

Outline

Get Past Your Negative Feelings About Documentation

- Documentation as a contributor to good clinical work
- Documentation through the lens of the “Golden Thread”
- Documentation as a protector of income and integrity
- Anxiety-reducing answers to common questions

Embrace the Requirement of Medical Necessity

- The elements of medical necessity
- The “Golden Thread” as a key part of medical necessity.
- Establish the connection between diagnosis and treatment

How to Write:

The Diagnostic Summary

- What’s needed in the diagnostic summary, and why
- How the diagnostic summary initiates the path of the Golden Thread

The Treatment Plan

- What’s needed in a treatment plan, and why
- Operationalize the presenting problem
 - Questions to ask
 - Describe the diagnostic criteria in behavioral terms
- Make a clear connection between goals, objectives, and interventions.
- Protect the client and the therapist with a thoughtful risk assessment
- Evaluate client progress.
- How the treatment plan it continues the path of the Golden Thread

And more ...

Activity: Write a treatment plan

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.
- Identify potential red flags in documentation and the proper corrective measures for them.

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

The Session Note

- The session note’s relationship to the treatment plan
- What’s needed in a session note and why
- Descriptive or narrative approach to interventions used
- Changes to treatment plan
- Justify multiple sessions

Activity: Write a session note

The Case and Collateral Contact Note

- What’s needed in a case and collateral contact note and why
- Differences between case and collateral contact notes
- Provide a clinical justification for the case/ collateral consult

The Discharge Summary

- What’s needed in a discharge summary, and why
- How the discharge summary completes the Golden Thread.

20 DOCUMENTATION RED FLAGS THAT LEAD TO TROUBLE

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.

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Mental Health Documentation & Medical Necessity

Simple, Clear Guidelines that Maintain Quality of Care and Protect Your Practice

Duluth, MN
Tuesday, October 22, 2019

Brooklyn Park, MN
Wednesday, October 23, 2019

Bloomington, MN
Thursday, October 24, 2019



REGISTER NOW! pesi.com/express/73928

Mental Health Documentation & Medical Necessity

Simple, Clear Guidelines that Maintain Quality of Care and Protect Your Practice

- ✓ Spend less time on paperwork.
- ✓ Lessen the chance of audits, and be better prepared to pass the ones that do come your way.
- ✓ Reduce costly errors and billing denials.
- ✓ Demonstrate integrity with documentation that meets professional standards.
- ✓ Start seeing documentation as a contributor to good clinical work, not a detour away from it.



Current Medicare Standards

Duluth, MN
Tuesday, October 22, 2019

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Wednesday, October 23, 2019

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Mental Health Documentation & Medical Necessity

Simple, Clear Guidelines that Maintain Quality of Care and Protect Your Practice



"I love paperwork!"

--Said NO clinician, EVER.

Yet, the success of your practice depends on your ability to write good intake summaries, treatment plans, session notes, case/collateral notes, and discharge summaries. Taken together, these pieces to the documentation puzzle support your goal of providing quality services to your clients. They also impact the stability and success of your practice. When done well, they result in piece of mind and timely payment from insurance companies. When done poorly, they lead to the misery of denials, audits, and lost income.

The great news is that you CAN become proficient at mental health documentation and medical necessity. This seminar provides clear and simple guidelines for recordkeeping that adheres to professional standards and ethical codes, supports delivery of quality care, and reduces errors and delays in payments.

You will receive expert instruction from Beth Rontal, LICSW, affectionally known as the Documentation Wizard. For over 15 years, Beth has been instrumental at changing how individuals and organizations approach documentation. The results speak for themselves. Rates at which paperwork was returned to clinicians for correction have dropped significantly, in one case from 65% to under 8%. This gave clinicians back 3 to 5 clinical hours per week, saving thousands of dollars and improving job satisfaction.

Speaker

Beth Rontal, LICSW, is a psychotherapist in private practice Brookline, Massachusetts, as well as a documentation consultant 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, 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.



Seminar on DVD or CD Package: You can purchase a self-study package on the subject. You will receive a set of CDs or DVDs that include a digital copy of the seminar manual and post-test/evaluation. You and your colleagues can receive CE hours for a nominal fee. To determine if homestudy credits are available for your profession go to www.pesi.com or call 800-844-8260. Check with your licensing board to verify acceptance of self-study credits for license renewal.

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*SAVE BY INCLUDING THESE PRODUCTS WITH SEMINAR REGISTRATION!

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.

Private Practice Essentials:

Business Tools for Mental Health Professionals

By Howard Baumgarten, MA, LPC

Private Practice Essentials is an innovative, practical guide and workbook for creating business and clinical success in your counseling and therapy practice. You'll be guided through numerous exercises that provide a solid and personalized plan with realistic and attainable goals. It's like having a professional business consultant right at your fingertips, including 75+ reproducible worksheets, forms and exercises.

Questions? Call customer service at 800-844-8260

Live Seminar Continuing Education Credit Information

Credits listed below are for full attendance at the live event only. After attendance has been verified, pre-registered attendees will receive an email from PESI Customer Service with the subject line, "Evaluation and Certificate" within one week. This email will contain a link to complete the seminar evaluation and allow attendees to print, email or download a certificate of completion if in full attendance. For those in partial attendance (arrived late or left early), a letter of attendance is available through that link and an adjusted certificate of completion reflecting partial credit will be issued within 30 days (if your board allows). Please see "LIVE SEMINAR SCHEDULE" on this brochure for full attendance start and end times. NOTE: Boards do not allow credit for breaks or lunch.

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.

PESI, Inc. offers continuing education programs and products under the brand names PESI, PESI Healthcare, PESI Rehab and Psychotherapy Networker.

COUNSELORS: This intermediate activity consists of 6.25 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please save the course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

MINNESOTA COUNSELORS: Application for MN BBHT continuing education credits has been submitted. Please contact us at 800-844-8260 or info@pesi.com for the status of LPC CE hours.

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MARRIAGE & FAMILY THERAPISTS: This activity consists of 380 minutes of continuing education instruction. Credit requirements and approvals vary per state board regulations. You should save this course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

MINNESOTA MARRIAGE & FAMILY THERAPISTS: An application has been submitted to the Minnesota Board of Marriage & Family Therapists. Credit is pending.

WISCONSIN MARRIAGE & FAMILY THERAPISTS: This course has been submitted to the Wisconsin Association for Marriage and Family Therapy for review. Credit is pending.

NURSES, NURSE PRACTITIONERS, AND CLINICAL NURSE SPECIALISTS: This activity consists of 6.25 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please save the course outline, the certificate of completion you receive from this activity and contact your state board or organization to determine specific filing requirements.

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PESI, Inc. designates this live activity 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. PESI, Inc. is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education.

MINNESOTA PSYCHOLOGISTS: For the most up-to-date credit information, please go to: www.pesi.com/events/detail/73928.

SOCIAL WORKERS: PESI, Inc., #1062, is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved as ACE providers. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit. PESI, Inc. maintains responsibility for this course. ACE provider approval period: January 27, 2017 - January 27, 2020. Social Workers completing this course receive 6.25 Clinical Practice continuing education credits. Course Level: Intermediate. Full attendance is required; no partial credits will be offered for partial attendance. A certificate of attendance will be awarded at the end of the program to social workers who complete the program evaluation.

MINNESOTA SOCIAL WORKERS: PESI, Inc. is an approved provider with the State of Minnesota, Board of Social Work. Provider #: CEP-140. This course has been approved for 6.0 continuing education hours.

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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We would be happy to accommodate your ADA needs; please call at least two weeks prior to the seminar date.

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Walk-ins are welcome but admission cannot be guaranteed. Call M-F 7:00-6:00 Central Time for space availability if registering within one week of seminar.

TUITION OPTIONS

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- \$30 Tuition:** If you are interested in being our registration coordinator for the day, go to: www.pesi.com/coord for availability and job description, or call our Customer Service Dept. at 800-844-8260.

- Groups of 5 or more:** Call 800-844-8260 for discounts.

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MENTAL HEALTH DOCUMENTATION & MEDICAL NECESSITY: SIMPLE, CLEAR GUIDELINES THAT MAINTAIN QUALITY OF CARE AND PROTECT YOUR PRACTICE

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