# **New Client Intake Form**

**Section 1: Print Clearly** 

me Phone:	Work Phone:Cell Phone:	
rriedSingle	DivorcedYour email:Spouse email:	
eferred Phone Cont	tact Number:Sex:MF Date of Birth:/	/
ce:White	Black Hispanic Asian Mixed Race Other	
	erto RicanOtherNot of F	
hest Grade Comple	leted:Family Income:per year	
ployee Status:	Full-TimePart-timeHomemakerUnemployedRet	ired/ Disable
urce of Income:	Wages/SalaryRetirement/PensionPublic AsstSel	f-Employment
ing Arrangements:	HomelessDependent LivingIndeper	ndent Living
mber of Children:_	Currently Pregnant? Yes / No Tobacco Use Past 30 days? Yes / No	
e of illegal drugs pa	ast 30 days? Yes / No Do you use alcohol? Yes / No How many times weekly?	
w many drinks do y		
	you have per occasion? Have you ever been arrested? Yes / No # of Arres	
	you have per occasion? Have you ever been arrested? Yes / No # of Arres	<u> </u>
ason for Arrest(s)? <sub>_</sub>	you have per occasion? Have you ever been arrested? Yes / No # of Arres  In case of emergency, please contact:	ts?
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1. 2. ction 2: ason for appointme 1. Self-Referral *Please list re Presenting Pr  I am currentl Counselor Reason for se	Have you ever been arrested? Yes / No # of Arres   In case of emergency, please contact:   /	rts? Phone/ Relationship) Phone/ Relationship)
1. 2. ction 2: ason for appointme 1. Self-Referral *Please list re Presenting Pr  I am currentl Counselor Reason for se	Have you ever been arrested? Yes / No # of Arres   In case of emergency, please contact:   /	rts? Phone/ Relationship) Phone/ Relationship)
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## **INFORMATION FORM**

Client's Full Name:		Birth Date:	
Adult SS #:	Driver's License #:		
Employer Name:	Employer <i>F</i>	Address:	
Occupation:		<u> </u>	
Name of Spouse or Parent/Guard	dian:		
Referring Doctor (if applicable):_	Ph	none:	
Primary Care Doctor:Current Medication and Dosage:			
	Insurance Information		
Please present ALL insurance ca	rds and Driver's License to the clini	ician.	
Insurance Type:	MBR ID#:	Group#:	
Policy Holder Name/Relationship	):	Co-Payment amt:	
Policy Holder Date of Birth:	Policy Holder SS#: _		
Policy Holder Address (if differer	nt from client):		
Secondary Ins:	MBR ID#:	Group#:	
Policy Holder Name/ Relationshi	p:	Co-Payment amt.:	
Policy Holder Date of Birth:	Policy Hold SS#:		
Guarantor Name: (Person respo	nsible after insurance):		
Relationship:	Address:		
Home Phone:	Work Phone:	Cell:	
ASSIGNMENT, RELEASE, and I	HIPPA COMPLIANCE		
Counseling. This will remain in effect original. I hereby authorize said assist for all charges whether or not paid be Statement. I also acknowledge that	t until revoked by me in writing. A phot gnee to release all information necessa by said insurance. I further understand	stian Counseling for services rendered by Bay Area Christian atocopy of this assignment is to be considered as valid as the ary to secure payment. I hereby assume all financial responsibilithat all balances due are to be paid within 30 days of receipt of tall efforts will be made to ensure my privacy, and that all recor	
Client Signature (or Legal Guardian)		Date	

# **Confidentiality of Client Records**

Client Name:	
Social Security #://	
Date of Birth:	
Federal law and regulations protect all confidential patient records m will not say to a person outside the agency that a client attends coun patient unless:	
<ol> <li>The patient consents in writing,</li> <li>The disclosure is allowed by court order,</li> <li>The disclosure is made to medical/police personnel in a medic research, audit, or program evaluation.</li> </ol>	cal emergency or to qualified personnel for
Violation of the Federal law and regulations by a program is a appropriate authorities in accordance with Federal regulations.	crime. Suspected violations may be reported to
Federal law and regulations do not protect any information al program or against any person who works for the program or about a	•
Federal law and regulations do not protect any information al reported under State law to appropriate State or local authorities.	bout suspected child abuse or neglect from being
I have received and understand the above reference to my co Counseling, Inc. I am aware that Bay Area Christian Counseling, Inc. d phone unless utilizing our secure online counseling services located a understand this form and my signature are to become a permanent p Counseling, Inc.	loes not communicate via e-mail, text, or cell at <a href="https://www.bayareachristiancounseling.org">www.bayareachristiancounseling.org</a> . I further
Client or Legal Guardian 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.

			/	/
Client/ Legal Guardian Signature	D	ate		
	_		/	/
Witness Signature	D	ate		

# **Ability to Pay Form**

Client and Parent Name:				
Fee charged for Service:	50 Minute Intake = \$1	35.00 60	O Minute Sess	sion = \$115.00
50 Minute Family Session with Patient = \$100.00		50	O Minute Indi	vidual Session = \$80.00
50 Minute Family Session wit	hout Patient = \$80.00	30	O Minute Sess	sion = \$60.00
Fee charged for Court Appear Report Preparation Fee Forms & Letters:		\$200.00/per hou \$150.00/per rep \$25 to \$75 depe	ort nding on deta	ail/time
<u>Phone calls:</u> A fee of \$15 will minutes. Any longer time fra	•		ian 15 minute	is not to exceed 20
Program justification for redu			ys):	
I authorize Bay Area Christian Couns about me to release to my insurance the benefits payable to related service further co-pay/ co-insurance information requests that payment be made and In addition, I understand that it is my	e company and its age ces. <u>Please note: Co-pation please contact y</u> authorizes release of	ents any informatic bay/co-insurance is your insurance con medical informat	on needed to s subject to cl npany. I unde ion necessary	determine these benefits or hange at any time. For erstand my signature below to pay the claim.
insurance coverage. If for any reason agree to pay for all services rendered	my insurance compa	any does not cover	or pay for m	y services within 45 days, I
I also understand that a 24-hour car	ncellation notification	n is necessary for o	canceling or r	escheduling an appointment
If 24-hour* notification is not given,	I understand that I a	ım required to pay	<mark>/ a \$55.00 fe</mark>	e for my missed
appointment(s). Any no call/no sho	w missed fee is \$80.0	<b>0.</b> Those fees will	be charged to	the following credit card:
Type of Card: VISA or	MasterCard or	American Express	or D	Discover
Credit Card Number:			Exp. Date:	_ Security Code (3 digit
# on back):	Ame	erican Express Secu	urity Code (4	digit #)
Card Holder Signature:				_
I am aware Bay Area Christian Counselir credit card. In addition, if a check is retu Money Order. Bay Area Christian Couns account sent to collections is subject to	irned or credit card is d eling's policy states all	eclined payment for smonies are due for s	all future servervice within	vices must be paid by cash or 30 days of notification and any
Client/Guardian Signature:		Da	te:	
Clinician Signature:		Da	te:	

## **RELEASE AND/OR OBTAIN INFORMATION FORM**

l,	, AUTHORIZE BAY AREA CHRISTIAN COUNSELING
(Name of Client/Legal Guardian)	
TO RELEASE/OBTAIN INFORMATION CONCERNIN	IG MY TREATMENT TO/FROM
For Client	Date Consent Initiated:
REGARDING THE FOLLOWING INFORMATION:	
Initial Interview	Psycho-Social History
Counselor's Notes	Discharge Summary
Medical History, Physical Exam,	Disability Report or
Forms Laboratory Reports	
Other (Specify):	
I WOULD LIKE THIS INFORMATION FORWARDED	D BECAUSE:
It will contribute to a comprehensive trea	atment plan for me.
It will provide information to my insurance	ce company r third party payees as needed for billing.
Other reasons (Specify):	
be disclosed without my written consent unless of this consent at any time, except to the extent the ordered, etc.). I also understand that this consen	ected under Federal and State Confidentiality Regulations and cannot otherwise provided for by Regulations. I understand that I may revoke at action has been taken in reliance on it (e.g. probation, parole, court expires automatically at the completion of the disclosure unless t or condition, which marks the expiration of consent:
Client/Legal Guardian Signature	Date
Witness Signature	Date

#### PROBATION OF REDISCLOSURES

This information has been disclosed to you from records whose confidentiality is protected by Federal Law, Federal Regulations (42CFR, Part 2) prohibit you from making any further disclosure of it without the specific written consent of the person to whom it pertains, or as otherwise permitted by such regulations. A general authorization for the release of medical information is NOT sufficient for this purpose.

#### **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 of 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 the 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. <u>Treatment.</u> 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 you 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 you PHI to other health care providers and entities in their billing and collection efforts.
- 3. <u>Healthcare Operations.</u> Our practice may use and disclose you 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 you PHI to other health care providers and entities to assist in their health care operations.
- 4. Appointment Reminders. Our practice may use and disclose you PHI to contact you and remind you of your appointment.
- 5. <u>Treatment Options.</u> Our practice may use and disclose your PHI to inform you of potential treatment options and alternatives.
- 6. <u>Health-related Benefits & Services</u>. 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. <u>Disclosure Required by Law</u>. 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:

- 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 make 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 insect 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 s part of the routine patient care is 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 that sic 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 po	licies, please contact us at 410.266.3058.	
Client/Legal Guardian Signature HIPPA Disclosure	Date	
Clinician Signature	Date	