**Starting Your Own Private Practice Part 2:**

**Legal, Ethical, and Best Practices-Clinical Documentation & Forms**

**Training Syllabus**

**Sponsored by:**

Scottsdale Recovery Center

10446 N 74th St #150, Scottsdale, AZ 85258

[(888) 663-7847](https://www.google.com/search?client=safari&rls=en&q=scottsdale+recovery+center&ie=UTF-8&oe=UTF-8)

**Facilitators:**

**Charise Schwertfeger, M.S., LMFT**

Charise received her graduate degree from the Marriage and Family Therapy program at Arizona State University, cohort graduation December 2009. She is a Licensed Marriage and Family Therapist who has worked as a clinician in multiple clinical settings including public mental health, private community agencies, as well as private practice. She has also supervised graduate intern clinicians and associate clinicians in the community health setting and private practice setting. She is a member of various clinical organizations for therapists and has additional training in the areas of Emotionally Focused Therapy (EFT) and Eye Movement Desensitization and Reprocessing (EMDR).

**Minon Maier, M.A., LMFT**

Minon received her graduate degree from the Marriage and Family Therapy program at the University of San Diego, graduation May 2005. She is a Licensed Marriage and Family Therapist who has worked as a clinician in multiple clinical settings including public mental health, inpatient treatment, acute care, private community agencies, as well as private practice. She has also supervised graduate intern clinicians and associate clinicians in the community health settings as well as private practice. She is a member of various clinical organizations for therapists and has additional training in the areas of Emotionally Focused Therapy (EFT) and Eye Movement Desensitization and Reprocessing (EMDR).

**Training Description and Objectives:**

Through lecture, discussion, and activities this training is designed to develop and strengthen clinicians’ knowledge of the legal, ethical, and professional requirements regarding clinical documentation in the state of Arizona. This training includes step by step points to guide the reader in completing required tasks required while operating a clinical private practice in the state of Arizona. Considerations in confidentiality, storage of patient’s personal information, creating a private practice and yearly revisions will also be discussed.

1. Identify forms, required in the state of Arizona, to be present in all client clinical files
2. Outline Requirements for Consent for Treatment
3. Managing Video or Audio Recordings
4. Requirements for Treatment Plan
5. Management of Client Records
6. Documenting Session Notes
7. Client Financial Records
8. Release of Information
9. Miscellaneous Practice Forms

\*This course reviews basic information regarding starting a business in Arizona and may not include all possible forms or procedures necessary for some clinicians. Each clinician is responsible for completing the requirements in their place of practice and following any guidelines or requirements which may be provided to them by outside entities. This training is provided based on experience of clinicians in the area and field, and the steps they were required to take. It also includes example information based on personal experience. Clinicians may experience differences in requirements based on their area of specialty, demographics, and entity requirements.

Resources:

<https://apps.azsos.gov/public_services/Title_04/4-06.pdf>

<https://azbbhe.us//>

<https://azbbhe.us/pdfs/BOARD%20STATUTES%20080318.pdf>

<http://www.impactteam.info/documents/ClinicalDocumentationGuidelines.pdf>

<https://www.magellanprovider.com/media/51220/soap.pdf>