Outpatient Group Roster Procedure

PURPOSE

The purpose of the Group Roster form is to report all outpatient group services that need to be submitted to the Iowa Department of Public Health. The group roster can also be used as an attendance list of all persons in attendance during the group session. The purpose of the group roster book is to have a centrally located place for all group rosters to be kept. Out-reach offices will keep their own rosters.

PROCEDURE FOR STARTING A GROUP

When it has been approved to start a new group, the facilitator of the group will need to do the following:

1. The facilitator will need to meet with the receptionist to discuss clerical procedures such as:
    A. The location of the group.
    B. The time and days of the group.
    C. Any other clerical needs for the group that the facilitator may need the receptionist to do.

2. Fill out a New Group Information Form. This form needs to be completely filled out and the Director's signature is required. Make a copy of this form for the data department and the billing clerk. In addition to the New Group Information Form, a list of clients (and their primary counselor) that are signed up for the first group needs to be turned in. Out-reach counselors do not need to turn in a list of clients.

PROCEDURE FOR COMPLETING GROUP ROSTER

The data department will complete the top portion of the roster, client names, client ID number, dates of the group and primary counselor. All group rosters will be kept in the group roster book located at the receptionist desk (or designated spot for out-reach offices.)

Before each group the facilitator will make a copy of the appropriate group roster and place the original back in the book. Complete the group roster by doing the following:

1. If the client is in attendance place an X in the appropriate date column.
2. If the client is not in attendance place NS of no show, RS for rescheduled or CAN for cancelled.
3. If this is the clients last group or their not attending this group because they are done with the group, then fill in the date in the End Date column.
4. Length of session should be in 15-minute increments. *
5. Counselor initials. *

*If there are two different facilitators for a group only one can be the primary facilitator and those initials should go in the appropriate box. The second facilitator's initials should go underneath. The group will be entered with the counselor initials that are in the box. The second facilitator will just get credit for doing group hours.

*If a client shows up for group and their name and information is not on the group roster then first make sure the client is in the correct group. If they are in the correct group then you will need to get all necessary information recorded on the group roster. (Name, start date and counselor.)

For facilitators with school facility clients in their group, you will need to record the client's school code next to the primary counselors name for that client on the group roster.

If only one client shows up for group, you cannot count that as a group. The correct procedure would be to put them as CAN on the group roster and then add them to the service log as an individual session.

Make a copy of the roster for the data department, the billing clerk and any counselors with clients in the group by 12:00 noon the following workday.

PROCEDUR FOR ENDING OR MAKING CHANGES TO A GROUP

If you are going to end one of your current groups please do the following:

1. On the New Group Information Form fill out the Facilitator Name and the Group Name. Then in the Other Information section please explain what you are doing with the group.
   Example: Temporarily suspending the group, terminating the group, etc.
2. Have your component director sign the form.
3. Make a copy of this for the data department and the billing clerk.
4. This note should be turned in before the next group roster for this group is due.

If you are going to make a change to one of your current groups please do the following:

1. On the New Group Information Form fill out the Facilitator Name and the Group Name. Answer only the questions that the changes are being made too.
   Example: Day and Time, location, name, etc.
2. Have your component director sign the form.
3. Make a copy of this for the data department, the billing clerk and the receptionist.
4. This note should be turned in before the next group roster for this group is due.

PROCEDURE FOR REFERRING A CLIENT TO A GROUP (**Client has an assigned counselor.)**

1. The primary counselor will contact the group facilitator with their referral.
2. The group facilitator will determine if the client is appropriate for the group.
3. The counselor will then fill out a Group Roster Information form to have them added to the group.
4. The facilitator will put their initials on the form and send it to the data department.

Please note: If you are adding or removing a client from the Intensive Outpatient Group a copy of the Group Roster Information form needs to given to the billing clerk.

PROCEDURE FOR REFERRING A CLIENT TO A GROUP (**Client DOES NOT have an assigned counselor.**)

1. The assessment counselor or component director will contact the group facilitator with their referral.
2. The group facilitator will determine if the client is appropriate for the group.
3. The assessment counselor or component director will then fill out a Group Roster Information form to have them added to a group.
4. The facilitators will put their initials on the form, tear off the white copy and send it to the data department. Put the yellow copy back in the primary counselors box.

Please note: If you are adding or removing a client from the Intensive Outpatient Group a copy of the Group Roster Information form needs to given to the billing clerk.

PROCEDURE FOR REMOVING A CLIENT FROM GROUP

When a client is no longer going to be attending group the primary counselor or the facilitator of the group needs to fill out a Group Roster Information form to have the client removed and send it to the data department. Your other option, if you are the facilitator of the group, you can record the end date in the column of the appropriate client.

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