

Psychological Testing Administration Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A psychological testing administration note documents a test administration and scoring encounter: which instruments were given, who gave each one, and the total face-to-face minutes behind each billed unit (CPT 96136 to 96139). The substance is a Medicare payment condition; the discrete note is convention. Most run 150 to 350 words plus the time log.

Encounter header and the order medical necessity starts here

Do: tie the session to the treating practitioner's order and the referral question; Medicare treats testing as a diagnostic test.

Pitfall: a note floating free of any order; without the order and rationale in the chart, every unit is deniable.

Tests administered, by name no unnamed batteries

Do: list every instrument given that day by full name or standard abbreviation; full batteries typically run 4 to 8 hours.

Pitfall: "comprehensive battery per referral"; unnamed tests read as tests that may not have happened.

Administrator and role the code split turns on this

Do: say who gave each test: psychologist (96136/96137) or trained technician (96138/96139); name and credential them.

Pitfall: an unstated administrator leaves neither code pair supported; the claim rests on nothing.

Supervision statement general versus direct

Do: name the supervisor and record what was delivered; the regulation requires general supervision: available, not present.

Pitfall: boilerplate claiming on-site supervision that the appointment book contradicts.

The time log minutes, not clock ceremony

Do: record total face-to-face administration and scoring minutes; a new unit at 16 past each increment; combine multi-day time on the last date of service.

Pitfall: unit-shaped time; exactly 30 minutes per unit, every session, is the first flag reviewers pull.

Behavioral observations validity's evidence

Do: note effort, breaks, accommodations, and anything bearing on validity; specific beats long.

Pitfall: the same "cooperative, adequate effort" line copied forward across sessions supports nothing.

Scoring and disposition scoring in, interpretation out

Do: keep scoring minutes inside the total, route raw results to the interpreting clinician, and sign the note.

Pitfall: interpretation smuggled in; integration and report writing belong to the evaluation codes.

Before you sign

- ☐ Every instrument named, no bare "battery"
- ☐ Administrator and role stated for each test
- ☐ Total minutes support the billed units (midpoint rule)
- ☐ Multi-day time combined on the last date of service
- ☐ Supervision level and availability documented
- ☐ Observations specific to today's session
- ☐ Interpretation left to the evaluation report

Drafting with AI

Give it the day's shorthand: tests, who administered, minutes, observations; it drafts the full note with the supervision statement and the unit math shown.

"Draft a testing administration note: technician gave CVLT-3 and CPT-3, 117 minutes today, 96 on day one, combined and reported on today's date of service."

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

150 to 350 words
plus the time log

4 to 10 min by hand
clinical team estimate

General supervision
the Medicare technician rule

Payers · auditors · boards
who reads it

Psychological Testing Administration Note Template

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

Patient (initials):

DOB:

Date of service:

Ordered by (treating practitioner):

Order date:

Referral question:

Tests administered today

Each instrument by full name or standard abbreviation · note any carried over from a prior day

Administrator and role

Who gave each test · psychologist (96136/96137) or trained technician (96138/96139) · name and credentials

Supervision (technician-administered testing)

Supervising psychologist or physician · level delivered: general (available) or on site · how availability was documented

Time log (administration + scoring minutes)

Today's start, stop, breaks, and total · prior days of this battery · combined total reported on the last date of service · units supported (30 minutes, then 16+ past each increment)

Behavioral observations

Effort and engagement · breaks, accommodations, interruptions · anything bearing on validity

Scoring and disposition

Scored by, with scoring minutes inside the total · raw results routed to the interpreting clinician · feedback plan

Completed by (name and credentials):

Signature:

Date: