myAvatar

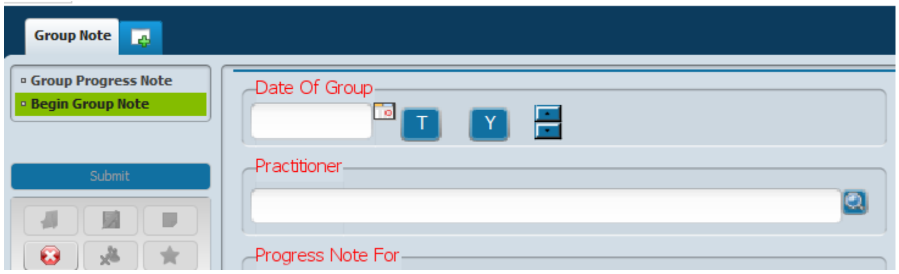
Quick Reference

Group Notes

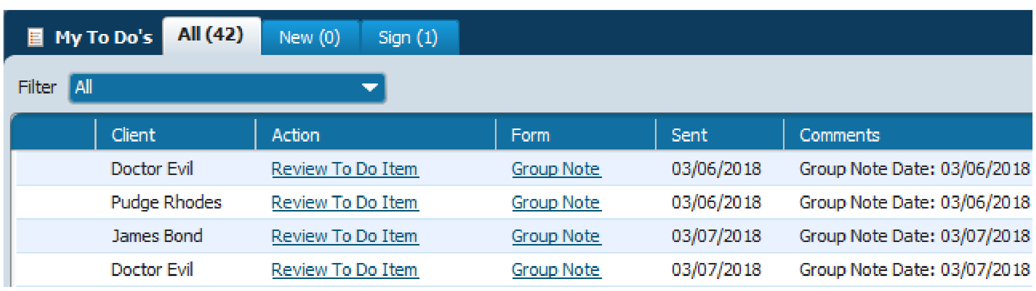
Group notes are populated from scheduled appointments. The group note portion allows you to enter in a general overview for the group, then individualize the note for individual clients in your My To Do's.

Process

1. From the calendar (Scheduling Calendar or My Calendar), right click on the appointment and select **Group Note**
2. **Click on the second section, Begin Group Note**



3. Complete required sections, including selecting **Progress Note for "Existing Appointment"** and "Group Type" under Note Type
4. Identify Appointment which Note Addressess
5. Verify patients in attendance in **Clients who Attend Group** and add/deselect missing patients
6. Write your Group Note and File Note
7. Go to your My To Do on your Home View (refresh widget) and click on your first patient's **Group Note**



8. Verify patient name and individualize note. Address Treatmetn Plan element if appropriate
9. Click final and and submit
10. Next patient will pop up
11. Patient will pop up in My To Do's
12. Click Group Note and individualize note
13. Submit as Final and Submit. Enter password

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