

Client Information

Legal Name _____ Date _____

Preferred Name _____ Date of Birth ___/___/_____

Legal Guardian Name _____

Legal Guardian Name _____

Mailing Address _____

Please Check:

Yes **No** Do we have your authorized permission to send you mail for administrative purposes only that may include Protected Health Information (PHI) such as your name or your receipts?

Client (Child) Phone Number (Circle one: Cell / Home) _____

Yes **No** Can we call you and receive calls from you at this number?

Yes **No** Do we have your authorized permission to leave you a message at this number for the purpose of scheduling only, that may include PHI (ie your name, our name and the reason for the call)?

Guardian Phone Number (Circle one: Cell / Home / Work) _____

Guardian Phone Number (Circle one: Cell / Home / Work) _____

Yes **No** Can we call you and receive calls from you at these numbers?

Yes **No** Do we have your authorized permission to leave you a message at these number for the purpose of scheduling only, that may include PHI (ie your name, our name and the reason for the call)?

Client Email: _____

Yes **No** Do we have your authorized permission to send you email or respond to email from you for the purpose of scheduling only, that may include PHI (such as your name, our name, appointment dates)?

Yes **No** Do you wish to receive our email Newsletter? *Healing Times: Strategies for Healthy Living*
**Note: We will not sell or distribute any email addresses under any circumstances.

Guardian Email: _____

Guardian Email: _____

Yes **No** Do we have your authorized permission to send you email or respond to email from you for the purpose of scheduling only, that may include PHI (such as your name, our name, appointment dates)?

Yes **No** Do you wish to receive our email Newsletter? *Healing Times: Strategies for Healthy Living*
**Note: We will not sell or distribute any email addresses under any circumstances.

Emergency Contact Information

Name _____ Relationship _____ Phone _____

**We will only contact this person in the event of a life threatening emergency.

How did you hear about us? _____

As a professional courtesy, may we send a note to thank them for the referral? Yes No

Contract For Services

1. Following is the contract for services between your provider (Clinician) and you, _____ (Client Name) the client. This contract is dated ____/____/_____, and will remain in effect until both parties agree to written changes.

2. Credentials:

- Clinician is a Licensed Certified Social Worker - Clinical, Licensed Clinical Professional Counselor, Licensed Graduate Social Worker or Licensed Graduate Professional Counselor in the State of Maryland. Clinician also obtained a professional Masters degree, and is committed to providing professional mental health care to the Client. Clinician uses a range of modalities of counseling and psychotherapy.

3. Client Rights and Important Information:

- Client is entitled to receive information about methods of therapy, therapy techniques used and the duration of therapy (if it can be determined by Clinician). Consult your Clinician regarding your care, about any questions or discussion regarding Clinicians specific therapy methods and techniques.
- Generally, the information provided by and to Client during therapy sessions is legally confidential, meaning that the Clinician cannot disclose confidential information without the Client’s consent.

Noted exceptions to this general rule are listed below:

*For more detailed information, see the attached Notice of Privacy Practices (NPP).

- If you sign a written Release of Information for a specific person for a specific reason.
- When the clinician suspects or determines, the client is a danger to themselves or others.
- Information concerning any type of abuse of children or vulnerable adults.
- Consultation with other mental health professionals. *No identifying information will be shared.
- Communication with administrative office staff for administrative purposes only such as scheduling, correspondence, billing or other administrative documents and tasks.
- When a court order or subpoena requires release of Client records.
- To defend myself in legal actions by a client.
- *Note, if you are using Employee Assistance Program (EAP) services, the EAP, not your employer, may be notified of your session dates, assessed issues, goals and outcome, and clinical recommendations.

- Client has the right to express any grievances regarding dissatisfaction with services. Client may send a written complaint to the Secretary of the U.S. Department of Health and Human Service. We ask Client to also discuss any dissatisfaction with Clinician directly to improve the quality of our care.

4. Fee Information:

	Amy Hooper,	Lev Grotel,	Jill Abramson,	Tamar Barnett,	Jing Yang,	Colleen Fitzgerald,	Cathy Caldwell,	Erin Wical
	LCSW-C, CEAP	LCSW-C	LCSW-C	LCPC	LGPC	LGPC, NCC	LCPC, ATR-BC	LGPC

Minutes	\$175	\$150	\$140	\$140	\$140	\$140	\$130	\$130
○ 50-60 Intake	\$175	\$150	\$140	\$140	\$140	\$140	\$130	\$130
○ 45-50 Individual	\$160	\$130	\$130	\$130	\$130	\$130	\$130	\$130
○ 50-60 Couples	\$175	\$150	\$140	\$140	\$140	\$140	\$130	\$130
○ 50-60 Family	\$175	\$150	\$140	\$140	\$140	\$140	\$130	\$130

- *Note, if you are using EAP services, the EAP is responsible for payment for all authorized visits.
- **Full fee will be charged for any missed or canceled appointments with less than 24 business hours notice.** Monday appointments must be canceled by Friday. One “exception pass” will be given each year.

4. Fee Information Continued:

- No charges will be assessed for brief or occasional telephone calls. However, if there are frequent telephone calls lasting more than 10 minutes, Client will be billed proportionately.
- Outstanding payments that are not received within 60 days will be charged a \$25 late fee. There will be a \$25.00 fee for any returned checks.
- Fees may change in the future and if they do, Client will be notified at least 30 days prior to any change.
- Clinician does not complete or submit claims to your insurance company. Insurance filing is the responsibility of the client. If your insurance company covers and authorizes reimbursement, they will pay you directly. The information the insurances usually require will be included on your receipt.
- Clinician does not accept 3rd party payments from insurance companies, health savings accounts, workman's compensation, attorneys or disability services.
- All payments are to be made directly to Clinician, from Client, at the time of each session.

5. Office Policies

- Effective psychotherapy requires a good match between Client and Clinician. The first sessions will determine if Clinician is the right provider for Client based on clinical needs. If not, Clinician will offer Client several other options of providers to better meet Client's needs.
- Clinician will do their best to help Client achieve their goals, but cannot guarantee any particular result. The more active a role Client takes in treatment, the more Client will benefit from the services rendered.
- While psychotherapy can be very beneficial, there may be times when a client's symptoms or distress level may increase during treatment. Please share this with Clinician if distress arises so they can assist.
- While sessions may be intimate emotionally and psychologically, it is important to know the relationship between Client and Clinician is professional and not a friendship. Contact is limited to paid therapeutic sessions as well as phone and email contact for the purpose of administration or scheduling.
- Lateness by the Client does not alter the fee or ending time. Clinician lateness will always be made up.
- In the event of inclement weather, call your therapist to find out if your session is cancelled. If Montgomery County Government is closed and Client is unable to attend the session, the fee is waived.
- Due to safety reasons, we cannot have any children under 13 years left unattended in our waiting room.
- Clinician does not complete court reports, recommendations for custody, disability applications, or psychological testing. If you require these documents, Clinician can refer you to a specialist or doctor.
- Client waives their right to request records in the event of a legal matter as your clinician is ethically compromised if they get involved in the legal matters of their clients.
- Assisting with legal action is outside the scope of practice for Clinician.
- The Protected Health Information about Client in the clinical record is available for you to review. Unless disclosing the record to Client will likely endanger Client or someone else's safety, Client can review or receive a copy of the records if a request is made in writing 30 days in advance. Due to the sensitive nature of these records, it is recommended to review them with your clinician present. There is a standard copying fee of \$.25 per page. Alternatively, Client has a right to request a summary of services sent to Client or to another provider.
- Clinician is directly responsible for the care, maintenance and property of the client records. Contact about records and records requests will be made directly to the Clinician.
- If documentation is required, there will be a set fee for any completion of forms, preparation of a summary or assessments. Please discuss these requests and associated fees with your Clinician before any additional paperwork is requested or completed.
- It is impossible to guarantee the confidentiality of email or text messaging content. You acknowledge the risks and release therapists from liability for the risk to your confidentiality when you chose to email or text your therapist. For more private communication, call your therapist directly or schedule a session to talk in the office.

- All Clients and Clinician emails will be limited to administrative issues (ie scheduling or billing). Client understands that fax and email communication may be intercepted by others and Clinician is not responsible if such interceptions occur. Clinician will limit their communication to the methods documented by the Client in this agreement, given the limitations listed above.
- We do not accept friend requests or connections from clients on any social media platforms such as Facebook, Linked In, Twitter, etc. We cannot protect confidentiality if you connect with us via social media. The relationship will be kept to office sessions and administrative phone or email contact only.
- By signing this form, you consent to release your contact information and, if necessary, clinical records to a designee, in the event your clinician has an emergency and they are unable to contact you directly.
- Client has the right to terminate services at any time. It is most helpful and recommended that Client discuss termination with Clinician before discontinuing. All Clients are mailed a closure letter at the end of treatment to formally end the therapeutic agreement.

6. Emergencies and After Hours:

- Office phone is for non-emergency voicemail only. Your clinician does not offer after hour emergency services.
- **If you have an Mental Health or Medical emergency, please call 911, go to your nearest emergency room or call the Montgomery County Crisis Center at (240) 777-4000 or walk in at 1301 Piccard Drive, Rockville, MD.**

By my signature I am affirming that I understand and accept the policies described in this document and that I have received copies of the Notice of Privacy Practices. By agreeing to psychotherapeutic treatment, I understand that services will be rendered in a professional manner, consistent with accepted ethical standards. If Client is under eighteen years of age, responsible Guardian agrees to all terms and conditions of contract and is legally bound by the same terms as Client.

_____	_____	_____
Client Name	Client Signature	Date
_____	_____	_____
Legal Guardian Name (if Client is under 18)	Legal Guardian Signature	Date
_____	_____	_____
Legal Guardian Name (if Client is under 18)	Legal Guardian Signature	Date
_____	_____	_____
Clinician Name	Clinician Signature	Date

Additional Treatment Information for Minors

What to expect in therapy:

The purpose of meeting with a therapist is to get help with issues in your life that are bothering you or that are keeping you from being successful in important areas of your life. You may be here because you wanted to talk to a therapist about these issues. Or, you may be here because your parent, guardian, doctor or teacher had concerns about you. When we meet, we will discuss these issues. I will ask questions, listen to you and suggest a plan for improving these issues. It is important that you feel comfortable talking to me about the issues that are bothering you.

Confidentiality and Privacy:

Privacy, also called confidentiality, is an important and necessary part of good counseling. As a general rule, I will keep most of the information you share with me in our sessions confidential; however, it is common practice for me to meet with your parent/parents/guardian for periodic updates about our work together as well as to get information from them. Most specific details you share with me do not need to be told to your parent/parents/guardian and I will discuss with you what I intend to tell the relevant adults in your life.

There are, however, important exceptions to this rule that are important for you to understand before you share personal information with me in a therapy session. In some situations, I am required by law or by the guidelines of my profession to disclose information whether or not I have your permission. I have listed some of these situations below.

Confidentiality cannot be maintained when:

- You tell me you want to cause serious harm or death to yourself, and I believe you have the intent and ability to carry out this threat in the very near future. I must take steps to inform a parent or guardian of what you have told me and how serious I believe this threat to be. I must make sure that you are protected from harming yourself.
- You tell me you plan to cause serious harm or death to someone else, and I believe you have the intent and ability to carry out this threat in the very near future. In this situation, I must inform your parent or guardian, and I must inform the person who you intend to harm.
- You are doing things that could cause serious harm to you or someone else, even if you do not intend to harm yourself or another person. In these situations, I will need to use my professional judgment to decide whether a parent or guardian should be informed.
- You tell me you are being abused-physically, sexually or emotionally-or that you have been abused in the past. In this situation, I am required by law to report the abuse to the Child Protective Services and would notify your parents as well.
- You tell me that another child in your family or another child that you know is being abused-physically, sexually or emotionally-or that child has been abused in the past. In this situation, I am required by law to report the abuse to the Child Protective Services.

You are involved in a court case and a request is made for information about your counseling or therapy. If this happens, I will not disclose information without your written agreement unless the court requires me to. I will do all I can within the law to protect your confidentiality, and if I am required to disclose information to the court, I will inform you that this is happening.

Communication with your parents/guardians:

Except for situations such as those mentioned above, I will not tell your parent or guardian specific things you share with me in our private therapy sessions unless we discuss that I plan to first and I believe it is very clinically important for you. This includes activities and behavior that your parent/guardian would not approve of — or would be upset by — but that do not put you at risk of serious and immediate harm. However, if your risk-taking behavior becomes more serious, then I will need to use my professional judgment to decide whether you are in serious and immediate danger of being harmed. If I feel that you are in such danger, I will communicate this information to your parent or guardian. Usually, I will tell you that I feel I must communicate with your parent/guardian, and often, we may work together to tell them something important.

Even if I have decided to keep information confidential – to not tell your parent or guardian – I may believe that it is important for them to know what is going on in your life. In these situations, I will encourage you to tell your parent/guardian first and will help you find the best way to tell them. Also, when meeting with your parents, I may sometimes describe issues in general terms, in order to help them know how to be more helpful to you.

You should also know that, by law in Maryland, your parent/guardian has the right to see any written records I keep about our sessions. It is rare that a parent/guardian requests to view records, and I have asked them not to do so as part of the consent to treatment, but by law I would be required to provide these records if asked.

Communication with other adults:

School: I will not share any information with your school unless I have permission from you and your parent or guardian. Sometimes I may request to speak to someone at your school to find out how things are going for you. Also, it may be helpful at times for me to give suggestions to your teacher or counselor at school. If I want to contact your school, or if someone at your school wants to contact me, I will discuss it with you and ask for your written permission. A very unlikely situation might come up in which I don't have your permission but both I and your parent/guardian believe that it is very important for me to share certain information with them. In this situation, I will use my professional judgment to decide whether to share any information.

Doctors: Sometimes your doctor and I may need to work together; for example, if you need to take medication in addition to seeing a therapist. I will get your written permission and permission from your parent/guardian in advance to share information with your doctor. The only time I will share information with your doctor even if I don't have your permission is if you are doing something that puts you at risk for serious and immediate physical/medical harm.

Social Media

Some clients wish to invite therapists or former therapists to be friends on Facebook, my Space, Twitter etc. Unfortunately, I am unable to accept requests of this kind. I feel your privacy is better protected if I am not part of your online social network. In addition, this lets you tell me important parts of your life yourself rather than me reading about you online. It also keeps my life private and separate from therapist, so that the focus remains on you and the reason(s) you wish to attend treatment. Please feel free to discuss any questions/concerns about this policy or any of these policies with me.

Overview:

Therapy is a great way to work on issues or concerns relevant to you and your parents/caretakers. Part of successful treatment includes being open and honest with your therapist, and trying out the things we talk about in treatment in your daily life. Your therapist will make every effort to be clear about your privacy. Typically, your therapist will share general information with your parents/caretakers, such as whether you attended sessions, main treatment areas and if you appear to be participating in treatment. Unless one of the situations your therapist discussed with your comes up (issues of child abuse, wanting to hurt yourself or others, or very risky behavior), your therapist will keep the specifics of therapy private unless your therapist inform you that it would be clinically beneficial to share certain information with your guardian. Sometimes you and your therapist may discuss involving your parents/caretakers in treatment, or to consult with them to get more information. However, you should also know it is legal in Maryland for parents/caretakers to access your treatment records.

Signing below indicates that you have reviewed the policies described above and understand the limits to confidentiality. If you have any questions as we progress with therapy, you can ask your therapist at any time.

Minor's Signature _____ Date _____

Parent/Legal Guardian: Initial the points and sign below to indicate your agreement to respect your child's privacy:

- _____ I will refrain from requesting detailed information about individual therapy sessions with my child. I understand that I will be provided with periodic updates about general progress, and/or may be asked to participate in therapy sessions as needed.
- _____ Although I know I have the legal right to request written records/session notes since my child is a minor, I agree NOT to request these records in order to respect the confidentiality of my child's treatment.
- _____ I understand that I will be informed about situations that could seriously endanger my child. I know this decision to breach confidentiality in these circumstances is up to the therapist's professional judgment.

_____	_____	_____
Client Name	Client Signature	Date
_____	_____	_____
Legal Guardian Name (if Client is under 18)	Legal Guardian Signature	Date
_____	_____	_____
Legal Guardian Name (if Client is under 18)	Legal Guardian Signature	Date
_____	_____	_____
Clinician Name	Clinician Signature	Date

Clinical Intake (for teen to fill out)

What do you want to focus on in therapy? _____

Are you feeling: Depressed Anxious Angry Elated Stressed Happy Confused
 Frustrated Worried Hurt Afraid Sad Other _____

Counseling History:

Have you received any previous counseling or other therapeutic assistance? Yes No
Please explain (including when, for how long, was it helpful?)

Medical History:

Are you suffering from any Medical conditions at this time? If yes, please explain (use back if needed):

Medication, non-prescription drugs, & herbal supplements you are now using / and the amount?

LifeStyle Information:

Describe your weekly exercise frequency: 0-1 session 2-4 sessions 5-7sessions 8+ sessions

Describe your nightly sleep: 0-5 hours 5-6 hours 7-8 hours 9-10 hours 11-12 hours 12+ hours

Describe your daily technology use (computer, phone, tablet etc.): 0-2 hrs 3-4 hrs 5-7 hrs 8+ hrs

Describe your daily caffeine use: 0-1 cup 2-3 cups 3-5 cups 6+cups

Describe your daily tobacco use: 0-1 cigarette 2-4 cigarettes 5-10 cigarettes 11+ cigarettes

Describe your daily alcohol use: 0-1 drink 2-3 drinks 3-5 drinks 6-8 drinks 9+ drinks

Describe your daily drug use: Type of Drug _____ Amount Used _____

Family History:

Are you? Single In a Relationship Other _____

Do you have any children? (names/ages) _____

Who is living in your home now: _____

Risk Assessment:

Are you having or had in the past any thoughts of hurting yourself or others? Please explain:

Describe the use of alcohol and drugs by *those living with you*: _____

Have you or family members, in the past or at present, had problems/addiction with drugs, alcohol, food, sex, gambling, other? Please explain: _____

HIPAA: Your Information. Your Rights. Our Responsibilities.

This notice describes how medical information about you may be used and disclosed and how you can get access to this information. **Please review it carefully.**

Your Rights - You have the right to:

- Get a copy of your paper or electronic medical record
- Correct your paper or electronic medical record
- Request confidential communication
- Ask us to limit the information we share
- Get a list of those with whom we've shared your information
- Get a copy of this privacy notice
- Choose someone to act for you
- File a complaint if you believe your privacy rights have been violated

Your Choices - You have some choices in the way that we use and share information as we:

- Tell family and friends about your condition
- Provide disaster relief
- Provide mental health care

Our Uses and Disclosures - We may use and share your information as we:

- Treat you
- Run our organization
- Bill for your services
- Help with public health and safety issues
- Do research
- Comply with the law
- Address workers' compensation, law enforcement, and other government requests
- Respond to lawsuits and legal actions

Your Rights - When it comes to your health information, you have certain rights.

This section explains your rights and some of our responsibilities to help you.

Get an electronic or paper copy of your medical record

- You can ask to see or get an electronic or paper copy of your medical record and other health information we have about you. Ask us how to do this.
- We will provide a copy or a summary of your health information, usually within 30 days of your request. We may charge a reasonable, cost-based fee.

Ask us to correct your medical record

- You can ask us to correct health information about you that you think is incorrect or incomplete. Ask us how to do this.
- We may say "no" to your request, but we'll tell you why in writing within 60 days.

Request confidential communications

- You can ask us to contact you in a specific way (for example, home or office phone) or to send mail to a different address.
- We will say "yes" to all reasonable requests.

Ask us to limit what we use or share

- You can ask us not to use or share certain health information for treatment, payment, or our operations. We are not required to agree to your request, and we may say "no" if it would affect your care.
- If you pay for a service or health care item out-of-pocket in full, you can ask us not to share that information for the purpose of payment or our operations with your health insurer. We will say "yes" unless a law requires us to share that information.

Get a list of those with whom we've shared information

- You can ask for a list (accounting) of the times we've shared your health information for six years prior to the date you ask, who we shared it with, and why.
- We will include all the disclosures except for those about treatment, payment, and health care operations, and certain other disclosures (such as any you asked us to make).

Get a copy of this privacy notice: You can ask for a paper copy of this notice at any time, even if you have agreed to receive the notice electronically. We will provide you with a paper copy promptly.

Choose someone to act for you

- If you have given someone medical power of attorney or if someone is your legal guardian, that person can exercise your rights and make choices about your health information.
- We will make sure the person has this authority and can act for you before we take any action.

File a complaint if you feel your rights are violated

- You can complain if you feel we have violated your rights by contacting us using the information on page 1.
- You can file a complaint with the U.S. Department of Health and Human Services Office for Civil Rights by sending a letter to 200 Independence Avenue, S.W., Washington, D.C. 20201, calling 1-877-696-6775, or visiting www.hhs.gov/ocr/privacy/hipaa/complaints/.

- We will not retaliate against you for filing a complaint.

Your Choices - For certain health information, you can tell us your choices about what we share. **If you have a clear preference for how we share your information in the situations described below, talk to us. Tell us what you want us to do, and we will follow your instructions.**

In these cases, you have both the right and choice to tell us to:

- Share information with your family, close friends, or others involved in your care
- Share information in a disaster relief situation
- Include your information in a hospital directory

If you are not able to tell us your preference, for example if you are unconscious, we may share your information if we believe it is in your best interest. We may also share your information when needed to lessen a serious and imminent threat to health or safety.

In these cases we never share your information unless you give us written permission:

- Marketing purposes
- Sale of your information
- Most sharing of psychotherapy notes

Our Uses and Disclosures - How do we typically use or share your health information?

We typically use or share your health information in the following ways.

Treat you

We can use your health information and share it with other professionals who are treating you.

Example: A doctor treating you for an injury asks another doctor about your overall health condition.

Run our organization

We can use and share your health information to run our practice, improve your care, and contact you when necessary. *Example: We use health information about you to manage your treatment and services.*

Bill for your services

We can use and share your health information to bill and get payment from health plans or other entities.

Example: We give information about you to your health insurance plan so it will pay for your services.

How else can we use or share your health information?

We are allowed or required to share your information in other ways – usually in ways that contribute to the public good, such as public health and research. We have to meet many conditions in the law before we can share your information for these purposes. For more information see: www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/index.html.

Help with public health and safety issues

We can share health information about you for certain situations such as:

- Preventing disease
- Reporting adverse reactions to medications
- Reporting suspected abuse, neglect, or domestic violence
- Preventing or reducing a serious threat to anyone’s health or safety

Do research

We can use or share your information for health research.

Comply with the law

We will share information about you if state or federal laws require it, including with the Department of Health and Human Services if it wants to see that we’re complying with federal privacy law.

Address workers’ compensation, law enforcement, and other government requests

We can use or share health information about you:

- For workers’ compensation claims
- For law enforcement purposes or with a law enforcement official
- With health oversight agencies for activities authorized by law
- For special government functions such as military, national security, and presidential protective services

Respond to lawsuits and legal actions

We can share health information about you in response to a court or administrative order, or in response to a subpoena.

Our Responsibilities

- We are required by law to maintain the privacy and security of your protected health information.
- We will let you know promptly if a breach occurs that may have compromised the privacy or security of your information.
- We must follow the duties and privacy practices described in this notice and give you a copy of it.
- We will not use or share your information other than as described here unless you tell us we can in writing. If you tell us we can, you may change your mind at any time. Let us know in writing if you change your mind.

For more information see: www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/noticepp.html.

Changes to the Terms of this Notice

We can change the terms of this notice, and the changes will apply to all information we have about you. The new notice will be available upon request, on our web site, and we will mail a copy to you.

Notice must also include: Effective Date of this Notice: 9-22-13