

OpenEMR's Groups Module

Introduction

OpenEMR's Groups module makes it possible to document patients' participation in group sessions.

NOTE: these 'groups' are not related to the user role groups seen in ACL contexts. These groups can be used for any kind of group gathering, for any number of patients. They may have assigned to them any number of 'Main Counselors' and any arbitrary list of 'Guest counselors'.

Individual groups are managed by the EMR in a similar fashion as a patient is, in that when you're working with a particular group, its name and group ID is displayed where a patient's name and PID is in the Group interface. Like a patient, it has its own dropdown list of past encounters, and a group session appointment is added to the Main Counselors(s) calendar similarly to a patient's appointment. Also group activities are 'contained' in a summary 'group encounter' form for the date the group session occurred, similar to the events are that occur during a patient's appointment.

However, unlike a patient appointment, group encounters are also associated with the records of the multiple patients who participated in that group session so the session encounter is listed in each individual patient's own list of encounters. These group encounter summaries may contain individual free-text notes on that patient's participation in that group.

This document is the result of my reverse engineering the use of the module; no code review was used. If I missed anything please let me know and I'll be happy to update the doc.

Some additional information may be derived from the OpenEMR forum post:

<https://community.open-emr.org/t/group-therapy-module/10509/8>

- HTuck MI-Squared

Procedure

This document is divided into the following sections:

Setup

- A. Configure EMR/ User

B. Create group

Use

C. Schedule group sessions

D. Add group participants

E. Document group activity

Setup

A. Configure EMR/ ACLs

As an administrator- privileged user:

1. From Main Menu:

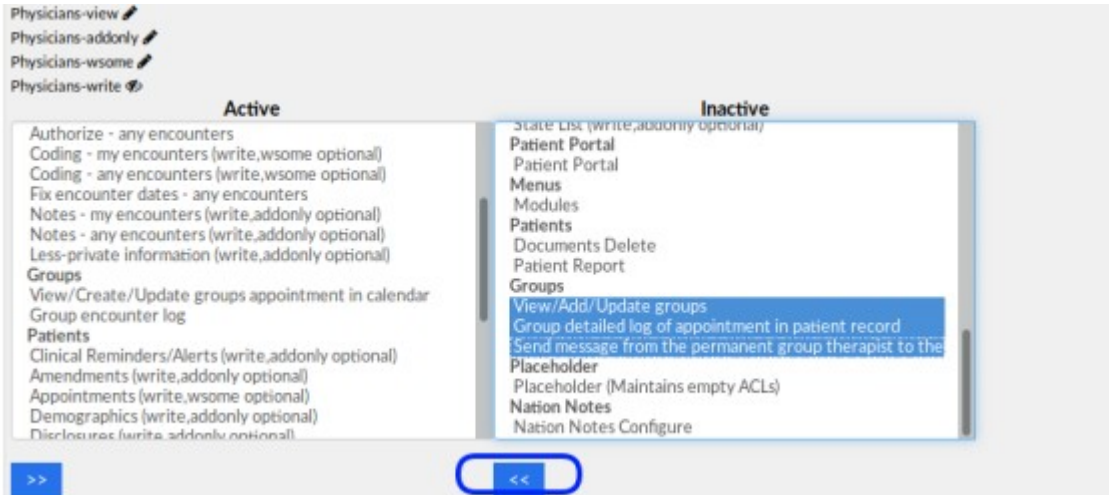
**'Administration /
Globals, Appearance'**
(default opening tab) -
select: **'Enable Group
Therapy'**, 1/3 down the
list.

Navigation Area Width for Frames	175
Application Title	OpenEMR
Enable Group Therapy	<input checked="" type="checkbox"/>
New Patient Form	All demographics fields, with search and dup
Modify Patient Form	Standard check

2. On **' / Globals, Calendar'**
tab, make sure the item,
**'Appointments - Group
Summary - Number to
Display'** - is what you want.

Appointments - Patient Summary - Number to Display	10
Appointments - Group Summary - Number to Display	10
Excluded Appointments - Tooltip - Number to Display	15

3. Update user group ACL



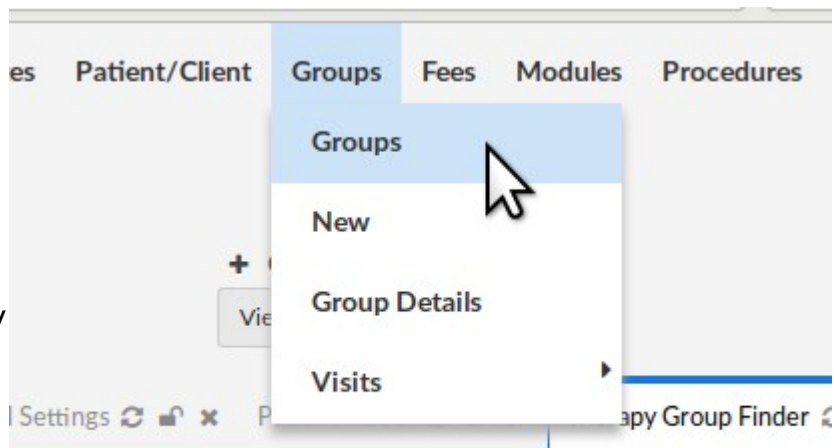
The default active user permissions for Groups are not sufficient to fully use the group module. Move to 'Active' pane all the Groups ACLs for whichever user group will be assigned to work with this module,

- Alternately, create a new user group named, perhaps, 'Group Therapist', containing all the 'Groups' ACLs. Then add that group to all users who will be using the module.

4. Survey of the Groups menu

Main menu: Groups

- shows list of existing groups
- can search for groups if list is longer than display
- can filter closed groups out of display by 'Group type'



'New' - create new group

'Group Details' - edit parameters of groups.

(Shows same display as if a group is selected from Groups list)

'Visits' - operations related to visit (encounter) summaries of the currently selected group. Most functions also available from group summary display

/ create visit - create an encounter summary for the current group

/ current - displays the group summary of the currently selected group

/ visit history - displays the selected group's list of visit (encounter) summaries

B. Create A Group

From Main Menu, click '**Groups / New**'

The screenshot shows the 'Add group' form with the following details:

- Group's name: Vietnam Vets PTSD Group
- Starting date: 2020-02-04
- Type of group: Open (selected)
- Obligatory participation: Mandatory (selected)
- Status: Active (selected)
- Main Counselors: Virginia Appar, walter. arclloy, norman dogbody
- Guest counselors: Guest1 Counselor, Guest 2 Counselor
- Notes: focus is reintegration into society of ch PTSD

1. 'Add group' tab opens (top of pic above)

2. Fill in its name: 'Vietnam Vets PTSD Group'

Date of group creation is 'Starting Date' by default

3. 'Type of Group': '**Closed**' is default-- **Be sure to change this!**

If left 'Closed', the group may be fully created but it will be inoperative and you'll need to delete it and start again!

4. 'Obligatory Participation': set as desired

5. 'Status': Active, Finished, Canceled. Set as appropriate

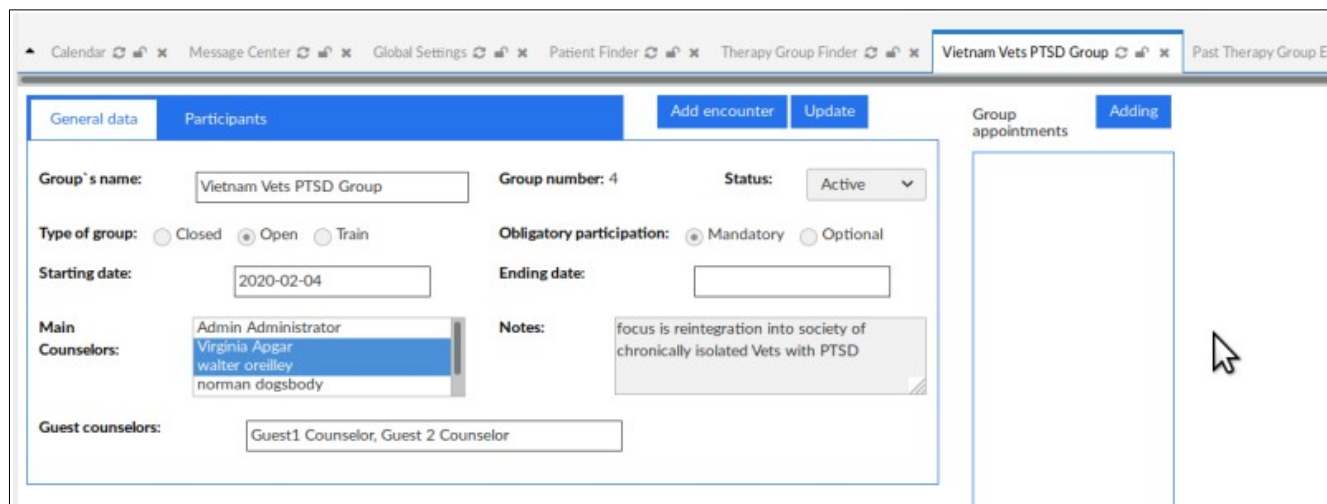
6. 'Main Counselors': Ctrl+left click to select counselors of group

Main counselors must be EMR users

7. 'Notes': re: the nature of the group, or its mission, or whatever.

8. 'Guest Counselors': this is comma separated freetext so can be anybody including non- EMR users

9. Click 'Add Group' (oval lower left)

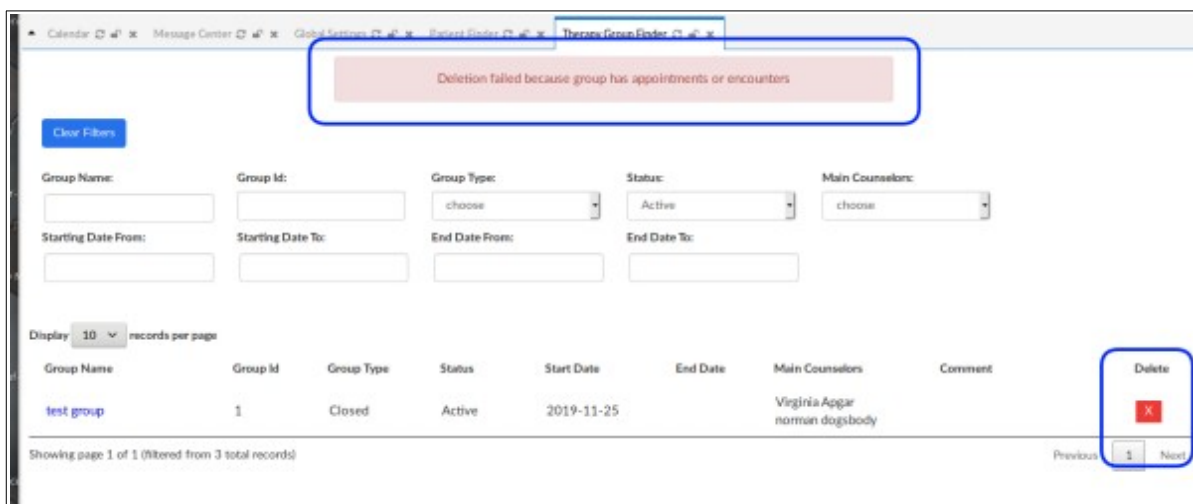


Group panel displays with 'General Data' tab active (above)

Removing a group

Note that similar to a patient record, a Group cannot be deleted if it has been used at all, because it will contain patient information which is not allowed to be destroyed; per error message at top above (round rectangle below). You may delete a group immediately after it has been created, for e.g., if an error was made in its configuration. Otherwise, its Type may only be set to 'Closed'.

- Closed groups remain on the group list
- Once group is closed it can not be reopened!



Use

C. Schedule group sessions

At this point you may schedule its sessions.

*Note, this step may be performed from the Calendar display,
just be sure to select the 'Group' tab*

It appears that the group appointment may be added to all of the official counselors' calendars, not only the lead counselor. But each counselor's scheduled appointment must be handled individually, for example if that counselor will be listed in reports that they led a group.

From Main Menu select 'Groups/ Groups/ ' and click on the desired group (not pictured)

The screenshot shows a web-based interface for managing a group. The 'General data' tab is selected. The group name is 'Vietnam Vets PTSD Group', group number is 4, and status is 'Active'. The type of group is 'Open'. The starting date is '2020-02-04'. The main counselors listed are 'Admin Administrator', 'Virginia Apgar', 'walter orsillo', and 'norman dogbody'. A blue 'Adding' button is circled in the top right corner of the form area.

1. Open the Group's General Data tab
2. Click 'Adding' button at top right (oval top right above)

3. Fill out the event dialog in the same manner as scheduling a regular appointment

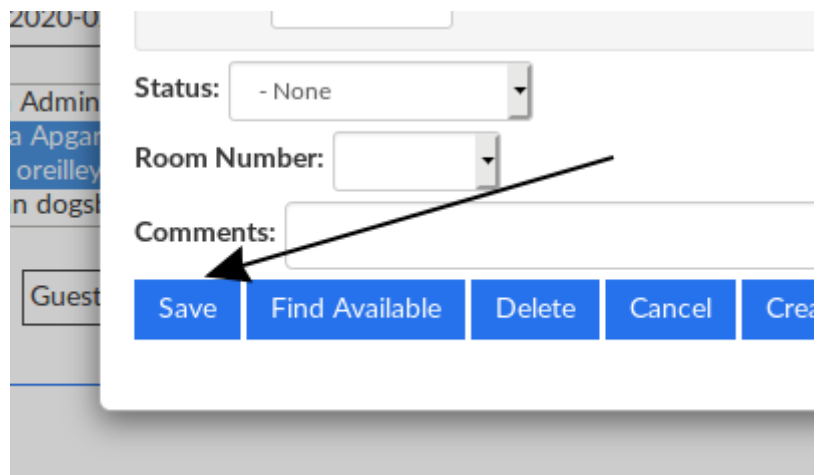
See that documentation for instructions

Presumably this will be a repeating appointment, as pictured.

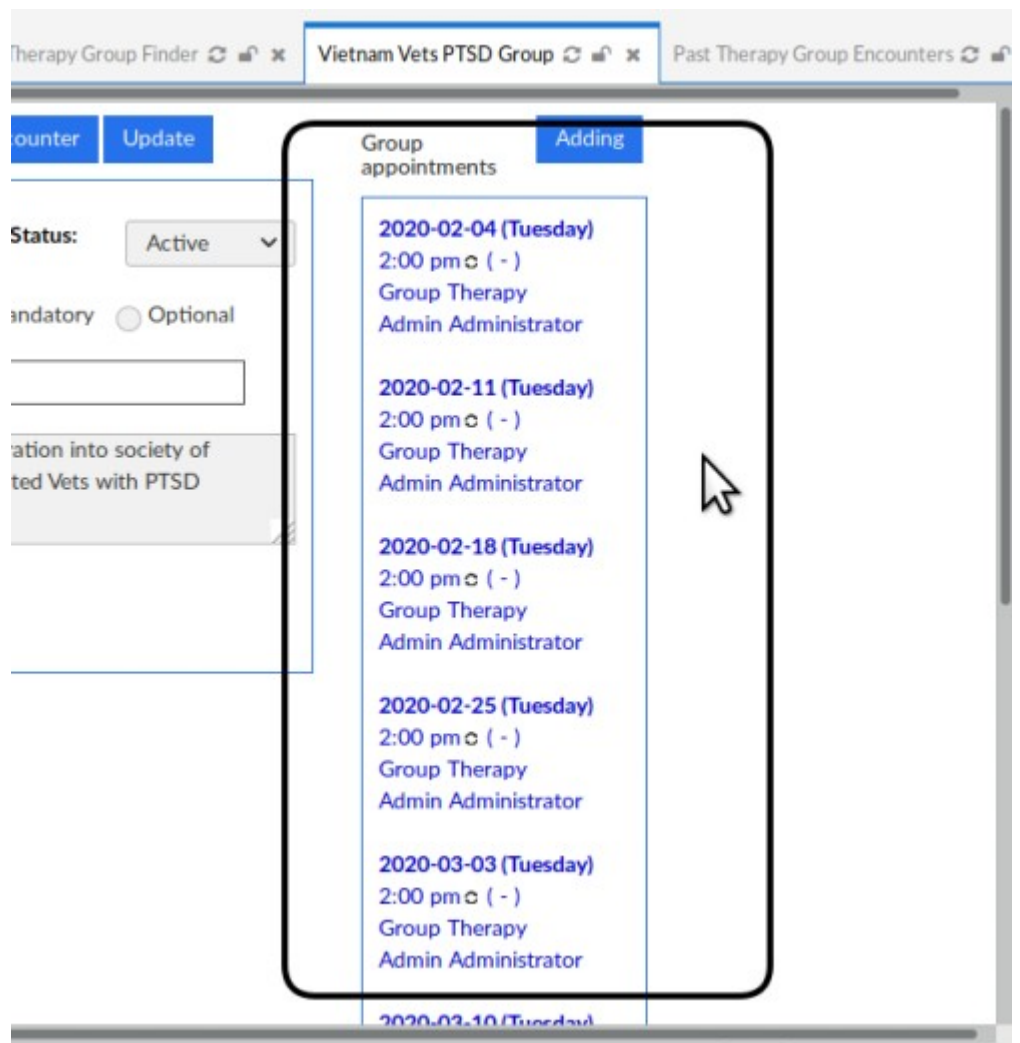
Name	ID	Type	Start Date
Vietnam Vets PTSD Group	4	Open	2020-02-04

4. Click in the 'Group' text area to activate a search tool to locate the group (round rectangle above)

5. Click 'Save' button at lower left of dialog (arrow)

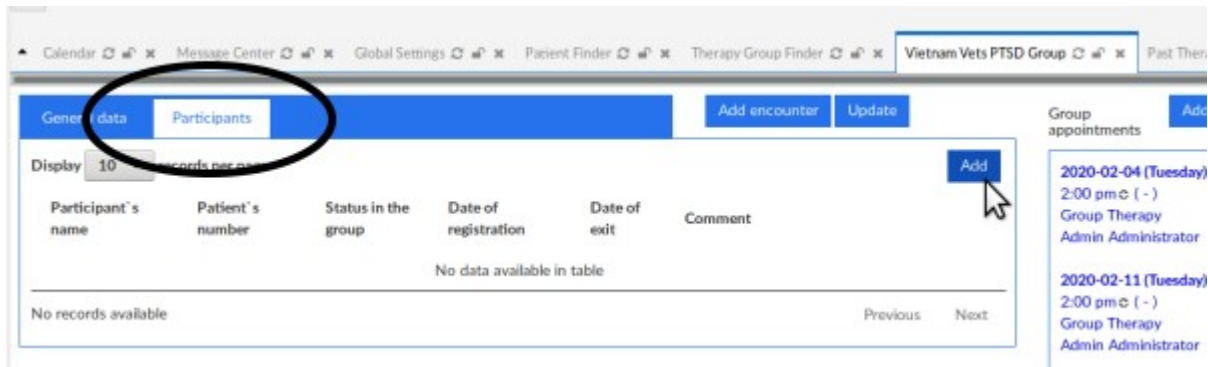


6. The scheduled sessions are displayed in 'Group Appointments' at right of panel.

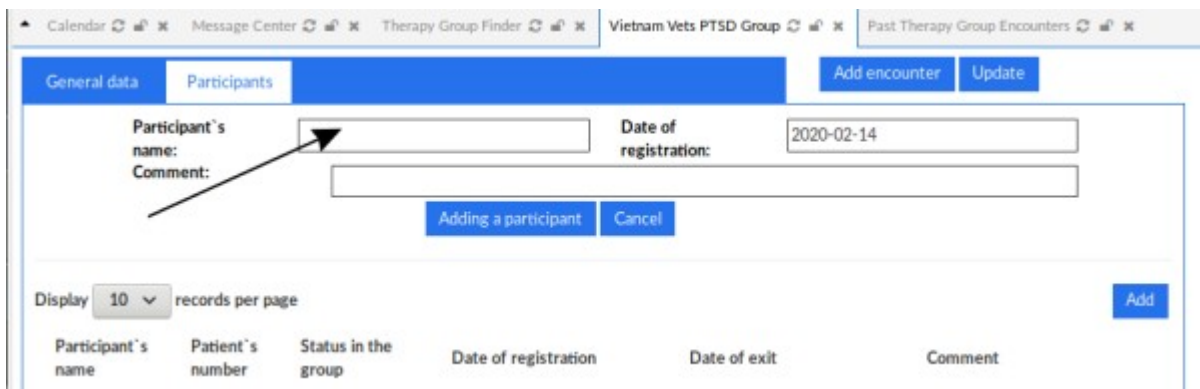


D. Add participants to group

1. In the group details panel click 'Participants' tab (black oval below)

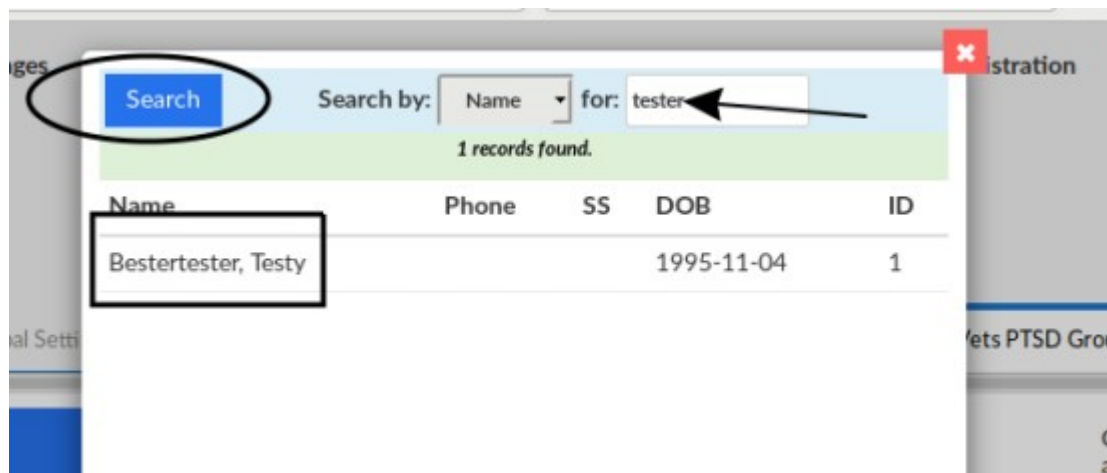


2. Click 'Add' button (cursor arrow at right above)



Participants panel expands down

3. Click in 'Participant's Name' text area (arrow above) which opens the name picker.



4. Enter part of name (arrow top right above)
5. Click 'Search' (oval)
6. Select name from list (rectangle)

Now: 'Participant's Name' is displayed;

'Date of Registration' is current date by default; may be changed.

7. Add optional comment about participant in text area below name
8. Click button 'Adding a Participant' (arrow above)

Participant's name	Patient's number	Status in the group	Date of registration	Date of exit	Comment
Bestertester, Testy	1	Active	2020-02-04		pt can be dangerous

Participant's name with the comment is added to list

Repeat from step 2 above to add all Participants

E. Document group activity

Indicate Group Status for Reports

Some reports monitor visit and encounter data so you may want to indicate in the calendar that the session did occur. This is accomplished in the same basic manner as for a patient encounter.

1. On the calendar, click the group session's time (oval at bottom, right)

visually confirm you're looking at the 'Group' tab (arrow at top)

2. Open the Status dropdown and select 'Took Place'

(cursor arrow at right)

The screenshot shows a software interface for documenting a group session. At the top, there are three tabs: 'Patient', 'Provider', and 'Group'. A black arrow points to the 'Group' tab. Below the tabs, there are several input fields: 'Category' (Group Therapy), 'Title' (Group Therapy), 'Facility' (Faux Healthcare), 'Billing Facility' (Faux Healthcare), 'Group' (Vietnam Vets P), and 'Coordinating Counselors' (Administrator, Admin). The date is set to 2020-02-05, the time is 3:00 PM, and the duration is 60 minutes. There are also fields for 'Repeats' (every day) and 'Days Of Week' (Su, Mo, Tu, We, Th, Fr, Sa). A 'Status' dropdown menu is open, showing options: '- None', 'Took Place', 'Did Not Take Place', and '< Not Reported'. A cursor arrow points to 'Took Place'. At the bottom, there are buttons for 'Save', 'Cancel', and 'Create Duplicate'. The last update is by Admin Administrator on 2020-02-06 00:27:32. Below the form, a calendar grid shows a session for 'Vietnam Vets ...' at 3:00 PM, which is circled in red.

3. Click on 'Current' to indicate that only this day's session took place, not all the rest of the scheduled sessions.

until date 2020-04-04

Status: = Took Place

Room Number:

Comments:

Option one, apply the changes to only the Current event. Option two, apply to this event and all Future occurrences or lastly, apply to All event occurrences?

All Cancel Future Current

LUNCH LUNCH LUNCH LUNCH

For example, this is 'Reports / Visits / Encounters' showing the group sessions that have been marked 'Took Place', and their participants, and any comments.

Report - Encounters

Facility: -- All Facilities -- Provider: -- All --

From: 2020-02-01 To: 2020-02-14

Details Forms Esignd Encounter Esignd Not Esignd

New

Submit Print

Provider	Date	Patient	ID	Status	Encounter	Encounter Number	Form	Code
Administrator, Admin	2020-02-03	Bestorlester, Testy	1	Empty	screened and registered.	19		
	2020-02-03	Le Pew, Pepe	2	Empty	screened and registered.	18		
	2020-02-04	Bestorlester, Testy	1	Empty	Bestorlester briefly testy	16		
	2020-02-04	Le Pew, Pepe	2	Empty	Le Pew very engaged	15		
	2020-02-05	Bestorlester, Testy	1	Empty	Testy got testy but maintained	13		
	2020-02-05	Le Pew, Pepe	2	Empty	Pepe very engaged	12		

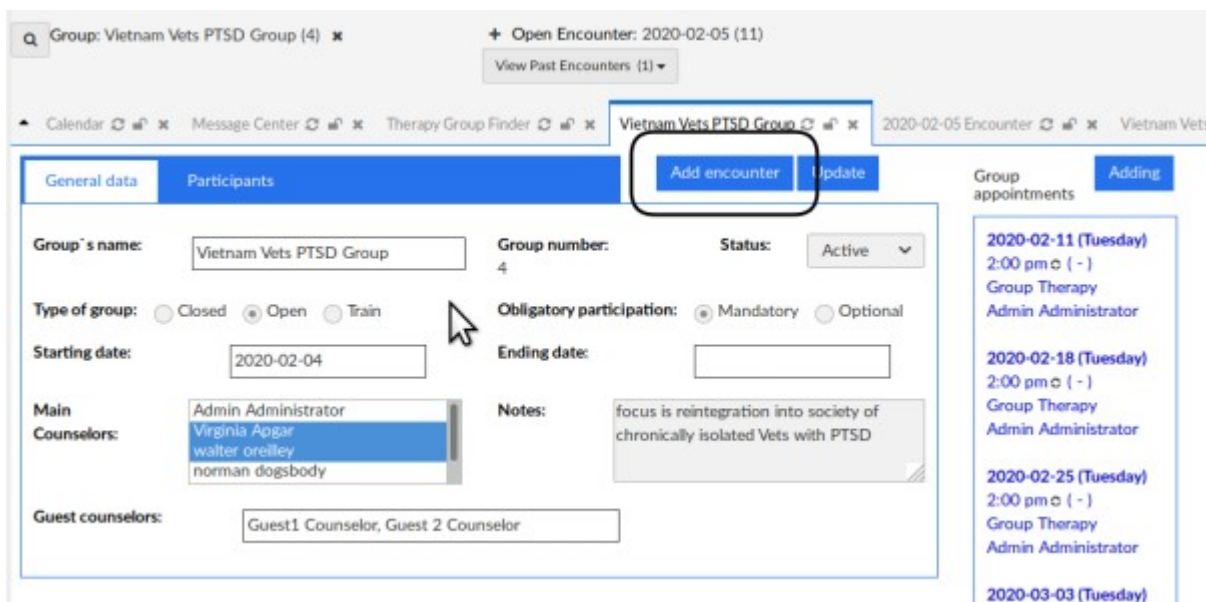
Create Group Encounter Form

Unlike the option that exists for a regular patient appointment the Groups module will not create a group encounter form when a group session is marked as 'Taken Place'. A suitably privileged staff will need to manually create one for a session for it to appear in reports and in the participants' records.

1. Either, on the calendar click the group name...



... or from the main menu select 'Groups / Groups' then select the group name (not pictured)...



... and arrive at the Group Details screen

2. Click button 'Add Encounter' (round rectangle at top) to show the group encounter form.

Calendar Message Center Therapy Group Finder Vietnam Vets PTSD Group Therapy Group Encounter Vietnam Vets PTSD Group

New Group Encounter Form

Visit Details

Visit Category: Group Therapy Sensitivity: Normal

Date of Service: 2020-02-04 Onset/hosp. date:

Facility: Faux Healthcare

Reason for Visit

First Vets PTSD group

Save Cancel

3. Set the date of service (round rectangle above)

(it will default to the date you are making the encounter form)

4. Enter a comment on the group proceedings if desired (cursor arrow)

5. Click 'Save' (oval lower left)...

Calendar Message Center Therapy Group Finder Vietnam Vets PTSD Group 2020-02-04 Encounter Vietnam Vets PTSD Gro

Summary Clinical

2020-02-04 Group Encounter for Vietnam Vets PTSD Group

Delete Expand All Collapse All

New Therapy Group Encounter by Admin Administrator (Collapse) Edit eSign

Facility: Faux Healthcare Reason: First Vets PTSD group Counselors: Admin Administrator

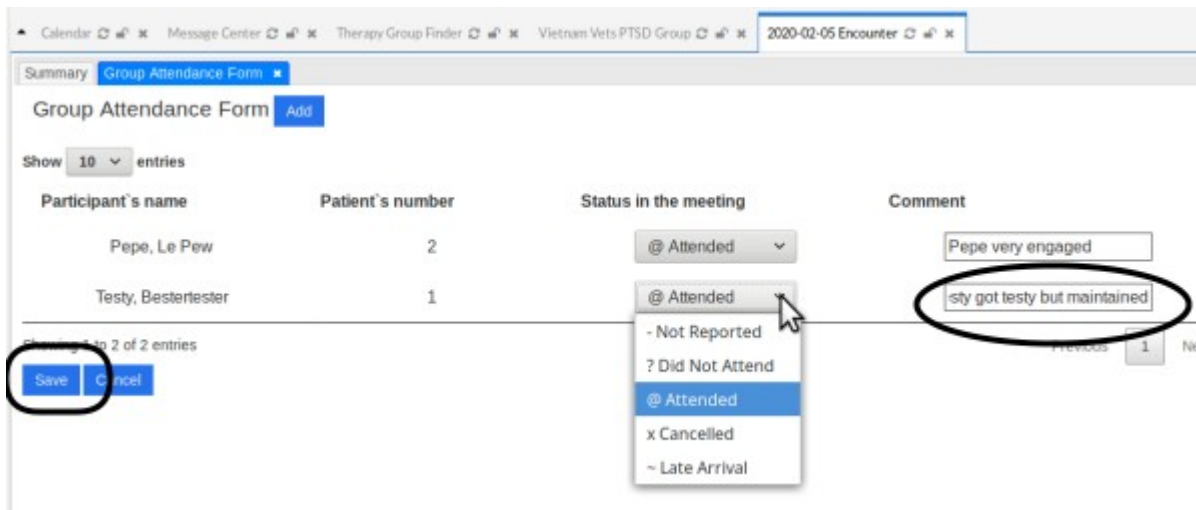
Group Attendance Form New Group Encounter Form

Provided Education Resource
 Provided Clinical Summary?
 Transition/Transfer of Care?
 Medication Reconciliation
 Summary of Care Provided

eSign Log
No signatures on file

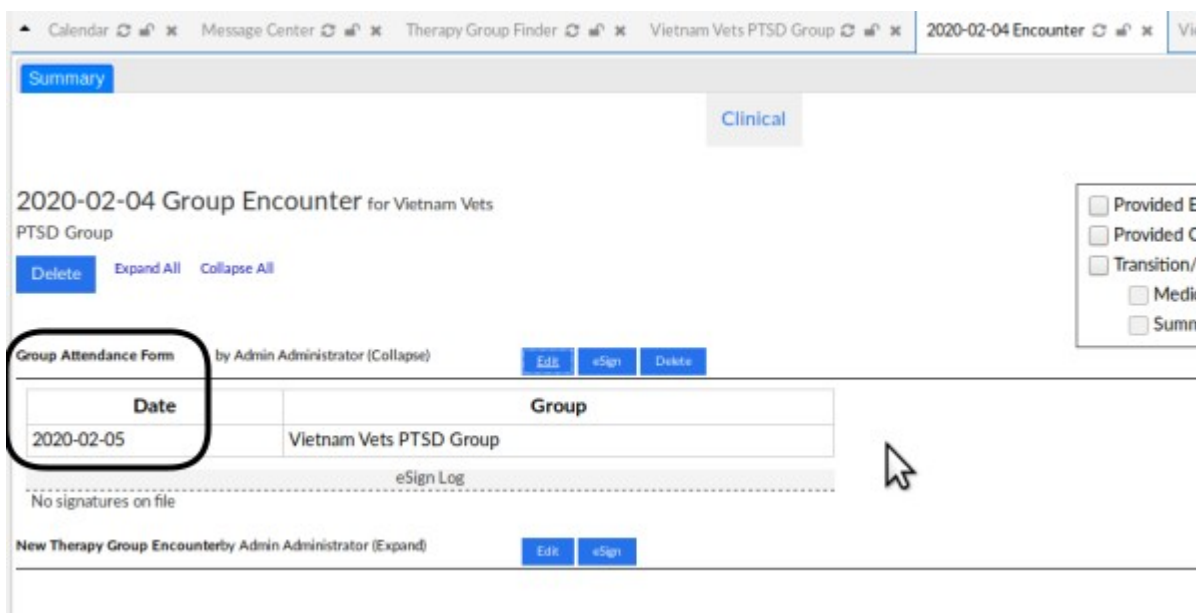
... and the encounter summary appears.

6. Click the 'Clinical' encounter menu item (oval above)
7. Select 'Group Attendance Form' in 'Clinical' menu list (cursor arrow above)
8. Select each participant's 'Status in the meeting' dropdown (cursor arrow below)

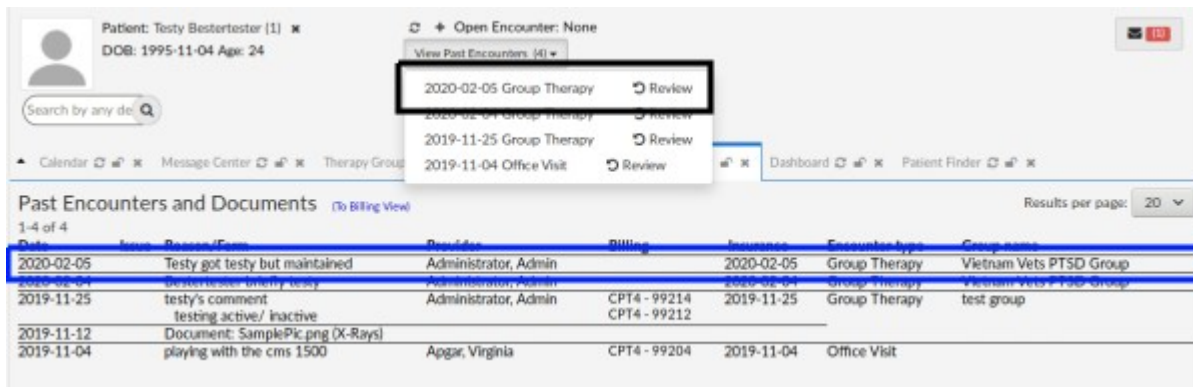


9. Add a comment on that patient's participation if desired (oval above)
10. Click 'Save' at lower left (round rectangle)

The session summary appears on the group encounter summary. The summary's date reflects when the encounter summary was created, and shows the session date in the 'Group Attendance Form' section (round rectangle below).

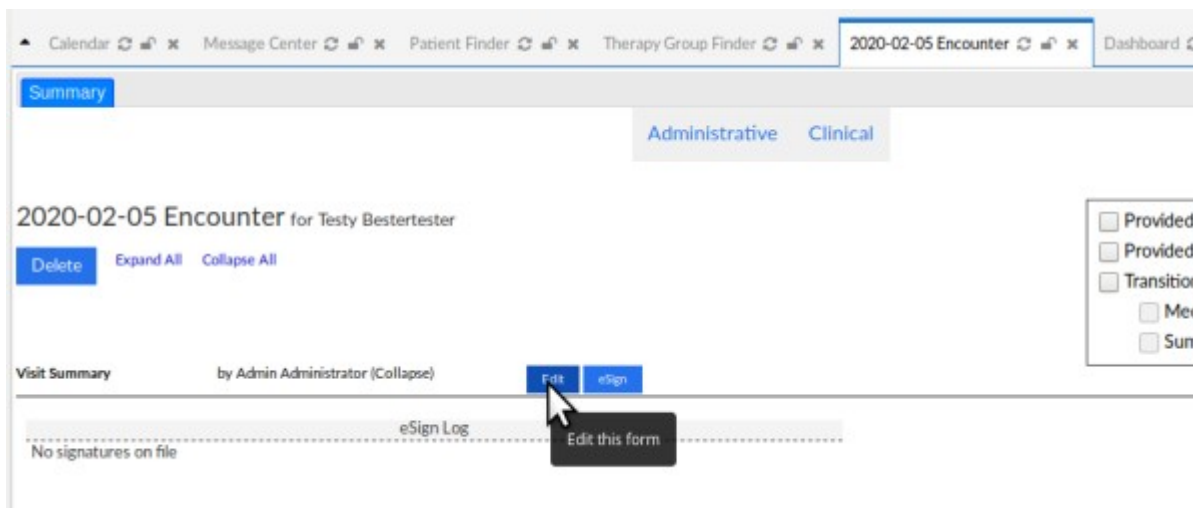


Each patient's group sessions appear in their encounter list and 'Past Encounters and Documents' list (rectangles below).



View a patient's participation note

1. Click the session's listing in 'Past Encounters and Documents' (blue rectangle above) to display the patient's encounter summary.



2. Click the 'Edit' button...

Note that similar to a regular encounter summary, group session encounters may be e-signed, which will register them in the relevant reports.

The screenshot shows a web interface for an OpenEMR encounter summary. At the top, there are several tabs: 'Calendar', 'Message Center', 'Patient Finder', 'Therapy Group Finder', '2020-02-05 Encounter', and 'Dashboard'. The '2020-02-05 Encounter' tab is active, and a 'Summary' button is visible in the top left corner of the main content area.

The main content area is divided into three sections:

- Visit Details:** This section contains several fields:
 - Visit Category:** A dropdown menu with 'Group Therapy' selected.
 - Date of Service:** A text input field containing '2020-02-05'.
 - Group name:** A text input field containing 'Vietnam Vets PTSD Group'.
 - Facility:** A dropdown menu with 'EXOSTAR DEA AUDIT' selected.
 - Billing Facility:** A dropdown menu with 'Faux Healthcare' selected.
 - Sensitivity:** A dropdown menu with 'None' selected.
 - Onset/hosp. date:** An empty text input field.
- Reason for Visit:** A large text area containing the text 'Testy got testy but maintained'. A mouse cursor is positioned over the text area.
- Link/Add Issues (Injuries/Medical/Allergy) to Current Visit:** A section with a blue 'Add Issue' button.

3. ... and read the participant's group encounter summary for that session (cursor arrow above) in 'Reason for Visit' text area.

Conclusion

The Groups module adds to OpenEMR the capability to log and track patients' participation in any sort of group session. Sessions are documented in a way that includes the data in reports and other EMR functions in the same manner as a regular patient appointment.