

# New Patient Intake Form

## Section 1: Print Clearly

Client Full Name: \_\_\_\_\_

Full Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Married \_\_\_ Single \_\_\_ Divorced \_\_\_ Your email: \_\_\_\_\_ Spouse email: \_\_\_\_\_

Preferred Phone Contact Number: \_\_\_\_\_ Sex: \_\_\_ M \_\_\_ F Date of Birth: \_\_\_/\_\_\_/\_\_\_

Race: \_\_\_ White \_\_\_ Black \_\_\_ Hispanic \_\_\_ Asian \_\_\_ Other

Ethnicity: \_\_\_ Puerto Rican \_\_\_ Mexican \_\_\_ Cuban \_\_\_ Other \_\_\_ Not of Hispanic Origin

Highest Grade Completed: \_\_\_\_\_ Family Income: \_\_\_\_\_ per year

Employee Status: \_\_\_ Full-Time \_\_\_ Part-time \_\_\_ Homemaker \_\_\_ Unemployed \_\_\_ Retired/ Disabled

Source of Income: \_\_\_ Wages/Salary \_\_\_ Retirement/Pension \_\_\_ Public Asst. \_\_\_ Self-Employed

Living Arrangements: \_\_\_ Homeless \_\_\_ Dependent Living \_\_\_ Independent Living

Number of Children: \_\_\_\_\_ Currently Pregnant? Yes / No Tobacco Use Past 30 days? Yes / No

Use of illegal drugs past 30 days? Yes / No Do you use alcohol? Yes / No How many times/week? \_\_\_\_\_

How many drinks do you have per occasion? \_\_\_\_\_ Have you ever been arrested? Yes / No # of Arrests? \_\_\_\_\_

Reason for Arrest(s)? \_\_\_\_\_

In case of emergency, please contact:

1. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (Contact Name/ Phone/ Relationship)

2. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (Contact Name/ Phone/ Relationship)

## Section 2:

Reason for appointment at Bay Area Christian Counseling

1. Self-Referral \* \_\_\_\_\_ 2. Attorney Referred\* \_\_\_\_\_ 3. Court Referred\* \_\_\_\_\_ 4. Other \_\_\_\_\_

\*Please list referral source: \_\_\_\_\_

Presenting Problem: \_\_\_\_\_

### I am currently seeing a:

Counselor \_\_\_\_\_ 2. Psychologist \_\_\_\_\_ 3. Psychiatrist \_\_\_\_\_ 4. Other \_\_\_\_\_

Reason for seeing above professional:

Current Mental Health Problems: yes / no Diagnosis: \_\_\_\_\_

Please check any of the following that you suffer from:

\_\_\_\_\_ Trouble getting out of bed \_\_\_\_\_ Difficulty working w/ others \_\_\_\_\_ Difficulty staying focus

\_\_\_\_\_ Over/Under Eating \_\_\_\_\_ Difficult Relationships \_\_\_\_\_ Frequent Worrying \_\_\_\_\_ Depression

List anything else you'd like your clinician to know:

\_\_\_\_\_

Patient Signature (or Legal Guardian) \_\_\_\_\_ Date: \_\_\_\_\_

# INSURANCE INFORMATION FORM

Client's Full Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

SS #: \_\_\_\_\_ Driver's License #: \_\_\_\_\_

Employer Name: \_\_\_\_\_ Employer Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

Emergency Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

Name of Spouse or Parent/Guardian: \_\_\_\_\_

Referring Doctor (if applicable): \_\_\_\_\_ Phone: \_\_\_\_\_

Primary Care Doctor: \_\_\_\_\_ Current Medication and Dosage: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## Insurance Information

**Please present ALL insurance cards and Driver's License to the clinician.**

PRIMARY INS: \_\_\_\_\_ Policy#: \_\_\_\_\_ Group#: \_\_\_\_\_

Policy Holder/ Relationship: \_\_\_\_\_ Co-Payment amt.: \_\_\_\_\_

Policy Holder Date of Birth: \_\_\_\_\_ Policy Holder SS#: \_\_\_\_\_

SECONDARY INS: \_\_\_\_\_ Policy#: \_\_\_\_\_ Group#: \_\_\_\_\_

Policy Holder/ Relationship: \_\_\_\_\_ Co-Payment amt.: \_\_\_\_\_

Policy Holder Date of Birth: \_\_\_\_\_ Policy Hold SS#: \_\_\_\_\_

Guarantor Name: (Person responsible after insurance): \_\_\_\_\_

Relationship: \_\_\_\_\_ Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

## **ASSIGNMENT, RELEASE, and HIPPA COMPLIANCE**

I hereby assign all medical benefits to which I am entitled to Bay Area Christian Counseling for services rendered by Bay Area Christian Counseling. This will remain in effect until revoked by me in writing. A photocopy of this assignment is to be considered as valid as the original. I hereby authorize said assignee to release all information necessary to secure payment. I hereby assume all financial responsibility for all charges whether or not paid by said insurance. I further understand that all balances due are to be paid within 30 days of receipt of statement. I also acknowledge that this office is HIPPA compliant, and that all efforts will be made to ensure my privacy, and that all records and copies of HIPPA privacy practices are available to me upon request.

\_\_\_\_\_  
Patient Signature (or Legal Guardian)

\_\_\_\_\_  
Date

## Confidentiality of Patient Records

Client Name: \_\_\_\_\_

Social Security #: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Date of

Birth: \_\_\_\_\_

Federal law and regulations protect all confidential patient records maintained by this agency. The staff or counselors will not say to a person outside the agency that a patient attends counseling or disclose any information identifying the patient unless:

1. The patient consents in writing,
2. The disclosure is allowed by court order,
3. The disclosure is made to medical/police personnel in a medical emergency or to qualified personnel for research, audit, or program evaluation.

Violation of the Federal law and regulations by a program is a crime. Suspected violations may be reported to appropriate authorities in accordance with Federal regulations.

Federal law and regulations do not protect any information about a crime committed by a patient either at the program or against any person who works for the program or about any threat to commit such a crime.

Federal law and regulations do not protect any information about suspected child abuse or neglect from being reported under State law to appropriate State or local authorities.

I, \_\_\_\_\_ have received and understand the above reference to my confidentiality right at Bay Area Christian Counseling, Inc. I am aware that Bay Area Christian Counseling, Inc. does not communicate via e-mail, text, or cell phone unless utilizing our secure online counseling services located at [www.bayareachristiancounseling.org](http://www.bayareachristiancounseling.org). I further understand that this form and my signature are to become a permanent part of my record at Bay Area Christian Counseling, Inc.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Clinician Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Bay Area Christian Counseling, Inc.

## Informed Consent for Treatment

I have reviewed the Bay Area Christian Counseling Patient Information Packet, which Includes information regarding access, fees, Patient Rights and Responsibilities and Privacy Practices. I accept those policies and practices. I understand I may request a copy of these notices if I wish to keep them for my personal records.

Behavior health treatment offers no guarantees. Yet, by working with my therapist, doctor and/or counselor, I will get the support necessary to manage the concerns I bring to Bay Area Christian Counseling. I recognize that I will need to try new ways of dealing with these issues. Together with my therapist, doctor, and/or counselor, I may be asked to develop practices, tasks and/or exercises that I will complete outside of therapy that will complement and enhance the effectiveness of treatment. My openness and willingness to engage in these activities may well have a direct impact on the efficacy of the therapy process.

I agree to fully collaborate with my therapist, doctor, and/or counselor. I agree to ask any questions I have, to clarify my therapeutic goals and how therapy is address them.

I understand that therapy may not continue to be necessary when the concerns I initially had are resolved. I also understand that I can terminate my therapy at any time I wish. I may also ask to transfer to another therapist, doctor, and/or counselor if I feel that my current therapy has been ineffective. I agree to notify my therapist, doctor, and/or counselor of my interest in transferring or intent to end therapy and to schedule a transitional session to discuss the reasons for my decision and the possible risks of premature termination of therapy with that treating clinician prior to transferring or terminating therapy.

I also understand that my therapist, doctor and/or counselor may end my treatment if we do not make progress, or if our relationship becomes too strained to continue working together. If treatment is to be terminated, upon request, my therapist, doctor, and/or counselor will make suggestions to guide me in finding another provider of my choice. I will make every effort to follow these suggestions.

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Patient/ Guardian Signature

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Date

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Witness Signature

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Date

## Ability to Pay Form

Patient Name: \_\_\_\_\_

Fee charged for Service:	\$	v1 (90791)	= \$125.00
	\$	v2+ (90837)	= \$85.00
		(90834/90853/90847)	= \$75.00
Fee charged for Court Appearance	\$	200.00/per hour, <b><u>4 hour minimum</u></b>	
Report Preparation Fee	\$	150.00/per report prep	

Program justification for reduction of client fee (i.e. insurance co-pay):

\_\_\_\_\_  
\_\_\_\_\_

I, \_\_\_\_\_, authorize Bay Area Christian Counseling or designated third party billing agency, holder of my medical information about me to release to my insurance company and its agents any information needed to determine these benefits or the benefits payable to related services. Please note: Co-pay/co-insurance is subject to change at any time. For further co-pay/ co-insurance information please contact your insurance company. I understand my signature below requests that payment be made and authorizes release of medical information necessary to pay the claim.

In addition, I, \_\_\_\_\_, understand that it is my responsibility to provide accurate insurance information if I intend to use my insurance coverage. If for any reason my insurance company does not cover or pay for my services within 60 days, I agree to pay for all services rendered. Any portion of a client balance not paid within 90 days will be charged to the credit card below. **Our policy is not to have any client exceed a \$250 balance.**

**I also understand that a 24-hour cancellation notification is necessary for canceling or rescheduling an appointment. If 24-hour\* notification is not given, I understand that I am required to pay a \$55.00 fee for my missed appointment(s).** That fee will be charged to the following credit card:

Type of Card: VISA                      or                      MasterCard   or                      American Express                      or                      Discover

Credit Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Security Code (3 digit # on back): \_\_\_\_\_ American Express Security Code (4 digit #) \_\_\_\_\_

Card Holder Signature: \_\_\_\_\_

I am aware Bay Area Christian Counseling charges a returned check fee of \$25 and a \$10 administrative fee for any declined credit card. In addition, if a check is returned or credit card is declined payment for all future services must be paid by cash or Money Order. Bay Area Christian Counseling's policy states all monies are due for service within 30 days of notification and any account sent to collections is subject to a \$50.00 administrative fee and/or a 35% collections fee.

Patient Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Clinician Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# Notices of Privacy Practices

As required by the privacy regulations created as a result of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

This notice describes how health information about you (as a patient of this practice) may be used and disclosed and how you can get access to your individually identifiable health information. Please review this notice carefully.

A. Our commitment to your privacy:

Our practice is dedicated to maintaining the privacy of your individually identifiable health information also called protected health information, or PHI. In conducting our business, we will create records regarding you and the treatment and services we provide to you. We are required by law to maintain the confidentiality of health information that identifies you. We also are required by law to provide you with the notice of our legal duties and the privacy practices that we maintain in our practice concerning your PHI. By federal and state law, we must follow the terms of the Notice of Privacy Practices that we have in effect at the time.

We realize that these laws are complicated, but we must provide you with the following important information:

- How we may use and disclose your PHI,
- Your privacy rights in your PHI,
- Our obligations, concerning the use and disclosure of your PHI.

The terms of this notice apply to all records containing your PHI that are created or retained by our practice. We reserve the right to revise or amend this Notice of Privacy Practices. Any revision or amendment to this notice will be effective for all of your records that our practice has created or maintained in the past, and for any of your records that we create or maintain in the future. Our practice will post a copy of our current Notice in our offices in a visible location at all times. And you may request a copy of our most current Notice at any time.

B. If you have any questions about this Notice, please contact Jim Stafford, Executive Director.

C. We may use and disclose your PHI in the following ways:

The following categories describe the different ways in which we may use and disclose your PHI

1. Treatment. Our practice may use your PHI to treat you. For example, we may ask you to have laboratory tests (such as blood and urine) tests and we may use the results to help us reach a diagnosis or to provide comprehensive treatment. We might use your PHI in order to write a prescription for you, or we might disclose your PHI to a pharmacy when we order a prescription for you. Many of the people who work for our practice including, but not limited to, our clinicians and assistants may use or disclose your PHI in order to treat you or to assist others in your treatment. Additionally, we may disclose your PHI to other Health care providers for purposes related to your treatment.
2. Payment. Our practice may use and disclose your PHI in order to bill and collect payment for the services and items you may receive from us. For example, we contact your health insurer to certify that you are eligible for benefits (and for what range of benefits), and we may provide your insurer with details regarding your treatment to determine if your insurer will cover, or pay for, your treatment. We may also use and disclose your PHI to obtain payment from third parties that may be responsible for such costs, such as family members. Also, we may use your PHI to bill you directly for services and items. We may disclose your PHI to other health care providers and entities in their billing and collection efforts.
3. Healthcare Operations. Our practice may use and disclose your PHI to operate our business. As examples of the way in which we may use and disclose your information for our operations, our practice may use your PHI to evaluate the quality of your care you received from us, or to conduct cost management and business planning activities for our practice. We may disclose your PHI to other health care providers and entities to assist in their health care operations.
4. Appointment Reminders. Our practice may use and disclose your PHI to contact you and remind you of your appointment.
5. Treatment Options. Our practice may use and disclose your PHI to inform you of potential treatment options and alternatives.
6. Health-related Benefits & Services. Our practice may use and disclose your PHI to inform you of health-related benefits or services that may be of interest to you.
7. Release of Information to Family/Friends. Our practice may use or disclose your PHI to family members or a friend that is involved in your care, or who assists in taking care of you. For example, a parent or guardian may ask that a baby sitter take their child to the counselor/psychiatrist for a mental health appointment. In this example, the baby sitter may have access to this child's medical information.
8. Disclosure Required by Law. Our practices will use and disclose your PHI when we are required to do so by federal, state or local law.

D. Use and disclosure of your PHI in certain circumstances.

1. Public health risks. Our practice may disclose your PHI to public health authorities that are authorized by law to collect information for the purposes of:
  - Maintaining vital records, such as births and deaths,
  - Reporting child abuse or neglect,
  - Preventing or controlling disease, injury, or disability
  - Notifying a person regarding potential exposure to a communicable disease,
  - Notifying a person regarding a potential risk for spreading or contracting a disease or condition,

- Reporting reactions to drugs or problems with products or devices,
  - Notifying individuals if a product or device they may be using has been recalled,
  - Notifying appropriate government agency (i.e.) and authorities regarding the potential abuse or neglect of an adult patient (including domestic violence); however, we will only disclose information if the patient agrees or we are required or authorized by law to disclose this information
  - Notifying your employer under limited circumstances related primarily to workplace injury or medical surveillance.
2. Health Oversight Activities. Our practices may disclose your PHI to a health oversight agency for activities authorized by the law. Oversight activities can include, for example, investigations, inspections, audits, surveys, licensure and disciplinary actions; civil, administrative and criminal procedures or actions; or other activities necessary for the government to monitor government programs, compliance with civil rights laws, and the health care system in general.
  3. Lawsuits & similar proceedings. Our practice may disclose your PHI in response to a court or administrative order, if you are involved in a lawsuit or similar proceedings. We also may disclose our PHI in response to a discovery request, subpoena or other lawful process by another party involved in the dispute, but only if we have made an effort to inform you of the request or to obtain an order protecting the information the party has requested.
  4. Law Enforcement. We may disclose your PHI if asked by a law enforcement official:
    - Regarding a crime victim in certain situation, if we are unable to obtain the person's agreement,
    - Concerning a death, we believe has resulted from a criminal conduct,
    - Regarding criminal conduct at our offices
    - In response to a warrant, summons, court order, subpoena, or similar legal process,
    - To identify/locate a suspect, material witness, fugitive or missing person,
    - In an emergency, to report a crime (including the location or victim (s) of the crime, or the description, identify or location of the perpetrator).
  5. Deceased patients. Our practice may release your PHI to the medical examiner or coroner to identify the cause of death. If necessary, we also may release information in order for funeral directors to perform their jobs.
  6. Organ & tissue donation. Our practice may release your PHI to organizations that handle organ, eye or tissue procurement or transplantation, include organ donation banks, as necessary to facilitate organ or tissue donation and transplantation if you are an organ donor.
  7. Research. Our practice may use and disclose your PHI for research purposes in certain limited circumstances. We will obtain your written authorization to use your PHI for research purposes except when an Internal Review Board or Privacy Board has determined that the waiver of our authorization satisfies all of the following conditions:
    - a. The use or disclosure involves no more than a minimal risk to our privacy based on the following: (i) a adequate plan to protect the identifiers from improper use and disclosure; (ii) an adequate plan to destroy the identifiers at the earliest opportunity consistent with the research (unless there is a health research justification for retaining the identifiers or such retention is otherwise required by law); and (iii) adequate written assurances that the PHI will not be re-used or disclosed to any other per or entity (except as required by law) for authorized oversight of the research study. Or for other research for which the use of disclosure would otherwise be permitted;
    - b. The research could not practicably be conducted with the waiver,
    - c. The research could not practicably be conducted without access to and use pf PHI
  8. Serious Threats to health or Safety. Our practice may use and disclose your PHI when necessary to reduce or prevent a serious threat to your health and safety or the health and safety of another individual or the public. Under these circumstances, we will only make disclosures to a person or organization able to help prevent the threat.
  9. Military. Our practice may use and disclose your PHI if you are a member of U.S. or foreign military forces (including veterans) and if required by the appropriate authorities.
  10. National security. Our practice may disclose your PHI to federal officials for intelligence and national security activities authorized by law. We also may disclose your PHI to federal officials in order to protect the President, other officials or foreign heads of state, or to conduct investigations.
  11. Inmates. Our practice may disclose you PHI to correctional institutions or law enforcement officials if you are an inmate or under the custody of a law enforcement official. Disclosure for these purposes would be necessary: (a) for the institution to provide health care services to you, (b) for the safety and security of the institution, and/or to protect your health and safety or the health and safety of other individuals.
  12. Workers compensation. Our practice may release you PHI for workers" compensation and similar programs.
- E. Your rights regarding PHI:
- You have the following rights regarding the PHI that we maintain about you:
1. Confidential communications: You have the right to request that our practice communicate with you about your health and related issues in a particular manner or at a certain location. For instance, you may ask that we contact you at home, rather than work. In order to request a type of confidential communication you must make a written request to Jim Stafford, Executive Director specifying the requested method of contact, or the location where you wish to be contacted. Our practice will accommodate reasonable requests. You do not need to give a reason for your request.
  2. Requesting restrictions. You have the right to request a restriction in our use of disclosure of your PHI for treatment, payment or health care operations. Additionally, you have the right to request that we restrict our disclosure of your PHI to only certain individuals involved in your



care or the payment for your care, such as family members and friends. We are not required to agree to your request; however, if we do agree, we are bound by our agreement except when otherwise required by law, in emergencies or when the information is necessary to treat you. In order to request a restriction in our use or disclosure of your PHI, you must make a request in writing to Jim Stafford, Executive Director, 102 Old Solomons Island Rd, Ste 202, Annapolis, MD 201401. Your request must describe in a clear and concise fashion:

- The information you wish restricted,
  - Whether you are requesting to limit our practice's use, disclosure or both,
  - To whom you want the limits to apply.
3. Inspections & Copies. You have the right to inspect and obtain a copy of your PHI that may be used to make decisions about you, including patient medical records and billing records, but not including psychotherapy notes. You must submit your request in writing to Jim Stafford, Executive Director, 102 Old Solomons Island Rd, Ste 202, Annapolis, MD 21401 in order to inspect and/or obtain a copy of your PHI. Our practice may charge a fee for the costs of copying, mailing, labor, and supplies associated with your request. Our practice may deny your request to inspect and/or in certain limited circumstances; however, you may request a review of our denial. Another licensed health care professional chosen by us will conduct reviews.
  4. Amendment. You may ask us to amend your health information if you believe it is incorrect or incomplete, and you may request an amendment for as long as the information is kept by or for our practice. To request an amendment, your request must be in writing and submitted to Jim Stafford, Executive Director, 102 Old Solomons Island Rd, Ste 202, Annapolis, MD 21401. You must provide us with a reason that supports your request for the amendment. Our practice will deny your request if you fail to submit your (and the reason for supporting your request) in writing. Also, we may deny your request if you ask us to amend information that is in our opinion: (a) accurate and complete; (b) not kept of the PHI kept by or for the practice; (c) not part of the PHI which you would be permitted to inspect and copy; or (d) not created by our practice, unless the individual or entity that created the information was not available to amend the information.
  5. Accounting of disclosures. All of our patients have the right to request an "accounting of disclosures." An accounting of disclosures is a list of certain non-routine disclosures our practice has made of your PHI for purposes not related to treatment payment or operations. Use of your PHI as part of the routine patient care in our practice is not required to be documented (For Example, the doctor sharing information with the nurse; or the billing department using your information to file your insurance claim). In order to obtain an accounting of disclosures, you must submit your request in writing to Jim Stafford, Executive Director, 102 Old Solomons Island Rd, Ste 202, Annapolis, MD 21401. All requests for an "accounting of disclosures" must state a time period, which may not be longer than six years from the date of disclosure and may not include dates before August 2015. The first list you request within a 12-month period is free of charge, but our practice must charge you for additional lists within the same 12-month period. Our practice will notify you of the costs involved with additional requests, and you may withdraw your request before you incur any costs.
  6. Right to a paper copy of this notice. You are entitled to receive a copy of our notice of privacy practices. You may ask us to give you a copy of this notice at any time. To obtain a paper copy of this notice contact Jim Stafford, Executive Director.
  7. Right to file a complaint. If you believe your privacy rights have been violated, you may file a complaint with our practice or with the Secretary of the Department of Health and Human Services. To file a complaint with our practice, contact Jim Stafford, Executive Director. All complaints must be submitted in writing. You will not be penalized for filing a complaint.
  8. Right to provide an authorization for other uses and disclosures. Our practice will obtain your written authorization for uses and disclosures that are not identified by this notice or permitted by applicable law. Any authorization you provide to us regarding the use and disclosure of your PHI may be revoked at any time in writing. After you revoke your authorization, we will no longer use or disclose your PHI for the reasons described in the authorization. Please note: we are required to retain records of your care.

**Again, if you have any questions regarding this notice of our health information privacy policies, please contact us at 410.266.3058.**

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**Client Signature HIPPA Disclosure**

**Date**

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**Clinician Signature**

**Date**