Policies & Procedures
A. Documentation Policy

Timely completion of documentation is an ethical and professional requirement governed by numerous entities from licensure boards to Medicare and Medicaid, and has ramifications on therapist income. FPCC strives to strike a balance between a timeline that works for a variety of styles with the administrative needs of the practice and ethical and regulatory requirements.

Timeline for Notes Completion

Documentation (also referred to as "notes") for all service types including intake appointments and follow up sessions must be completed within 5 calendar days of the date of service.

> **Expedited Timeline:** Notes for clients in crisis, those with suicidal/homicidal ideation or active suicidality, or when mandated reporting is initiated due to a disclosure, must be completed within 24 hours.

Medicaid Treatment Plan Timeline

This section applies only to clients with a Medicaid insurance plan. (See "Medicaid Requirements" document on the FPCC website for treatment plan guidelines for clients with other insurance.)

Treatment plans must be completed *within* two sessions. "Within" means **by the end** of the second session. The assessment session counts as one session. A consultation, if applicable, does not count as one of the two sessions. The entirety of the second session, however, cannot be used for this purpose. Up to 15 minutes of the second session may be used to complete the treatment plan in collaboration with the client, thus it is important that the majority of the plan be prepared between the assessment and the follow up session so that minimal time is needed to finalize the plan. This can be done by using information gathered from the intake.

If the plan is not completed within the second session, the client cannot continue to be scheduled using billable therapy session codes. The treatment plan must be uploaded to the client's chart within 5 calendar days of completion.

Other Paperwork/Documentation:

Maintaining complete client records is important to achieve a high standard of client care. All documentation, such as releases of information, revised treatment plans, records received, etc. should be uploaded to the chart within 5 calendar days of receipt. This preserves the integrity of the client chart and prevents problems related to ethics and compliance.

Impact on Income

Completing notes, charging credit cards and submitting claims are linked within the EHR. Delayed notes completion prevents clients from being charged and claims from being submitted, which has a direct impact on therapist income. It also can result in client complaints due to multiple charges when notes are caught up.

Non-Compliance with Documentation Policy

Lack of adherence to this policy may result in disciplinary action, up to and including termination.

Your signature of acknowledgement on the Employee Handbook signature page indicates your understanding and acceptance of this policy.