

Group Therapy Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A group therapy note is the progress note a clinician writes for each member of a group psychotherapy session. It pairs a brief group-level summary of the session's topic and interventions with individualized documentation of that member's participation, response, and progress. Each member's note is filed in their own record.

Group header & attendance the session's who and when

Do: record group name and type, session number, facilitator and credentials, the count of members present, and start/stop times.

Pitfall: listing other members by name in this member's note; the roster belongs in an attendance log, not in every chart.

Group summary: topic & interventions the shared layer

Do: record the session topic or curriculum and what you did as facilitator; this part may read the same across member notes.

Pitfall: letting the shared summary be the whole note; the individualized sections make each note a distinct record of a distinct service.

Individual participation & response this member only

Do: document this member's engagement, in-session work, and response; describe peer interaction by role ("another member"), never by name.

Pitfall: quoting or describing another member's disclosure in this member's record.

Mental status & risk still individual in a group room

Do: record member-specific observations and a risk statement each session.

Pitfall: silence on risk; a group setting does not suspend individual monitoring.

Progress toward plan goals medical necessity lives here

Do: tie the session to the member's own numbered treatment plan goal.

Pitfall: substituting the group's purpose for the member's goal; necessity is judged member by member.

Plan & next steps dated and specific

Do: record homework, the next session, and any indicated individual follow-up.

Pitfall: a bare "continue group"; say what continuing group is meant to achieve for this member.

Before you sign

- ☐ One note per member, in that member's record
- ☐ Individual sections differ from every other member's note
- ☐ No other member named or identifiable
- ☐ Risk status stated for this member
- ☐ Progress tied to this member's plan goal
- ☐ Attendance count and start/stop times recorded
- ☐ Signed with credentials, dated promptly

Drafting with AI

Capture 30 seconds of bullets after group: topic, interventions, then one line per member on participation, response, risk, and plan.

"Draft individualized group therapy notes for 8 members from this group summary and these per-member bullets, CBT skills group for anxiety, session 5 of 10: ..."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

100–250 words
per member

5–10 min per member
clinical team estimate

After every group session
one note per member

Care team · payers · auditors
who reads it

Group Therapy Note Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client (initials): _____ Date: _____ Session #: _____ Group name/type: _____

Facilitator(s) / credentials: _____ Members present (count): _____ Start/stop times: _____

GROUP SUMMARY · the shared layer, may repeat across member notes

Topic & curriculum

Session topic, curriculum or agenda item, stage of the group

Facilitator interventions

What you did: teaching, exercises, process work, handouts

INDIVIDUAL · this member only, different in every member's note

Participation & response

This member's engagement, in-session work, response to interventions; peers by role only, never by name

Mental status & risk

Member-specific observations and a risk statement for this session

Progress toward plan goal(s)

Link this session to the member's own numbered treatment plan goal

Plan & next steps

Homework, next session, any indicated individual follow-up

Clinician signature / credentials: _____ Date signed: _____