

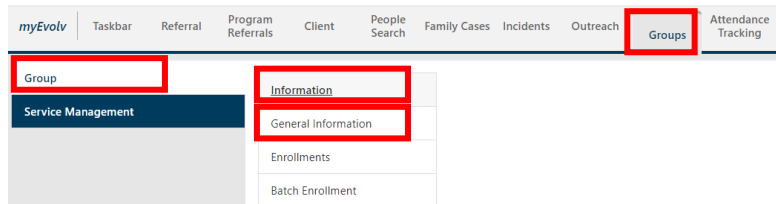
Managing Group Enrollment

Guidance included:

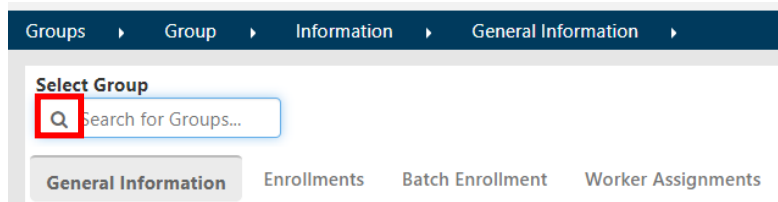
- [How to use this Document - Click for video](#)
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Creating a New Group

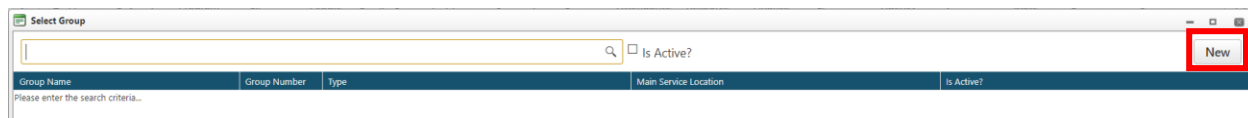
Breadcrumbs: Groups > Group > Information > General Information



Click the magnifying glass in the Select Group field.



Click New in the upper right-hand corner.



New Group Window will open via pop up window.

Managing Group Enrollment

Group Information

- **Is Active:** This box will automatically be selected.
- **Name:** Name of the group you are creating
- **Type:** Use magnifying glass to select the program the group is attached to
- **Group #:** This field can be used to add an additional option to differentiate similar groups
- **Program:** Use magnifying glass to select groups
- **Main Service Location:** Select Location where sessions will usually be held
- **Currently Accepting Placements:** This box will automatically be selected.

The screenshot shows the 'Group Information' form. On the left is a sidebar with 'Group Information' selected. The form has a dark blue header. Fields are arranged in a grid: 'Is Active' (checked), 'Name*' (Test Group), 'Type' (code), 'Group #' (Dani), 'Program*' (Groups), and 'Main Service Location*' (RTC (Lic.# 00001)). 'Currently Accepting Placements' is also checked.

Classes/Units

- **Is Active:** This box will automatically be selected.
- **Description:** Enter description of group
- **Unit Number:** Enter a number or additional identifying information as directed by supervisor.
- **Total Capacity:** Enter group capacity if necessary

The screenshot shows the 'Classes/Units' section. The sidebar has 'Classes/Units' selected. Below the header, there is a table with columns: 'Is Active', 'Description*', 'Unit Number*', 'Total Capacity', and 'Actions'. The first row has 'Is Active' checked, 'Description' as 'Test Group for Guides', 'Unit Number' as '1', and 'Total Capacity' as '#'. The 'Actions' column has a dropdown menu.

Schedules

- **Schedule Description:** Indicate how often group will be held (Daily, Weekly, Twice Weekly, etc.)
- **Start Date:** Use calendar icon to select start date.
 - **Start Date/Time must be BEFORE Date/Time of first service!**
- **End Date:** End date needs to be set for a future date. Typically, one year from start date.
- **Daily Start Time:** Enter 8a**
- **Daily End Time:** Enter 8p**
- **Is Active:** This field will automatically be checked
- **Select which days the group sessions will be held.****

**When establishing a group start time, end time, days selected, it is best to keep a wide range of times/days so that groups can easily be rescheduled for holidays, illness, etc.

Managing Group Enrollment

Schedule Description	Start Date	End Date	Daily Start Time	Daily End Time	Duration	Is Active	Default Event	Default Staff	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Actions
Daily	09/29/21	12/31/21	08:00 AM	09:00 PM	HH:MM	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Actions
					HH:MM	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Actions

Worker Assignments

- Workers/Workgroups: leave these fields blank

Additional Information:

- Use field as necessary

Click Save.

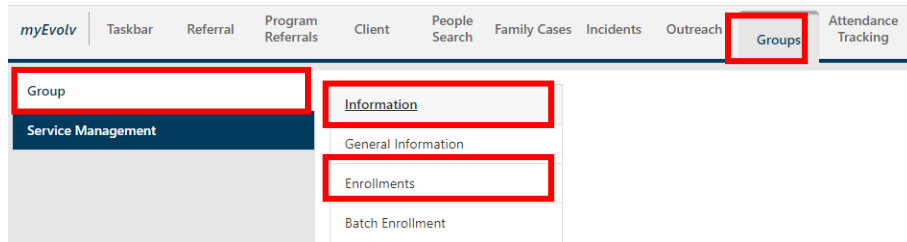
Group Information can be edited as necessary from Group Information screen.

Managing Group Enrollment

[Adding New Members to a Group](#)

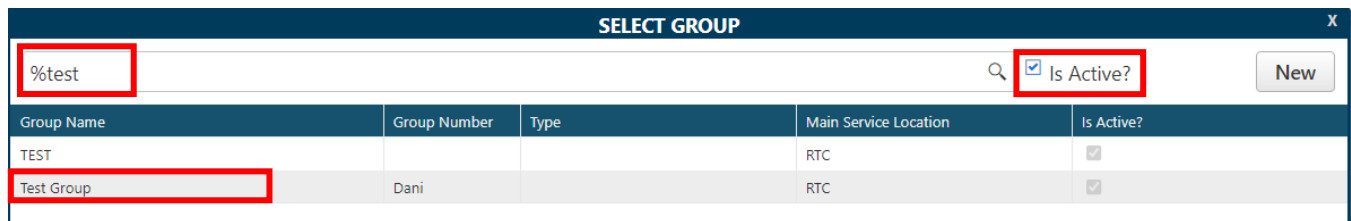
**Keep in mind that client must be enrolled in the program the group is attached to before enrolling in selected group.*

Breadcrumbs: Groups > Group > Information > Enrollments

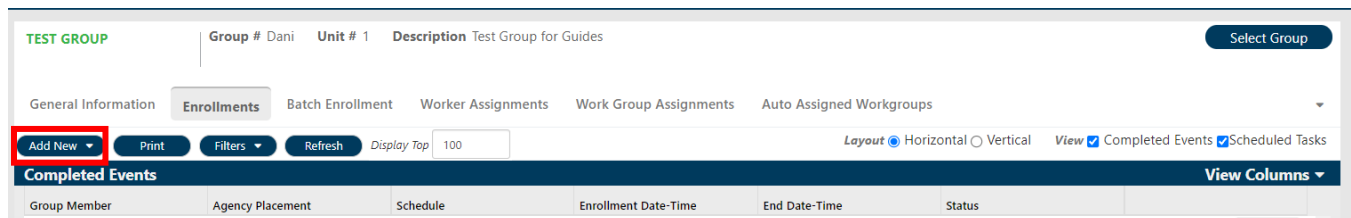


Search and Select Group

- To make searching easier, use % and a keyword to search for group.
- To view only the active groups, click Is Active?



Click Add New > Add Event > Group Enrollment



Search

Complete Last Name, First Name, Gender and click Proceed.

Managing Group Enrollment

Wizard Process - Support Group Enrollment

Search Results Personal Information

Previous **Proceed** Cancel

Agency Information

Agency*
Rainbow Treatment Center

Person

Enter as much information as possible. This is not a search screen and requires you to enter complete information.

Anonymous
☐

AKA

Last Name*
Test

First Name*
Carl

Middle Name

Gender*
M Male

Date of Birth

Results

Find client on list of results and click the name to select. Click Proceed.

Wizard Process - Support Group Enrollment

Search **Results** Personal Information

Previous **Proceed** Cancel

☐ Create new record with information entered for [Test, Carl]

Name	DOB	Gender	Address
		Female	Address Not Found...
		Male	, WHITERIVER, AZ 85941
		Male	Address Not Found...
		Male	st Fork Rd., WHITERIVER, AZ 85941
		Male	, WHITERIVER, AZ 85941
		Female	Address Not Found...
		Female	Address Not Found...
Test, Carl	01/01/1990	Male	1234 Peach Street, WHITERIVER, AZ 85941

**Information from actual clients hidden for privacy.*

Personal Information

- Confirm you have the selected the correct client.
- Click Proceed.

Wizard Process - Support Group Enrollment

Search Results **Personal Information**

Previous **Proceed** Cancel

Name

Last Name*
Test

First Name*
Carl

Middle Name

Name Suffix

Salutation
code

AKA

Maiden Name

Gender*
M Male

Anonymous
☐

Managing Group Enrollment

Group Enrollment

- Unit/Class, Group Member, Agency Placement: These fields will automatically populate and cannot be changed.
- Schedule: Use magnifying glass to complete field.
- Enrollment Date-Time: Use calendar/clock icon to complete fields
- End Date-Time: Leave these fields blank

Click Finish.

Wizard Process - Support Group Enrollment

Search Results Personal Information

Previous Finish Cancel

Group: Test Group Unit: Test Group for Guides

Membership

Unit/Class: Test Group for Guides

Group Member: Test, Carl

Agency Placement: Rainbow Treatment Center - from 09/28...

Schedule*: Daily - 09/29/2021 to 12/31/2022 (Su...

Enrollment Date-Time*: 09/29/2021 09:00 AM

End Date-Time:

Troubleshooting:

- If you get an error upon saving:

myevoltrtcdevxb.netsmartcloud.com says

Error(s) occurred on save:

Group Enrollment 09/27/2021 07:00am does not correspond placement period or is in the future for this individual: [Test, Carl]

OK

or

myevoltrtcdevxb.netsmartcloud.com says

Error(s) occurred on save:

Client must be enrolled in program [Groups] before you can enroll into this group.

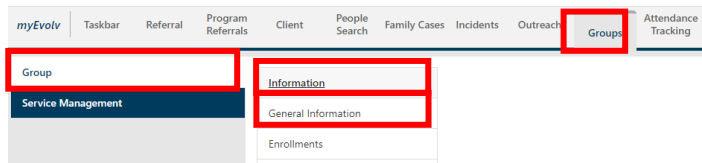
OK

- Close out of the window and navigate to client's Enrollment page
 1. Make sure the client Intake/Re-Admit date is before Date/Time of group enrollment
 2. Make sure the client is enrolled in Groups program.
 3. Date/Time of enrollment into the program the group is attached to MUST be before Date/Time enrollment into a specific group.

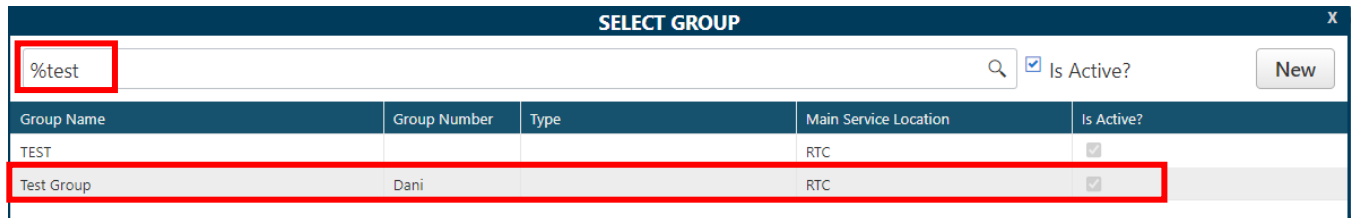
Managing Group Enrollment

Ending Current Group Members

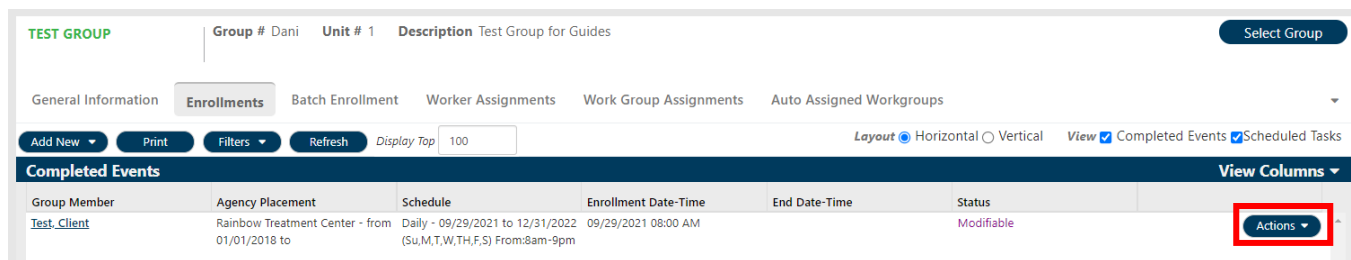
Breadcrumbs: Groups > Group > Information > Enrollments



Search and select group.

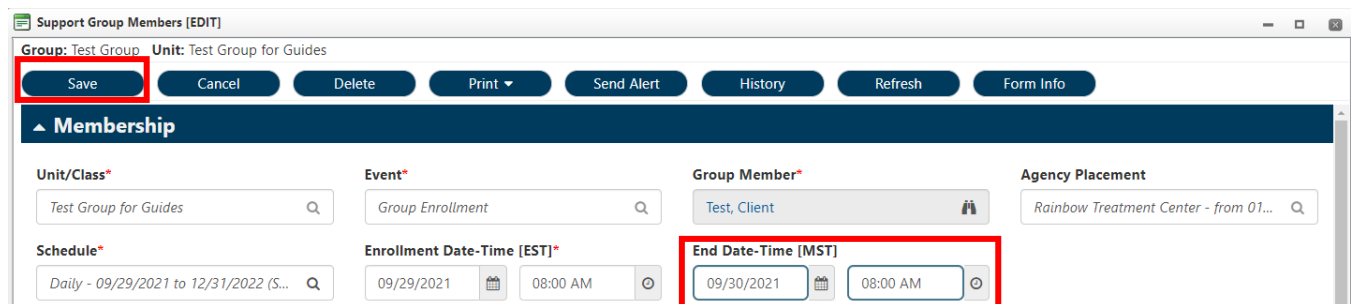


Click Actions > Open the client you wish to end.



Complete End Date-Time fields.

Click Save to close and apply changes.



Client will now be listed with an end date and is no longer an active group member.

Managing Group Enrollment

TEST GROUP

Group # DaniUnit # 1Description Test Group for Guides

Select Group

General Information

Enrollments

Batch Enrollment

Worker Assignments

Work Group Assignments

Auto Assigned Workgroups

Add New

Print

Filters

Refresh

Display Top

100

Layout

Horizontal

Vertical

View

Completed Events

Scheduled Tasks

Completed Events

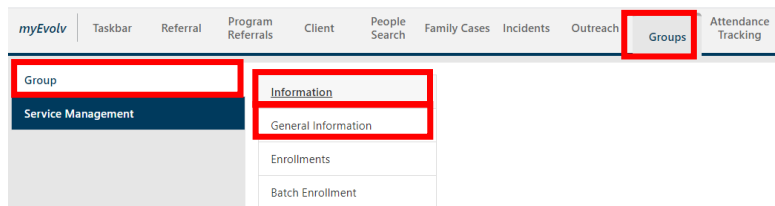
View Columns

Group Member	Agency Placement	Schedule	Enrollment Date-Time	End Date-Time	Status	
Test Client	Rainbow Treatment Center - from 01/01/2018 to	Daily - 09/29/2021 to 12/31/2022 (Su,M,T,W,Th,F,S) From:8am-9pm	09/29/2021 08:00 AM	09/30/2021 08:00 AM	Modifiable	<div>Actions</div>

Managing Group Enrollment

Editing Group End Date

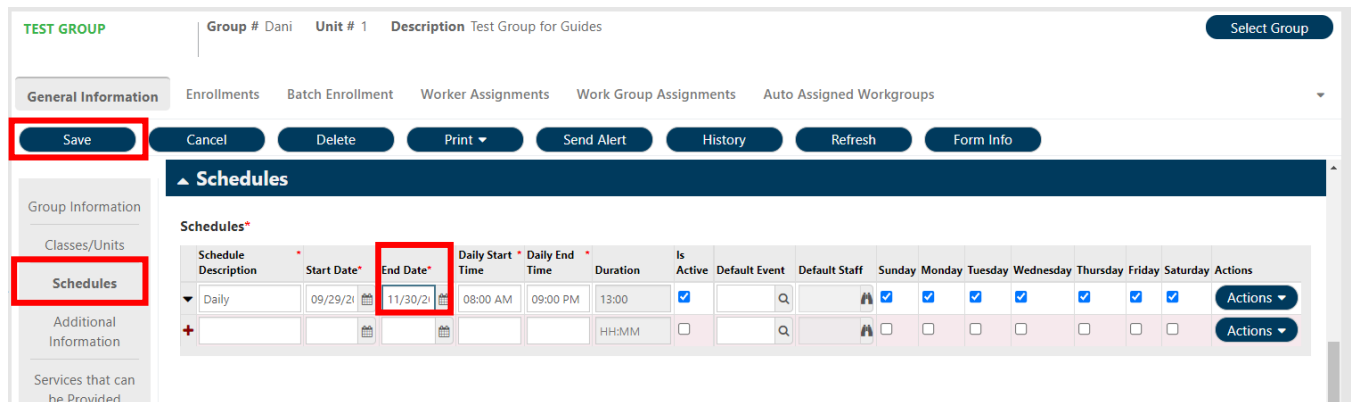
Breadcrumbs: Groups > Group > Information > General Information



Navigate to Schedules section of Group Information screen.

- Use calendar icon in the End Date field to edit group end date.
 - Extend out another 6 months to a year depending on the group need.

Click Save to apply changes.



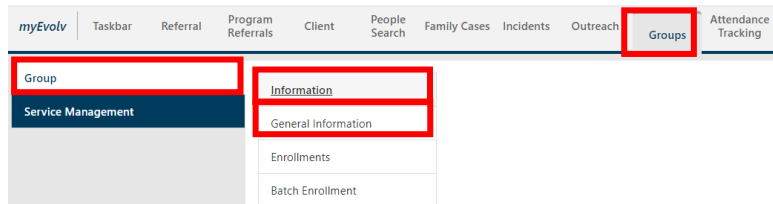
Schedule Description	Start Date*	End Date*	Daily Start Time	Daily End Time	Duration	Is Active	Default Event	Default Staff	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Actions
Daily	09/29/21	11/30/21	08:00 AM	09:00 PM	13:00	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Actions
					HH:MM	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Actions

Managing Group Enrollment

Marking a Group Inactive

When you are sure that a group will no longer be used, mark the group Inactive.

Breadcrumbs: Groups > Group > Information > General Information



Group Information

- Uncheck the Is Active box
- Add the letter z to the beginning of the group name. Doing this moves the group to the bottom of the list when searching.
- Save to apply changes
- The group will no longer appear in searches when Is Active? is checked and/or will appear at the bottom of the list alphabetically.

A screenshot of the 'TEST GROUP' form in the myEvolv application. The 'General Information' tab is selected. The 'Save' button is highlighted with a red box. Below the buttons, the 'Group Information' section is expanded, showing the 'Is Active' checkbox, which is checked and highlighted with a red box. The 'Name*' field contains 'Test Group' and is also highlighted with a red box. Other fields include 'Type' (code), 'Group #' (Dani), 'Program*' (Groups), and 'Main Service Location*' (RTC (Lic.# 00001)). The 'Currently Accepting Placements' checkbox is also checked.

Managing Group Enrollment

[Entering a Group Service/Ticket](#)

Breadcrumbs: Groups > Service Management > Service Management > Activities

Add new > Add Event > Select service from list

- Services without (M)/(S) are for regular BHTs and require Supervisor and Med Team approval
- Services with (S) should be completed by Supervisors and require Med Team approval
- Services with (M) should be completed by Med Team and only require a signature

The screenshot shows the 'TEST GROUP' interface. At the top, there's a header with 'Group # Dani', 'Unit # 1', and 'Description Test Group for Guides'. Below this are tabs for 'Activities', 'Training', and 'Service Entry'. The 'Activities' tab is active. A red box highlights the 'Add New' button in the top left. A dropdown menu is open below it, showing a search bar 'Search events...' and a list of service options: 'Group Therapy', 'Group Therapy (M)', 'Group Therapy (S)', 'Peer Services Group', 'Peer Services Group (M)', 'Peer Services Group (S)', 'Prevention Group', 'Prevention Group (M)', 'Prevention Group (S)', 'Skills Training and Development', 'Skills Training and Development (M)', and 'Skills Training and Development (S)'. To the right of the dropdown, there are buttons for 'Print', 'Filters', 'Refresh', and a 'Display Top' dropdown set to '100'. Below these is a table with columns 'Activity Type', 'Encounter With', and 'Do Not'.

Once a service is selected, enter Date and Time in pop-up box.

Click Update.

The screenshot shows a pop-up box titled 'Get Date Time [EDIT]'. It has two buttons at the top: 'Cancel' and 'Update'. The 'Update' button is highlighted with a red box. Below the buttons is a section titled 'Enter Date'. Under this section, there's a 'Date Time' label and two input fields. The first field contains '09/30/2021' and the second field contains '10:00 AM'. Both input fields are highlighted with a red box.

Encounter Information

- **Unit/Class:** This field will automatically fill and cannot be changed
- **Contact Type:** This field will automatically fill and cannot be changed
- **Activity Type:** Use magnifying glass to make selection

Managing Group Enrollment

- **Service Facility:** Use magnifying glass to make selection
- **Is Telehealth:** Uncheck this box if group is in person
- **Do Not Bill Indicator:** Check this box if the group is cancelled

RTC Group Note [ADD]

Group: Test Group Unit: Test Group for Guides

Save Cancel Print Form Info

Encounter Information

Unit/Class* Test Group for Guides

Contact Type* Group Therapy

Activity Type* W2W Working To Wellness

Service Facility* 00001 RTC (Lic.# 00001)

Is Telehealth ☒

Do Not Bill Indicator ☐

- **Actual Date:** Enter Date and time of group
- **Duration:** Enter total duration of group
- **Completed By:** This field will automatically fill. Use binoculars to edit as necessary
- **Location:** Use magnifying glass to make selection

Encounter Information

Completed Information

Actual Date* 09/30/2021 10:00 AM

Duration (hh:mm)* 00:25

Completed By* Hutchinson, Kathleen Marie

Location* 08 Agency Office

Tasks/Schedules

Future groups cannot be scheduled on the service event; however, the next future scheduled service will appear.

Tasks/Schedules

Schedule Next

[Click Here](#)

Next Scheduled Event

Event	Due Date to Complete	Scheduled Date to Complete	Task	Program Responsible	Staff Responsible	Created By

Refresh

Managing Group Enrollment

Progress Note

Enter group service narrative describing service provided during session.

Completed Information

Tasks/Schedules

Service Related Encounter Information

Progress Note

Group Members

Progress Note

Progress Note

B **I** **U** **Text** **Link** **Image** **Table** **14** **Alert** **Bulleted List** **Numbered List** **Indent** **Text Color** **Table** **Print** **Refresh**







Working to Wellness service
In-Person Processing service
Today's discussion included - What is Fear- fear is one of the seven universal emotions experienced by everyone around the world. The Host emphasized that Fear arises with the threat of harm, either physical, emotional, or psychological, real or imagined. The Host emphasized that fear actually serves an important role in keeping us safe as it mobilizes us to cope with potential danger, the universal trigger for fear is the threat of harm or the threat of relapse. The Host also emphasized that responding to fear of relapse with ourselves can keep us feeling trapped and prevent us from doing things we'd like to.
PLAN: this In Person Processing group was accepted very well, because it dealt with information that could be utilized by every member of the group and is very beneficial to them. Client was encouraged to continue to maintain sobriety at all times to be successful.
Next Lesson: Processing group topic

Scroll to Group Members

- Mark the clients who attended present.
 - If group duration is entered first, when a client is marked present, duration will automatically fill.
 - Individual durations can be edited if client did not participate for the entire session.
 - If clients are not present, simply do not mark them present. It is best **not** to use the No Show? option due to future issues with discharging clients.
- Click the paper Icon to enter the individual note.
 - Note icon changes to a notebook with a pencil when a progress note has been entered.
- Goals and Diagnosis can also be identified

Group Members

Group Members

Name	<input type="checkbox"/> Present?	Start Time	Duration	No Show?	Represented by Other?	Participant Role	Participant	Notes	Goal	Diagnosis	Medicare Incident To?	
Test, Client	<input checked="" type="checkbox"/>	10:00 AM	00:25	<input type="checkbox"/>	<input type="checkbox"/>	  			<input type="checkbox"/>	View Service
Test, Client	<input checked="" type="checkbox"/>	10:00 AM	00:25	<input type="checkbox"/>	<input type="checkbox"/>	  			<input type="checkbox"/>	View Service

- **Author:** This field will automatically fill
- **Progress Note:** Enter individual note narrative.

Click Update to save individual note.

Managing Group Enrollment

Progress Note [ADD]

Cancel Update Form Info

Author*

Hutchinson, Kathleen Marie

Progress Note

This is a test Individual group note: Client actively participated in group discussion. Client was attentive, cooperative and interacted well during group discussion and had good insight regarding todays topic

Review group note information for accuracy before signing/submitting for approval. Be sure to check that all clients marked as present have a duration and an individual note.

Sign/Route for approval

BHTs: Click Routing > Start Group Note Multiple approvals

RTC GROUP NOTE [EDIT]

Group: Test Group Unit: Test Group for Guides

Save Cancel Print Send Alert History Refresh Routing Form Info

Encounter Information

Unit/Class* Test Group for Guides

Contact Type* Group Therapy

Activity Type* W2W Working To Wellness

Start Group Note Multiple Approvals

Select appropriate supervisor from drop down list and enter a message in the memo field.

Click Submit to Supervisor.

Routing Actions - (Current Status: Open)

Submit to Supervisor Reassign Routing History

Supervisor:

Hutchinson, Kathleen Marie

Group note

Submit to Supervisor Cancel

Assigned User: Name Not Set

Managing Group Enrollment

Supervisors (S): Click Routing > Start Basic Approval Workflow

The screenshot shows the 'RTC GROUP NOTE [EDIT]' form. The top navigation bar includes buttons for Save, Cancel, Print, Send Alert, History, Refresh, Routing (highlighted with a red box), and Form Info. Below the navigation bar, the 'Encounter Information' section is visible, containing fields for Unit/Class*, Contact Type*, Activity Type*, Service Facility*, Is Telehealth, and Do Not Bill Indicator. A red box highlights the 'Routing' button and a tooltip that reads 'Start Basic Approval Workflow w/ options to route betw'.

Click the Submit to Supervisor tab.

The screenshot shows the 'Routing Actions - (Current Status: Open)' dialog box. The 'Submit to Supervisor' tab is highlighted with a red box. The dialog box contains a dropdown menu for 'Assign To:' with 'Hutchinson, Kathleen Marie' selected. Below the dropdown is a text area with the text 'group note' highlighted by a red box. At the bottom right, the 'Submit to Supervisor' button is highlighted with a red box. The 'Assigned User:' field at the bottom shows 'Name Not Set'.

Med Team (M): Click E-Sign

The screenshot shows the 'RTC GROUP NOTE [EDIT]' form. The top navigation bar includes buttons for Save, Cancel, Print, E-Sign (highlighted with a red box), Send Alert, History, Refresh, and Form Info. Below the navigation bar, the 'Encounter Information' section is visible, containing fields for Unit/Class*, Contact Type*, Activity Type*, Service Facility*, Is Telehealth, and Do Not Bill Indicator. The 'E-Sign' button is highlighted with a red box.

Managing Group Enrollment

- Submitting the note to supervisor, signs the note and updates status from modifiable to Signed/Submitted.
- Once a note is approved by supervisor the status changes to Approved.
- Notes that are not signed or submitted for approval, remain modifiable.

Groups (4)							Add Event ▾	Schedule Task ▾
Service	Due Date	Scheduled Date	Actual Date	Duration	Staff	Status		
Group Therapy (S)			09/30/2021 02:30 PM EST	00:25	Hutchinson, Kathleen Marie	Approved	Actions ▾	
Group Therapy (M)			09/30/2021 12:00 PM EST	00:25	Hutchinson, Kathleen Marie	Signed	Actions ▾	
Group Therapy			09/30/2021 11:00 AM EST	00:25	Hutchinson, Kathleen Marie	Modifiable	Actions ▾	
Group Therapy			09/30/2021 10:00 AM EST	00:25	Hutchinson, Kathleen Marie	Signed/Submitted	Actions ▾	

◀ Page 1 of 1 ▶ Records per Page: 10 ▾
 Displaying 1 - 4 of 4

Managing Group Enrollment

[Group Troubleshooting Tips](#)

If you get an error when attempting to enroll clients or if you are getting an error when entering services, check the group schedule and check the client enrollment page.

1. Check Group Schedules.

Breadcrumbs: Groups > Group > Information > General Information

- Start Date: Start Date is **before** first date of service
- End Date: End date is in the future
- Start Time/End Time: Wide range of time available to enter services
- Day of the week: Make sure Day of week is checked

Schedule Description	Start Date*	End Date*	Daily Start Time	Daily End Time	Duration	Is Active	Default Event	Default Staff	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Actions
Daily	09/30/	12/31/	08:00 AM	09:00 PM	13:00	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Actions
					HH:MM	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Actions

2. Make sure your client is enrolled in the program that your group is attached to.

Breadcrumbs: Groups > Group > Information > General Information

- Check the program the that group is attached to.

TESTING GROUP | Group # 1 | Unit # dani | Description Testing Group for Videos | Select Group

General Information | Enrollments | Batch Enrollment | Worker Assignments | Work Group Assignments | Auto Assigned Workgroups

Save | Cancel | Delete | Print | Send Alert | History | Refresh | Form Info

Group Information

Is Active ☒ Name* Testing Group Type 13 Group Therapy Group # 1

Program* Groups Main Service Location* RTC (Lic.# 00001) Currently Accepting Placements ☒

- Go to the client's Enrollment page and make sure they are enrolled in the Agency and the Program the Group is attached to **before** the date of enrollment into the group and/or the date of the service ticket.

Breadcrumbs: Client > Client Information > Critical Information > Enrollment Information

Program: Groups 09/30/2021 09:00am

Facility Providers: