Outline

Why is Documentation the Topic Clinicians Love to Hate?
- How do you feel about documentation?
- Why is documentation so daunting?
- Why is documentation the topic clinicians love to hate?
- Why document?

Medical Necessity
- Definition of Medical Necessity
- What is "The Golden Thread" and how does it relate to medical necessity?
- What is the role of the diagnosis in justifying medical necessity?

How to Write a Treatment Plan
- Definition of a treatment plan
- Everything that's needed in a treatment plan and why
- How to write a treatment plan that justifies medical necessity using behavioral language and the "golden thread" with examples
- Practice writing a treatment Plan

How to Write a Session Note
- Definition of a session note and how it relates to the treatment plan
- Everything that's needed in a session note and why
- How to write a session note that justifies medical necessity using behavioral language and the "golden thread" with examples
- Practice writing a session note

How to Write an Intake Summary
- Definition of an intake summary and how it relates to all other documentation
- Everything that's needed in an intake summary and why
- How to write an intake summary that lays the ground for medical necessity

How to Write Case/Collateral Contact Notes
- Definition of a case/collateral contact note and how it relates to the treatment plan
- Everything that's needed in a case/collateral contact note and why
- How to write a case/collateral Contact Note that justifies medical necessity using behavioral language and the "golden thread" with examples

How to Write a Discharge Summary
- Definition of a discharge summary and how it relates to the treatment plan
- Everything that's needed in a discharge summary and why
- How to write a discharge summary that completes the "golden thread" with examples

Live Seminar Schedule

7:30 Registration/Morning Coffee & Tea
8:00 Program begins
11:50-1:00 Lunch *(on your own)*
4:00 Program ends

There will be two 15-min breaks (mid-morning & mid-afternoon). Actual lunch and break start times are at the discretion of the speaker. A more detailed schedule is available upon request.

Objectives
- Explain the importance of proper documentation in informing clinical decision-making
- Evaluate the role of the clinical diagnosis in justifying medical necessity and providing more effective services to clients
- Determine how to use the behavioral language required by insurance companies to facilitate delivery of services to clients
- Explain how to document what really happens in a clinical session without violating privacy or confidentiality
- Assess medical necessity by employing the "golden thread" for improved treatment outcomes

Target Audience: Mental Health Administrators • Psychiatrists • Psychologists Counselors • Marriage and Family Therapists • Psychotherapists • Social Workers Office Managers • Mental Health Nurses • Other Mental Health Professionals

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Mastery in Mental Health Documentation & Medical Necessity

Comprehensive Clinical Documentation for Psychotherapists

Towson, MD
Wednesday, April 10, 2019

Ellicott City, MD
Thursday, April 11, 2019

Bowie, MD
Friday, April 12, 2019

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Comprehensive Clinical Documentation for Psychotherapists

- **Pass** audits, **protect** your income, **save** time, and **reduce** your anxiety
- **Simplify** and **clarify** the documentation process
- Write quick, thorough, and effective treatment plans and session notes
- Create records which can be subpoenaed without violating privacy or confidentiality
- Translate your work into the language required by **insurance companies**
- Maintain **quality of care** and professional standards, all while representing your work with integrity

Current Medicare Standards

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Mastery in Mental Health Documentation & Medical Necessity

Comprehensive Clinical Documentation for Psychotherapists

The Gold Standard for Documentation

Clinical documentation is a professional standard of care, but there is little guidance about what to write or how to write it. Paperwork can seem disconnected from helping clients. It can create confusion and anxiety about possible violations of privacy and confidentiality, potentially traumatic audits, and even legal nightmares. What are the criteria for a client needing services? How is medical necessity justified? How can the "golden thread" of documentation be created and maintained so that audits are passed and a professional standard of care is maintained even when insurance is not involved?

This course can help answer these questions and more! Effective clinical documentation is not rocket science. It is a formula that, once learned, translates clinical thinking into clean documentation, so that writing notes and treatment plans can be done quickly and efficiently, getting authorizations is easy, and audits are not as threatening. In addition, confidentiality is not violated and continuity of care is practiced. Choose mastery over misery and allow good clinical documentation to be a contribution to high quality clinical work rather than a detour away from it.

Speaker

Beth Rontal, LICSW, is a psychotherapist in private practice in Brookline, Massachusetts, as well as a documentation consultant (wizard) and private supervisor. Ms. Rontal earned her MFA from Boston University, and her Master's in Social Work from Simmons College in Boston. She was clinical supervisor at a mental health clinic for 16 years, where she was instrumental in developing and implementing the clinic's first electronic documentation system. This implementation significantly reduced documentation time and errors and decreased the paperwork returned by clinicians from 65% to 8%, which in turn allowed for the addition of 3 to 5 clinical hours per week and generated thousands of dollars in savings for the company.

Ms. Rontal continues to be a developer and consultant in the field of clinical documentation. She is a sought-after national lecturer who has taught seminars over the course of many years, in addition to having published numerous articles on the topic.

Speaker Disclosure:
Financial: Beth Rontal is in private practice. She has intellectual property rights to Documentation Wizard. Ms. Rontal receives a speaking honorarium from PESI, Inc.
Non-financial: Beth Rontal has no relevant non-financial relationship to disclose

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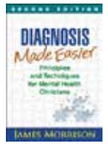

Diagnosis Made Easier, 2nd Edition
Principles and Techniques for Mental Health Clinicians

By James Morrison, M.D.

This popular practitioner guide and course text takes the reader step by step through diagnostic decision making in mental health. Acclaimed for both the clarity of his writing and his clinical expertise, James Morrison provides principles and decision trees for evaluating information from multiple sources and constructing a valid, clinically useful working diagnosis. More than 100 vivid vignettes-from the straightforward to the toughest cases-illustrate the practical application of these methods. Essential topics include developing a differential diagnosis and dealing with comorbidity.

DSM-5® Handbook of Differential Diagnosis

By Michael First, M.D.

DSM-5™ Handbook of Differential Diagnosis provides a comprehensive overview of the process of diagnosing DSM-5™ disorders while serving as a reference guide to assist in the differential diagnosis of individual patients. The handbook is an invaluable addition to the DSM-5™ collection and an important contribution to the mental health profession.

Mastering the DSM-5®:
Integrating New & Essential Measures Into Your Practice

By Mary Flett, Ph.D.

Mastering the DSM-5® provides a guide for each of the assessment measures, examples of how they can be implemented for various populations and settings, and suggestions for using evaluation tools with clients. Easy to use with case studies and examples, also includes implementation checklists, templates to chart and measure results, and links to formatted excel spreadsheets.

Questions? Call customer service at **800-844-8260**

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If your profession is not listed, please contact your licensing board to determine your continuing education requirements and check for reciprocal approval. For other credit inquiries not specified below, or questions on home study credit availability, please contact cepesi@pesi.com or 800-844-8260 before the event.

Materials that are included in this course may include interventions and modalities that are beyond the authorized practice of mental health professionals. As a licensed professional, you are responsible for reviewing the scope of practice, including activities that are defined in law as beyond the boundaries of practice in accordance with and in compliance with your profession's standards.

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PSYCHOLOGISTS: The following state psychologist boards recognize activities sponsored by PESI, Inc. as an approved ACCME provider: Alaska, Arkansas, California, Colorado, Georgia, Illinois, Indiana, Kentucky, Maryland, Missouri, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, Pennsylvania and South Carolina. This activity consists of 6.0 clock hours of continuing education instruction. Certificates of attendance will be issued for you to submit to your state licensing board to recognize for continuing education credit. Full attendance is required; no partial credits will be offered for partial attendance.

PHYSICIANS: PESI, Inc. is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

PESI, Inc. designates this enduring material for a maximum of 6.0 AMA PRA Category 1 Credit(s). Physicians should only claim credit commensurate with the extent of their participation in the activity.

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OTHER PROFESSIONS: This activity qualifies for 380 minutes of instructional content as required by many national, state and local licensing boards and professional organizations. Save your course outline and certificate of completion, and contact your own board or organization for specific requirements.

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