

# **Group Notes/Encounter Collection**

## **User Manual**



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**Department of Veterans Affairs  
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## Revision History

Date	Version	Description	Author
08/2014	1.3	<p>Updated Title Page, Revision History, Table of Contents and renumbered pages.</p> <p>Updated Index, page <a href="#">19</a>.</p> <p>Updated for ProPath template compliance. Made corrections to reference a generic Provider and Clinic in screenshots. Added ICD-10 information to screenshots on pages <a href="#">10-16</a>.</p> <p>For patch OR*3*353, changed “ICD-9” to ICD-10, or just “ICD” where appropriate.</p>	<p>VA PM: Kristen Templet            HP PM: Mike Klein            TW: Corrie DeCapua</p>
08/2014	1.2	<p>Updated for ProPath template compliance. Made corrections to reference a generic Provider and Clinic in screenshots. Added ICD-10 information to screenshots on pages 9 - 15.</p> <p>For patch OR*3*353, changed “ICD-9” to ICD-10, or just “ICD” where appropriate.</p>	<p>VA PMs: Rich Holmes/            Kristen Templet            HP PM: Mike Klein            TW: Corrie DeCapua</p>
11/01/2004	1.1	Name Sanitation	Charles Arceneaux
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# Introduction

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## Purpose of Group Notes

This program was designed to assist providers in documenting group therapy sessions and events such as immunization clinics. It allows the easy assembly of patient groups based on Clinics, Specialties, Wards, Teams, or Provider lists. It then allows the note author to specify parts of a note that apply to the entire group and parts that apply to individuals. It does the same with encounter data. After the note and encounter information is complete, it provides for a single signature for the entire group.

## Scope of the Manual

Tasks associated with Group Notes are: System setup, workstation setup, creation of notes for a group, and collection of encounter data. This manual provides information deemed necessary to carry out these functions.

From time to time improvements are made to the TIU package, including improvements to Group Notes. The latest information about TIU, as well as the latest version of this manual, is posted on the Text Integration Utilities (TIU) Web Page at:

`vista.med.va.gov/tiu/html/Enhance.htm`

or

`vaww.vista.med.va.gov/tiu/html/Enhance.htm`

This document is intended for use during development and testing of the Group Notes executable. When Group Notes is released this document will cease to exist as a living document and the information in it will be inserted into the appropriate VistA manuals. (However, the document will continue to be available on the above page—it will not be updated with post-release changes.)

Also on release, information about Group Notes will be available on the TIU page of the VDL (VistA Document Library) at <http://www.va.gov/vdl/application.asp?appid=142>.

## Audience

Information in this manual is intended for end users. This usually means providers conducting group sessions and limited scope clinics such as for training or vaccination.

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# User Section

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## Group Notes Operation

Group Notes is a companion to the CPRS (Computerized Patient Record System) Notes tab. If you are familiar with creating clinical notes in CPRS you will have little trouble with Group Notes.

Creating notes for a group of patients who have just participated in a group therapy session, education, or an immunization clinic follows these steps:

1. Set the visit location and the date/time for the encounter.
2. Select the patients involved, compiling them into a list.
3. Select a note title common for the group.
4. Enter note information common for the group.
5. Enter encounter data that is common for the group.
6. Select individual patients and enter encounter and note information unique to each individual.
7. Sign the notes.
8. Go back to the patient selection screen and repeat for additional groups.

If you are interrupted and exit the session before signing the notes, Group Notes will file notes individually unsigned and generate notifications that there are notes awaiting signature. Any work subsequent to exiting Group Notes must be accomplished in CPRS.

## Visit Information

Information filled in or provided in the Group fields (upper right corner) is carried forward by the program into the encounter fields.

Check that the provider is correct.

Set Location here.

Check that the visit time is correct.

Group Notes in use by: Cprprovider,Seven

File Help

Patient List

- Providers
- Clinics
- Team/Personal
- Wards
- Specialties
- All

Patients (all)

- Gnpatient.Fourteen
- Tiupatient.Fourteen
- Cprspatient.Eight
- Cprspatient.Eleven
- Cprspatient.Five
- Cprspatient.Four -- ALIAS
- Cprspatient.Fourteen
- Cprspatient.Nine
- Cprspatient.One
- Cprspatient.Seven
- Cprspatient.Six -- ALIAS
- Cprspatient.Ten
- Cprspatient.Thirteen
- Cprspatient.Three
- Cprspatient.Twelve
- Cprspatient.Two -- ALIAS
- Cprspatientdrg.Ten
- Gnpatient.Eight
- Gnpatient.Eleven
- Gnpatient.Five
- Gnpatient.Five
- Gnpatient.Four
- Gnpatient.Fourteen

Group Encounter Provider:  
Cprprovider,Seven - Staff Physi...

Group Visit Location:  
Clinic One

Group Visit Date/Time:  
Nov 4,2004@12:58

**Gnpatient.Fourteen**

SSN: 666-34-8765  
DOB: Apr 02,1944  
Female  
Veteran  
70% Service Connected

Inquiry

Patient list for group notes/encounters

Name	SSN	Age	Sex	Location	Admission	Primary Team	Primary Provider
CPRSPATIENT.FOURTEEN	666-44-4226	72	M	2AS	6/30/2004		
CPRSPATIENTDRG.TEN	666-23-4334	68	M				
GNPATIENT.FOURTEEN	666-34-8765	60	F				

Group Notes

## Patient Selection

As with CPRS, Group Notes opens with the patient selection screen. This screen is very similar to the CPRS patient selection screen with a number of fields and buttons added to facilitate group notes.

The screenshot shows the 'Group Notes in use by: Cprsprovider,Seven' window. It features a 'Patient List' sidebar with radio buttons for 'Providers', 'Clinics', 'Team/Personal', 'Wards', 'Specialties', and 'All'. The main area displays a list of patients, with 'Gnpatient,Fourteen' selected. A callout box points to this list with the text 'Select a patient list.' Another callout points to the patient names with 'Select patients by clicking on their names'. To the right, there are fields for 'Group Encounter Provider' (set to 'Cprsprovider,Seven - Staff Physic...'), 'Group Visit Location' (set to 'Clinic One'), and 'Group Visit Date/Time' (set to 'Nov 4,2004@12:58'). Below these is a detailed demographic view for 'Gnpatient,Fourteen', including SSN (666-34-8765), DOB (Apr 02,1944), gender (Female), and status (Veteran, 70% Service Connected). An 'Inquiry' button is located below the demographics. A callout points to this button with 'This button supplies additional demographic information.' At the bottom, a table titled 'Patient list for group notes/encounters' shows the selected patient. A callout points to the table with 'Patients are listed here.' At the bottom right, a 'Group Notes' button is highlighted with a callout: 'Click here when the list is complete.'

Name	SSN	Age	Sex	Location	Admission	Primary Team	Primary Provider
CPRSPATIENT_FOURT...	666-44-4226	72	M	2AS	6/30/2004		
CPRSPATIENTDRG,TEN	666-23-4334	68	M				
GNPATIENT_FOURTEEN	666-34-8765	60	F				



**Note:** If the patients are being selected from a clinic appointment list, the date and time of the visit **MUST** match exactly the date and time of the appointment. If there is a mismatch, you will create a duplicate encounter.

An extra button is added below patient demographics that, when pressed, displays detailed patient demographic information. Finally there is a list box provided showing the patient list as you build it.

With the patient list there are two additional buttons: Remove and Remove All. These have the obvious function allowing you full edit control over the list. Once you are satisfied press the Group Notes button.

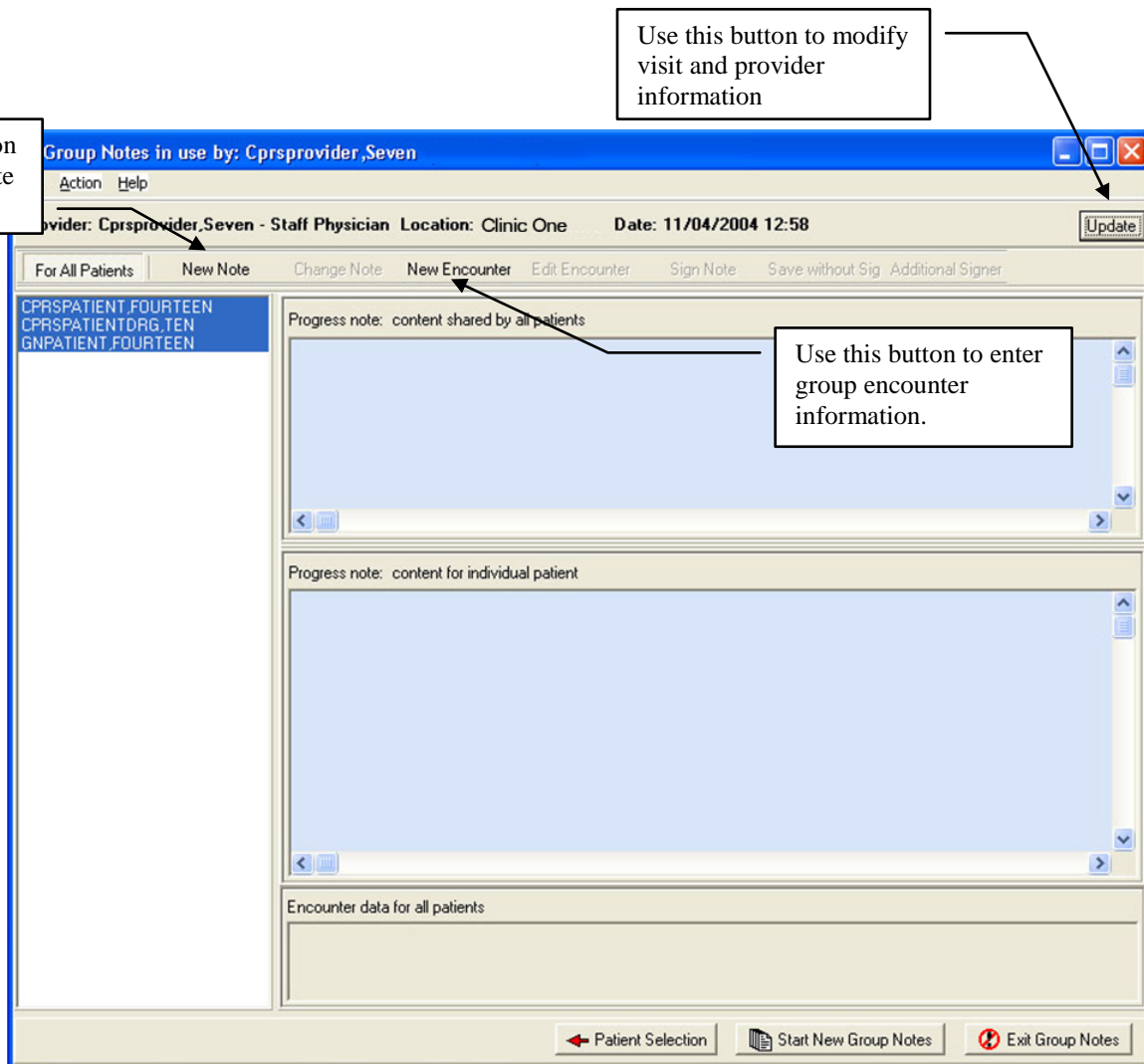
## Common Encounter Data Entry



**Note:** Information common to the entire group must be entered before data for an individual patient.

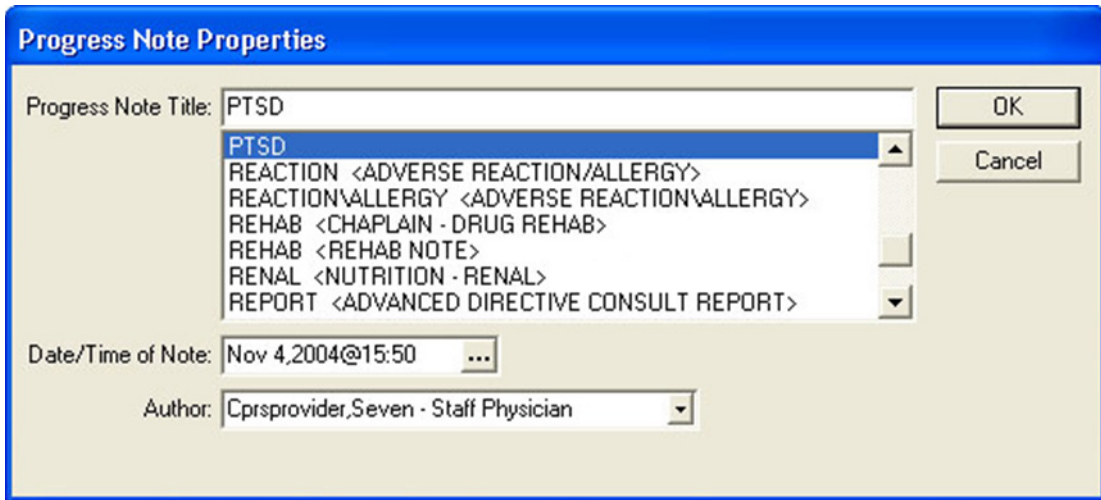
Pressing the Group Notes button moves to the note-building dialog screen. To return to patient selection (to add or subtract patients) use the Patient Selection button.

Until you change it by selecting an individual patient, all actions will apply to the entire group.



## Common Note Title

Pressing the New Note button will allow you to select a note title. This will be the note title used for each member of the group:



**Note:** If the provider requires a co-signer, the co-signer must be designated at the time of note title selection. The field for designating a cosigner appears only if the author of the note requires a cosigner. The requirement for cosigner is a product of the author's User Class and the set up of the document in TIU.

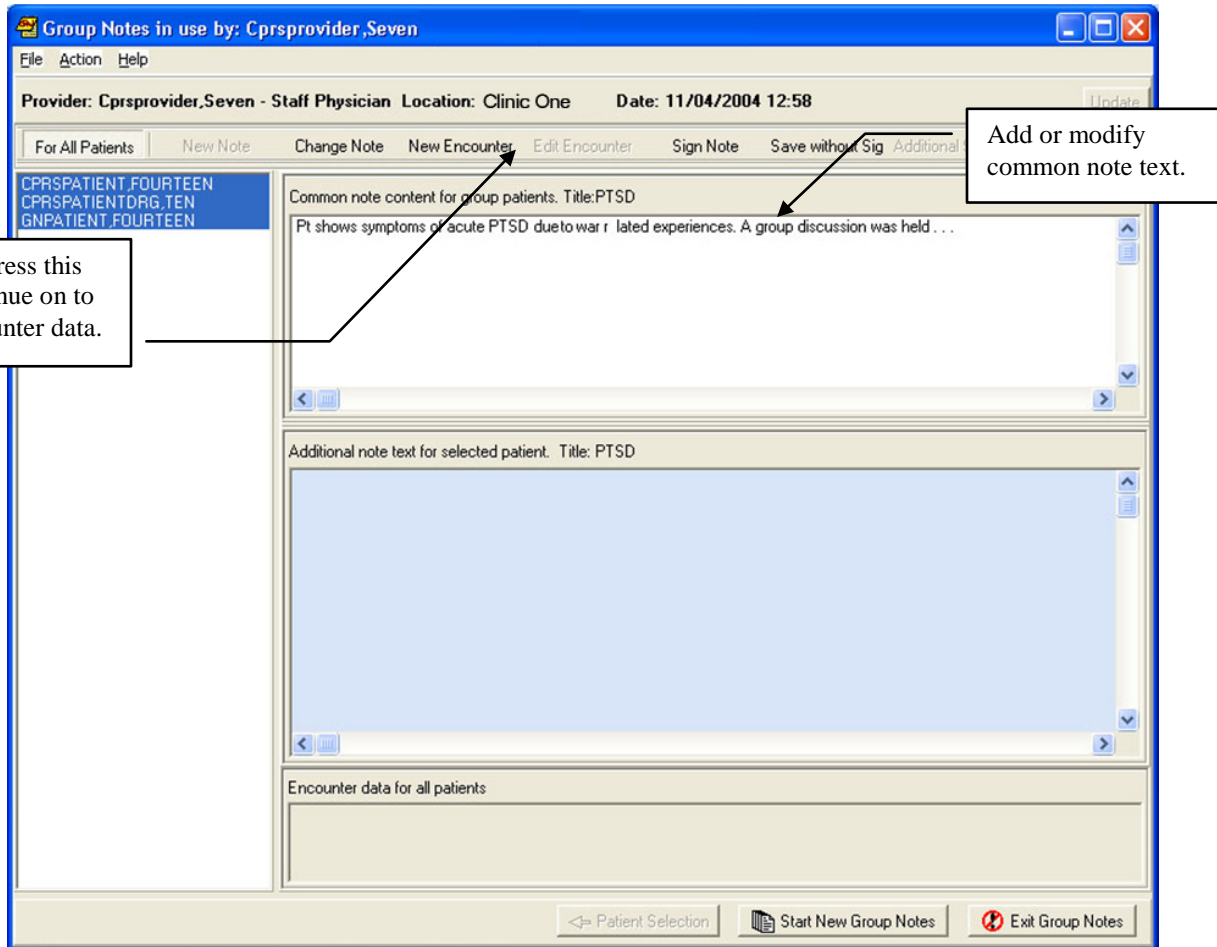
This is the “point of no return.” Once you select a title, a note will be created for each member of the group. If you exit the program without signing, unsigned notes are created for each member of the group and notifications will appear in CPRS that a note awaiting signature is available for each of these patients.



**Warning:** Objects in boilerplate are problematic for group notes. The first patient on the list gets filled in and then the note text is given to each patient. So, do not use objects in the boilerplate of these notes titles that would be different for each patient.

## Common Note Text Entry

If the note title selected contains boilerplate text, it will appear in the Common note content pane. You may edit the contents of this boilerplate and/or add additional text.



**Note:** For CACs and ADPACs: When setting up boiler plate that will be used in Group Notes be aware that inserted objects that import specific patient data will not work properly. Generally speaking, do not put TIU objects in this boiler plate. Exceptions to this rule are objects that are general in nature such as the current date.

## Common Encounter Entry

The Group Notes encounter form is customized for group entry. At this point in the program only tabs that would be common to all patients are displayed:

The screenshot shows a software interface for entering group notes. The main window is titled "Group Notes in use by: Cprsprovider,Seven". A sub-window titled "Encounter Form for Clinic One (Nov 04, 2004@12:58)" is open. The form has several sections:

- Type of Visit:** A list with "NEW PATIENT" selected.
- Section Name:** A list with "Comprehensive Exam 51+ Min 99205" selected.
- Modifiers for Comprehensive Exam 51+ Min:** A list of checkboxes for various wound dressings (A8, A5, A4, A9, A1, A7).
- Service Connection & Rated Disabilities:** Fields for "Service Connected: NO" and "Rated Disabilities: NONE STATED".
- Available providers:** A list of providers including "Cprsprovider,Seven - Staff Physician".
- Current providers for this encounter:** A list containing "Cprsprovider,Seven - Staff Physician".

At the bottom right of the dialog box, there are "OK" and "Cancel" buttons. An arrow points to the "OK" button with a callout box that says "When finished press the OK button."

Fill out the encounter form the way you would normally perform this operation, and then press the OK button.

Select an individual patient by clicking on the patient's name:

The screenshot shows a software window titled "Group Notes in use by: Cprsprovider,Seven". The interface includes a menu bar (File, Action, Help), a status bar (General Information for All Patients: Provider= Cprsprovider, Seven; Location= Clinic One; Date= 07 Update), and a toolbar with buttons for "For All Patients", "New Note", "Change Note", "New Encounter", "Edit Encounter", "Sign Note", "Save without Sig", and "Additional Signer".

On the left, a list of patient names is shown: CPRSPATIENT\_FOURTEEN, CPRSPATIENT\_TEN, and GNPATIENT\_FOURTEEN. An arrow points from the first name to a callout box: "When finished with common data, select a single patient that you need to enter individual data for."

The main area contains three text boxes: "Common note content for group patients. Title:PTSD" with the text "Pt shows symptoms of acute PTSD due to war related experiences. A group discussion was held..."; "Additional note text for selected patient. Title: PTSD" (empty); and "Encounter Data for all patients" with the text "NEW PATIENT Comprehensive Exam 51+ Min", "Diagnoses: PTSD \* (ICD-9-CM 309.81) (Primary)", and "Patient Educations: DEPRESSION SCREENING". An arrow points from this section to a callout box: "Group encounter data appears in this pane."

At the bottom, there are three buttons: "<- Patient Selection", "Start New Group Notes", and "Exit Group Notes".

Two callout boxes provide additional information: "ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date." and "ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date."



## Individual Note Text Entry

When an individual patient is selected, the Additional note text pane becomes active.

The screenshot displays the 'Group Notes in use by: Cprsprovider,Seven' window. The interface includes a menu bar (File, Action, Help), a status bar (Provider: Cprsprovider,Seven - Staff Physician, Location: Clinic One, Date: 11/04/2004 12:58), and a toolbar with buttons for 'For All Patients', 'New Note', 'Change Note', 'New Encounter', 'Edit Encounter', 'Sign Note', 'Save without Sig', and 'Additional Signer'. A list of patient identifiers is shown on the left, with 'CPRSPATIENTDRG,TEN' selected. The main area is divided into three panes: 'Common note content for CPRSPATIENTDRG,TEN (666-23-4334) Title: PTSD' containing the text 'Pt shows symptoms of acute PTSD dueto war related experiences. A group discussion was held . . .', 'Additional note text for CPRSPATIENTDRG,TEN (666-23-4334) Title: PTSD' containing 'Pt showed increased hostility . . .', and 'Encounter data for CPRSPATIENTDRG,TEN (666-23-4334)' containing 'NEW PATIENT Comprehensive Exam 51+ Min', 'Diagnoses: Posttraumatic Stress Disorder \* (ICD-9-CM 309.81) (Primary)', and 'Patient Educations: DEPRESSION SCREENING'. The bottom toolbar has buttons for '<=> Patient Selection', 'Start New Group Notes', and 'Exit Group Notes'. Three callout boxes provide instructions: one points to the 'Edit Encounter' button, another to the 'Additional note text' pane, and a third to the 'Patient Selection' button.

When finished customizing individual notes, press this button to customize individual encounter data.

Type information specific to the selected patient here.

Repeat for each patient that needs specific note text.

ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.

# Individual Encounter Entry

When an individual patient is selected the encounter form now shows all tabs.

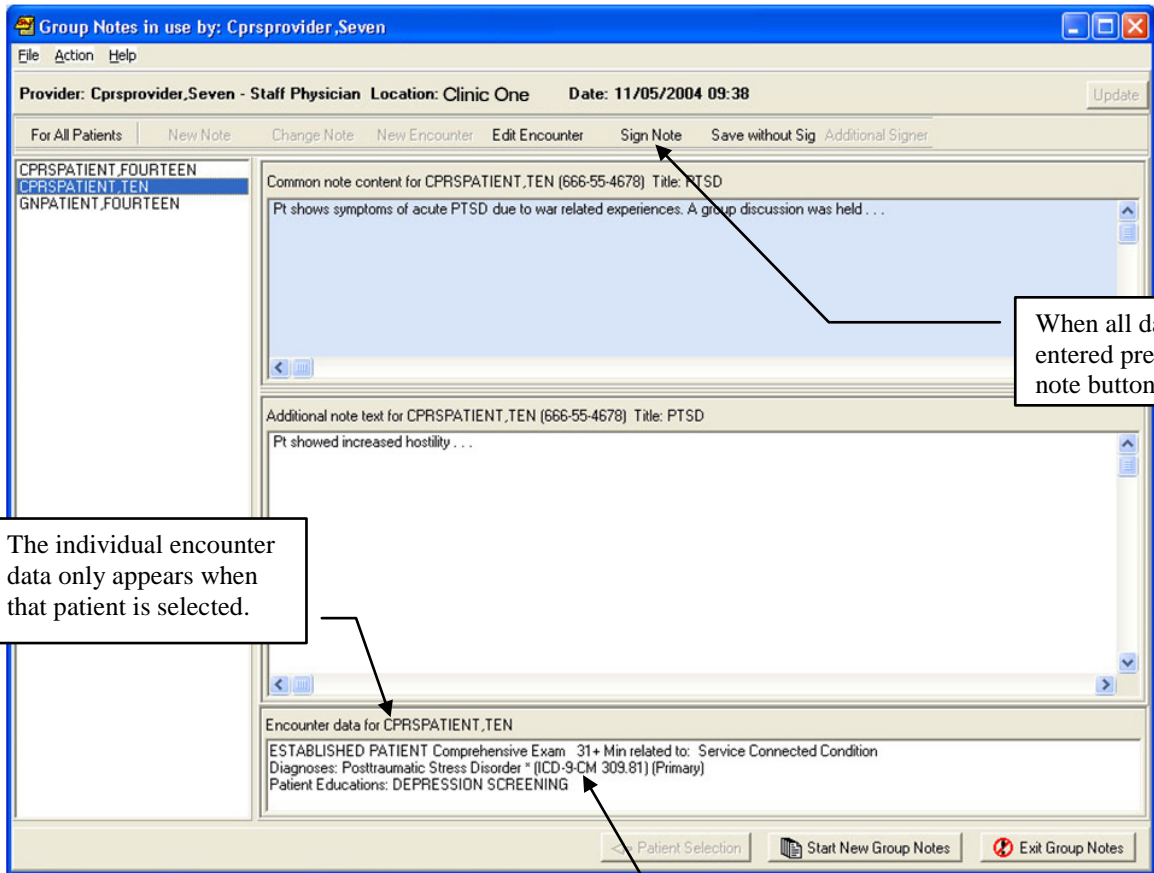
Encounter data that applies only to this single patient may now be entered.

If the patient is in any of these categories, you must indicate if the group session was related.

ESTABLISHED PATIENT Comprehensive Exam 31+ Min  
Diagnoses: Posttraumatic Stress Disorder \* (ICD-9-CM 309.81) (Primary)  
Patient Educations: DEPRESSION SCREENING

ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.



When all data has been entered press the sign note button.

The individual encounter data only appears when that patient is selected.

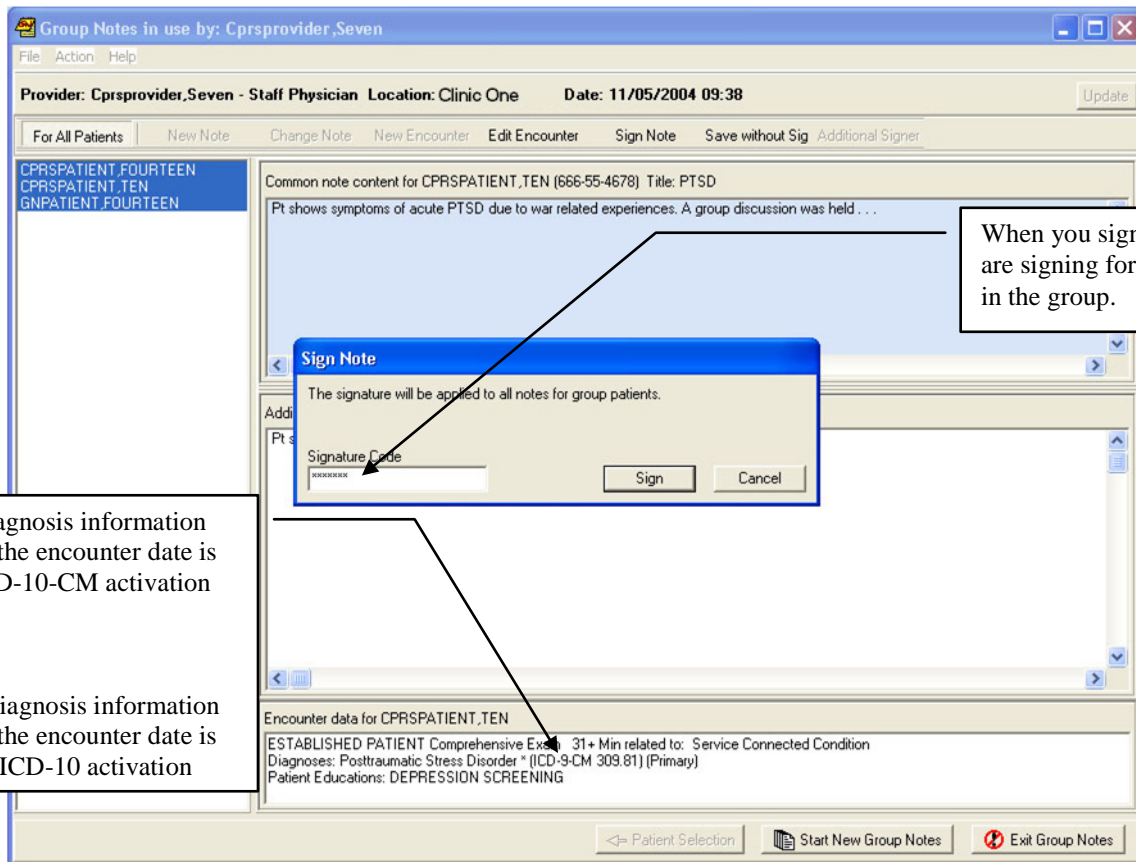
ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.

## Group Signing

When the sign note button is pressed the program automatically selects For All Patients. If any encounter data is missing such as service connected status, the program will prompt you for it at this time.

When you sign the note, you are signing for every patient in the group:



If business rules specify that you need a cosigner, then notifications will appear in CPRS to the effect that the expected cosigner has notes ready to sign.

After the signature has been accepted, the Additional Signer button becomes active. If this button is pressed the following dialog appears:

The screenshot shows a software window titled "Group Notes in use by: Cprprovider,Seven". The window has a menu bar with "File", "Action", and "Help". Below the menu bar, it displays "Provider: Cprprovider,Seven - Staff Physician", "Location: Clinic One", and "Date: 11/05/2004 09:38". A toolbar contains buttons for "For All Patients", "New Note", "Change Note", "New Encounter", "Edit Encounter", "Sign Note", "Save without Sig", and "Additional Signer".

A list of patients is shown on the left, with "CPRSPATIENT\_TEN" selected. A dialog box titled "Identify Additional Signers" is open in the center. It has fields for "Author (not editable)" (Cprprovider,Seven) and "Expected Cosigner (not editable)". Below these are two lists: "Select or enter additional signers" and "Current additional signers". The "Current additional signers" list contains "Cprprovider,Eight".

At the bottom of the window, there is a section for "Encounter data for CPRSPATIENT\_TEN (666-55-4678)". It displays: "ESTABLISHED PATIENT Comprehensive Exam 31+ Min related to: Service Connected Condition", "Diagnoses: Posttraumatic Stress Disorder \* (ICD-9-CM 309.81) (Primary)", and "Patient Educations: DEPRESSION SCREENING".

Three callout boxes provide additional information:

- One box points to the patient list with the text: "Only a single patient can be selected."
- Another box points to the "Additional Signer" button with the text: "Notice that the Additional Signer button is now active."
- A third box points to the encounter data with the text: "ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date. ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date."

## Repeat

To return to the patient selection dialog with a clean slate to enter another group, press the Start New Group Notes button. Otherwise press the Exit Group Notes button

The screenshot shows the 'Group Notes' application window. The title bar reads 'Group Notes in use by: Cprsprovider,Seven'. The menu bar includes 'File', 'Action', and 'Help'. The status bar at the top indicates 'Provider: Cprsprovider,Seven - Staff Physician', 'Location: Clinic One', and 'Date: 11/05/2004 09:38'. Below this is a toolbar with buttons for 'For All Patients', 'New Note', 'Change Note', 'New Encounter', 'Edit Encounter', 'Sign Note', 'Save without Sig', and 'Additional Sign'. The main content area is divided into several sections: a list of patient names on the left, a 'Signed by' section showing 'Signed by: CPRSPROVIDER,SEVEN at 11/5/2004 11:52:43 AM' with a callout box stating 'When signed, this notice appears and you may not make any further changes.', a 'Common note content' section for patient CPRSPATIENT,TEN (666-55-4678) titled 'PTSD' with text 'Pt shows symptoms of acute PTSD due to ware related experiences. A group discussion was held...', an 'Additional note text' section for the same patient titled 'PTSD' with text 'Pts shows increased hostility...', and an 'Encounter data' section for the same patient listing 'ESTABLISHED PATIENT Comprehensive Exam 31+ Min related to: Service Connected Condition', 'Diagnoses: Posttraumatic Stress Disorder \* (ICD-9-CM 309.81) (Primary)', and 'Patient Educations: DEPRESSION SCREENING'. At the bottom, there are three buttons: 'Patient Selection', 'Start New Group Notes', and 'Exit Group Notes'. A callout box points to the 'Start New Group Notes' button with the text 'Press this button to start over on a new group.' Another callout box points to the 'Encounter data' section with the text 'ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date. ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.'

# Glossary

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ADPAC	Automated Data Processing Application Coordinator. A VistA software expert who usually works for IRMS.
Boilerplate	<p>A pre-defined TIU template that can be filled in for Titles, speeding up the text entry process. TIU exports several Titles with boilerplate text which can be modified to meet specific needs; sites can also create their own.</p> <p>For Group Notes a title with information that would be common for each member of the group works well. Any TIU objects used in boilerplate are filled in as if for the first patient, so avoid objects in Group Notes boilerplate.</p>
CAC	Clinical Application Coordinator. A software specialist who usually works for one of the medical center services.
CPRS	Computerized Patient Record System. A front-end program that attempts to provide all VistA functionality in a Windows interface. Currently CPRS is being re-written to work in any windowing system that supports a web browser. This will allow users to access VistA from UNIX and Macintosh based systems. The target date for release of this advanced system is third quarter 2005.
IRMS	Information Resource Management Service.
TIU	Text Integration Utilities. An umbrella package with the purpose of combining all clinical note processing into a single entity. In CPRS, TIU is represented by the Notes tab.
VDL	VistA Document Library. A service of the Department of Veterans Affairs to provide documentation to all users. Anyone can access the VDL at web address: <a href="http://www.va.gov/vdl/">www.va.gov/vdl/</a>

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