Empowered Therapy Inc.
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SOPs:
Clinician Steps to draft a Clinical Treatment Summary

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Summary:

These are processes to follow when a current client, a previous client, a current or previous client's legal representation, Telligen, BCBS-PPO, UHC, or a third party entity directly affiliated with BCBS-PPO or UHC is requesting clinical documentation. We provide a clinical treatment summary in lieu of clinical treatment notes. Please be sure to use these SOPs in conjunction with consultation with your supervisor, if applicable, and your on-site clinical director.

Resources:

PBenson@empoweredtherapy.org

lgarski@empoweredtherapy.org

Clinical Treatment Summary Template

On-site CDs

Your Supervisor (if applicable)

Coordinating with the Client:

1. If the client is currently in treatment, review and discuss either their request for the clinical treatment summary or the outside party's request for the clinical treatment summary at your next scheduled session.

   a. If the client or the outside party is requesting clinical treatment notes, be sure to explain to your client why this is against Empowered's policy (issues related to privacy, client confidentiality, etc).
      i. If you do not feel ready to have this part of the discussion with your client, email your supervisor and/or on-site clinical director and request a consultation meeting.
2. If the client is not currently in treatment, follow-up with them via either phone or email to discuss the request.
   a. If you elect to call the client, be sure to keep the call to under 15 minutes as we do not typically bill for this time. If you have questions about this practice, email your supervisor and/or on-site clinical director and request a consultation meeting.
   b. If the client or the outside party is requesting clinical treatment notes, be sure to explain to your client why this is against Empowered's policy (issues related to privacy, client confidentiality, etc).
      i. If you do not feel ready to have this part of the discussion with your client, email your supervisor and/or on-site clinical director and request a consultation meeting.

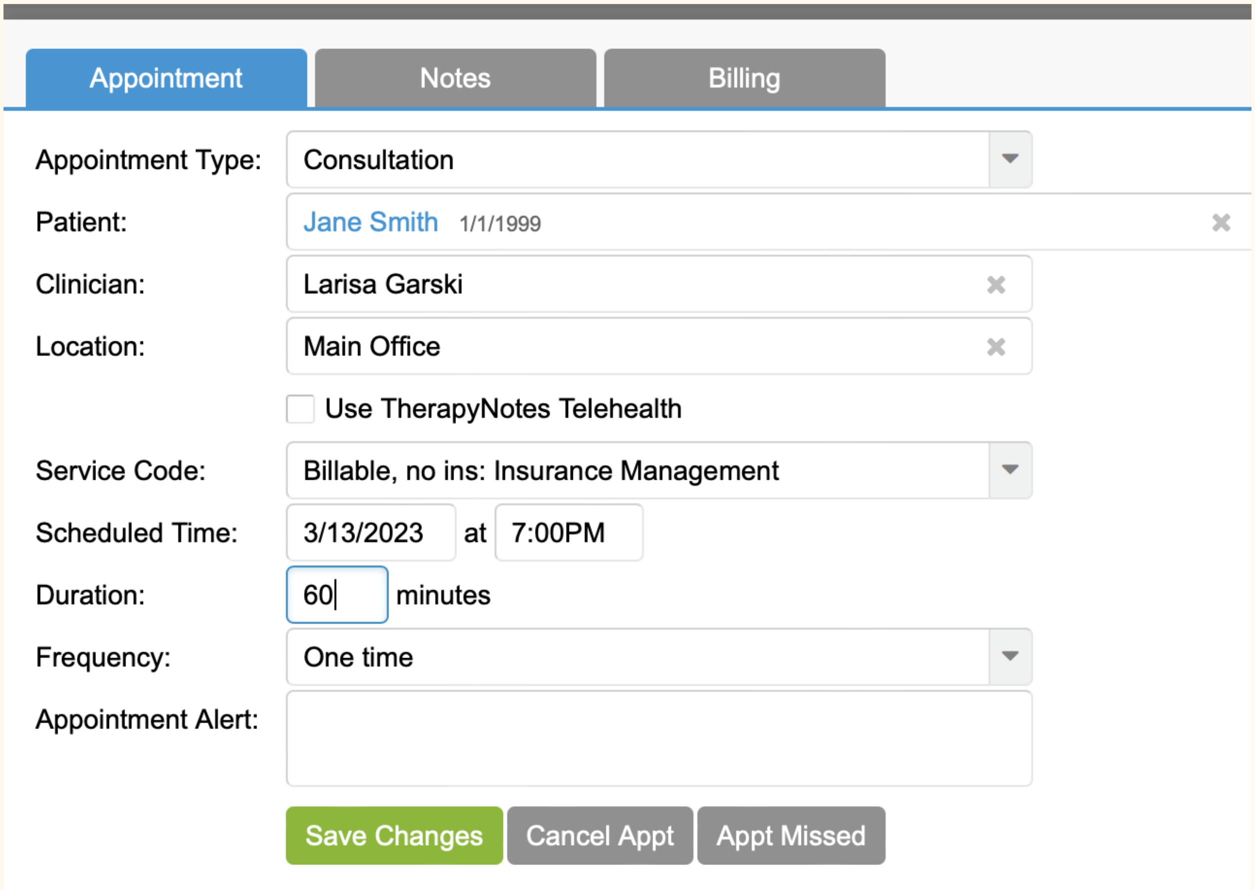
Drafting the Clinical Treatment Summary :

1. Meet with your supervisor and/or on-site CD to review the policies and procedures surrounding the drafting and releasing of the clinical treatment summary.
2. Review the Clinical Treatment Summary Template. Your clinical treatment summary should include:
   a. Diagnosis
   b. Current symptoms,
   c. Prescribed length of treatment.
   d. Summary of interventions
   e. Progress thus far in treatment.
   f. Current treatment plan within the body of the clinical treatment summary as well as attaching a pdf of said current treatment plan directly from Therapy Notes.
3. If you are currently under supervision, your supervisor must review, edit, and sign your clinical treatment summary.
4. If the client would like to send this clinical treatment to a specific entity such as their private insurance company or their current employer's HR department, you must

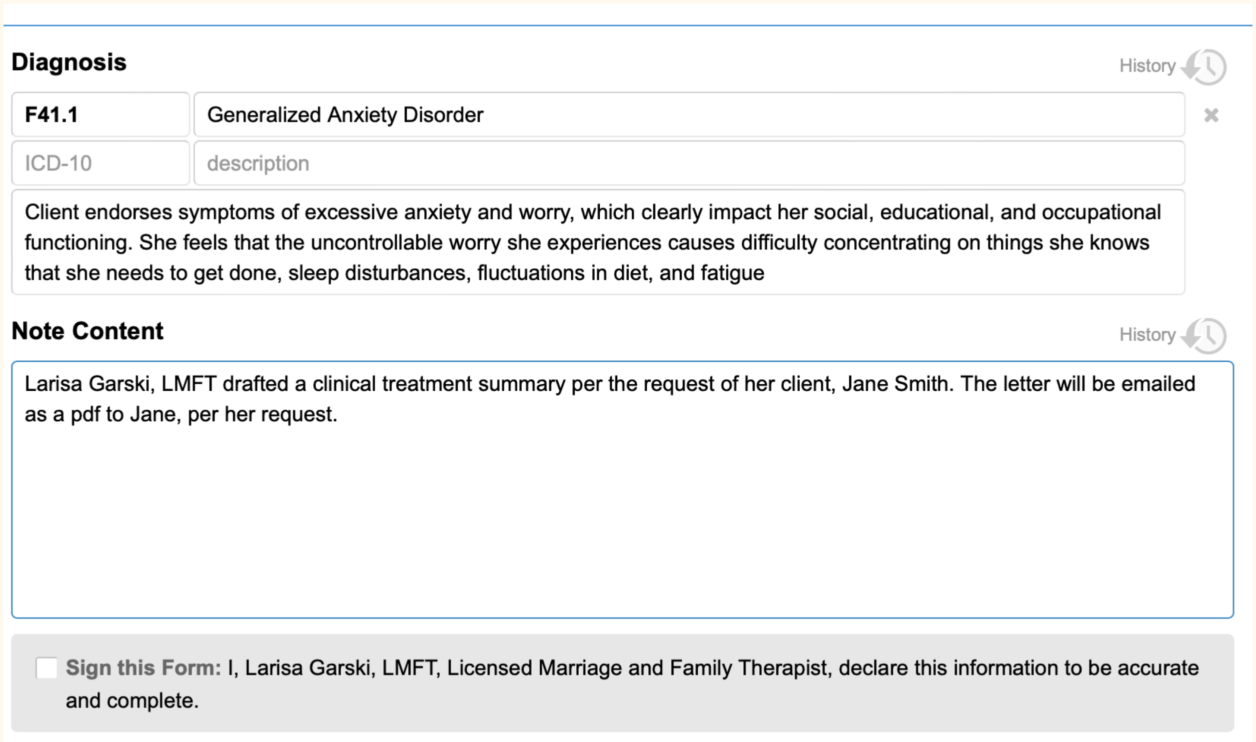
complete the necessary Release of Information form (ROI) with the client. Otherwise, you can simply release the clinical treatment summary to the client.

Billing for the Clinical Treatment Summary :

1. The standard rate for completing a clinical treatment summary is $30/10 minutes spent. This is due to the detailed and complex nature inherent in drafting this document as well as the time spent in consultation meetings to both prepare and review said document.
    a. A sliding scale rate is possible based on client need. If you have questions about this option, please email your supervisor and the Chief of Clinical Staff.
2. On the date you plan to finalize this clinical treatment summary, be sure to schedule it on your Therapy Notes calendar using the "Billable, no ins: Insurance Management" service code. We typically bill for no more than 60 minutes spent on a clinical treatment summary.



3. Be sure to draft the corresponding note:



Diagnosis History

F41.1	Generalized Anxiety Disorder
ICD-10	description

Client endorses symptoms of excessive anxiety and worry, which clearly impact her social, educational, and occupational functioning. She feels that the uncontrollable worry she experiences causes difficulty concentrating on things she knows that she needs to get done, sleep disturbances, fluctuations in diet, and fatigue

Note Content History

Larisa Garski, LMFT drafted a clinical treatment summary per the request of her client, Jane Smith. The letter will be emailed as a pdf to Jane, per her request.

☐ **Sign this Form:** I, Larisa Garski, LMFT, Licensed Marriage and Family Therapist, declare this information to be accurate and complete.

4. You will then track this clinical treatment summary in Gusto using the job title: Client Insurance Management
    a. You will be compensated at your full clinical rate for each hour spent. If you have any questions, please email Precious Benson, Payroll Manager, and Larisa Garski, Chief of Clinical Staff.