

Group Notes Cheat Sheet

CLAIMING FOR GROUP THERAPY PER DHCS INFO NOTICE 17-040

1. How should providers bill for Group Therapy sessions?

When services are being provided by two or more persons at one point in time, the number of staff group facilitators and **the unique involvement of each shall be documented in the context of the mental health needs of the beneficiary.** The progress note should include the total number of group participants (Medi-Cal and non-Medi-Cal participants) *and clearly indicate length of group session with documentation time included (or documentation time clearly recorded separately).* In addition, when multiple providers render a covered service to more than one participant, the total number of minutes of the session must be distributed among the group participants (regardless of payer source), and prorated among the providers at the group session.” (Cal. Code Regs., tit. 9 § 1840.314(c); Medi-Cal Billing Manual Chapter 7, section 7.5.5)

The example below demonstrates the approach to use to determine the number of minutes each provider may claim for each Medi-Cal beneficiary participating in the group session.

EXAMPLE 1:

1. Group: 100 minutes
2. Providers: 2
3. Participants: 10
4. Provider 1: renders 100 minutes of a covered service
5. Provider 2: renders 60 minutes of a covered service

Method:

Divide each provider's minutes providing a covered service by the number of group participants.

- Provider 1: $100/10=10$
- Provider 2: $60/10=6$

Provider 1 would bill 10 minutes per Medi-Cal beneficiary and provider 2 would bill 6 minutes per Medi-Cal beneficiary.

EXAMPLE 2: In this example one provider does the progress notes on all 10 beneficiaries documenting the specific involvement of each of the 2 providers as well as the specific service time of each provider and their documentation time

Set of Facts:

1. Group Session: 100 minutes
2. Providers: 2
3. Participants: 10
4. Provider 1 renders 100 minutes of a covered service
5. Provider 2 renders 60 minutes of a covered service
6. Documentation Time: Provider 1 spends 80 minutes to complete all ten (10) progress note for both providers on all beneficiaries

Method:

- Provider 1: 100 minutes of service time + 80 minutes of documentation time = 180 minutes divided by 10 beneficiaries = 18 minutes
- Provider 2: 60 minutes of service time divided by 10 beneficiaries = 6 minutes

Provider 1 would bill 18 minutes per beneficiary and provider 2 would bill 6 minutes per beneficiary

EXAMPLE 3: In this example each provider does separate progress notes on all 10 beneficiaries documenting their specific involvement and the amount of service and documentation time

Set of Facts:

1. Group Session: 100 minutes
2. Providers: 2
3. Participants: 10
4. Provider 1 renders 100 minutes of a covered service
5. Provider 2 renders 60 minutes of a covered service
6. Documentation Time: Provider 1 spends 80 minutes to complete progress notes on all ten (10) beneficiaries and Provider 2 spends 70 minutes to complete progress notes on all ten (10) beneficiaries

Method:

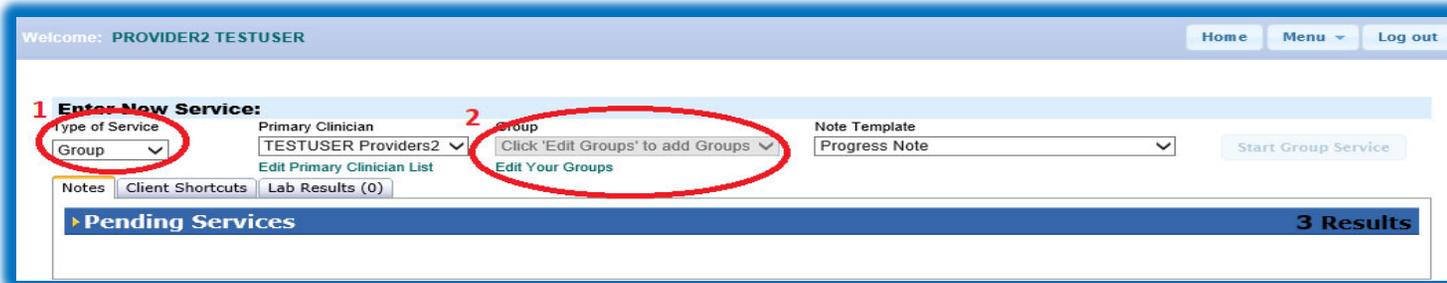
- Provider 1: 100 minutes of service time + 80 minutes of documentation time = 180 minutes divided by 10 beneficiaries = 18 minutes
- Provider 2: 60 minutes of service time + 70 minutes of documentation time = 130 minutes divided by 10 beneficiaries = 13 minutes

Provider 1 would bill 18 minutes per beneficiary and provider 2 would bill 13 minutes per beneficiary.

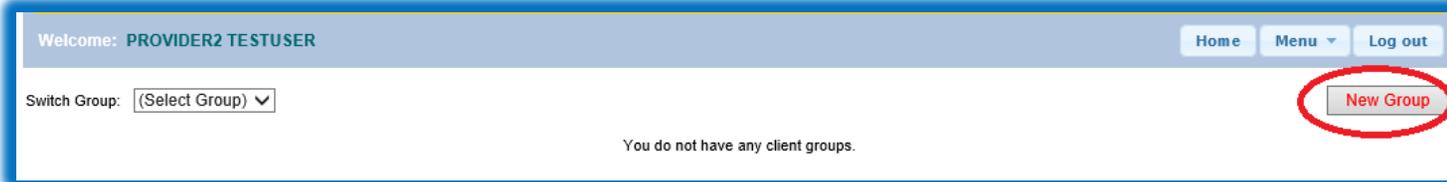
HOW THIS WORKS IN GATEWAY

Creating a Group in Gateway (you don't need to do this every time unless you are starting a completely new group)

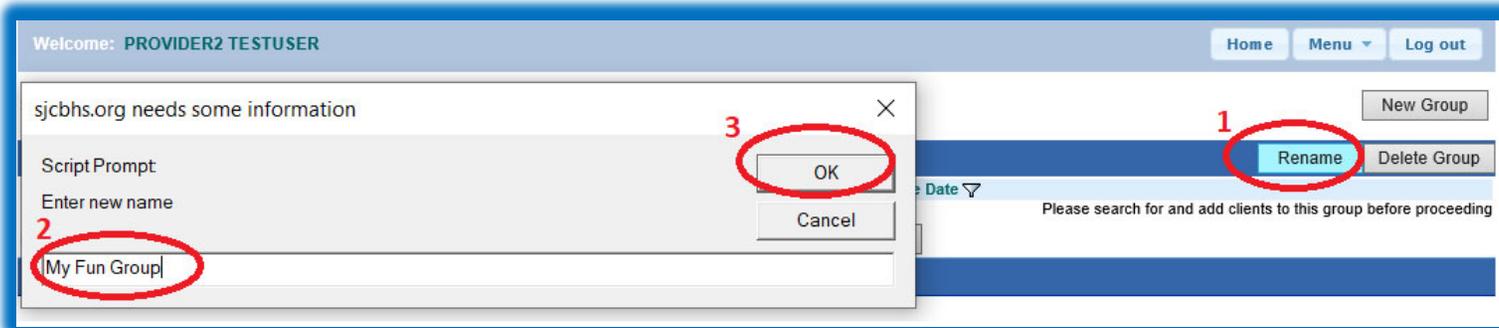
1. Go to your home screen in gateway. Under Type of Service, select "Group"
2. Under Group, select a group. If this is your first time for Group services, click "Edit Your Groups" to create (edit) group.



3. Click "New Group"



4. Click "Rename" to name your group
5. Enter your group name
6. Click "OK" to save your group name.

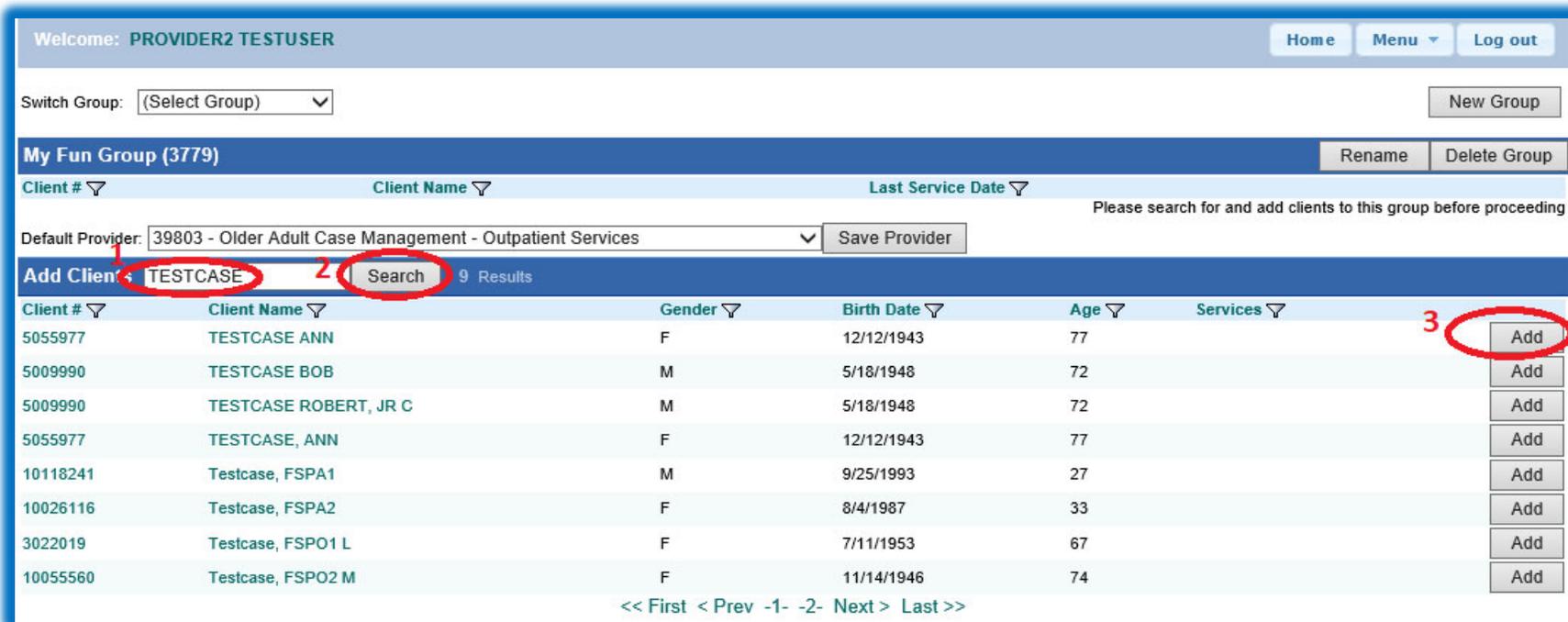


7. Select Default Provider if you need to (this is option), then, click "Save Provider"



Next, you need to add clients into your group.

- 8. Enter Client last name or client #
- 9. Click Search
- 10. Find the client you want to add into your group by click "Add"
- 11. When you done for adding clients into your group, click "Home"



If you select the wrong client, click “Remove” to remove from your group

Welcome: PROVIDER2 TESTUSER

Home Menu Log out

Switch Group: (Select Group) New Group

My Fun Group (3779) Rename Delete Group

Client #	Client Name	Last Service Date	
5055977	TESTCASE ANN	3/1/2021	Remove
5009990	TESTCASE ROBERT JR	3/1/2021	Remove

Default Provider: 39803 - Older Adult Case Management - Outpatient Services Save Provider

Add Clients TESTCASE Search 9 Results

Client #	Client Name	Gender	Birth Date	Age	Services	
5055977	TESTCASE ANN	F	12/12/1943	77		Add
5009990	TESTCASE BOB	M	5/18/1948	72		Add
5009990	TESTCASE ROBERT, JR C	M	5/18/1948	72		Add

How to write a Group Note in Gateway

From your homepage,

- 12. Under Type of Services, Select “Group”
- 13. Next, your group under “Group”
- 14. Then, click “Start Group Service”

Welcome: PROVIDER3 TESTUSER

Home Menu Log out

1 Enter New Service:

Type of Service: Group (circled in red)

Primary Clinician: TESTUSER Providers3

Group: 129 Relationship Group (circled in red)

Note Template: Progress Note

Start Group Service (circled in red)

Notes: Client Shortcuts Lab Results (0)

How to verify your group members

- 15. Check which members are present (red arrow).
- 16. Select appropriate RU for each youth. (Green arrow).
- 17. Select appropriate procedure code (yellow arrow)
- 18. Pick location and service date. If Group had a co-facilitator click on “add additional Clinician” even if co-facilitator is a MHRS (Blue Arrow).

Welcome: PROVIDER3 TESTUSER Home Menu Log out

Group: Relationship Group (129) Title: Progress Note

Group Members 4 Members Show client RUs for: 1305 - TESTUSER, PROVIDER3, MFT

Present	Client #	Name	Gender	Age	Procedure	Provider
<input checked="" type="checkbox"/>	5055977	TESTCASE, ANN	F	77	Rehab Group	Older Adult Case Management - Outpatient Services
<input checked="" type="checkbox"/>	10026116	Testcase, FSPA2	F	33	Rehab Group	Community Adult Treatment Services-CATS - Full Service F
<input checked="" type="checkbox"/>	3022019	Testcase, FSPO1	F	67	Rehab Group	MHSA-Gaining Older Adult Life Skills - Full Service Partners
<input checked="" type="checkbox"/>	5009990	TESTCASE, ROBERT JR	M	72	Rehab Group	Community Adult Treatment Services-CATS - Team C Outp

Additional participants in group:

Service Location: Phone Service Date:

Billing time
Primary Clinician: 1305 - TESTUSER, PROVIDER3 Service Time:

Add additional clinician

- 19. Select Co-Clinician from the list. (Red arrow)
- 20. Enter Service Time for Primary Clinician. (Green arrow)
- 21. Enter Service Time for Co-Clinician. (Yellow arrow)
- 22. Primary Clinician entering group section of the note. (Blue arrow) Provider3 and Provider2 co-facilitated a group that lasted 60 minutes. But Provider3 bills more because she did all the documentation so she added 40 minutes to her billing. Type body of note that applies to entire group. Making sure to list interventions done by both the facilitator and the co-facilitator. Click Save as Pending (on bottom right, not in picture). **In the body of your note, you need to type in how much time was spent doing documentation. This needs to be clearly reported in the body of your note. Start each note with "Documentation Time = Total 50 minutes/4 clients = 10 minutes for each client" ←Example**

Welcome: PROVIDER3 TESTUSER Home Menu Log out

Group: Relationship Group (129) Title: Progress Note

Group Members 4 Members Show client RUs for: 1305 - TESTUSER, PROVIDER3, MFT

Present Client #	Name	Gender	Age	Provider
<input checked="" type="checkbox"/> 5055977	TESTCASE, ANN Procedure: Rehab Group	F	77	Older Adult Case Management - Outpatient Services
<input checked="" type="checkbox"/> 10026116	Testcase, FSPA2 Procedure: Rehab Group	F	33	Community Adult Treatment Services-CATS - Full Service F
<input checked="" type="checkbox"/> 3022019	Testcase, FSPO1 Procedure: Rehab Group	F	67	MHSA-Gaining Older Adult Life Skills - Full Service Partner:
<input checked="" type="checkbox"/> 5009990	TESTCASE, ROBERT JR Procedure: Rehab Group	M	72	Community Adult Treatment Services-CATS - Team C Outp

Additional participants in group:

Service Location: Phone Service Date: 03/01/2021

Billing time

Primary Clinician: 1305 - TESTUSER, PROVIDER3 Service Time: 01:40

Co-Clinician: 1303 - TESTUSER, PROVIDER2 Service Time: 01:00

Total Staff Time: 02:40

[Add additional clinicians](#)

Note: Group section notes enter by the Primary Clinician (1305) here Previous Entries: (Select Note)

Home Screen View

23. Below is Primary Clinician Home screen view for the group notes you saved as pending. As Primary Clinician, you are able to see the process of Co-Clinicians' notes.

- Gsr# 4086 is Primary Clinician's notes
- Gsr# 4087 is Co-Clinician's notes.

Welcome: PROVIDER3 TESTUSER

Home Menu Log out

Enter New Service:
Type of Service
Select --- To start a new service note, select the type of service

Notes Client Shortcuts Lab Results (0)

Pending Services 8 Results

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
4881815	42086	5055977	TESTCASE, ANN	39803 - Older Ad...	3/1/2021	Progress	891 Rehab Gr...		
4881816	42086	10026116	Testcase, FSPA2	9069FS - Commu...	3/1/2021	Progress	891 Rehab Gr...		
4881817	42086	3022019	Testcase, FSPO1	9093FS - MHSA-...	3/1/2021	Progress	891 Rehab Gr...		
4881818	42086	5009990	TESTCASE, ROB	9069FS - Commu...	3/1/2021	Progress	891 Rehab Gr...		
4881819	42087	5055977	TESTCASE, ANN	39803 - Older Ad...	3/1/2021	Progress	891 Rehab Gr...		
4881820	42087	10026116	Testcase, FSPA2	9069FS - Commu...	3/1/2021	Progress	891 Rehab Gr...		
4881821	42087	3022019	Testcase, FSPO1	9093FS - MHSA-...	3/1/2021	Progress	891 Rehab Gr...		
4881822	42087	5009990	TESTCASE, ROB	9069FS - Commu...	3/1/2021	Progress	891 Rehab Gr...		

View: 10 << First < Prev 1 Next > Last >> PDF

25. Below is Co- Clinician Home screen view. Those note still in pending states.

Welcome: PROVIDER2 TESTUSER

Home Menu Log out

Enter New Service:
Type of Service
Select --- To start a new service note, select the type of service

Notes Client Shortcuts Lab Results (0)

Pending Services 4 Results

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
4881819	42087	5055977	TESTCASE, ANN	39803 - Older Ad...	3/1/2021	Progress	891 Rehab Gr...		
4881820	42087	10026116	Testcase, FSPA2	9069FS - Commu...	3/1/2021	Progress	891 Rehab Gr...		
4881821	42087	3022019	Testcase, FSPO1	9093FS - MHSA-...	3/1/2021	Progress	891 Rehab Gr...		
4881822	42087	5009990	TESTCASE, RO...	9069FS - Commu...	3/1/2021	Progress	891 Rehab Gr...		

View: 10 << First < Prev 1 Next > Last >> PDF

How to complete the group note

Both Primary Clinician and Co-Clinician must open each note and enter the body of note making it unique to each client and finalize them.

26. Below is Primary Clinician's note.

- a. Time Start: this when the group starting time. In this example, group start at 10:00 am.
- b. Services were provide in: What language is this group services provide in?
- c. Once the individual note enter entered into the note section, Primary Clinician can click "Finalize" bottom to finish the notes.

Group: Relationship Group (129) Title: Progress Note Client: TESTCASE, ANN (5055977)

Present Client #	Name	Gender	Age	Provider
<input checked="" type="checkbox"/> 5055977	TESTCASE, ANN Procedure: Rehab Group	Female	77	Older Adult Case Management - Outpatient Services
<input checked="" type="checkbox"/> 10026116	Testcase, FSPA2 Procedure: Rehab Group	Female	33	Community Adult Treatment Services-CATS - Full Service F
<input checked="" type="checkbox"/> 3022019	Testcase, FSPO1 Procedure: Rehab Group	Female	67	MHSA-Gaining Older Adult Life Skills - Full Service Partner:
<input checked="" type="checkbox"/> 5009990	TESTCASE, ROBERT JR Procedure: Rehab Group	Male	72	Community Adult Treatment Services-CATS - Full Service F

Additional participants in group: 0

Service Location: Phone Emergency? Pregnant/Post-Partum?

Service Date: 03/01/2021
Util. review date 10/31/2015

Billing time
Primary Clinician: 1305 - TESTUSER, PROVIDER3 Service Time: 01:40

Service Language

Episode Diagnosis Information					
Time Start:	Primary	Secondary	Tertiary	Fourth	SU
10:00 am <small>Hours:Minutes</small>	F25.1	F60.9	F31.81		

Client Primary Language: J - Other Non English Services were provided in: A - English

by: Service Provider HCIN/Language Line Face-to-face interpreter/staff Client Declines Interpreter Services

Reason for Decline: Select One Waiver Signed: Yes No

If Decline reason is other, please explain:

Note
Group section notes enter by the Primary Clinician (1305) here
Individualize note by Primary Clinician (1303) entries

Cancel Spell Check Save as Pending Finalize

26. Below is Co-Clinician's note. Once the individual note enter entered into the note section, Co-Clinician can click "Finalize" bottom to finish the notes.

Welcom **PROVIDER2 TESTUSER** Home Menu Log out

Group: Relationship Group (129) Title: Progress Note Client: TESTCASE, ANN (5055977)

Group Members 4 Members Show client RUs for: 1303 - TESTUSER, PROVIDER2, MFT

Present Client #	Name	Gender	Age	Provider
<input checked="" type="checkbox"/> 5055977	TESTCASE, ANN	Female	77	Older Adult Case Management - Outpatient Services
Procedure: Rehab Group				
<input checked="" type="checkbox"/> 10026116	Testcase, FSPA2	Female	33	Community Adult Treatment Services-CATS - Full Service P
Procedure: Rehab Group				
<input checked="" type="checkbox"/> 3022019	Testcase, FSPO1	Female	67	MHSA-Gaining Older Adult Life Skills - Full Service Partner:
Procedure: Rehab Group				
<input checked="" type="checkbox"/> 5009990	TESTCASE, ROBERT JR	Male	72	Community Adult Treatment Services-CATS - Full Service P
Procedure: Rehab Group				

Additional participants in group: 0

Service Location: Phone Emergency? Pregnant/Post-Partum? Service Date: 03/01/2021 Util. review date 10/31/2015

Billing time Primary Clinician 1303 - TESTUSER, PROVIDER2 Service Time: 01:00

Service Language Previous Entries:

Time Started: 10:00 AM Hours:Minutes

Episode Diagnosis Information

ICD-10:	Primary	Secondary	Tertiary	Fourth	SU
	F25.1	F60.9	F31.81		

Client Primary Language: J - Other Non English Services were provided in: A - English

Service Provider HCIN/Language Line Face-to-face interpreter/staff Client Declines inc. Interpreter Services

Reason for Decline: Select One Waiver Signed: Yes No

If Decline reason is other, please explain:

Note Previous Entries: (Select Note)

Group section notes enter by the Primary Clinician (1305) here

Individualize note by Co-Clinician (1303) entries

Cancel Spell Check Save as Pending Finalize

View group notes

On the left hand side, it display Primary Clinician's note; on the up right hand side, there is link to the Co-Clinician's note. On the right hand side, it display-co Clinician's note; on the up right hand side, there is link to the Primary-Clinician's note.

Welcome: PROVIDER3 TESTUSER Home Menu Log out

Group Service (42087) Individual (4881815), Primary Clinician: TESTUSER, PROVIDER3, MFT (1305) Type: Progress Note Co-Practitioner Service Notes: 4881819

Group Members

Client #	Client Name	Provider	Gender	Age	Present
5055977	TESTCASE, ANN	39803 - Older Adult Case Management - Outpati...	Female	77	<input checked="" type="checkbox"/>
10026116	Testcase, FSPA2	9069FS - Community Adult Treatment Services-CA...	Female	33	<input checked="" type="checkbox"/>
3022019	Testcase, FSP01	9093FS - MHSA-Gaining Older Adult Life Skills ...	Female	67	<input checked="" type="checkbox"/>
5099990	TESTCASE, ROBERT JR	9069FS - Community Adult Treatment Services-CA...	Male	72	<input checked="" type="checkbox"/>

4 records found.

Client: TESTCASE, ANN (5055977)
 Procedure: 891 Rehab Group
 Service Location: Phone
 Emergency: No
 Pregnant/Post-Partum: No
 Service Date: 3/1/2021

Role	Staff #	Staff Name	NPI	Time	Approved
Primary Clinician	1305	TESTUSER, PROVIDER3, MFT	1225152424	01:40	<input checked="" type="checkbox"/>

Service Language

Time Started: 10:00 AM
 Hours:Minutes
 ICD-10: F25.1 F60.9 F31.81
 Episode Diagnosis Information
 Primary Secondary Tertiary Fourth SU
 Client Primary Language: J - Other Non English
 Services were provided in: A - English
 by Service Provider HCIN/Language Line Face-to-face interpreter/staff Client Declines Interpreter Services
 Reason for Decline: Waiver Signed: Yes No
 If Decline reason is other, please explain:

Note

Group section notes enter by the Primary Clinician (1305) here
 Individualize note by Primary Clinician (1305) entries

Welcome: PROVIDER3 TESTUSER Home Menu Log out

Group Service (42087) Individual (4881819), Primary Clinician: TESTUSER, PROVIDER2, MFT (1303) Type: Progress Note Practitioner Service Note: 4881815

Group Members

Client #	Client Name	Provider	Gender	Age	Present
5055977	TESTCASE, ANN	39803 - Older Adult Case Management - Outpati...	Female	77	<input checked="" type="checkbox"/>
10026116	Testcase, FSPA2	9069FS - Community Adult Treatment Services-CA...	Female	33	<input checked="" type="checkbox"/>
3022019	Testcase, FSP01	9093FS - MHSA-Gaining Older Adult Life Skills ...	Female	67	<input checked="" type="checkbox"/>
5099990	TESTCASE, ROBERT JR	9069FS - Community Adult Treatment Services-CA...	Male	72	<input checked="" type="checkbox"/>

4 records found.

Client: TESTCASE, ANN (5055977)
 Procedure: 891 Rehab Group
 Service Location: Phone
 Emergency: No
 Pregnant/Post-Partum: No
 Service Date: 3/1/2021

Role	Staff #	Staff Name	NPI	Time	Approved
Primary Clinician	1303	TESTUSER, PROVIDER2, MFT	1457479990	01:00	<input checked="" type="checkbox"/>

Service Language

Time Started: 10:00 AM
 Hours:Minutes
 ICD-10: F25.1 F60.9 F31.81
 Episode Diagnosis Information
 Primary Secondary Tertiary Fourth SU
 Client Primary Language: J - Other Non English
 Services were provided in: A - English
 by Service Provider HCIN/Language Line Face-to-face interpreter/staff Client Declines Interpreter Services
 Reason for Decline: Waiver Signed: Yes No
 If Decline reason is other, please explain:

Note

Group section notes enter by the Primary Clinician (1305) here
 Individualize note by Co-Clinician (1303) entries

Please Note: The gateway template automatically does the billing math for you. It divides by number in group and adjusts for the co-facilitator. There fore, you no longer have to show you math in the body of the note. Also, the note above appears to bill 2:20 for one youth. It does not. When this note is pulled in ShareCare it will only bill 46.66 minutes per client.