

**FOR CALIFORNIA MFTs, LCSWs, LPCCs, and LEPs:**

**CE POST-TEST, Webinar: "WHAT SHOULD BE IN YOUR CHARTS -- AND PROBABLY ISN'T"**

*Presenter: Barbara Griswold, LMFT*

2 CEU CREDITS -- CAMFT Approved CEPA Provider #023504

*Be sure to read all answers before choosing the best one. ANSWER SHEET FOLLOWS THE TEST.*

**1. How do therapists protect themselves by keeping detailed progress notes?**

- a. Notes may be legally or ethically required
- b. Insurance plans require them
- c. They can help defend the therapist if a complaint is filed against the provider
- d. All of the above

**2. More detailed progress notes can also provide better care to clients by**

- a. Helping document symptoms/ impairment to prove medical necessity of care to a health plan
- b. Helping document symptoms and impairment for disability claims
- c. Providing valuable history to inform care and continuity of care
- d. All of the above

**3. Which of the following is true for most insurance plans' definition of medical necessity for treatment?**

- a. The treatment must address a DSM diagnosis, more than just a DSM-5 "Z code"
- b. The treatment should be aimed at personal growth
- c. The client need only desire / request treatment

**4. When choosing treatment goals, you may**

- a. use the client's DSM-5 diagnosis criteria
- b. use Treatment Planning Guides
- c. ask the client his/her goals
- d. All of the above

**5. True or False: It is encouraged that notes include relevant client quotes.**

**6. True or False: Even out-of-network therapists can have charts and care reviewed by a health plan, if a client submits an invoice for therapy to their plan.**

**7. In the SOAP Notes example, SOAP stands for**

- a. Subjective, Objective, Assessment, and Plan
- b. Subjective, Objective, Actions, Problems.
- c. Symptoms, Observations, Actions, Prognosis

**8. True or False: Collaborative documentation is when both therapist and client write notes after they leave the session, which they share at the next session.**

**9. Situations where extra-detailed notes should be taken include**

- a. Whenever you do anything unusual in treatment
- b. When ending with or referring a client
- c. When treating clients with personality disorders
- d. All of the above

**10. A treatment plan is typically required by insurance plans, and is ideally**

- a. written collaboratively by both therapist and client
- b. regularly reviewed and revised with the client
- c. a plan the therapist doesn't share with the client
- d. Both a and b

**11. Treatment plans include:**

- a. Treatment goals -- observable and measurable
- b. Planned interventions and homework
- c. Client family history
- d. Both a and b

**12. True or False: When treating couples, separate treatment goals and treatment plans must be created for each member of the couple.**

**13. Which of the following is a suggestion given for how to save time doing notes?**

- a. Try ending on time or 5 minutes early and writing notes then, or at a regular time each day
- b. Write less detailed notes
- c. Use templates that are all checkboxes

**14. Providers are experiencing more frequent treatment reviews due to**

- a. HIPAA, which requires more frequent reviews
- b. The Federal Parity Act and Affordable Care Act, which did away with session limits
- c. A decline in quality of care provided by therapists

**15. True or False: Insurance plans may require you to list the session start and stop times in progress notes.**

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Please fill out and return answer sheet on the next page.

A passing score of 70% is required for CE certificate.

*Barbara Griswold, LMFT is a Continuing Education Provider approved by the California Assn. of Marriage and Family Therapists (CAMFT #023504). Continuing Education Credits may only apply to California therapists.*

**FOR CALIFORNIA MFTs, LCSWs, LPCCs, and LEPs:  
 ATTESTATION AND ANSWER SHEET AND EVALUATION**

**WEBINAR: "WHAT SHOULD BE IN YOUR CLIENT CHART -- BUT PROBABLY ISN'T"**

*Course meets qualifications for 2 hours of CE credit for MFTs, LCSWs, LPCCs, and LEPs as required by the California Board of Behavioral Sciences; Barbara Griswold, MFT, CAMFT-Approved CE Provider #023504*

**ATTESTATION: "I attest that I personally viewed the webinar "What Should be In Your Client Chart -- But Probably Isn't" and completed the post-test answer sheet and evaluation myself. "**

Signature: \_\_\_\_\_ Phone: \_\_\_\_\_

Name (print clearly): \_\_\_\_\_ Date: \_\_\_\_\_

License Number: \_\_\_\_\_ License Type (circle): MFT LCSW LPCC LEP Other \_\_\_\_\_

E-mail address (print clearly): \_\_\_\_\_

Confirm e-mail address: \_\_\_\_\_

**POST-TEST ANSWER SHEET**

- |    |    |    |     |     |
|----|----|----|-----|-----|
| 1. | 4. | 7. | 10. | 13. |
| 2. | 5. | 8. | 11. | 14. |
| 3. | 6. | 9. | 12. | 15. |

**EVALUATION:**

Please use the following scale for quantitative questions below:

**1=Strongly Disagree 2=Disagree 3=Neutral 4=Agree 5=Strongly Agree**

1. After taking this course, participants will be able to:	<i>Strongly Disagree</i>					<i>Strongly Agree</i>
A. Identify how keeping superficial, vague, or out of date progress notes can hurt therapists and clients	1	2	3	4	5	
B. Identify common insurance plan documentation requirements	1	2	3	4	5	
C. Identify the elements of good progress notes, and be able to use the SOAP and DAP note templates	1	2	3	4	5	
D. Identify 10 situations when more detailed notes should be taken	1	2	3	4	5	
E. Name the components of a treatment plan, and how to choose treatment goals/interventions	1	2	3	4	5	
2. Technology was used effectively to support learning	1	2	3	4	5	
3. Presenter was knowledgeable about the subject area	1	2	3	4	5	
4. Maintained my interest	1	2	3	4	5	
5. Presenter effectively presented a complex topic clearly	1	2	3	4	5	
6. Information presented was current and accurate	1	2	3	4	5	

*continued*

Print Therapist Name: \_\_\_\_\_

*Evaluation (continued)*

- |  |                   |          |         |                |              |
|--|-------------------|----------|---------|----------------|--------------|
| 7. Course was appropriate to my education, experience, and license level:  | Yes               | No       |         |                |              |
| 8. Course was relevant to my practice:   | Yes               | No       |         |                |              |
| 9. How much did you learn from this webinar?   | Very Little       | Little   | Some    | A Good Bit     | A Great Deal |
| 10. How would you rate the overall value of this webinar?  | Very Poor         | Poor     | Average | Good           | Excellent    |
| 11. Course was user-friendly   | Strongly Disagree | Disagree | Agree   | Strongly Agree |              |
| 12. Would you recommend this webinar to others?  | Yes               | No       |         |                |              |
| 13. Accessibility: If you had questions or problems related to this webinar or getting credit, were they addressed effectively and in a timely manner? | N/A               | Yes      | No      |                |              |

Other comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any other topics you would like to see covered in a webinar? \_\_\_\_\_  
\_\_\_\_\_

*Thanks for viewing my webinar! Please contact me for help with your notes, and your insurance and practice-building questions!*



**TO RECEIVE YOUR CE CERTIFICATE:**

1. Complete and sign the required **Attestation and Answer sheet and Evaluation (pages 2 and 3)**.
2. Return both pages 2 and 3, in one of the following ways:
  - a) **By mail** to Barbara Griswold, LMFT, 4010 Moorpark Avenue, Suite 118, San Jose, CA 95117
  - b) **Scan and attach to an e-mail** directed to [orders@theinsurancemaze.com](mailto:orders@theinsurancemaze.com)
  - c) **By fax** to 408-249-9204, attention Barbara
3. **NOTE: A SCORE OF 70% OR MORE ON THIS TEST IS REQUIRED FOR CE CREDIT. IF A PASSING SCORE IS REACHED, YOUR CERTIFICATE WILL BE SENT VIA E-MAIL ATTACHMENT WITHIN 7 DAYS.**

***DISTANCE-LEARNING PROGRAM POLICIES:***

*Barbara Griswold, LMFT is approved by the California Association of Marriage and Family Therapists to sponsor continuing education for MFTs, LCSWs, LPCCs, and LEPs. Barbara Griswold, LMFT maintains responsibility for this program/course and its content. [www.theinsurancemaze.com](http://www.theinsurancemaze.com) 408.985.0846 4010 Moorpark Avenue #118, San Jose, CA 95117barbgris@aol.com.*

***Grievance Policy:*** *If a participant files a grievance regarding the course level or content, program administration, or non-receipt of certificates, the individual will be asked to put his/her comments in writing. All complaints will be responded to in an ethical and timely manner. Questions and concerns should be addressed to Barbara Griswold at the address, email, and phone number above.*

***Refund Policy:*** *Full refunds for CE test payment will be granted when request is submitted in writing and a post-test has not been submitted and graded. Refunds will be issued within 7 days of request.*

***Accommodations for the Disabled:*** *Arrangements can be made for those with disabilities or special needs. To discuss further, please contact Barbara Griswold, LMFT at [barbgris@aol.com](mailto:barbgris@aol.com) or 408-985-0846.*