



Clinical Record Making & Keeping

Essentials for Risk Management & Ethical Practice

Edward Zuckerman, Ph.D.

Objectives

This program consists of the recording and handouts from a full day seminar presented by Dr. Zuckerman. It will provide you with specific information and working tools for creating and keeping clinical records. The seminar handouts will include sample forms and other resources.

This seminar will enable you to describe:

- Ways to introduce new patients to your practice's procedures
- Five methods of assuring fully informed consent

- What to record and not record
- How to ensure your documenting is HIPAA-compliant
- How to ethically and legally release patient information
- The need for and desirable elements of a professional will
- Documenting issues with couples, kids, and families
- How to cope with issues raised by electronic records

6 Hours

Welcome to my practice

- What risk management means - Record retention and disposal - HIPAA: Gap analysis and safeguards decisions - Intake data collection - Sending a pre-appointment package

Documenting Informed Consent

- Five methods for assuring fully informed consent - The nature of consent - Voluntariness and competence - Issues with children and families - HIPAA-required complaint form - Informed consent to managed care

Documenting Decisions and Treatment

- What to record and not record - Quality records protect you
- Formats for Routine Progress Notes - HIPAA's rules as a baseline -Notice of Privacy Practices and the 'Consent' -Client access to and amendment of your records - Diagnostic options - Termination documents

Privacy and Confidentiality

- Personal, private, confidential, or privileged? - HIPAA privacy and authorizations - Crosswalking HIPAA and PA laws - "Confidential/HIPAA-compliance" notices - Requests for records - Your authorization form - Issues with couples, kids, and families - Sending records, confidential faxing, emailing, encryption

New Issues

- **Your Professional Will:** A new ethical & HIPAA requirement - Expected contents - Tailoring the contents
- **Electronic Records:** The HIPAA and HITECH Acts - Encryption's value and methods - Preservation and access - Known problems - Example & guidelines

Edward Zuckerman, Ph.D.

Edward Zuckerman earned his Ph.D. in Clinical Psychology from the University of Pittsburgh. He has worked in community mental health, with retarded adults, taught at the University of Pittsburgh and Carnegie Mellon for about 20 years, and was in full time independent practice of clinical psychology for almost 20 years. He also consults with Social Security Disability Determination in Greensburg, PA.

He is the author of the best-selling *The Paper Office* (in a 4rd edition for 2008) which contains all the forms and guidance one needs to operate a private practice legally, ethically, and profitably (see www.theclinicianstoolbox.com).

Dr. Zuckerman also edits the series of books called *The Clinician's ToolBox* for Guilford Press. He has presented workshops across the US. His presentations for J&K Seminars in 2003 and 2004 received very positive feedback.

Approved Home Study CE Hours for Psychologists Counselors Social Workers Nurses AOTA

Available for an additional fee - See Exam Enclosed

©J&K Seminars, LLC - 2010 - All Rights Reserved
904 Church Rd., Wyncote, PA 19095-1601

(800) 801-5415

Practice Level—Intermediate
www.JKSeminars.com

JK@JKSeminars.com