# Uses and Disclosures of Psychotherapy Notes

**Scope:**
Accountable Care Organization; Administrative & Business Offices; Ambulatory; Behavioral Health; Breast Health Center; Center for Advanced Medicine B; Center for Advanced Medicine C; foundation; Healthcare Center; Home Health; Hometown Health; Hospice; Hyperbaric; Laboratory; Medical Group; Monaco Ridge; Pregnancy Center; Regional Medical Center; Rehabilitation Hospital; Skilled Nursing; South Meadows Medical Center; Surgical Arts; Therapies; Urgent Care; Wound Care; X-ray & Imaging

**Policy Statement:**
Psychotherapy notes as defined are not part of the medical record and will only be released with an authorization or as required by law.

**Definition of Terms:**

1. Psychotherapy Notes – Psychotherapy notes (also referred to as process notes) are defined as those notes recorded (in any medium) by a healthcare provider who is a mental health professional documenting or analyzing the contents of conversation during private counseling session or a group, joint, or family counseling session and that are separated from the rest of the individual’s medical record.

   Psychotherapy notes excludes medication prescription and monitoring, counseling session start and stop times, the modalities and frequencies of treatment furnished, results of clinical tests, and any summary of the following items: diagnosis, functional status, the treatment plan, symptoms, prognosis, and progress to date. This information, often referred to as progress notes, becomes part of the individual’s medical record.

**Procedure:**

1. If process notes are kept by mental health professionals, they will be maintained in a secure location until such time as they are destroyed.
2. Mental health professionals will only release process notes with authorization by the patient or as required by law.

3. All patients or their authorized representative shall follow the Release of Records procedures as defined by Health Information Management contained here.

4. Each workforce member with treatment, payment or health care related responsibilities is responsible for compliance with these policies and principles.

5. The Privacy Officer has the responsibility of facilitating compliance with these procedures.


References/Regulations:

45 CFR §164.508(a)(2)
RENOWN.HRM.810 Coaching and Corrective Action
Authorization for Release of Information Form 100-07

Contributors:

Brian Colonna, HIPAA Privacy Coordinator
Drew Williamsen, Manager of Compliance
Kristen Davis-Coelho, Director of Behavioral Health