

Outline

Confidentiality of Mental Health Records

Interaction of State Mental Health and Federal AODA Privacy Laws

Patient Access

Release With Authorization

When and to Whom Records Can Be Released

Psychotherapy Notes

What Are They?

Who Controls Them?

Disclosure Without Authorization

Permitted Disclosures for Treatment

Permitted Disclosures for Other Reasons

Mandatory Disclosures

HIV Records

Subpoenas, Court Orders, Testimony, and Law Enforcement

Subpoenas

Different Types of Subpoenas

What Do You Have to do?

Limitations on Subpoenas

Court Orders

Court Orders for Records

Court Ordered Examinations

Search Warrants

Providing Testimony

Therapist Privilege

Depositions

Trial Testimony

Law Enforcement

Authority to Obtain Information

Investigations

Areas of Uncertainty

Disclosure of Impending Discharge

Disclosure of Treatment of Certain Injuries

Voluntary and Involuntary Mental Health Commitments

Grounds for an Involuntary Commitment

Threat to Others

Threat to Self

Procedures

Balancing the Rights of Minors

Mental Health Records and the Rights of Minors

Rights of Minors to Refuse/Consent to Treatment

Access to Records

Rights of Minors to Control Access to Their Records

Alcohol, Drug Abuse and Treatment Issues for Minors

Parental Rights

Divorce Issues

Custodial vs. Non-Custodial Parents

Foster Parents

Adoptive Parents

Educational Health Records and FERPA

Emancipation

Minors and Medical Treatment

Professional Boundary Issues

Boundary Issues: Therapeutic

The Dual Relationship

Special Issues for Rural Providers

Social Media

Boundary Issues: Civil Liability

Boundary Issues: Regulatory Issues

Process and Procedure

Telehealth and Teletherapy

Live Seminar & Webinar Schedule

(Times listed in Central)

8:00 Registration/Morning Coffee & Tea

8:30 Program begins

12:00-1:00 Lunch (*on your own*)

4:00 Program ends

There will be two 15-min breaks (mid-morning & mid-afternoon). Actual lunch and break start times are at the discretion of the speaker. A more detailed schedule is available upon request.

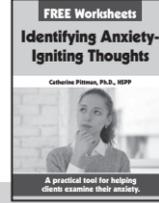
Objectives

1. Evaluate your current record-keeping practices in order to ensure compliance with ethical and legal requirements in the state of Wisconsin.
2. Determine what constitutes official medical records in the State of Wisconsin.
3. Determine the different requirements for release of protected health information via subpoenas and court orders.
4. Differentiate between the processes for voluntary and involuntary commitment for treatment and determine the clinician's role in each.

5. Analyze the legal and ethical considerations for the treatment of minor populations in Wisconsin with regard to age of consent, confidentiality and custody concerns.
6. Communicate how an understanding of common boundary and dual relationship issues/dilemmas can help you maintain appropriate relationships with your clients.

FREE BONUS OFFER!

Easy-to-Use Anxiety Assessment Tools



Get yours today at pesi.com/anxietyws

Group Training Solutions Made Easy!

- ONLINE or in-person
- Customizable
- Easy remote access
- From 5 to 5000
- CE hours available



www.pesi.com/inhouse

NON-PROFIT ORGANIZATION U.S. POSTAGE PAID EAU CLAIRE WI PERMIT NO. 3279

PESI, Inc. P.O. Box 1000 Eau Claire, WI 54702-1000

Legal and Ethical Issues in Behavioral Health in Wisconsin

6 CE Hours of Ethics!

Brookfield, WI
Thursday, February 10, 2022

Live Interactive Webinar
Thursday, February 10, 2022



We Are Back! Join In Person or Online!

Legal and Ethical Issues in Behavioral Health in Wisconsin

- Duty to warn in Wisconsin
- Professional ethics and boundary issues
- Protecting your credentials/license
- Protecting and properly disclosing health information
- Understanding the licensing board complaint process

6 CE Hours of Ethics!

Brookfield, WI
Thursday, February 10, 2022

Live Interactive Webinar
Thursday, February 10, 2022



REGISTER NOW:
pesi.com/express/86479



A NON-PROFIT ORGANIZATION CONNECTING KNOWLEDGE WITH NEED SINCE 1979

REGISTER NOW:
pesi.com/express/86479

Legal and Ethical Issues in Behavioral Health in Wisconsin

A better understanding of your ethical and legal obligations can not only help you provide more effective treatment to your clients, but can help you avoid costly mistakes. This seminar will provide you with the necessary tools to avoid a wide range of ethical and legal pitfalls.

Join attorney and emergency department physician Daniel L. Icenogle for an entertaining and enlightening day and leave with a greater understanding of the latest Wisconsin law as it relates to mental health. You will take home practical strategies to minimize and manage legal and ethical risks and you will learn how to immediately implement these risk reducing strategies into your practice.

If you attend only one seminar this year, make it this one.

Target Audience:

Social Workers • Counselors • Psychologists • Marriage & Family Therapists • Nurses
AODA Professionals • Health Information Managers • Medical Records Professionals



If you are not satisfied, please contact our customer service team at www.pesi.com/info or 800-726-3888 and we will make it right.

Recommended Reading:

Purchase this training for these exclusive savings!

Feeling Great
The Revolutionary New Treatment for Depression and Anxiety
\$26.99 **\$19.99**

Telemental Health
The Essential Guide to Providing Successful Online Therapy
\$24.99 **\$19.99***

Questions? Visit our FAQ page at www.pesi.com/faq or contact us at www.pesi.com/info.

Can't attend in person? You can still join us!

Watch live webinar from your home or office – Participate live in real-time while connecting and collaborating with peers, ask the presenter questions, earn a live CE certificate, free bonus – replay on demand access for 90 days (live CE is only available when viewed live) **or Watch on-Demand** – learn at your own pace, lifetime access online to content and materials, earn a self-study certificate (CE hours, approvals and cost of CE Certificates may vary from live event, visit pesi.com for availability).

Have a seminar idea? A manuscript to publish? The nation's top speakers and authors contact PESI first. If you are interested in becoming a speaker or have a new topic idea, please contact **Anna Rustick** at arustick@pesi.com or call 715-855-8195.

MEET YOUR SPEAKER

DANIEL L. ICENOGLA, JD, M.D., is a health law attorney and an emergency department physician, practicing law in the firm of Icenogle & Associates, LLC, Readstown, Wisconsin, which provides a variety of health law services for physicians, hospitals and other medical providers. He is a 1981 graduate of Loyola Stritch School of Medicine and a 1992 cum laude graduate of the University of Wisconsin Law School. He was formerly chair of the board of directors for the Wisconsin State Bar Health Law Section, and is a member of the American Health Lawyers Association. He is also a member of the Wisconsin Medical Society and its council on Health Care Access and Financing.

Speaker Disclosures:

Financial: Daniel Icenogle receives compensation as an Emergency Department Medical Director for Vernon Memorial Hospital and as a Senior Attorney for Icenogle and Associates, LLC. He receives a speaking honorarium from PESI, Inc.

Non-financial: Daniel Icenogle has no relevant non-financial relationship to disclose.

Live Seminar Continuing Education Credit Information

Credits listed below are for full attendance at the live event only. After attendance has been verified, pre-registered attendees will receive an email from PESI Customer Service with the subject line, "Evaluation and Certificate" within one week. This email will contain a link to complete the seminar evaluation and allow attendees to print, email or download a certificate of completion if in full attendance. For those in partial attendance (arrived late or left early), a letter of attendance is available through that link and an adjusted certificate of completion reflecting partial credit will be issued within 30 days (if your board allows). Please see "live seminar schedule" for full attendance start and end times. The CE certificate for the live, webinar can be downloaded after completing the webinar and passing the online post-test evaluation (80% passing score). NOTE: Boards do not allow credit for breaks or lunch. If your profession is not listed, please contact your licensing board to determine your continuing education requirements and check for reciprocal approval. For other credit inquiries not specified below, or questions on home study credit availability, please contact pesi@pesi.com or 800-726-3888 before the event. Materials that are included in this course may include interventions and modalities that are beyond the authorized practice of mental health professionals. As a licensed professional, you are responsible for reviewing the scope of practice, including activities that are defined in law as beyond the boundaries of practice in accordance with and in compliance with your professions standards. The planning committee and staff who controlled the content of this activity have no relevant financial relationships to disclose. For speaker disclosures, please see speaker bios. PESI, Inc. offers continuing education programs and products under the brand names PESI, PESI Healthcare, PESI Rehab, PESI Kids, and Psychotherapy Networker.

Ethics: This seminar includes 6.0 hours of state specific ethics instruction. If ethics is not specified within your licensing board's approval statement below, please contact your board to determine the applicability and amount of ethics allowed.

Addiction Counselors: This course has been approved by PESI, Inc., as a NAADAC Approved Education Provider, for 6.0 CE in the Legal, Ethical and Professional Development skill group. NAADAC Provider #77553. PESI, Inc. is responsible for all aspects of their programming. Full attendance is required; no partial credit will be awarded for partial attendance.

Wisconsin Counselors: CE credit is available. This course consists of 6.0 continuing education clock hours for Wisconsin Counselors. The Wisconsin Department of Safety and Professional Services (MPSW 19) accepts continuing education programs relevant to counseling by approved providers of the Association of Social Work Boards (Sec. 20-195cc-3). Please see social work CE statements for this program.

Marriage & Family Therapists: This activity consists of 360 minutes of continuing education instruction. Credit requirements and approvals vary per state board regulations. You should save this course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

Nurses, Nurse Practitioners, and Clinical Nurse Specialists: PESI, Inc. is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation. Nurses in full attendance will earn 6.0 contact hours. Partial contact hours will be awarded for partial attendance.

Psychologists & Physicians:



Physicians
PESI, Inc. is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians. PESI, Inc. designates this live activity for a maximum of 6.0 AMA PRA Category 1 Credits™. Physicians should only claim credit commensurate with the extent of their participation in the activity.

Psychologists

The following state psychologist boards recognize activities sponsored by PESI, Inc. as an approved ACCME provider: Alaska, Arkansas, California, Colorado, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Missouri, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, Oklahoma, Pennsylvania, South Carolina and Wisconsin. This activity consists of 6.0 clock hours of continuing education instruction. Certificates of attendance will be issued for you to submit to your state licensing board to recognize for continuing education credit.

Wisconsin Psychologists: CE credit is available. This course consists of 6.0 continuing education credit hours for Wisconsin Psychologists. The State of Wisconsin Department of Safety and Professional Services under Wis. Administrative Code Chapter PSY 4 confirms acceptance of continuing education programs relevant to psychology by providers that are approved for Category 1 AMA credit. This live activity is certified for a maximum of 6.0 AMA PRA Category 1 Credits™ by PESI as an accredited ACCME provider authorized to award credit by the AMA. PESI, Inc. is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.



Social Workers: PESI, Inc., #1062, is approved to offer social work continuing education by the Association of Social Work Boards (ASWB)

Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved as ACE providers. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit. PESI, Inc. maintains responsibility for this course. ACE provider approval period: January 27, 2020 - January 27, 2023. Social Workers completing this live course receive 6.0 Ethics continuing education credits. Course Level: Intermediate. Full attendance is required; no partial credits will be offered for partial attendance. A certificate of attendance will be awarded at the end of the program to social workers who complete the program evaluation.

Other Professions: This activity qualifies for 360 minutes of instructional content as required by many national, state and local licensing boards and professional organizations. Save your course outline and certificate of completion, and contact your own board or organization for specific requirements.

For all credit approvals and details, visit: www.pesi.com/express/86479

SIGN UP TODAY!

Legal and Ethical Issues in Behavioral Health in Wisconsin

SAVE TIME! Express Register Online: pesi.com/express/86479

1 Please complete entire form if sending by mail please print legibly ©2021

*Email address _____ ***Email required to receive registration confirmation, CE certificate, and/or digital product.**

Name _____ Profession _____

Billing Address _____ Home Work

Company Name (if work address): _____

City _____ County _____ State _____ Zip _____

*Cell Ph () _____ Work Ph () _____
***Required for event updates**

2 Live Training Options (make copy for your records)

A SELECT LOCATION

- BROOKFIELD, WI • February 10, 2022** [86479BRO]
DoubleTree Hotel Milwaukee-Brookfield
18155 W Bluemound Rd • 53045 • (262) 792-1212
- LIVE VIDEO WEBINAR • February 10, 2022** [PWZ86479]
Broadcast LIVE to your computer!

B SELECT TUITION includes downloadable seminar manual

- \$219.99** – choose one of the options below:
- per person for 2 or more preregistering together —OR—
 - single registration postmarked 3 weeks prior to seminar date
 - \$249.99** standard
- Add tax in HI & NM for Webinar

3 Home Study Options

- On-Demand Digital Seminar \$219.99*** [POS061150]
- DVD \$219.99**** [RNV061150]

* plus applicable sales tax, visit www.pesi.com/faq for more information

4 Recommended Reading

- \$26.99 \$19.99**** *Feeling Great* book [PUB086345]
- \$24.99 \$19.99**** *Telemental Health* book [PUB086565]

**Discount included with purchase of this training. Attendees add applicable state and local taxes except in AK, DE, MT, NH, OR and \$6.95 shipping

5 Select Payment Method

All registrations must be prepaid.

- Check enclosed payable to **PESI, Inc.**
 - Purchase order enclosed (Fed ID # 26-3896894)
 - MC VISA AE Discover Novus
- 16 digits 13-16 digits 15 digits 16 digits

Card # _____

Card Exp. _____ CVV#*: _____

Signature _____

(*MC/VISA/Discover: last 3-digit # on signature panel on back of card.) (*American Express: 4-digit # above account # on face of card.)

IN-PERSON SAFETY

As you prepare to make face-to-face learning a part of your professional development, we want you to know that your safety is ALWAYS our top priority. We are fully committed to monitoring and implementing all best practices outlined by state and local regulations.

ADA NEEDS

We would be happy to accommodate your ADA needs; Please notify us at time of registration.

SAME DAY REGISTRATION

Walk-ins are welcome but admission cannot be guaranteed. Contact us for space availability if registering within one week of seminar.

TUITION OPTIONS

Advance registration required. Cannot be combined with other discounts.

- **Get a Group Discount!** Contact us at pesi.com/info to save for groups of 5 or more
- **FREE Military Tuition:** Free live seminars for veterans and active duty military, limited seats available, advanced registration online required
- **\$50 Tuition:** If you are interested in being our registration coordinator for the day, go to: www.pesi.com/coord for availability and job description, first come, first serve.
- **Discounted Student Rate:** 50% off standard tuition on live events for students. Current student schedule with registration form required or visit www.pesi.com/students for details.

QUESTIONS

Visit pesi.com/faq or contact us at pesi.com/info

TAXES AND SHIPPING

Taxes and shipping apply where applicable, see website for details

OTHER WAYS TO REGISTER

Fax: 800-554-9775
Mail: PESI, Inc.
PO Box 1000
Eau Claire, WI 54702-1000
Phone: 800-726-3888
Online: pesi.com/express/86479

Total Payment: _____