

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

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 Webinar Schedule (Times listed in Eastern)

8:00 Program begins

11:50-1:00 Lunch Break

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.

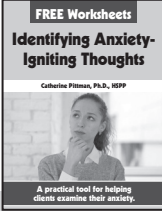
Objectives

1. Determine the importance of proper documentation in informing clinical decision-making.
2. Evaluate the role of the clinical diagnosis in justifying medical necessity and providing more effective services to clients.
3. Determine how to use the behavioral language required by insurance companies to facilitate delivery of services to clients.
4. Assess how to document what really happens in a clinical session without violating privacy or confidentiality.
5. Assess medical necessity by employing the “golden thread” for improved treatment outcomes.
6. Analyze potential red flags in documentation and the proper corrective measures for them.

FREE BONUS OFFER!

Easy-to-Use Anxiety Assessment Tools

Get yours today at www.pesi.com/anxietyws



Group Training Solutions Made Easy!

- ONLINE or in-person
- Customizable
- Easy remote access
- From 5 to 5000
- CE hours available



www.pesi.com/inhouse

NON-PROFIT
ORGANIZATION
U.S. POSTAGE PAID
EAU CLAIRE, WI
PERMIT NO. 32729

PESI, Inc.
P.O. Box 1000
Eau Claire, WI 54702-1000

Mental Health Documentation & Medical Necessity

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

LIVE Interactive Webinar
Friday, August 6, 2021

BONUS! – Registration includes FREE on-demand access for 3 months.



REGISTER NOW:
pesi.com/webcast/85433

Join us online for this live training!

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

LIVE Interactive Webinar
Friday, August 6, 2021

BONUS! – Registration includes FREE on-demand access for 3 months.



A Non-Profit Organization Connecting Knowledge with Need Since 1979

REGISTER NOW:
pesi.com/webcast/85433

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, MSW, 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.

Target Audience:

Mental Health Administrators • Marriage and Family Therapists • Physicians
Psychiatrists • Psychologists • Counselors • Social Workers • Office Managers
Mental Health Nurses • Addiction Counselors • Nurses • Other Mental Health Professionals



Risk Free Purchase! PESI stands by our trainings and we have a 100% satisfaction guarantee. If you are not satisfied, please contact our customer service team at www.pesi.com/info or 800-844-8260 and we will make it right.

PESI Offers Group Discounts!

To save on groups of 5 or more, contact us at pesi.com/info!

Questions? Visit our FAQ page at www.pesi.com/faq or contact us at www.pesi.com/info.

Have a seminar idea? A manuscript to publish? The nation's top speakers and authors contact PESI first. If you are interested in becoming a speaker or have a new topic idea, please contact **Anna Rustick** at arustick@pesi.com or call **715-855-8195**.

Meet Your Speaker

Beth Rontal, MSW, 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.

CE CREDITS AVAILABLE FOR LIVE WEBINAR

This continuing education activity is designed to meet state board requirements for the following professionals: **Marriage and Family Therapists, Psychologists, Counselors, Social Workers, Addiction Counselors, Nurses, and Physicians.**

For specific credit approvals and details, visit pesi.com/webcast/85433

National CE Credit Approvals For Live Webinar

Credits listed are for full attendance at the live webcast only. The CE certificate can be downloaded/printed after completing the webcast and passing the online post-test evaluation (80% passing score). Please see schedule for full attendance start and end times. NOTE: Boards do not allow credit for breaks or lunch.



This course has been approved by PESI, Inc., as a NAADAC Approved Education Provider, for 6.0 CE in the Counseling Services skill group. NAADAC Provider #77553. PESI, Inc. is responsible for all aspects of their programming. Full attendance is required; no partial credit will be awarded for partial attendance.



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



PESI, Inc. is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation. Nurses in full attendance will earn 6.25 contact hours.



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, 2020 - January 27, 2023. Social Workers completing this course receive 6.25 Clinical 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.

Self-study credit: To check availability for your profession, go to www.pesi.com or call 800-844-8260 with your licensing board to verify acceptance of self-study credit for license renewal.

*Content and materials in this course may include interventions and modalities that are beyond the authorized practice of your profession. 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 Kids, PESI Rehab and Psychotherapy Networker.

Earn up to
6.25 CE
Hours for one
low price!

For all credit approvals and details, visit: www.pesi.com/webcast/85433

SIGN UP-TODAY! Choose your Learning Experience!

PESI offers multiple formats to fit your CE needs

Register Online at: pesi.com/webcast/85433

Live Interactive Webinar (Option 1)

August 6, 2021 [PWZ85432]

\$219.99 tuition

8am Eastern time

Live Webinar Experience:

- Participate live in real-time while connecting and collaborating with peers
- Ask the presenter your questions
- Earn a live CE certificate

FREE BONUS: Replay on-demand access for 90-days after webinar

**Live CE is only available when viewed live*

Get a Group Discount! Contact us at pesi.com/info to save for groups of 5 or more

On-Demand Digital Seminar (Option 2)

\$219.99 [POS055315]

Digital Seminar Experience:

- Learn at your own pace with 24/7 access from your PESI account
 - Access to the program materials
 - Enjoy lifetime on-demand access
 - Earn a self-study CE certificate
- CE hours and approvals may vary from live event. Visit www.pesi.com or call 800-844-8260 to check for availability.

DVD (Option 3)

\$219.99 [RNV055315]

DVD Experience:

- Self-study CE certificate available
- CE hours, approvals and cost of CE Certificates may vary from live event. Visit www.pesi.com or call 800-844-8260 to check for availability and pricing

Recommended Reading:



Feeling Great
The Revolutionary New Treatment for Depression and Anxiety

David D. Burns, M.D.

~~\$26.99~~ **\$19.99***



Telemental Health
The Essential Guide to Providing Successful Online Therapy

Joni Gilbertson, MA, NCC, LCPC, LMHC,
BC-TMH, CTMH

~~\$24.99~~ **\$19.99***

** Discount Included with purchase of the Webinar*

OTHER WAYS TO REGISTER

Phone: 800-844-8260

Fax: 800-554-9775

Mail: PESI, Inc.
PO Box 1000
Eau Claire, WI 54702-1000

*If mailing/faxing registration, find form at www.pesi.com/form or call 800-844-8260

ADA NEEDS

We would be happy to accommodate your ADA needs; Please notify us at time of registration.

QUESTIONS

Visit pesi.com/faq or contact us at pesi.com/info

TAXES AND SHIPPING

Taxes and shipping apply where applicable, see website for details

