

# Alliance for Equity in Cancer Care

an initiative funded by Merck Foundation

**FOR PHYSICIANS, APPs, and PAs**

## Principal Illness Navigation (PIN) Billing Sample Documentation HCPCS G0023 & G0024

This document provides standardized forms and examples to support documentation of Medicare Principal Illness Navigation (PIN) services. The forms are aligned with CMS expectations for person-centered, disease-specific care planning and incorporate the CMS Accountable Health Communities Health-Related Social Needs (HRSN) Screening Tool as the foundation for identifying social barriers that may affect treatment adherence and outcomes. Practices should adapt these forms to their workflow and EHR while ensuring documentation remains consistent with current CMS guidance.

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### Completed Care Plan Template (*Sample Patient: Mary Smith*)

**Problem:** Metastatic breast cancer on chemotherapy

**Goal:** Complete chemotherapy without avoidable treatment delays.

**Preferences:** Morning appointments and phone follow-up.

**Barriers:** Transportation and food insecurity.

**Interventions:** Arrange transportation, connect to food resources, reinforce symptom management, coordinate oncology appointments, weekly follow-up.

**Responsible Team:** Navigator, oncologist, social worker, PCP.

**Target Date:** Monthly review.

**Outcome:** Transportation secured; food assistance initiated; no missed chemotherapy visits.

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## PIN Workflow

- Referral from treating practitioner
- Confirm patient eligibility for PIN
- Complete initiating visit
- Obtain and document patient consent
- Complete baseline PIN Assessment
- Complete CMS AHC HRSN screening
- Develop person-centered disease-specific care plan
- Provide navigation services and track cumulative monthly time
- Review and update care plan monthly
- Bill G0023 after first 60 minutes and G0024 for each additional full 30 minutes

## Completed PIN Assessment Template (*Sample Patient: Mary Smith*)

**Patient:** Mary Smith, 72-year-old female

**Diagnosis:** Metastatic breast cancer receiving chemotherapy

**Reason for Referral:** High-risk condition requiring ongoing coordination and navigation.

**Clinical Status:** Fatigue and nausea after chemotherapy; hypertension controlled; lives alone.

**Goals:** Complete chemotherapy, avoid hospitalization, remain independent.

**Preferences:** Telephone follow-up; morning appointments; written education.

**Functional Status:** Independent in ADLs with treatment-related fatigue.

**Housing Instability:** Negative

**Food Insecurity:** Positive – difficulty obtaining nutritious meals during treatment.

**Transportation Needs:** Positive – needs transportation assistance for oncology visits.

**Utility Needs:** Negative

**Interpersonal Safety:** Negative

**Additional Navigation Needs:** Medication education, appointment coordination, oncology financial counseling, limited caregiver support.

**Navigation Summary:** Patient meets PIN criteria due to serious high-risk illness and social barriers affecting treatment adherence.

**Recommended Interventions:** Transportation referral, food pantry referral, social work, financial counseling, weekly navigation calls, care coordination.

**Follow-up:** Weekly telephone outreach; monthly care plan review.

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## References

- [CMS CY 2024 Medicare Physician Fee Schedule Final Rule](#) – Final rule establishing Medicare payment policies for CY 2024, including the creation of Principal Illness Navigation (PIN) services and HCPCS codes G0023 and G0024.
- [CMS Health-Related Social Needs \(HRSN\) Frequently Asked Questions \(FAQ\)](#) – CMS guidance addressing Caregiver Training Services, Community Health Integration (CHI), Principal Illness Navigation (PIN), and related documentation and billing questions.
- [CMS Accountable Health Communities \(AHC\) Health-Related Social Needs Screening Tool](#) – Official CMS HRSN Screening Tool (PDF) used to assess the five core health-related social needs domains.
- [Medicare.gov – Principal Illness Navigation Services Coverage](#) – Official Medicare beneficiary guidance describing eligibility, covered services, provider requirements, frequency, and cost-sharing for PIN services.
- [A Guide to Using the CMS Accountable Health Communities HRSN Screening Tool](#) – CMS implementation guide describing the purpose of the screening tool, scoring, administration, interpretation, and best practices for integrating HRSN screening into clinical workflows.