

## Project Search

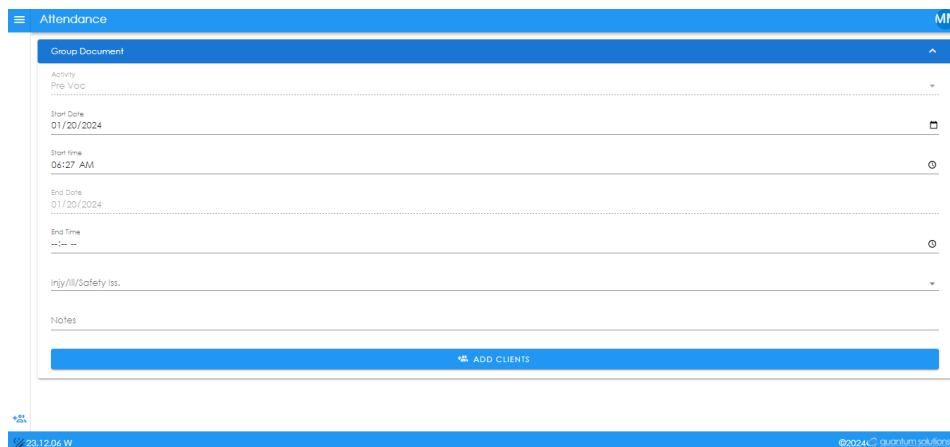
### Q: What is a Group note?



**A:** The group documentation home screen is used to complete the details of all participants in the group. The items we enter here will be copied out to all participant's notes when we create individual notes, so we don't have to key the same information for every participant in the group. The information on this screen applies to all participants in the group.

### Starting the Group note

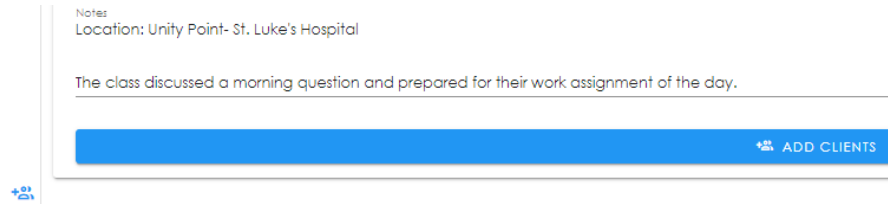
1. Click on the Project Search Group icon and you will see a screen called Attendance.



2. The Activity/Start Date/Start Time fields will automatically populate. The Start Date and Time will default to the date and time the note was started.
3. Start Date - Choose the service date. This can be typed or selected with the calendar option.  
**Tip:** Double check this date is correct before moving on.
4. Start time = Time group service started. AM/PM is required. Type or select with clock. Example would be 8:00AM.
5. End Time = Time group service ended. AM/PM is required. Type or select with clock. Example would be 8:45AM.
6. Meds Given? – Choose 'No' from the dropdown.
7. Injy/III/Safety Iss – Answer 'No' from the dropdown.
8. Notes– Start typing Location: Unity Point-St Lukes Hospital and 0 miles. Locations and number of miles are a requirement for all notes. **Tip:** Always include as a location. **Tip:** If you walked with the participant within the hospital this number would still be zero miles.

**Example of Location and Miles: – Location: Unity Point-St Luke's Hospital, 0 miles**

- Under the Location Line - you will document a paragraph about what the class did during the service. **Example: The class discussed a morning question and prepared for their work assignment of the day.**

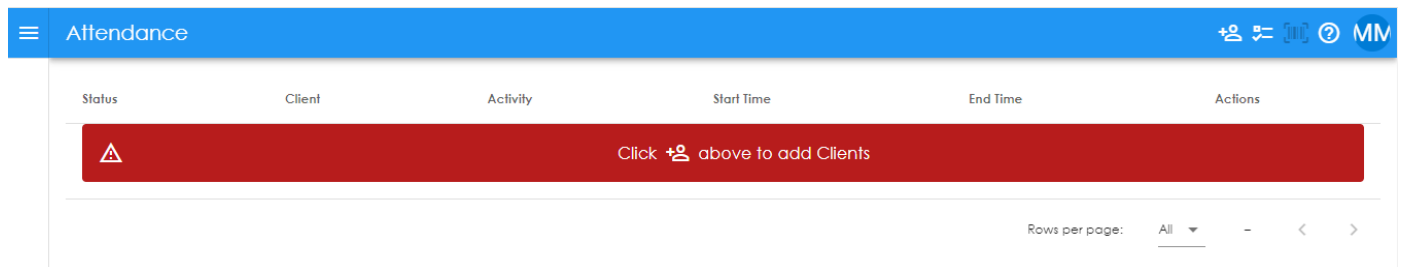



Notes  
Location: Unity Point- St. Luke's Hospital

The class discussed a morning question and prepared for their work assignment of the day.


**ADD CLIENTS**

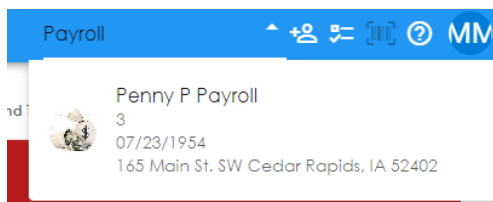
- Click on the **ADD CLIENTS** button. The following screen will appear.







Status	Client	Activity	Start Time	End Time	Actions
Click  above to add Clients					


Rows per page: All

 = **Add New Participant Name**. Click on the icon to add a new record. This icon is in the upper right-hand corner of the screen. In this example, we will add Penny Payroll and Mary Poppins. You would add names for everyone in your group that day. **Tip:** Add only the first or last name and search for that participant. Watch for similar names.



Payroll

    MM

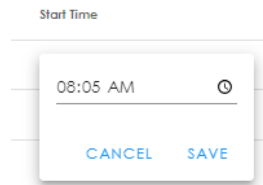
 Penny P Payroll  
3  
07/23/1954  
165 Main St, SW Cedar Rapids, IA 52402

Status	Client	Activity	Start Time	End Time	Actions
	Penny P Payroll	Pre Voc	08:00 AM	08:45 AM	
	Mary E Poppins	Pre Voc	08:00 AM	08:45 AM	

Rows per page: All 1-2 of 2

Edit the start and end time if necessary. You would start with participant 1- Penny Payroll.

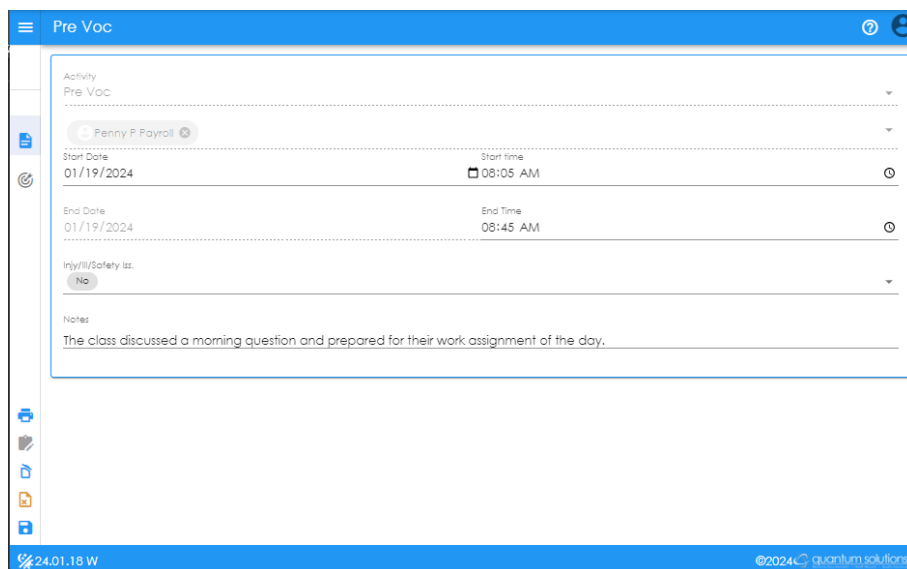
- Click on the Start Time and type or use clock. Click Save. Repeat this step for end time.  
**Tip:** You should match the participant check-in and out times for that day.



Edit start and end time for participant 2. Repeat the steps above. You would continue to change times for a longer participant list.

The next step is to edit the participant notes that were copied from the group note. Click on the pencil icon next to participant 1- Penny Payroll. This is the edit button.

The participant note will open on a new screen. There may be a brief loading message.



Pre Voc

Activity: Pre Voc

Penny P Payroll

Start Date: 01/19/2024 Start time: 08:05 AM

End Date: 01/19/2024 End Time: 08:45 AM

Injury/Safety iss.: No
















Notes: The class discussed a morning question and prepared for their work assignment of the day.

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Update the Meds Given and Iny/III/Safety Iss question as needed. The next step would be to complete the Goal/Objectives section under the bullseye icon.

**How to delete a participant name:**

If there is one name to remove, click on the trash can icon to the far right. Type Delete on the next window and click OK.

Attendance						
Status	Client	Activity	Start Time	End Time	Actions	
✓	 Penny P Payroll	Day Hab	08:33 AM	02:30 PM	   	
✓	 Mary E Poppins	Day Hab	08:00 AM	02:30 PM	   	
⚠	 Snuggle m Bear	Day Hab	08:00 AM	02:30 PM	   	

Rows per page: All ▾

Are you sure you want to delete this item?

Type Delete  
Delete

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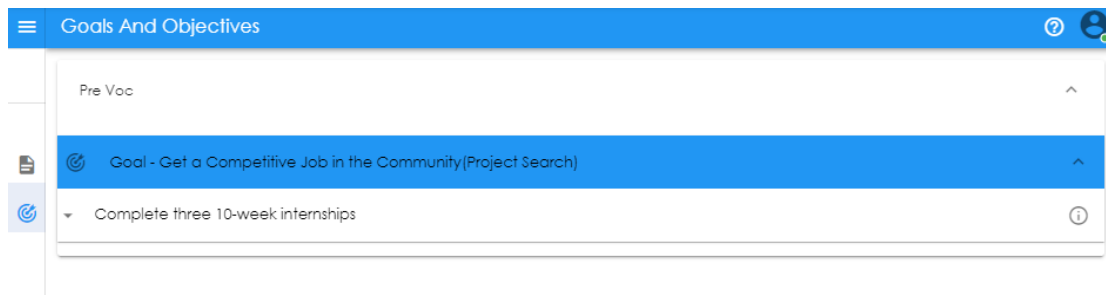
CANCEL   OK

**Starting the Goals/Objectives**

 = Goals/Objectives

You will click on the icon on the far-left side to complete documentation. The main paragraph describing what you did during the service needs to be documented under a goal.

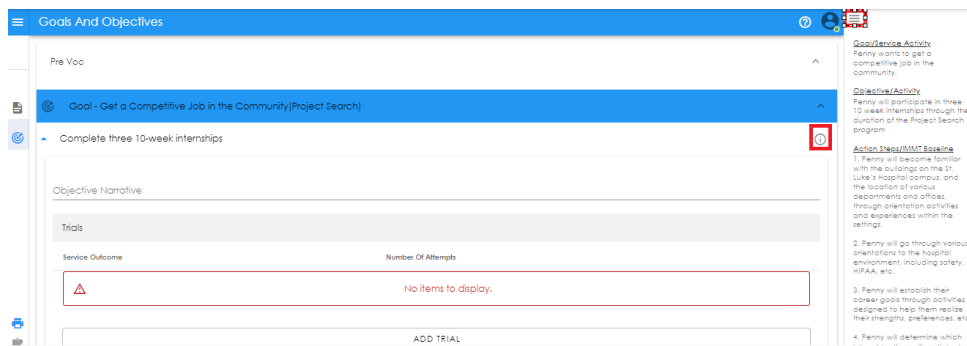
The Goal Documentation field is hidden on first appearance. To open, click on the title name or the drop-down arrow to the far right. Click the heading and more dropdown boxes will appear.



**How to open the Goal Synopsis:**

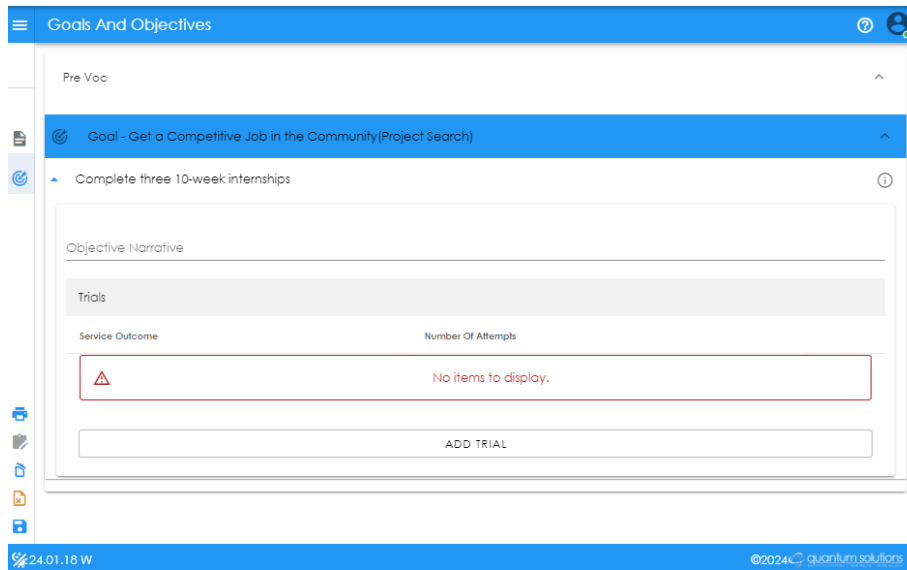
 = Goal Synopsis

The synopsis will contain all approved Goal Objectives + Action Steps. The action steps are the building blocks to explaining what staff did (the objective narrative) and the participant’s response. Look for the encircled I and with one click the synopsis is on the far-right side of the screen. A tip would be to leave this open as you finish the goal documentation.



**How to complete Goal documentation:**

Click on the correct subtitle to force the fields open. In this example, click on Complete three 10-week internships. Under Objective Narrative you will type one paragraph using the action steps under Goal Synopsis. Only document on the action steps attempted during shift. Then click on Add Trial to complete.



**How to complete the Objective Narrative: (What you did during the service and the participant’s response)**

**Example: Staff reviewed today’s assignment. Penny identified she was cleaning in labor and delivery. Staff asked what her tasks would be. Penny answered emptying the trash and bringing in fresh linens. Penny left to begin her internship duties for the day.**

Objective Narrative  
Staff reviewed today's assignment. Penny identified she was cleaning in labor and delivery. Staff asked what her tasks would be. Penny answered emptying the trash and bringing in fresh linens. Penny left to begin her internship duties for the day.

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**How to complete the Add Trial: (Explains the service outcome for your shift)**

You will click on the field titled Add Trial and No Items to Display will disappear. There will now be a dropdown menu titled Service Outcome. Nothing needs to be changed in the Number of Attempts field. This will default to 1. Choose the best outcome for that session from the following options.

- Objective Met
- Objective Not Met
- Declined

Trials	
Service Outcome	Number Of Attempts
Service Outcome	Number Of Attempts 1
ADD TRIAL	


Service Outcome

- Objective Met
- Objective Not Met
- Declined

ADD

Trials	
Service Outcome	Number Of Attempts
Service Outcome Objective Met	Number Of Attempts 1
ADD TRIAL	

**How to Save the Participant Note**

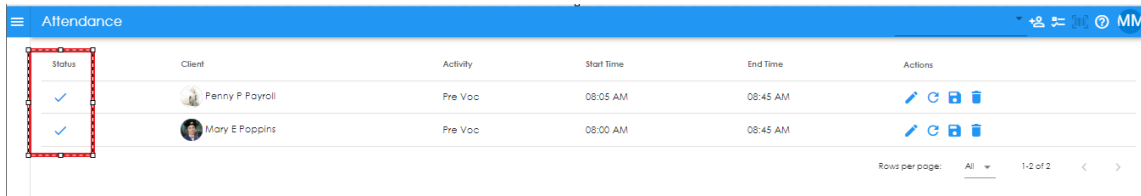
 = Finish

Click on the icon called Finish. Lower-left hand corner of screen. You will see a message prompting you to close the note.

Please click the Close button in the upper right hand corner.

CLOSE = Go Back to the Attendance screen

The Close button is in the upper right-hand corner. Your view should now be the list of participant names. There is now a blue checkmark under Status to indicate the note is saved. Click on the pencil icon in row 2 and repeat the prior steps. You will continue the same steps for all participants on the list until there are blue checkmarks on every row. **Tip:** Use the back button to add the afternoon shift notes.



Status	Client	Activity	Start Time	End Time	Actions
✓	Penny P Payroll	Pre Voc	08:05 AM	08:45 AM	[Pencil] [Refresh] [Save] [Trash]
✓	Mary E Poppins	Pre Voc	08:00 AM	08:45 AM	[Pencil] [Refresh] [Save] [Trash]

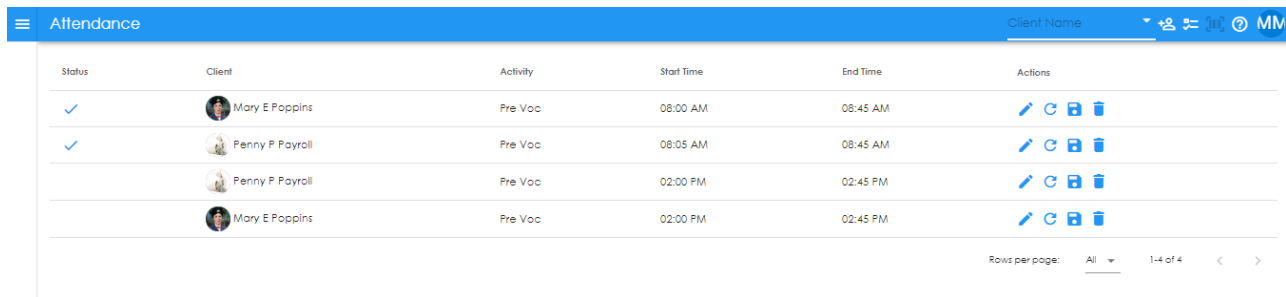
**How to add more notes for PM shift:**



**Back-** will move to the prior screen.

If you have two shifts in the same day, you will use the red reverse arrow in the bottom left-hand corner of the screen.

You will land back on the group note and change the start/end times and complete a new group note. Repeat the same steps under [Starting the Group note-Page 1.](#)

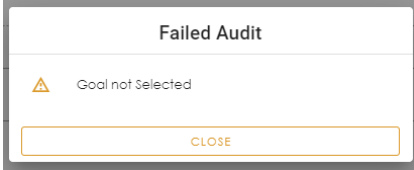


Status	Client	Activity	Start Time	End Time	Actions
✓	Mary E Poppins	Pre Voc	08:00 AM	08:45 AM	[Pencil] [Refresh] [Save] [Trash]
✓	Penny P Payroll	Pre Voc	08:05 AM	08:45 AM	[Pencil] [Refresh] [Save] [Trash]
	Penny P Payroll	Pre Voc	02:00 PM	02:45 PM	[Pencil] [Refresh] [Save] [Trash]
	Mary E Poppins	Pre Voc	02:00 PM	02:45 PM	[Pencil] [Refresh] [Save] [Trash]

Click on Add Clients assign the same names- and click on the pencil to edit. Personalize the note as previously done for the morning shift. Add the goal documentation and click on the diskette icon to save.



### Error Messages: What to do?

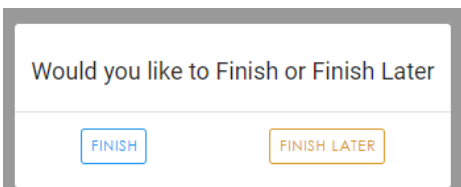


You will see Failed Audit – ‘Goal not Selected’ when you have not saved a goal for one or more participants. This will be clear once you have added all goals for participants.

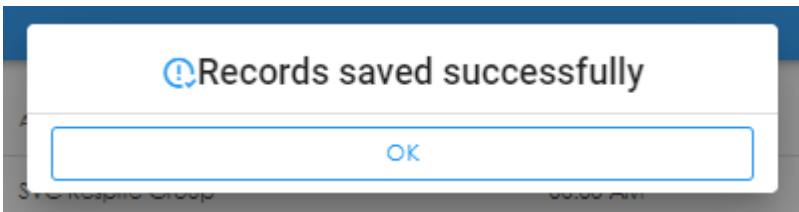
### Completing the final save:

Once all the participant names have a blue check mark under Status this group note is ready to be marked finish. Click on the blue diskette icon in the left side panel to finish. There will be a confirmation message and Finish needs to be marked every time.

- ✓ = **Status**- no further editing needed at this time.
- 💾 = **Finish**- Notes can be marked finish or finish later at this time.



The final message will indicate that the group note has been saved successfully. Click OK to Close.



The Web Dashboard screen will display, and the user can log out at this time. Reminder all Incidents Reports should be completed immediately after submitting notes. Directions on how to complete is on the Arc employee portal.