



## Groups Module Guide

Use the Groups Module to manage treatment groups, including keeping a group roster and tracking individual sessions. Then create Encounter Notes or Misc Notes for each attendee at a group session.

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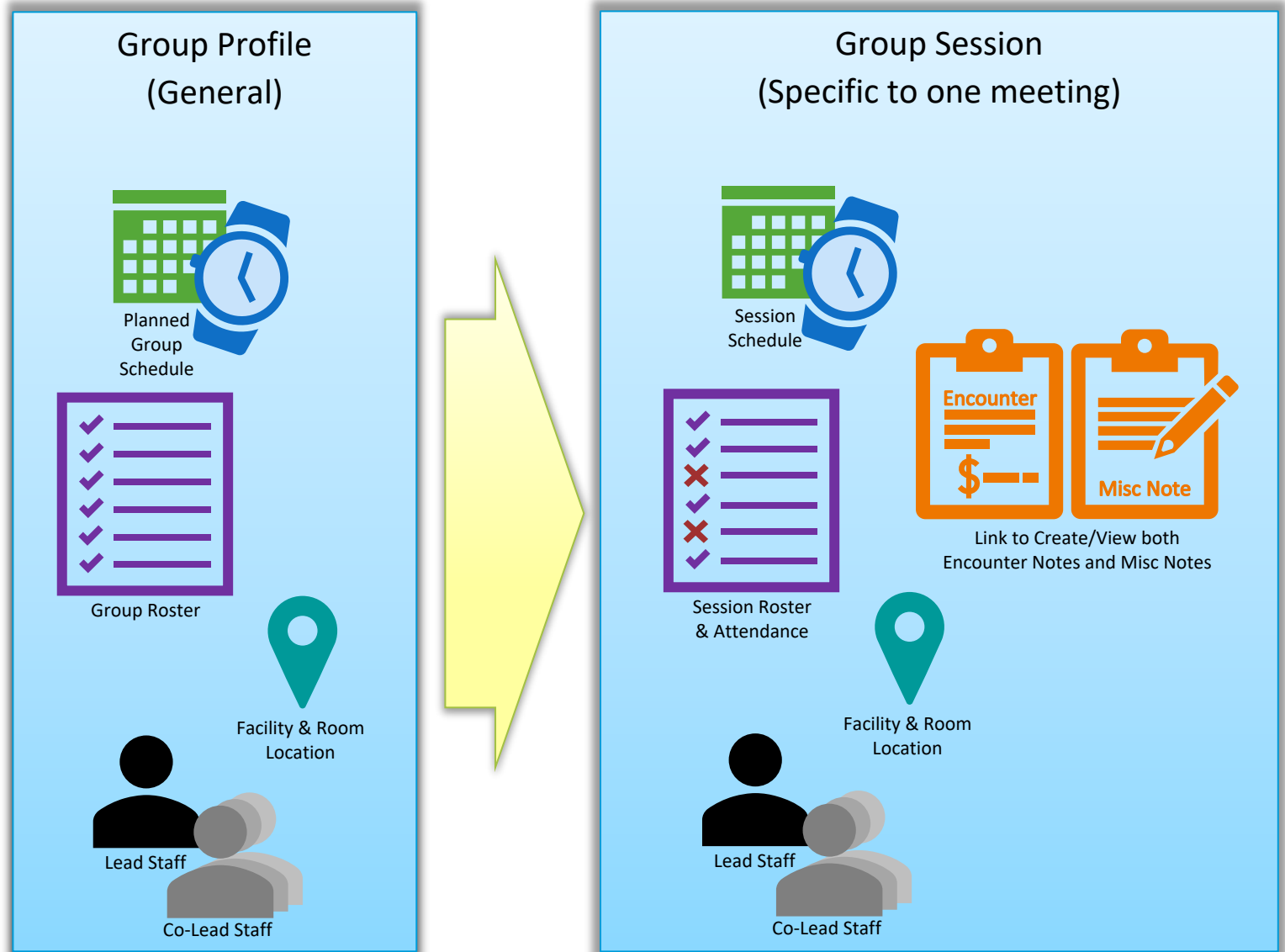
## Introducing UWITS Groups

The UWITS Groups module can be used to manage treatment groups.

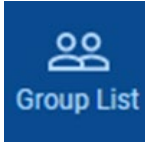
A **Group Profile** is created to document general information about the group. This general information includes when and where the group plans to meet, the clients who are to attend and so forth.

A **Group Session** is created to document the specific details about each time that the group meets. As a Group Session is created, it is automatically populated with the general information from the Group Profile. It can then be customized to show the details for that specific meeting, including **attendance** at the meeting. A special feature enables an **Encounter Note** and/or a **Misc Note** to be created for each attendee.

**Group Types** allow an agency to organize Groups into a list of categories which can be customized by the agency.



## Group Profile Search screen



Navigate to the **Group Profile Search** screen by clicking on **Group List** in the blue Navigation bar to the left.

To find an existing Group Profile, use the available search filters then click on the Search button.

To setup a brand-new Group, click on the **+ Add** link.

A screenshot of the 'Group Profile Search' screen. It features a search form with fields for 'Type' and 'Lead Staff', an 'Active' section with 'Yes' (selected) and 'No' radio buttons, and a 'Search' button. Below the form is a 'Group Profile List' section with an '+ Add' link, a pagination bar showing 'Showing 1 - 23 of 23' items, and a table with columns: Group Name, Group Type, Lead Staff, Day of Week, Time of Day, Start Date, and End Date. The first row of the table shows 'Women's Group', 'Testing', 'User, Training', 'Monday', '3:30 PM', '12/19/2007', and an empty End Date cell. A blue arrow points from the '+ Add' link to the text 'To setup a brand-new Group, click on the + Add link.' Another blue arrow points from the first row of the table to a context menu.

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**Tip!** Sort the table by any column by clicking on the column heading for that column. Click again to sort in the opposite order.

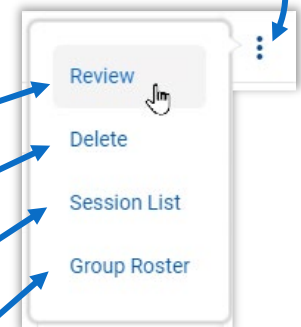
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To review the **Group Profile** hover over the action button (⋮) then click on the **Review** option. (See page 4.)

To delete a **Group Profile** hover over the action button (⋮) then click on the **Delete** option.

To review the **Session List** hover over the action button (⋮) then click on the **Session List** option. (See page 6.)

To review the **Group Roster** hover over the action button (⋮) then click on the **Group Roster** option. (See page 5.)



## Group Profile

Update each required field in the **Group Profile** screen.

To select Co-Lead Staff member(s), click on a name listed in the **Co-Lead Staff** box then click on the ➡ button to move the selection to the **Selected Co-Lead Staff** box.

**Tip!** To select more than one **Co-Lead Staff** at once, hold down the Ctrl key while clicking on names in the **Co-Lead Staff** box.

Click the **Save** or the **Save and Finish** button to save the **Group Profile**.

A **Group Session** refers to one specific meeting of the **Group**.

To create a group session, click on the **Create Group Session** button.



### Caution!

Keep the roster in the Group Profile updated. New Group Members cannot be added to a Group Session. Whenever a client arrives to attend a Group Session before they have been added to the roster in the Group Profile then it means extra work for the Lead Staff.

### Group Profile

Group Name

Commitment to Sobriety

Group Type

Alcohol Group

Start Date

1/1/2025

End Date

Day of Week

Tuesday

Time of Day

6:00 PM

Lead Staff

Weasley, Ron

Room Location

DefenseAgnstDarkArt

Facility

Administrative Unit

Co-Lead Staff

AgencyStaff, Testing  
Albro, Amber  
Alvarez, Leo, LCSW; Clinician  
Boisseau, Ben  
Charlton, Emily

Selected Co-Lead Staff

Granger, Hermione J.

Description

Enter the description of the Group here.

Save

Save and Finish

Cancel

Administrative Actions

Create Group Session

Print Sign-In Sheet

Roster List

Show All Clients

Edit Roster

Client Name	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date
Bacca, Chew	AU/99_2.1_GenAdult: 8/1/2021 -			0	Active	1/1/2025
Baggins, Frodo	AU/19_1.0_Adult ASAM: 7/8/2024 -			2	Active	1/1/2025
Jetson, George	AU/TEDS 99_2.5_GenAdult: 5/1/2020 -			2	Active	1/1/2025
Leia, Princess	AU/34_RS_RcvrySprt: 12/11/2020 -			2	Active	1/1/2025
Parker, Ben	AU/TEDS 99_1.0_GenAdult: 7/5/2012 -			0	Active	1/1/2025
wayne, Bruce	AU/28_MH1_Adult: 7/27/2022 -			2	Active	1/1/2025

To print a Sign-In Sheet, click on the **Print Sign-In Sheet** button.

To add or remove a client at the **Roster List**, click on the **Edit Roster** link. (See page 5.)

## Edit Group Roster

Participants in the Group must be included in the Roster for the Group before they can be noted as having attended a Group Session.

To add a new client to the Roster, click on the **+ Add Member** link.

Complete all required fields in the **Member Profile** at the bottom of the screen. Click on the **Save** or **Save and Finish** buttons to save.

### Caution!

Encounters created for attendance at sessions of this group will correspond with the **Program** selected on this screen at the time that the Group Session was created. Errors here mean extra work later.

### Roster

[+ Add Member](#)

Client Name ↑	Program ↑	# of Approved Session ↑	# of Sessions Attended ↑	Status ↑	Status Effective Date ↑	
Bacca, Chew	AU/99_2.1_GenAdult: 8/1/2021 -		0	Active	1/1/2025	⋮
Baggins, Frodo	AU/19_1.0_Adult ASAM: 7/8/2024 -		0	Active	1/1/2025	⋮
Jetson, George	AU/TEDS 99_2.5_GenAdult: 5/1/2020 -		0	Active	1/1/2025	⋮
Leia, Princess	AU/34_RS_RcvrySprt: 12/11/2020 -		0	Active	1/1/2025	⋮
Parker, Ben	AU/TEDS 99_1.0_GenAdult: 7/5/2012 -		0	Active	1/1/2025	⋮
wayne, Bruce	AU/TEDS 99_2.5_GenAdult: 7/27/2022 -		0	Active		⋮

### Member Profile

Client Name  
wayne, Bruce (4/12/1954)

Program  
6-Administrative Unit/TEDS 99\_2.5\_GenAdult : 7/27/2022 -

# of Sessions Approved

Status  
Active

# of Sessions Attended  
0

Status Effective Date  
1/1/2025

Client Due

Reason

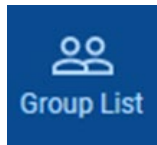
[Save](#) [Save and Finish](#) [× Cancel](#)

[Review](#)  
[Remove](#)

To review or edit a **Member Profile**, hover over the action button (⋮) then click on the **Review** option. The Member Profile data will appear at the bottom of the screen. Update as needed then click on the **Save** or the **Save and Finish** button to save changes.

To remove a client from the Roster, hover over the action button (⋮) then click on the **Remove** option.

## Group Session Search screen



Navigate to the **Group Session Search** screen by clicking on Group List in the blue Navigation bar to the left of the screen. Once at the Group Profile Search screen, to view a Session List for any Group, hover over the action button (⋮) then click on the **Session List** option. To find an existing Group Session, use the available search filters then click on the Search button.

**Tip!** Participants in the Group must be included in the Roster for the Group before they can be noted as having attended a Group Session.

To add a new **Group Session**, click on the **+ Add** link.

### Print Group Notes

To print a list of the Group Notes for several Group Sessions in one screen, click on the **Print Group Notes** button.

### Enter range of dates for notes

Date Range  
From 1/1/2025 To 1/31/2025  
× Cancel Go

### Group Session Search

Start Date 01/01/2025 End Date 4/21/2025

Search

### Group Session List

+ Add

Print Group Notes

Showing 1 - 2 of 2

Group Name ↑	RenderingStaff ↑	Date ↑	Service Code ↑	Service Description ↑	Start Time ↑	End Time ↑	
Commitment to Sobriety	Weasley, Ron	1/14/2025	H0038/HQ	H0038HQ - Group self-help/peer services per 15 min.	6:00 PM	6:45 PM	⋮
Commitment to Sobriety	Weasley, Ron	1/7/2025	H0038/HQ	H0038HQ - Group self-help/peer services per 15 min.	6:00 PM		⋮

To find an existing Group Session, use the available search filters.

To review the **Group Session** hover over the action button (⋮) then click on the **Review** option.

Enter a date range then click on the **Go** button.

Click on the **Search** button to change the date range then click on the **Search** button again to apply the adjustment.

Click on the **Export** button to export the data.

### Group Session Notes Report

Export

Finish

Search


### Group Session Notes Report List

Group Profile Name ↑	Date ↑	Rendering Staff ↑	Type ↑	Note ↑
Commitment to Sobriety	1/28/2025	Weasley, Ron	Progress Notes	Document the topic of the group an

Click on the **Finish** button to close the screen.

## Group Session

Complete each required field in the Group Session screen.

To select Co-Lead Staff member(s), click on a name listed in the **Co-Lead Staff** box then click on the  button to move the selection to the **Selected Co-Lead Staff** box.

**Tip!** To select more than one **Co-Lead Staff** at once, hold down the Ctrl key while clicking on names in the **Co-Lead Staff** box.

Enter the notes that are applicable to the entire Group Session into the **Notes** box.

Click the **Save** or the **Save and Finish** button to save the **Group Profile**.

### Group Session Notes

Hide Context Information

Group Name  
Commitment to Sobriety

Group Type  
Alcohol Group

Note Type  
Progress Notes

Billable  
☒ Yes ☐ No

Start Date  
1/7/2025

End Date

Start Time  
6:00 PM

End Time  
6:45 PM

Duration  
45 Min

# of Service Units/Sessions  
3

Lead Staff  
Weasley, Ron

Location  
Office

Service  
H0038HQ - Group self-help/peer services per 15 min.

Co-Lead Staff  
AgencyStaff, Testing  
Albro, Amber  
Alvarez, Leo, LCSW; Clinician  
Boisseau, Ben  
Charlton, Emily

Selected Co-Lead Staff  
Granger, Hermione J.

Note  
Document the topic of the group and the client to clinician ratio.

Save

Save and Finish

Cancel

### Attendees

Add Attendee

Mark as Present

Mark as No Show

Mark as Excused

<input type="checkbox"/> Client Name ↑	# Attn'd ↑	Status ↑	Individual Session Note Summary ↑	Encounter	Misc. Notes	Actions
<input type="checkbox"/> Bacca, Chew	0	No Show		<a href="#">Create</a>	<a href="#">Create</a>	
<input type="checkbox"/> Baggins, Frodo	2	Present		<a href="#">Create</a>	<a href="#">Create</a>	
<input type="checkbox"/> Jetson, George	2	Present		<a href="#">Create</a>	<a href="#">Create</a>	
<input type="checkbox"/> Leia, Princess	2	Present		<a href="#">Create</a>	<a href="#">Create</a>	
<input type="checkbox"/> Parker, Ben	0	Excused		<a href="#">Create</a>	<a href="#">View</a>	
<input type="checkbox"/> wayne, Bruce	2	Present		<a href="#">Create</a>	<a href="#">Create</a>	

Check the boxes to the left of the list of Attendees then click on the appropriate button to mark the checked Attendees as present, no show, or excused. (See page 8 for more information.)

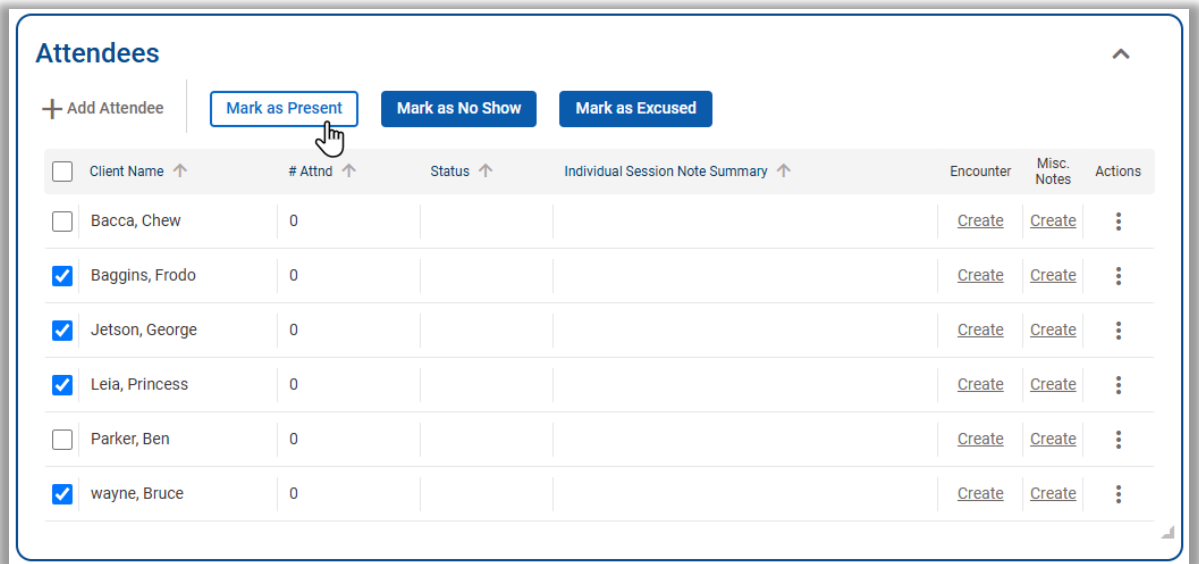
## Marking Attendance at a Group Session

To mark attendees as **Present**, check the box to the left of each Client Name, then click on the **Mark as Present** button.

To mark attendees as **No Show**, check the box to the left of each Client Name, then click on the **Mark as No Show** button.

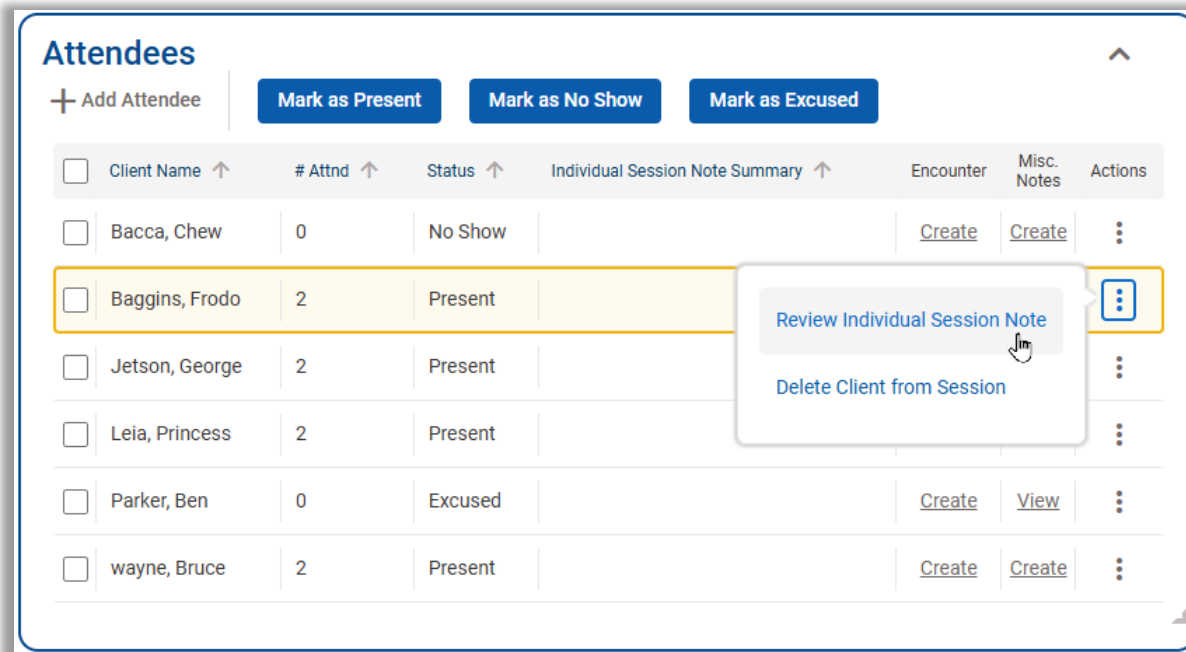
To mark attendees as **Excused**, check the box to the left of each Client Name, then click on the **Mark as Excused** button.

Save the Attendance by clicking on the **Save** or the **Save and Finish** button.



The screenshot shows the 'Attendees' interface. At the top, there are three buttons: 'Add Attendee', 'Mark as Present' (which is highlighted with a mouse cursor), 'Mark as No Show', and 'Mark as Excused'. Below these buttons is a table with the following columns: Client Name, # Attd, Status, Individual Session Note Summary, Encounter, Misc. Notes, and Actions. The table contains six rows of attendees. The first row is 'Bacca, Chew' with 0 attendees and a status of 'No Show'. The next three rows are 'Baggins, Frodo', 'Jetson, George', and 'Leia, Princess', each with 2 attendees and a status of 'Present'. The last row is 'Parker, Ben' with 0 attendees and a status of 'Excused'. The 'wayne, Bruce' row is also present with 2 attendees and a status of 'Present'. The 'Mark as Present' button is highlighted with a mouse cursor.

Client Name	# Attd	Status	Individual Session Note Summary	Encounter	Misc. Notes	Actions
<input type="checkbox"/> Bacca, Chew	0	No Show		Create	Create	⋮
<input checked="" type="checkbox"/> Baggins, Frodo	2	Present		Create	Create	⋮
<input checked="" type="checkbox"/> Jetson, George	2	Present		Create	Create	⋮
<input checked="" type="checkbox"/> Leia, Princess	2	Present		Create	Create	⋮
<input type="checkbox"/> Parker, Ben	0	Excused		Create	Create	⋮
<input checked="" type="checkbox"/> wayne, Bruce	2	Present		Create	Create	⋮



The screenshot shows the 'Attendees' interface. At the top, there are three buttons: 'Add Attendee', 'Mark as Present', 'Mark as No Show', and 'Mark as Excused'. Below these buttons is a table with the following columns: Client Name, # Attd, Status, Individual Session Note Summary, Encounter, Misc. Notes, and Actions. The table contains six rows of attendees. The first row is 'Bacca, Chew' with 0 attendees and a status of 'No Show'. The next three rows are 'Baggins, Frodo', 'Jetson, George', and 'Leia, Princess', each with 2 attendees and a status of 'Present'. The last row is 'Parker, Ben' with 0 attendees and a status of 'Excused'. The 'wayne, Bruce' row is also present with 2 attendees and a status of 'Present'. The 'Baggins, Frodo' row is highlighted in yellow. A dropdown menu is open for the 'Baggins, Frodo' row, showing two options: 'Review Individual Session Note' and 'Delete Client from Session'. A mouse cursor is pointing at the 'Review Individual Session Note' option.

Client Name	# Attd	Status	Individual Session Note Summary	Encounter	Misc. Notes	Actions
<input type="checkbox"/> Bacca, Chew	0	No Show		Create	Create	⋮
<input checked="" type="checkbox"/> Baggins, Frodo	2	Present		Create	Create	⋮
<input type="checkbox"/> Jetson, George	2	Present		Create	Create	⋮
<input type="checkbox"/> Leia, Princess	2	Present		Create	Create	⋮
<input type="checkbox"/> Parker, Ben	0	Excused		Create	Create	⋮
<input type="checkbox"/> wayne, Bruce	2	Present		Create	Create	⋮

## Add Individual Session Notes

For each client who attended the meeting, hover over the action button (⋮) then click on the **Individual Session Note** option. Enter and save the notes specific to that individual.

Repeat for all clients who attended the meeting.

## Creating an Encounter Note from a Group Session

Before creating an **Encounter Note** from a Group Session, mark **Attendance** and add an **Individual Session Note** for every client.

### Before Creating an Encounter Note from a Group Session:

1. Verify that each Individual Session Note **only** includes details for the specific client whose name is listed on the same row.
2. Verify that the client attended the meeting and has been marked as Present. (See page 8.)

Attendees							
+ Add Attendee		Mark as Present	Mark as No Show	Mark as Excused			
<input type="checkbox"/> Client Name ↑	# Attnd ↑	Status ↑	Individual Session Note Summary ↑	Encounter	Misc. Notes	Actions	
<input type="checkbox"/> Bacca, Chew	0	No Show		<a href="#">Create</a>	<a href="#">Create</a>	⋮	
<input type="checkbox"/> Baggins, Frodo	0	Present		<a href="#">Create</a>	<a href="#">Create</a>	⋮	
<input type="checkbox"/> Jetson, George	0	Present		<a href="#">Create</a>	<a href="#">Create</a>	⋮	

To create an Encounter, hover over the **Create** link in the **Encounter** column for a client. Verify that the **Individual Session Note** is for the correct client and that the client has been marked as **Present**. Click on the **Create** link to create an Encounter.

**Tip!** It is recommended that you do not create an Encounter Note if the client did not attend the group meeting. Create a Misc Note instead. (See page 10.)

Please see the **Notes Guide** for assistance in creating quality Encounter Notes.

### Treatment Plan/Encounter Notes

Hide Context Information

ENC ID			
Created By	Created Date	Updated By	Updated Date

Billable ☒ Yes ☐ No

Program 7-Administrative Unit/19\_1.0\_Adult ASAM : 7/8/2024 -

Service H0038HQ - Group self-help/peer services per 15 min.

Start Date1/7/2025

End Date

Start Time6:00 PM

End Time6:45 PM

Duration45

Min

Rendering Staff Weasley, Ron

Dimension1 - Acute Intoxication and/or Withdrawal Potential

Severity RatingLow

Priority, Goal, & Method Statement

Review

## Creating a Misc Note from a Group Session

Before creating a **Misc Note** from a Group Session, please mark Attendance then save your changes by clicking on the **Save** or the **Save and Finish** button.

Once Attendance has been marked, hover over the **Create** link in the **Misc Notes** column for the selected client. Before clicking on the link, verify that the yellow highlight is highlighting the correct client. Then, click on the **Create** link to create the Misc Note.

Complete all required fields then click on the **Save** or **Save and Finish** button to save.

Attendees						
<div><div>+ Add Attendee</div><div>Mark as Present</div><div>Mark as No Show</div><div>Mark as Excused</div></div>						
<input type="checkbox"/>	Client Name ↑	# Attd ↑	Status ↑	Individual Session Note Summary ↑	Encounter	Misc. Notes
<input type="checkbox"/>	Bacca, Chew	0	No Show		Create	Create
<input type="checkbox"/>	Baggins, Frodo	2	Present		Create	Create
<input type="checkbox"/>	Jetson, George	2	Present		Create	Create
<input type="checkbox"/>	Leia, Princess	2	Present		Create	Create
<input type="checkbox"/>	Parker, Ben	0	Excused		Create	Create
<input type="checkbox"/>	wayne, Bruce	2	Present		Create	Create

**Tip!** When the client did not attend the meeting, erase the group section of the note. It is not relevant to this client and will only be a distraction.

Please see the **Notes Guide** for assistance in creating quality Misc Notes.

### Miscellaneous Notes

Hide Context Information

Author Name  
Masters, Robyn R.

Author Title  
Support Staff

Created Date

Note Type  
Miscellaneous

Service Date  
1/7/2025

Duration  
45 Min

Program  
7-Administrative Unit/TEDS 99\_1.0\_GenAdult : 7/5/2012 -

Start Time  
18:00

End Time  
18:45

Alert  
☐ Yes ☒ No [Mark Alert](#)

Frequency  
Incidental

Was Report Sent to State  
☐ Yes ☐ No

Summary  
Commitment to Sobriety Meeting on 1/7/2025

Unsigned Notes

Allow Disclosure  
☐ Yes ☒ No

Add Note

Sign Note

Signed Notes

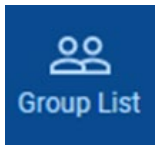
Signed by Masters, Robyn R., 4/23/2025 11:41:28 AM:  
Entered by: Masters, Robyn R. on 4/23/2025 11:36 AM:  
Facilitated by: Weasley, Ron; Granger, Hermione J.;  
  
Client excused by previous arrangement.

Save

Save and Finish

Cancel

## Appendix: Setup Group Types (For Navigator Use Only)



Group Type

Navigate to the **Group Type** screen by clicking on **Group List** then selecting the **Group Type** option. **Group Types** allow an agency to organize Groups into categories.



**Proceed with Caution!** After a Group Type has been edited, it may appear to other staff that the Group Type has disappeared. **Please communicate with all applicable staff when changes are made.**

### Add a new Group Type

To add a new **Group Type**, click on the **+ Add Group Type** button. Complete all required fields then click on the **Save** or **Save and Finish** button to save.

### Edit a Group Type

To edit a **Group Type**, hover over the action button (⋮) then click on the **Edit** option. The bottom of the screen will be populated with the data for the selected **Group Type**. Update as needed then click on the **Save** or **Save and Finish** button to save.

### To Expire a Group Type

To expire a **Group Type**, hover over the action button (⋮) then click on the **Edit** option. Next, enter a date in the **Expiration Date** box. Click on the **Save** or **Save and Finish** button to save.

Note: A future date may be entered into the **Expiration Date** box. Once that date has passed, groups assigned to that **Group Type** will continue to appear in the list, but the **Group Type** will no longer be an option in drop-down boxes.

### To Remove a Group Type

To remove a **Group Type**, you must first reassign each group which is currently assigned to that **Group Type** to another **Group Type**. Once no groups are assigned to that **Group Type**, it can be removed. To do so, hover over the action button (⋮) then click on the **Remove** option. There is no prompt to ask you to verify that this action is desired. When no groups are assigned to that **Group Type** then it will simply be removed.

Description ↑	Created Date ↑	Effective Date ↑	Expiration Date ↑	Sort Order ↑	
Survivors group	10/16/2007	10/16/2007			⋮
Relapse prevention	12/19/2007	12/19/2007			⋮
Substance Abuse Issues	6/9/2008	7/1/2007			⋮
Triggers Group	7/15/2009	2/1/2008			⋮

**Group Type**

**+ Add Group Type**

**Unit**  
Administrative Unit

**Description**  
Triggers Group

**Effective Date**  
2/1/2008

**Expiration Date**

**Sort Order**

**Save** **Save and Finish** × Cancel

✖ The group type Self Help Group has one or more groups assigned to it and cannot be deleted. ✖