enter **Practitioners time** and **Co-Practitioner** if applicable.



The screenshot shows the "PRACTITIONERS / TIME" tab interface. It features three input fields with the following values: "90" for Face-To-Face, "40" for Other Time, and "130" for Total Duration (minutes). The text "Enter Practitioner's time here" is displayed above the first input field. The labels "Face-To-Face", "Other Time", and "Total Duration (minutes)" are positioned above their respective input fields.

**Face-To-Face time** is the time you spent facilitating the group.

**Other Time** is the **total** time it takes to write you progress notes, 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.” And if it took you 20 minutes each way to travel to and from the work site where the group is located, add a total of 40 minutes to “Other Time,” in addition to the note writing time.

You may also add travel time to your “Other Time.” Unfortunately, prep time for the group is not a Medi-Cal reimbursable service. Do not include any prep time (i.e. making copies, writing group handouts, gathering supplies) into your “Other time.”

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12. **Service Information tab:** Enter information as dictated by the nature of the service provided.

▼ SERVICE INFORMATION

Location: Office

Service Program: County - Adult Access

Service Charge Code: GROUP REHAB COUNSELING (M455)

13. Enter **Evidence Based Practices** and **Service Strategies** as needed.

14. Enter **Language** information.

15. **Progress Note tab:**

a. **Note Type = Group**

b. Write your **Group Intervention**. You will have the opportunity to customize/edit the intervention for each client when you write the individual notes.

c. The **User To Send Scratch Note To-Do Item To** field will already have your name populated into the field. This instructs Avatar to send the scratch notes to your **My To Do's**.

▼ PROGRESS NOTE

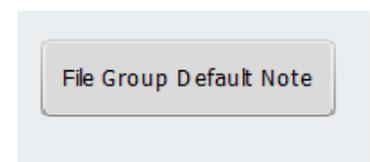
Note Type: Group

User To Send Scratch Note To-Do Item To: Nancy Mast

Group Intervention(s) Related to MH Condition/Problem (Applicable to All Clients Who Attended the Group Session)

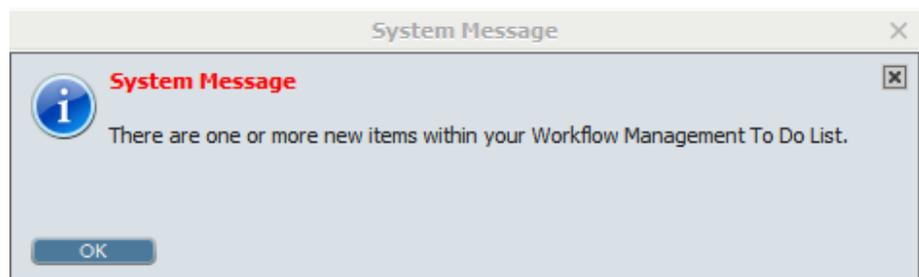
Led discussion around analyzing clients' fears/anxiety, by examining the probability of the negative expectation of occurring, the real consequences of them occurring, clients' ability to control the outcome, worst possible outcome, and ability to accept the outcome.

16. When you are satisfied with your Scratch Note, click File Group Default Note to save and close.



17. When you file your group default note, Avatar will send an individual Scratch Note for each client in your group to your My To Do's. You will receive a system message telling you there are new items in your workflow.

**Click OK.**

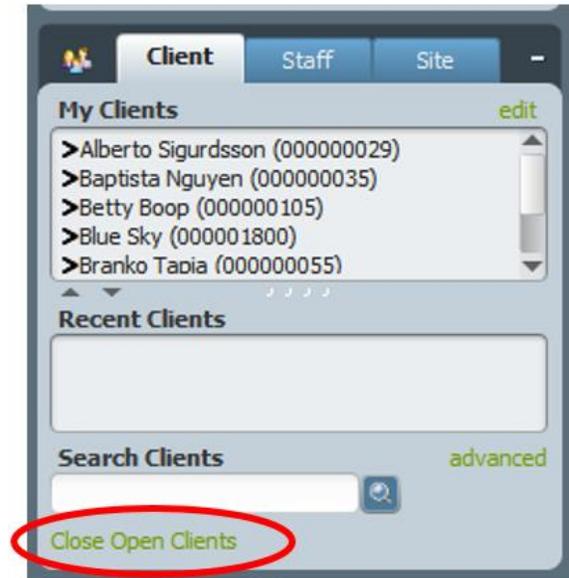


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Once you file your note, Avatar will open a new blank note, just as it does with individual progress notes. You do not need this blank note. Click the red and white “X” on the left side of the form to close this blank note without saving. 

**NOTE: Close all of your open charts before completing your notes.** If the chart is open for a client, you may not be able to open the scratch note from your My To Do’s.

There is a handy link that closes all charts in your Clients & Staff Widget labeled “Close Open Clients.” If you click this, all of your open charts will close.

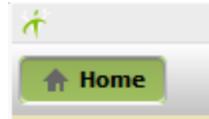


## Open Your Individual Scratch Notes in Your My To Do’s Widget

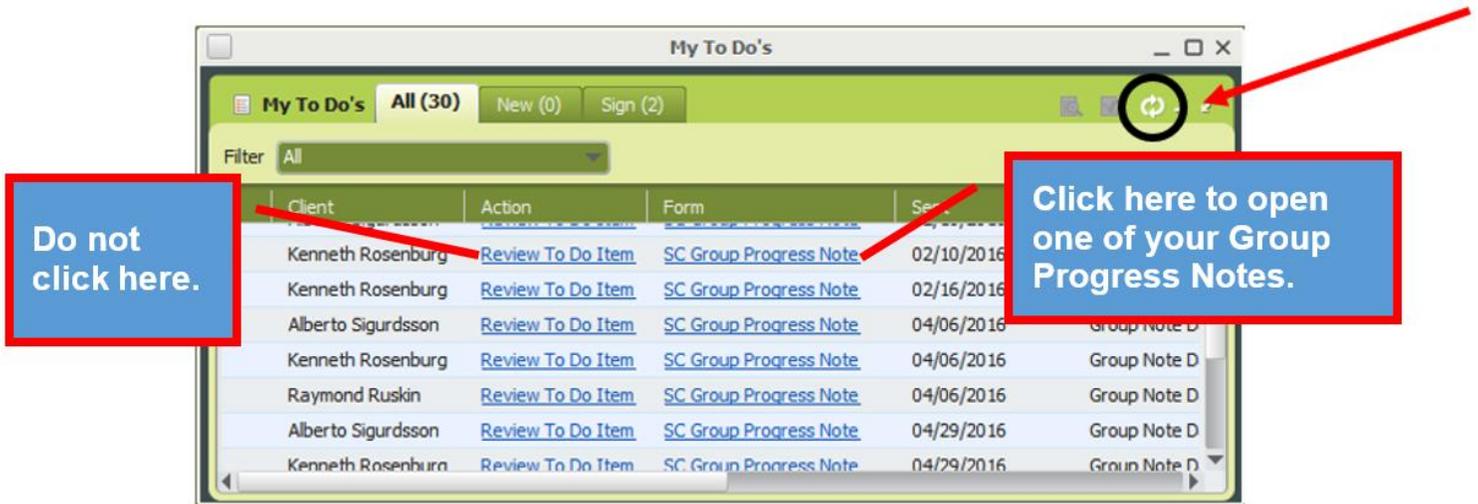
Once you file your Group Default Note, Avatar sends a link to individual “scratch” notes, one for each client, to your My To Do’s. All the notes will have the same service information as well as the intervention you wrote when you created your Group Default Note. In your My To Do’s you will open and complete the notes, one at a time until you have written the individual notes for all group members. After you complete your first note for a group, the next one will launch automatically until all the notes for that group are completed.

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1. Return to Your Home console by clicking “Home” in the upper left hand corner of your Avatar Screen.
2. **Click the refresh button in your My To Do’s** so you can see the draft Group Progress Notes that have been delivered to you.



**IMPORTANT:** In your My To Do’s **DO NOT click Review Draft Item.** This will not launch the progress note. In addition, you have started down a path that will delete your link to the note without your completing the note.



3. Click “SC Group Progress Note” for one of the notes in your My To Do’s to launch the note. The note will open. 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.

**It is strongly recommended that you complete all the notes for the group at one time. Completing part of the notes one day and then the rest on a different day may lead to problems completing all of the notes.**

## Completing Your Group Progress Notes

Open the first note in the group from your My To Do’s as shown above.

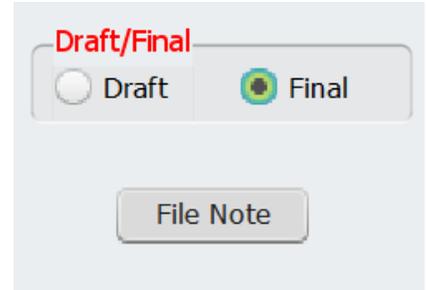
Once you have completed your **group scratch note**, a large portion of each **individualized group progress note** has already been completed. You will still need to fill in the sections of each note that are unique to each client in the group. You should be familiar with these sections from the SC General Purpose Progress Note. If you need a refresher, see the [Avatar Clinicians Manual](#) on the [Santa Cruz County Avatar Web Page](#).

- **Treatment Plan Elements Section:** Select the plan elements that the service you provided addresses.

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- **Language Question:** Complete the question as appropriate.
- **Progress Note Section:** Enter the note Type, Client Presentation, Response and Follow-Up sections of each note. The intervention you already entered will be there, but you may edit the Intervention section to customize for the client.

Once you have completed the first note in the group, select "Final" and then click "File" to file the note.



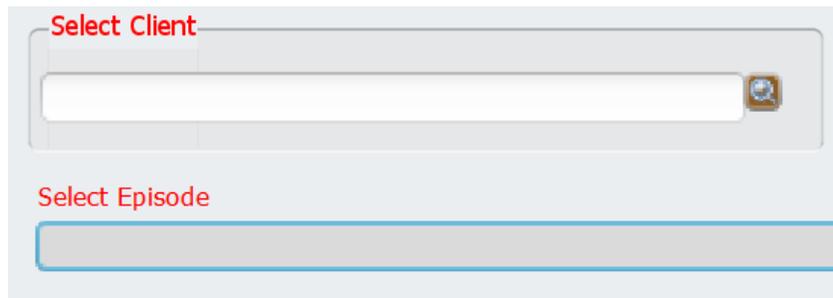
Draft/Final  
 Draft  Final  
File Note

## It is not recommended that you save Group Notes in draft.

Once you file your last note, Avatar will open a new blank note, just as it does with individual progress notes. You do not need this blank note. Click the red and white "X" on the left side of the form to close this blank note without saving.



You will know this is a blank note because the client name and other fields will be blank.



Select Client  
Select Episode

### What To Do When Only One Client Comes to Group

You must have at least two clients to use the Group Progress Note. (This is because the billing component of the form won't work correctly if there is only one client.)

**If only one client shows up for group, instead of using the Group Progress Note form, use the SC General Purpose Progress Note.**

For the "Note Type," use "Progress Note." Do not use "Group" for the "Note Type."



Note Type  
Progress Note

Use an individual service code. Do not use a group service code.

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## Group Progress Note Duration Problems

The Avatar Group Progress Note may miscalculate the duration time for one or more notes in a group. When this happens, the charges minutes and charges attached to the note will also be incorrect. To tell if this has happened, run a Service Activity Report (SAR). In the column titled, "Clients Group," which indicates the number of individuals in each group, you will see a "1" next to some clients. This means that Avatar has not calculated the group correctly. (A group count would never be "1" because then it would not be a group.)

EXAMPLE BELOW: In the snip from a SAR below, the service outlined in red has not been calculated correctly (client names are cut off, but would be at the far left). You can see that the group count ("Clients Group") is 1. In addition, note that the minutes and charges are also incorrect.

Services outlined in green have been calculated correctly. You can see the number of clients should be "5." Of the 5 clients in the group, the minutes for one client have been miscalculated as 146 min., instead of 29 min.

EP. #	Program	Date Of Service	Service	Service Description	Total duration	All Units	Adjusted Total	MediCal Eligible Units	Clients Group	Cost
15	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	146	146	146	Y	1	464.28
15	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	106	106	27	Y	4	84.27
104	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	146	146	29	Y	5	92.86
104	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	106	106	106	Y	1	337.08
79	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	146	146	29	Y	5	92.86
79	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	146	146	29	Y	5	92.86
79	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	106	106	106	Y	1	337.08
110	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	146	146	29	Y	5	92.86
110	Front - Opal-Adult Outpatient	3/31/17	M455	GROUP REHAB COUNSELING	106	106	27	Y	4	84.27

To have this corrected, send an encrypted message to [askqi@santacruzcounty.us](mailto:askqi@santacruzcounty.us) requesting a correction of the **group count**. Once we correct the group count, the minutes/units, as well as the charges, will adjust automatically.

# Santa Cruz Avatar

## How to Avoid Getting the Group Progress Note Duration Error for Your Group

Here are a few things that you can do to reduce the chance of this error occurring.

For clinicians:

- 1) Complete all the notes for one group in the same sitting. Do not, for example, do half the notes for your group today and the other half of the group tomorrow. It's better to wait and do the notes from a single group in one sitting.
- 2) Update the Group Registration form frequently, especially if your program has a lot of client turnover. You may need to update the Group Registration form a couple of times a week, or even daily.
- 3) Try to avoid saving your individual group notes (the ones for each client) as a draft. Complete the note and finalize.
- 4) Be extra careful and double check your notes before finalizing.
- 5) **Group Notes Cannot be Reverted to Draft.** If you *do* finalize a note and *then* realize you have an error, there are many things that we can change behind the scenes for you such as the group count, service code, total duration, service program and admission program. Send your correction request to [askqi@santacruzcounty.us](mailto:askqi@santacruzcounty.us).

For supervisors: Make sure your staff members have dedicated time for documentation structured into their schedules. It can be difficult to complete group notes accurately if there are interruptions.

## Group Progress Note Corrections

### Group Progress Note Deletions

Send your correction message to [askqi@santacruzcounty.us](mailto:askqi@santacruzcounty.us)

**Group Count:** We can change the group count (number of people in the group) for an individual note. For example, Joe Smith is in your group, but this week, he did not attend. When you wrote your progress notes, you forgot to "uncheck" him from the group list and so you ended up with a note that you did not need. In addition, the group count for this and all notes in the group are going to be 1 more than they should be. For example, if the group, including Joe Smith, had five people in it, when we delete Joe's note, we will need to change the *group count* for the other notes in the group.

**Draft** group progress notes cannot be deleted at all, either by the clinician, or by the help desk. If you need group notes deleted, put NA or VOID in the **intervention**, and then finalize. (This helps us find the note.) Once the notes are finalized, we can delete them for you.

**If the client name is wrong**, we will need to delete the note and you will rewrite it. The name cannot be changed once the note has been started.

**If the date is wrong** it cannot be changed. The group will have to be deleted and redone.

# Santa Cruz Avatar

Use the template below to provide information about the note(s).

Copy and paste the template below into a message to [askqi@santacruzcounty.us](mailto:askqi@santacruzcounty.us)

If you are re-entering your note(s), and not just requesting a deletion, copy and paste the information from your note into a Word document. That way you can paste it back into Avatar when you re-create your notes.

## Group Progress Note Deletion Template (fill out completely)

Client name & number:

Episode number & name:

Service Date:

Data Entry Date and time\*:

Total Duration time:

Service code:

Clinician:

Action requested: Deletion

Reason:

Is this a group note? (Y/N): Y

How many people in the group?:

\*We only need the data entry date and possibly the data entry time if there are multiple notes in chart with the same information. For example, you make a mistake with the note, and then you redo it again a few minutes later. We need the time submitted from the note you want deleted so that we do not delete the wrong one.

Please include the above information for every group participant. **You must finalize the note first and then request a deletion. We cannot delete draft notes. Put NA or VOID in the intervention blanks of the notes.**\*We might need the data entry time if the client has gone to multiple groups in the same day. It may be the only way we can figure out which note to delete.

**If you need to have the Group Count changed after your note is deleted, fill out the template below for the rest of the notes in the group.**

**To find out what the group count is, use the Service Activity Report.** Only supervisors and certain clerical staff have access to this report. If you do not have access to it, talk to your supervisor about who can print this out for you.

See the [Avatar Supervisor Guide](#) on the [County Avatar Webpage](#) for more information about the Service Activity Report.

# Santa Cruz Avatar

## Group Progress Note Group Count Change Template (fill out completely)

Client name & number:

Episode number & name:

Service Date:

Data Entry Date and time\*:

Total Duration time:

Service code:

Clinician:

Action requested: Change Group Count from \_\_\_\_ to \_\_\_\_

Reason:

Is this a group note? (Y/N): Y

How many people in the group?:

\*We only need the data entry date and possibly the data entry time if there are multiple notes in chart with the same information. For example, your program runs multiple groups throughout the day and you do to groups with this client. If the duration and service code are exactly the same for the two groups, the only way we can tell the difference between notes you want to keep and the note you want deleted is the entry time.

## Group Progress Note Data Changes

Currently, Group Progress Notes cannot be reverted to draft for changes because they lose critical data that cannot be added back in, such as the service date.

Use the template below to indicate what change you need in your note.

## Group Progress Note Correction Template (fill out completely)

Client name & number:

Episode number & name:

Service Date:

Data Entry Date and time\*:

Total Duration time:

Service code:

Clinician:

Action requested:

Reason:

Is this a group note? (Y/N): Y

How many people in the group?:

\*We only need the data entry date and possibly the data entry time if there are multiple notes in chart with the same information. For example, your program runs multiple groups throughout the day and you do to groups with this client. If the duration and service code are exactly the same for the two groups, the only way we can tell the difference between notes you want to keep and the note you want deleted is the entry time.

# Santa Cruz Avatar

## I have A LOT of corrections. Can I put them in a spreadsheet instead?

Yes, this is no problem as long as your spreadsheet has all the fields in the template above. (Please do not just send in a copy of information from the Service Activity Report. This does not have all of the information we need to find the note and make the change for you.)

If you would like a spreadsheet sent to you with all of the needed data fields, send a message to [askqi@santacruzcounty.us](mailto:askqi@santacruzcounty.us)