

# Documentation and Record Keeping: Essentials for Mental Health Professionals

This webinar explains the goals and potential benefits of effective clinical documentation as well as the ethical and legal requirements for doing so. Documentation is addressed from a clinical and risk management perspective. Specific recommendations are made for how to document the clinical services provided in a competent and effective manner. Additionally, common pitfalls to avoid are addressed. How to store and maintain records is addressed for both paper and electronic records. Precautions to take to protect and preserve records are described in detail along with how and when to dispose of them. Guidance is provided for following HIPAA and other laws and regulations relevant to documentation and record keeping. Participants in this webinar will receive practical guidance that can be integrated into daily practice to document more effectively, to better achieve the goals of thoughtfully created treatment records, and to meet and exceed professional standards and practice guidelines relevant to documentation and record keeping.

## Target Audience

Psychologists      Social Workers      Counselors  
Therapists      Psychiatrists      Nurses  
Course level: Intermediate

## Learning Objectives

At the end of this seminar, participants will be able to:

- 1) Explain the goals of documentation
- 2) Describe the elements of effective documentation
- 3) Explain how effective documentation is a risk management strategy
- 4) List steps to take to protect electronic health records
- 5) Name three things to avoid in your documentation

## Seminar Schedule

The webinar outline is attached. See the Live Webinar page for the start and end times.

## Outline

Begin 11 AM ET  
Goals of documentation  
Essentials element of documentation  
Advantages of effective documentation  
Risks of poor documentation  
Case law  
Examples  
Break 12:30-12:45 PM ET  
Content of documentation  
HIPPA  
Informed consent  
Risk management strategies  
Electronic records  
Key recommendations  
End 2:15 PM ET

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## The Presenter

Jeffrey E. Barnett, Psy.D., ABPP is a licensed psychologist and is board certified by the American Board of Professional Psychology in Clinical Psychology and in Clinical Child and Adolescent Psychology. Additionally, he is a Distinguished Practitioner in Psychology of the National Academies of Practice. He also is a Professor of Psychology at Loyola University Maryland. He is a nationally recognized expert in professional ethics issues for mental health professionals and has served as chair of the ethics committees of the Maryland Psychological Association, the American Psychological Association, and the American Board of Professional Psychology. He also has served as the Vice Chair of the Maryland Psychology Licensing Board. Dr. Barnett has numerous publications to include 13 books and over 250 articles and book chapters and over 300 professional presentations that focus on ethics, legal, and professional practice issues for mental health professionals. Through his many publications and presentations Dr. Barnett has made major contributions in ethics and ethics education, ethical decision-making, online education, mentoring, boundaries and multiple relationships, self-care and the promotion of psychological wellness, clinical supervision, tele-mental health, integrating religion and spirituality into clinical practice, business of practice, and integrating Complementary and Alternative Medicine into clinical practice. Among his many awards he is a recipient of the American Psychological Association's Award for Outstanding Contributions to Ethics Education and its award for Distinguished Contributions to the Independent Practice of Psychology.

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This seminar has been reviewed and approved by Keith Hannan, Ph.D., Laura Davie, LICSW, Tina Jenkins, Psy.D., and Loreen Yearick, MSN, RN. This approval expires on March 1, 2028.

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