**COMPLETED BY:**

1. Staff delivering services within scope of practice. Co-signature must be completed within reasonable time.

**COMPLIANCE REQUIREMENTS:**

1. A Group Progress Note must be completed after every group service contact with the client.
2. Content of each progress note must support the service claimed.
3. The Group Progress Note Template shall be used for all group services, and all prompts must be addressed.
   1. **Overview of Group** prompt is to document a narrative describing to global focus of the group for all beneficiaries attending.
   2. **Collateral Server** prompt is to document the clinically compelling reason for a collateral server, if applicable (e.g., the mode of therapy used requires a co-facilitator).
   3. **Travel To/From** is used to document when the server must travel to conduct the group.
   4. **Intervention** shall document how the global focus of the group directly addresses the individual beneficiary’s symptoms, condition, diagnosis, and/or risk factors. This section is to be individualized to the beneficiary.
   5. **Client Response** documents how the individual beneficiary responded to the group intervention – this is to be individualized to the beneficiary.
   6. **Next Steps** documents planned action steps by the provider or beneficiary, collaboration with beneficiary, collaboration with other provider(s), and/or update to problem list.
4. Data must be entered into the Electronic Health Record (EHR).
5. Every progress note within the EHR must be completed and final approved within 3 business days (date of service is day 0).
   1. Progress notes signed by a provider needing co-signature are considered “on time” when the provider signs the note within 3 business days and the co-signer signs with a reasonable time.
   2. Notes will no longer be disallowed for being final approved late but may be marked out of compliance.

**DOCUMENTATION STANDARDS:**

1. Service entry shall be completed as a part of the progress noting process.
2. Completion and final approval of the progress note by the staff is a certification the documented service was provided personally, and the service was provided to a beneficiary meeting access criterion, or during assessment to determine if the beneficiary meets criteria.
3. When it is not completed and final approved, the note is at risk for deletion by another server.
4. Paper forms are only to be completed when the EHR is not accessible and/or when staff have not yet been trained in the EHR.
5. Progress notes are not viewed as complete until they are final approved.