

CLIENT INFORMATION

Name: (F, MI, L)		Client DOB:	Date:
Address:		City/Zipcode:	
SSN:	Employer:		Work Phone:
Home Phone:	Cell Phone:	Email:	
Preferred Method of Contact		Is it ok to leave a message?	Emergency Contact: Name and Phone #
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Work Phone	<input type="checkbox"/> Yes	Primary Care Physician:
<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Email	<input type="checkbox"/> No	

INSURANCE INFORMATION

Subscriber Name (F,M,L):		Subscriber DOB:
Address (If different):		SSN:
Primary Insurance Company:	Employer:	
Policy/ID# (On card)	Group#	

By signing this form, I am stating that the information I have provided is accurate. I also authorize my therapist and their staff to release protected health information from my clinical record to any of the following entities as applicable for the billing for payment of services: EAP program, my health insurance company, and/or its designated managed care company. I also authorize my therapist to use software provided by Therapy Appointment and the clearinghouse Office Ally to submit claims and store recorders. I understand that this authorization continues indefinitely unless I revoke it in writing. However, if I revoke this authorization, I understand that any of the above entities retains the right to information in my clinical record prior to the revocation date.

Sign:	Date:
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IF CLIENT IS NOT A MINOR SKIP THIS PAGE

Complete if client is a minor or someone else is responsible for payment.

Parent (s):	Phone
Parent (s):	Phone
Person responsible for payment of services:	Relation to Client:
Responsible party's address (if different than client):	

Parents of Minors

I authorize _____ to receive services including evaluations and treatment. I consent to services for the minor mentioned above and to allow the above insurance policy to be billed.	
Sign:	Date:
Sign:	Date:

Informed Consent

Client-Therapist Service Agreement

Welcome to my practice. This document contains important information about my professional services and business policies. It also contains summary information about the Health Insurance Portability and Accountability Act (HIPAA), a federal law that provides privacy protections and patient rights about the use and disclosure of your Protected Health Information (PHI) for the purposes of treatment, payment, and health care operations. Although these documents are long and sometimes complex, it is very important that you understand them. When you sign this document, it will also represent an agreement between us. **We can discuss any questions you have when you sign them or at any time in the future.**

Goals of Counseling

There can be many goals for the counseling relationship. Some of these will be long term goals, such as, improving the quality of your life, learning to live with mindfulness and self-actualization. Others may be more immediate goals, such as, decreasing anxiety and depression symptoms, developing healthy relationships or changing behavior. Whatever the goals for counseling, they will be set by the clients according to what they want to work on in counseling. The therapist may make suggestions on how to reach that goal, but you decide where you want to go.

Risks/Benefits of Counseling

Counseling is an intensely personal process that can bring unpleasant memories or emotions to the surface. There are no guarantees that counseling will work for you. Clients can sometimes make improvements only to go backwards after a time. Progress may happen slowly. Counseling requires a very active effort on your part. In order to be most successful, you will have to work on things we discuss outside of sessions.

There are many benefits to counseling. Counseling can help you develop coping skills, make behavioral changes, reduce symptoms of mental health disorders, improve the quality of your life, learn to manage anger, learn to live in the present and many other advantages.

Appointments

Appointments will ordinarily be 50-60 minutes in duration, once per week. Some sessions may be more or less frequent, as needed. The time scheduled for your appointment is assigned to you and you alone. If you need to cancel or reschedule a session, provide your therapist with 24 hours' notice. If you miss a session without canceling, or cancel with less than 24 hour notice, you may be required to pay a cancellation fee of \$50 for the session. It is important to note that insurance companies do not provide reimbursement for canceled sessions; thus, you will be responsible for the cancellation fee. In addition, you are responsible for coming to your session on time; if you are late, your appointment will still need to end on time.

Confidentiality

Your therapist will make every effort to keep your personal information private. If you wish to have information released, you will be required to sign a consent form before any information will be released. There are some limitations to confidentiality to which you need to be aware. Your therapist may consult with a supervisor or other professional therapist in order to give you the best service. In the event that your therapist consults with another therapist, no identifying information, such as your name, would be released. Therapists are required by law to release information when the client poses a risk to themselves or others, and in cases of abuse to children or the elderly. If your therapist receives a court order or subpoena, she may be required to release some information. In

such a case, your therapist will consult with other professionals and limit the release to only what is necessary by law. As a private therapy office your therapist does the best to protect your anonymity, but there may be times when there are other people sitting in the waiting room. If this makes you uncomfortable please talk with your therapist.

Record Keeping

Your therapist may keep records of your counseling sessions and a treatment plan which includes goals for your counseling. These records are kept to ensure a direction to your sessions and continuity in service. They will not be shared, except with respect to the limits to confidentiality discussed in the Confidentiality section. Should the client wish to have their records released, they are required to sign a release of information which specifies what information is to be released and to whom. Records will be kept for at least 7 years but may be kept for longer. Records will be kept either electronically, on a USB flash drive, or in a paper file and stored in a locked cabinet in the therapist's office. Your therapist uses Therapyappointment.com to manage electronic files and scheduling. This website is HIPPA compliant.

Professional Fees

You are responsible for paying at the time of your session, unless prior arrangements have been made. Payment must be made by check or cash. If you refuse to pay your debt, your therapist reserves the right to use an attorney or collection agency to secure payment. Additional time will be charged in 30 minute increments. If there is a returned check, the charge will be \$35. A sliding fee scale is offered for services not covered by insurance. To receive sliding scale fees, you must discuss this arrangement with your therapist. Fees are subject to change at therapist's discretion.

If you anticipate becoming involved in a court case, it is recommended that we discuss this fully before you waive your rights to confidentiality. If your case requires therapist participation, you will be expected to pay for the professional time required at the cost of \$150 per hour. This would include travel, prep, and appearance time. Emails and phone calls with attorneys will be charged \$75 per incident and there will be an additional charge of \$150 to process a request for records for an attorney or to be released to court.

Insurance

If you have a health insurance policy, it will usually provide some coverage for mental health treatment. With your permission, I will assist you to the extent possible in filing claims and ascertaining information about your coverage, but **you are responsible for knowing your coverage and for letting me know if/when your coverage changes.** This includes knowing if you have a deductible that needs to be met before you have coverage. Your therapist uses a clearinghouse, Office Ally to assist in filing insurance claims.

You should also be aware that some insurance companies require you to authorize your therapist to provide them with a clinical diagnosis. Sometimes additional clinical information will need to be provided, which will become part of the insurance company files. By signing this Agreement, you agree that the therapist can provide requested information to your carrier if you plan to pay with insurance. **If insurance denies coverage or payment for any reason, you remain responsible for paying any outstanding balance.**

Clients' Initials: _____

Contacting Your Therapist

Your therapist is often not immediately available by telephone. I do not answer my phone when I am with clients or otherwise unavailable. At these times, you may leave a message on my confidential voice mail and your call will be returned as soon as possible, be aware it may take a day or two for non-urgent matters. **If you feel you cannot wait for a return call or it is an emergency situation, go to your local hospital or call 911.**

Email is another option for contacting your therapist and at times may be the fastest way to reach me. Due to the nature of online technology there is always the possibility that unauthorized persons may attempt to discover your personal information. **I have taken every precaution to safeguard you information but cannot guarantee that unauthorized access to electronic communication could not occur.** Please be advised to take precautions with regard to authorized and unauthorized access to any technology used in communication with your therapist. Be aware of any friends, family members, significant others or co-workers who may have access to you computer, phone, or other technology. It is best to keep communications related only to scheduling purposes.

Payment Arrangement

Insurance: Yes No

Sliding Fee Arrangement

Client pays: \$ _____ Client Initials: _____

Therapist Initials: _____

Consent to Counseling

Your signature below indicates that you have read this Agreement and agree to its terms.

Name of Client(s): _____

Client Signature _____ Date _____
(Guardian if client is a minor)

Client Signature _____ Date _____

Intake Assessment Form

Name (First, Last):

DOB:

Gender: Male Female

Transgender

Presenting Concerns

Who Referred you?

What occurred to cause you to seek counseling now?:

Living Conditions

Rent Own Friend/Relative's Home Respite Care Jail/Prison Homeless

Residential Care/Treatment Facility: Hospital Temporary Housing Residential Program Nursing

Are you at risk of losing your current housing? Are you satisfied with you current housing?

Yes No

Yes No

Comments:

Family History

Pertinent Family Medical, Mental Health and Substance Use History:

Family Dynamics (Please include everyone who lives in your household and ages):

Personal History

Highest Level of Education: GED High School College Vocational Training Graduate Degree
 Other

Employment Status: Currently Employed at:
 Not Employed Other:

Military Service: N/A Active Veteran Date of Discharge:

Legal Status: Do you have a history or current involvement with the legal system? Yes No

Comments:

Religion/Spirituality and Cultural/Ethnic Information:

Friendships/Social/Peer Support Relationships, Pets, Community Supports:

Intake Assessment Form

Substance Use History

Substance use status: No history of abuse Active abuse Early full remission Partial remission
 Sustained full remission Sustained partial remission

Client Treatment history: Outpatient Inpatient 12-step program Stopped on own
 Other

Comments: (Please provide locations and dates of treatment)

Substances used: (Age of First Use, Amount of Current Use)

- | | |
|--|--|
| <input type="checkbox"/> Alcohol _____ | <input type="checkbox"/> Amphetamines/speed _____ |
| <input type="checkbox"/> Cocaine _____ | <input type="checkbox"/> Crack cocaine _____ |
| <input type="checkbox"/> Hallucinogens (e.g., LSD) _____ | <input type="checkbox"/> Inhalants (e.g., glue, gas) _____ |
| <input type="checkbox"/> Marijuana or hashish _____ | <input type="checkbox"/> Opioids _____ |
| <input type="checkbox"/> PCP _____ | <input type="checkbox"/> Prescription _____ |
| <input type="checkbox"/> Other _____ | |

Consequences of substance abuse:

Medical and Mental Health History

Medications you are currently taking:

Known Allergies:

Physical Health Concerns:

Primary Care Physician:

Primary Psychiatrist:

Previous Mental Health Diagnosis:

Previous Mental Health Counseling/Treatment Experiences:

Did you find any of your previous treatments to be beneficial?

Would you like us to request previous records?: Yes No

Sexual and Relationship History

Describe any significant issues from the past or currently in your intimate relationships:

Sexual Orientation: Heterosexual Homosexual Bisexual Other
 Currently sexually active Sexually satisfied Sexually dissatisfied

Age of first sexual experience:

Trauma related to sex: Yes No

Would you like therapy to focus on sexual issues or topics? Yes No

Comments:

Intake Assessment Form

Symptom Check List – Please check any that apply to you.

- | | |
|--|--|
| <input type="checkbox"/> Aggressive Behaviors | <input type="checkbox"/> Frequently aggressive towards people or animals |
| <input type="checkbox"/> Agitation | <input type="checkbox"/> Bingeing/Purging |
| <input type="checkbox"/> Irritability | <input type="checkbox"/> Anorexia |
| <input type="checkbox"/> Panic Attacks | <input type="checkbox"/> Often destroy property? |
| <input type="checkbox"/> Phobias | <input type="checkbox"/> Often set fires? |
| <input type="checkbox"/> Have recurrent or persistent thoughts that bother you. | <input type="checkbox"/> Often lose your temper? |
| <input type="checkbox"/> Excessive anxiety/worry for over 6 months, more days than not. | <input type="checkbox"/> Often feel angry or resentful? |
| <input type="checkbox"/> Difficulty controlling the worry, sleep disturbance, or restlessness. | <input type="checkbox"/> Often argue with adults or authority figures? |
| <input type="checkbox"/> Re-experience in your mind bad things that have happened to you. | <input type="checkbox"/> Often refuse to comply with rules? |
| <input type="checkbox"/> Depressed Mood | <input type="checkbox"/> Often blame other people for your mistakes? |
| <input type="checkbox"/> Hopelessness | <input type="checkbox"/> Ever been diagnosed with ADHD? |
| <input type="checkbox"/> Mood Swings | <input type="checkbox"/> Often make careless mistakes? |
| <input type="checkbox"/> Social Isolation | <input type="checkbox"/> Often don't finish assignments. |
| <input type="checkbox"/> Grief | <input type="checkbox"/> Often distracted when listening to people. |
| <input type="checkbox"/> Poor Grooming | <input type="checkbox"/> Have trouble organizing tasks? |
| <input type="checkbox"/> Appetite Disturbance | <input type="checkbox"/> Avoid things that take you a long time? |
| <input type="checkbox"/> Feel depressed most of the day, nearly every day. | <input type="checkbox"/> Easily distracted by stuff going on around you? |
| <input type="checkbox"/> Changes in sleep | <input type="checkbox"/> Often forgetful |
| <input type="checkbox"/> Elevated Mood | <input type="checkbox"/> Poor Memory |
| <input type="checkbox"/> Withdrawal | <input type="checkbox"/> Often fidget |
| <input type="checkbox"/> Feeling inadequate | <input type="checkbox"/> Often feel restless |
| <input type="checkbox"/> Have less interest/pleasure in doing things you usually enjoy doing. | <input type="checkbox"/> Often "on the go," can't sit still long |
| <input type="checkbox"/> Feel fatigued nearly every day. | <input type="checkbox"/> Often talk too much |
| <input type="checkbox"/> Feel worthless or excessively guilt most of the time. | <input type="checkbox"/> Have trouble waiting your turn |
| <input type="checkbox"/> Have a difficult time thinking/concentrating, or feel indecisive a lot. | <input type="checkbox"/> Often blurt out the answers to questions |
| <input type="checkbox"/> Have any beliefs that other people would think are strange. | <input type="checkbox"/> Interrupt a lot. |
| <input type="checkbox"/> Ever wanted to hurt or kill yourself. | <input type="checkbox"/> Physical Trauma Perpetrator |
| <input type="checkbox"/> Currently feel suicidal. | <input type="checkbox"/> Physical Trauma Victim |
| <input type="checkbox"/> Ever made, or currently have, a suicide plan. | <input type="checkbox"/> Sexual Trauma Perpetrator |
| <input type="checkbox"/> Ever attempted suicide | <input type="checkbox"/> Sexual Trauma Victim |
| <input type="checkbox"/> Delusions | <input type="checkbox"/> Sexually Acting out |
| <input type="checkbox"/> Ever experience any of the following, lasting for one week:
feelings of grandiosity, decreased need for sleep, pressured speech,
racing thoughts, distractible, agitated, increase in pleasure-seeking
activities, increase in libido. | <input type="checkbox"/> Sexual Dysfunction |
| <input type="checkbox"/> Seen or heard things that other people didn't see or hear. | <input type="checkbox"/> Substance Abuse |
| | <input type="checkbox"/> Self-Injury |
| | <input type="checkbox"/> Emotional Trauma Perpetrator |
| | <input type="checkbox"/> Emotional Trauma Victim |

Any other information that you feel is important:

Signature: _____

Therapist Signature _____

Date:

Date:

Intake Assessment Form

Intake Assessment Form

Name (First, Last):

DOB:

Gender: Male Female

Transgender

Presenting Concerns

Who Referred you?

What occurred to cause you to seek counseling now?:

Living Conditions

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Residential Care/Treatment Facility: Hospital Temporary Housing Residential Program Nursing

Are you at risk of losing your current housing? Are you satisfied with you current housing?

Yes No

Yes No

Comments:

Family History

Pertinent Family Medical, Mental Health and Substance Use History:

Family Dynamics (Please include everyone who lives in your household and ages):

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Highest Level of Education: GED High School College Vocational Training Graduate Degree
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Employment Status: Currently Employed at:
 Not Employed Other:

Military Service: N/A Active Veteran Date of Discharge:

Legal Status: Do you have a history or current involvement with the legal system? Yes No

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Any other information that you feel is important:

Signature: _____

Therapist Signature _____

Date:

Date:

Intake Assessment Form