

CLIENT INFORMATION PACKET

This booklet will help acquaint you with my office procedures, as well as provide information about your rights and responsibilities with regard to consultation. You will also find updated information about your rights pursuant to the Health Insurance Portability and Accountability Act (HIPAA). If you have any questions about this information, please discuss them with me at any time. Some of the forms you are filling out ask for similar information. This is due to the forms being for different purposes (e.g. insurance). In any case, I apologize for the redundancy and thank you for taking the time to fill out the forms.

DIRECTIONS

From the North take 100 south to 394, west on 394 to Parkplace Blvd/Xenia Avenue. Turn left onto Parkplace Blvd Avenue, crossing over 394 and continue approximately three blocks to Gamble Drive. Take a left onto Gamble Drive and continue to the third parking lot entrance on the right. Follow the ramp up and you will see “West End Plaza” above the entrance. Take the west bank of elevators to the third floor and when the doors open, you will be facing our office suite.

From the South take 100 north to 394, west on 394 to Parkplace Blvd/Xenia Avenue. Turn left on Parkplace Blvd, crossing over 394 and continue approximately three blocks to Gamble Drive. Take a left onto Gamble Drive and continue to the third parking lot entrance on the right. Follow the ramp up and you will see “West End Plaza” above the entrance. Take the west bank of elevators to the third floor and when the doors open, you will be facing our office suite.

From the East take 394 west to Parkplace Blvd/Xenia Avenue. Turn left on Parkplace Blvd, crossing over 394 and continue approximately three blocks to Gamble Drive. Take a left onto Gamble Drive and continue to the third parking lot entrance on the right. Follow the ramp up and you will see “West End Plaza” above the entrance. Take the west bank of elevators to the third floor and when the doors open, you will be facing our office suite.

From the West take 394 east to Parkplace Blvd/Xenia Avenue. Turn right onto Parkplace and continue approximately three blocks to Gamble Drive. Take a left onto Gamble Drive and continue to the third parking lot entrance on the right. Follow the ramp up and you will see “West End Plaza” above the entrance. Take the west bank of elevators to the third floor and when the doors open, you will be facing our office suite.
sides of the building.

***Special Note for weekend appointments:** If you are arriving on a weekend, the side doors will be locked. The South entrance is unlocked until 1pm on Saturday. After 1pm, you will be required to scroll through the keypad in the vestibule until you find the Parkdale code. Entering the code will ring our suite and we’ll be able to talk with you over the intercom. It will take a 3-5 second delay between the time we “buzz” you in and when the door is ready to be opened.

PROFESSIONAL RELATIONSHIP

Professional consultation is not easily described in general statements. It varies depending on the personalities of the consultant and client, and the concerns you are experiencing. There are many different methods we may employ to attend to the concerns that you hope to address. Consultation is not like a medical doctor and calls for a very active role on your part. It might even include other important people in your life. Consultation can have additional benefit as you work on your goals and strategies at home that we’ve talked about during our meetings.

Consultation can have benefits and some risks. Since consultation may involve discussing challenging experiences of your life, you may experience sadness, guilt, anger, frustration, loneliness, etc. On the other hand, consultation may have many benefits. Successful consultation can lead to increased satisfaction in relationships, new possibilities for addressing specific concerns, and/or reductions in feelings of distress. But there are no guarantees of what you will experience.

Our first few sessions will focus on understanding your needs, goals, and presenting concerns. After these first few sessions, we will be able to discuss your first impressions of what our work could include and then co-create a potential plan to follow if we decide to continue with consultation. It is important to evaluate this information along with your own opinions of whether you feel comfortable working together. Since consultation involves a commitment of time, money, and energy, it is important to be selective about the consultant you select. If you have questions about my procedures, we can discuss these whenever they arise. While we co-create possible solutions, you maintain the right to implement them, or decide against implementing any or all of them.

MEETINGS & PROFESSIONAL FEES

I conduct an initial session of approximately 50 minutes at a cost of \$180. Following the initial session is an evaluation period of 2 to 3 sessions, during which we can both decide if I am the best person to provide the services you need to meet your goals. The fee for these 50-minute sessions is \$180. I usually suggest one 50-minute session per week at a time, although some sessions may be shorter or longer and I recommend one session per week until your goals are met. We work together to determine how often and for what length of time we meet. Once an appointment hour is scheduled, you will be financially responsible if you were to cancel without for 24-hour notice, in which case a cancellation fee of \$100.00 would be charged. If were unable to attend due to circumstances beyond your control, such as an unforeseen emergency, sudden illness, etc., the cancellation fee would be waived. *It is important to note that insurance companies do not provide reimbursement for cancelled sessions charges.* Periodically we are faced with the issue of raising our rates. While this is not an annual change, there have been times when the hourly rate has increased \$10.00/hour. In the event of a change, we will post these changes in our individual offices at least 90 days in advance and make every effort to verbally apprise you of the changes.

ADDITIONAL PROFESSIONAL FEES

In addition to weekly appointments, I charge \$180 per 50 minutes for other professional services you may need, though I will break down the hourly cost if I work for periods of less than 50 minutes. Other services may include report writing, telephone conversations lasting longer than 10 minutes, consulting with other professionals with your permission, preparation of records or treatment summaries, and time spent performing other services you may request. These services may not be covered by insurance.

If you become involved in legal proceedings that require my participation, you will be expected to pay for all my professional time, including preparation and transportation costs, and **ANY** legal fees that I might incur, even if I am called to testify by another party. I charge \$180 per hour for preparation and attendance at any legal proceeding, and in addition, mileage to and from any location.

CONTACTING ME

Email is the fastest way to reach me at j@jakevoeker.com When in the office, I am often not immediately available by phone, as I am likely with a client. If I am unavailable, incoming calls will forward to a voicemail that I monitor frequently. I will make every effort to return your call within 24 hours, except for weekends and holidays. If it might be

difficult to reach you, please leave times when you might be available by phone. Please use our voicemail for messages of a critical nature.

EMERGENCIES

If you are experiencing an immediate crisis and are unable to reach me and feel that you can't wait for me to return your call, contact your family physician or the nearest emergency room and ask for the psychologist [psychiatrist] on call, the St. Paul Ramsey Crisis Intervention Center at (651) 266-7900, or your local emergency services at 911. If I will be unavailable for an extended time, I will provide you with the name of a colleague to contact, if necessary. **Email is used to make or change appointments, or for general questions not requiring an immediate response.** Please use our voicemail for messages of a critical nature.

BILLING AND PAYMENTS

You will be expected to make co-pays or deductibles for each session *at the time of the appointment*, unless we agree otherwise or unless you have insurance coverage that requires another arrangement. If your account has not been paid for more than 45 days and arrangements for payment have not been agreed upon, I have the option of using legal means to secure the payment. This may involve hiring a collection agency or going through small claims court which will require me to disclose otherwise confidential information. In most collection situations, the only information I release regarding a client's treatment is his/her name, the nature of services provided, and the amount due. [If such legal action is necessary, its costs will be included in the claim.]

INSURANCE REIMBURSEMENT

Your health insurance company requires an assessment covering a broad range of topics, typically more than may be covered in our initial session, and we are required to provide your insurance provider with information relevant to therapeutic services, including a clinical diagnosis. I will make every effort to release only the minimum information necessary for the purpose requested by your insurance company to process your claim. Upon request, you may have a copy of any report I submit. This information will become part of the insurance company files, and while your insurance company may endeavor to keep this information confidential, we have no control over what happens to the information once it is submitted. Your private information might become part of a national medical information databank, and could be used in determining future insurability. To avoid the problems described above [unless prohibited by contract] you may opt to pay for these services yourself. Please note that I am not a Medicare provider, which means if you have Medicare, Medicare Supplement or switch to Medicare during our work, you will be responsible for the entire cost of therapy.

Most insurance companies require that we coordinate care with your Primary Care Physician, so it is important that we have your written consent to do so. If you have any questions or concerns regarding this, we can talk more about those before I coordinate care with your physician.

We process all insurance claims on your behalf. Please do not submit insurance claims unless we instruct you to do so, as this might reject our claim to your insurance provider.

CONCERNS

I urge you to discuss with me any questions or concerns you may have with the consultation you receive. If you are not satisfied with the results of that discussion, and additional measures are necessary, a formal concern or complaint may be made with Ms. Michelle A. Craveiro, MA, LMFT whose number is 952-224-0399 ext 102. If the results of that consultation are not satisfactory, you may call the Board of Marriage and Family Therapy at 612-617-2220.

Parkdale Therapy Group, LLC Insurance Registration Form

Today's Date _____

Client Name (Print) _____ Date of Birth _____

Street Address _____ Last _____ First _____ Middle Initial _____ City _____

State _____ Zip _____ Sex: F M Age _____ Partner Status: Sgl _____ Mar _____ Div _____ Sep _____ Other _____

Cell Phone _____ May I Leave A Message? Yes - No Work Phone _____ May I Leave A Message? Yes - No Other Phone _____ May I Leave A Message? Yes - No

Confidential Email Address: _____ May we send unencrypted confidential email? Yes or No

S.S.# _____ Employer _____ Occupation _____

Primary Care Physician: _____ Phone: _____ May I contact: Yes or No

Primary Insurance

Please note: *I am not a Medicare provider*

Primary Insurance Company _____ Phone { } _____

Ins Claims Address _____ City _____ State _____ Zip _____

Policy/ID # _____ (This can be the Policy Holder's social security number) Group/Plan # _____

Policy Holder Information: (if the client is not the employee/policy holder)

Name _____ Last _____ First _____ Middle Initial _____ Relationship _____

Address _____ City _____ State _____ Zip _____

S.S. # _____ Employer _____ Date of Birth _____

Diagnosis _____ (Required for Billing Insurance - Therapist will fill in) Therapist _____ (Therapist will fill in)

Secondary Insurance

Primary Insurance Company _____ Phone { } _____

Ins Claims Address _____ City _____ State _____ Zip _____

Policy/ID # _____ (This can be the Policy Holder's social security number) Group/Plan # _____

Policy Holder Information: (if the client is not the employee/policy holder)

Name _____ Last _____ First _____ Middle Initial _____ Relationship _____

Address _____ City _____ State _____ Zip _____

S.S. # _____ Employer _____ Date of Birth _____

Diagnosis _____ (Required for Billing Insurance - Therapist will fill in) Therapist _____ (Therapist will fill in)

Responsible Party (Where should the personal portion of the bill be sent, if not to the person named at the top of the page?)

Name _____ Relationship _____

Address _____ Phone { } _____

Assignment and Release

I the undersigned, certify that I (or my dependent) have insurance coverage as noted above and assign directly to the healthcare provider (therapist) listed on this form all insurance benefits, if any, otherwise payable for services rendered. I understand that I am financially responsible for all charges not covered by insurance. I hereby authorize the healthcare provider (therapist) to release all information necessary to secure the payment of benefits and to mail billing statements. I authorize the use of this signature on all insurance submissions. I the undersigned, certify that I (or my dependent) have insurance coverage as noted above and assign directly to the healthcare provider (therapist) listed on this form all insurance benefits, if any, otherwise payable for services rendered. I understand that I am financially responsible for all charges not covered by insurance. I hereby authorize the healthcare provider (therapist) to release all information necessary to secure the payment of benefits and to mail billing statements. I authorize the use of this signature on all insurance submissions. *I understand Jake Voelker is not a Medicare provider and cannot accept Medicare of any type for reimbursement of services.*

Signature of Responsible Party _____

Relationship (self, parent, etc) _____

Date _____

PAYMENT AUTHORIZATION FORM

This form will authorize Parkdale Therapy Group to charge your credit/debit card for your account balance. Additionally, if you have an outstanding payment this agreement authorizes payment. Your personal information will be kept safe and confidential.

Keeping your account up to date is effortless. Here's How Recurring Payments Work:
You authorize your scheduled charges to your Health Savings account (HSA) or credit card. You will be charged the amount specified on your monthly statement.

Payment is simple and secure whether using Health Savings account, Visa, MasterCard, American Express or Discover Card. Simply complete and sign this form to get started! A paid receipt will be sent to the mail, email, or Fax you prefer.

Please complete all the information below:

I _____ authorize Parkdale Therapy Group to charge my HSA or credit card as follows:

For, _____ the client(s)

Billing Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Credit Card

Visa MasterCard HSA

Amex Discover

Cardholder Name: _____

Account Number: _____ - _____ - _____ - _____

Exp. Date: _____

CVV (3-digit number on back of card) or (4 digit on the front if Am Ex)

Zip: _____ - _____

Receipt to be sent by (circle one): Email, Mail, or Fax

Signature _____

Date _____

I understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify Parkdale Therapy Group in writing of any changes to my account information. I understand that if I fail to make payments owed for attended sessions, if I fail to show for a scheduled appointment without notification, or if I cancel a session less than 24 hours from the start time of the session, and do not make the required payment(s) at the end of the month, authorized personnel at Parkdale Therapy Group has my permission to charge the card listed above accordingly. I certify that I am an authorized user of this credit card/bank account and will not dispute these scheduled transactions with my bank or credit card Company; so long as the transactions correspond to the terms indicated in this authorization form.

ADDITIONAL RESOURCES

Some problems can isolate people from support or help. For this reason, I am a believer in coordinating with concerned others during our work together. By utilizing other supportive people, we are not forced to deal with these challenges(s) alone. When you think about supportive others or resources, who or what might you want to include? Examples include family, friends, medical professionals, social workers, teachers, coaches, people or activities which provided a positive influence, such as authors, hobbies, pets, books, movies, etc.

I am also interested in others who know about the concern(s) you are facing. I've found some people may have knowledge or experience that could be useful when we discuss the impact these problems and their potential solutions. Concerned others may know of ways you have stood up to these or other challenges in the past. Feel free to list these people, so that if we both decide it would be helpful to contact them, we will have their information. Please note I will obtain your written permission *before* consulting with any of these people.

Potential contact/resource _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

Potential contact/resource _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

Potential contact/resource _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

Potential contact/resource _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

OTHER RESOURCES

Hobbies/Special Interests/Abilities _____

EMERGENCY CONTACTS

My priority is maintaining the safety and privacy of those with whom I consult. If there comes a time when I am concerned with your safety or the safety of others in your life, I may need to contact them. I ask you provide two names of people I could call if I am concerned about your safety. If you are the parent of a client I am seeing, there may be times when I am unable to contact you immediately and need someone else to verify your child's safety. Please list these individuals below.

Emergency Contact Name _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

Emergency Contact Name _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

Emergency Contact Name _____ Relation to You? _____

Work Phone _____ Cell/Other Phone _____ Email _____

COMMUNICATION: EMAIL, TEXT & OTHER NON-SECURE MEANS

It may become useful during our work to communicate by email, text message (e.g. "SMS") or other electronic methods of communication. Please know that these methods, in their typical form, are not confidential means of communication. If you use these methods to communicate with Parkdale Therapy Group providers there is a reasonable chance that a third party may be able to intercept and eavesdrop on those messages, even though we offer encrypted email. The kinds of parties that may intercept these messages include, but are not limited to:

- People in your home or other environments who can access your phone, computer, or other devices that you use to read and write messages
- Your employer, if you use your work email to communicate with Parkdale Therapy Group, LLC
- Third parties on the Internet such as server administrators and others who monitor Internet traffic

If there are people in your life you don't want to access these communications, please talk to your Parkdale Therapy Group, LLC provider about ways to keep your communications safe and confidential.

Consent For Transmission Of Protected Health Information

I consent to Parkdale Therapy Group, LLC providers use of email and mobile phone text messaging when transmitting your protected health information, such as:

- Information related to the scheduling of meetings or other appointments
- Information related to billing and payment
- Non-emergency related correspondence

I have been informed of the risks, including but not limited to my confidentiality in treatment, of transmitting my protected health information by unsecured means. I understand that I am not required to sign this agreement to receive therapy. I also understand that I may terminate this consent at any time.

Client Signature

Date

CONFIDENTIALITY AGREEMENT

Information about clients and their families is confidential with exception to the following:

- 1) Written authorization by the client and/or family (valid authorization form).
- 2) Therapist's duty to warn another in the case of potential suicide, homicide or threat of imminent, serious harm to another individual.
- 3) Therapist's duty to report suspicion of abuse or neglect of children or vulnerable adults.
- 4) Therapist's duty to report prenatal exposure to cocaine, heroin, phencyclidine, methamphetamine, and amphetamine or their derivatives, THC, or excessive & habitual alcohol use. (253b.02; 2007).
- 5) Therapist's duty to report the misconduct of mental health or health care professionals.
- 6) Therapist's duty to provide a spouse or parent of a deceased client access to their child or spouse's records.
- 7) Therapist's duty to provide parents of minor children access to their child's records. Minor clients can request, in writing, that specific information not be disclosed to parents. Such a request should be discussed with the therapist.
- 8) Therapist's duty to release records if subpoenaed by the courts.
- 9) Therapist's obligations to contracts (e.g. to employer of client, to an insurance carrier or health plan).

Consent For Sharing of Information Within The Parkdale Therapy Group

The Parkdale Therapy Group, LLC consists of a consulting team including: John L Jankord, MA, LMFT, LADC, LPCC; Michelle Craviero, MA, LMFT; Jessie Brown, Psy D, LP; Heather Klein, Ph D, LP; Tyra Hughes, MA, LMFT; Randi Born, Psy D, LP, MA, LMFT; Annie Will, MA, LMFT; Jake Voelker, MA, LMFT, Tiffany Leuthold, MS, LMFT, and Michelle Hunt-Graham, MA, LMFT, CDWF

The purpose of consulting with colleagues is to obtain additional insight, further therapeutic skills, and ensure the highest possible service to the people we serve. During collegial consultation we will make every effort to provide only those details necessary to gain adequate feedback.

My signature indicates I understand the above limits of confidentiality and the possible participation of interns.

Client Signature

Date

YOU HAVE THE RIGHT TO KNOW AND INQUIRE ABOUT:

- 1) The cost of counseling, time frame for payment, access to billing statements, billing procedure for missed appointments, and any issues related to insurance coverage.
- 2) When the therapist is available and where to call during off hours in case of emergency.
- 3) The way the therapist conducts sessions concerning intake, treatment, and termination. Clients take an active role in the process by asking questions about relevant therapy issues, specifying therapeutic goals, and renegotiating goals when necessary.
- 4) The nature and perspective of the therapist's work, including techniques used, and alternative methods of treatment.
- 5) The purpose and potential negative outcomes of treatment. Clients may refuse any treatment intervention or strategy.
- 6) The anticipated length and frequency of treatment and limitations that may arise due to difficulties in financing.
- 7) The liberty of clients to discuss any aspect of their therapy with others outside the therapy situation, including consultation with another therapist.
- 8) The status of the therapist, including the therapist's training, credentials, and years of experience.
- 9) The maintenance of records, including security and length of time they are kept, client's rights to access personal records, and release policies.
- 10) The right to request a referral and the right to require the current therapist to send a written report regarding services to the qualified referred therapist or organization upon the client's written authorization.
- 11) The procedure followed in the event of the therapist's death/illness.

- **I consent to this consultation, have read and understand my rights listed above, and have reviewed the Client Bill of Rights posted in our waiting room.**

Client Signature

Date

AS A CLIENT YOU HAVE A RESPONSIBILITY TO:

- 1) Ask questions and get clarification regarding your diagnosis and suggested treatment plan.
- 2) Be willing to be an active and collaborative partner in the therapeutic relationship.
- 3) Inform your therapist of any changes in your behavior and/or physical or mental health status that could affect your care, including compliance with any prescribed medication.
- 4) If using insurance, inform your therapist of any changes in your health insurance plan.
- 5) Be on time for scheduled appointments. If running late, please inform me by leaving a short text 651-621-0688. Please do not text and drive!
- 6) Cancel appointments if you are unable to keep them, so others may use the time slot. Please adhere to a minimum of a 24-hour notice to cancel your appointment. Please do consider your health and do not come if you are ill. Thank you!
- 7) Limit email communications primarily to scheduling issues (making appointments, rescheduling or canceling appointments). Email is not monitored sufficiently for therapeutic or crisis correspondence
- 8) Understand that for your confidentiality and to minimize the possibility of dual relationships, your therapist will not accept invitations for any social media connections (i.e., Facebook, LinkedIn, etc.).
- 9) Inform your therapist if you would prefer to “opt out” of text message or email appointment reminders.
- 10) Understand that, depending on our financial agreements, co-pays, deductible amounts or full session fees are due at the time of service. However, delays may occur with insurance reimbursement, or accrue due to unmet deductible amounts, therefore, there may be times when you develop a balance on your account. Balances on accounts will be reviewed monthly. Please understand, should a balance accumulate on your account, it will be limited to \$450.00, and must be paid within 45 days. If a balance remains unpaid without prior arrangement, additional fees and suspension or termination of services may result.

- **I have read and understand my responsibilities as a client listed above.**

Client Signature

Date

COLLABORATING IN THERAPY

Tell Me What Works and Has Worked for You

Each person, couple, and family is unique. You can help by sharing the style and questions I use that work best for you and your partner and your family. You are not expected to run the therapy. Therapists have expertise and good reasons for doing what they are doing, and a therapist should allow some room for flexibility. If you have been in counseling before and found some aspect or method particularly helpful, let me know more about those experiences.

Let Me Know When We Do Something That Was Useful/Helpful

Therapy can be a difficult and challenging and rewarding process. We see people when they are feeling stressed, feeling hopeless and sometimes feeling impatient. We often aren't aware of the things we do that have been helpful if people don't return or when change takes some time. So, most therapists appreciate hearing when we've done something that worked or you've found helpful. This can also make your therapy experience more productive, since your therapist will have your feedback to guide him or her in future sessions.

Tell Me Your Expectations

If you attend therapy hoping to go back to your childhood to find origins or contributions to the concerns that brought you into therapy and your therapist focuses on the present, someone is bound to be frustrated if that expectation isn't brought up and discussed before you proceed. Also, you might indicate how long you had anticipated you would attend therapy, and how often, to make sure you and the therapist are on the same track.

Tell Your Therapist What Doesn't Work

Like telling your therapist your expectations and letting him/her know what has worked or is helping, as well as letting him/her know when something isn't helping is important. This includes what is happening between as well as during your therapy sessions. This gives the opportunity for mid-course corrections in the therapy process.

Tell Your Therapist Your Objections

Some people think that they shouldn't speak up about their worries or objections to their therapist's suggestions, but a free and frank discussion about any misgiving helps your therapist attend to your concerns and make any adjustments to ensure a higher likelihood of success.

Ask Questions

About the therapy process, fees, any suggestions or methods, the therapist's training and qualifications, etc. Anything you are curious about. If it gets too personal or the therapist considers the questions intrusive or inappropriate, he/she will let you know.

Please Describe Your Background and Information Regarding Your Visit

Religious Affiliation/Spirituality: _____

Ethnic/Cultural Heritage: _____

RELATIONAL STATUS

Single Partnered Married Divorced Total # of marriages: _____

Length of current marriage/relationship: _____

Assessment of current relationship: Good Fair Poor

FAMILY INFORMATION

Relationship	Name	Age	Sex	Type (Bio, Step, Etc)
Mother	_____	____	____	_____
Father	_____	____	____	_____
Mother	_____	____	____	_____
Father	_____	____	____	_____
Sibling	_____	____	____	_____
Sibling	_____	____	____	_____
Sibling	_____	____	____	_____
Sibling	_____	____	____	_____
Sibling	_____	____	____	_____
Sibling	_____	____	____	_____
Sibling	_____	____	____	_____
Spouse/SO	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____
Children	_____	____	____	_____

EDUCATION Fill in All That Apply

Years of Education _____ Currently Enrolled: Yes or No

Completed: High School/GED ____ Vocational ____ College ____ Graduate School ____ Doctorate ____

Other Training _____

Special Circumstances _____

MILITARY

Military Service – Yes or No Combat Experience Yes or No

Branch: _____ Where Served: _____ Length of Service: _____

Rank at discharge: _____. Type of discharge: _____

What activities do you enjoy and feel you are successful when trying? _____

What personal qualities would others say you possess? _____

Who are some of the influential and supportive people and what activities do you find helpful (e.g. walking, hunting, yoga, painting), or beliefs (e.g. religion), in your life? Please describe. _____

LEGAL ISSUES

Please list any legal issues that are affecting you or your family at present, or any which have had a significant effect upon you or others. _____

COUNSELING & MEDICAL HISTORY

Have you previously worked with a counselor or therapist? Yes or No

If so, where and with whom: _____

Approximate dates of prior counseling? _____

For what reason(s) did you seek counseling? _____

Were you given a diagnosis? _____

What did you find **most helpful** in counseling? _____

What did you find **least helpful** in counseling? _____

Have you utilized psychiatric services? Yes or No Was it helpful? Yes or No

Have you taken medication for any psychological health concerns? Yes or No. If so, please list below:

Name of Medication	Dosage	Dates Taken	Is It Helping? (Y/N)

Other medical concerns requiring surgery, treatment, or hospitalization? Please describe: _____

Please describe your past and current use of any mood-altering drugs or alcohol: _____

Have you ever felt the need to cut down on your drinking or substance use? Yes or No

Have you felt annoyed by people criticizing your drinking or substance use? Yes or No

Have you ever felt guilty about drinking or substance use? Yes or No

Have you sought medical treatment for any use of the above substances? If so, briefly describe: _____

CURRENT REASON FOR SEEKING COUNSELING

Who referred you to me for therapy or counseling? _____

May I acknowledge the referral? Yes or No

Their email or phone number in which to acknowledge the referral _____

Briefly describe the problem or concern for which you, your child or adolescent would like addressed in counseling.

Regarding the reason(s) for coming to counseling, what is most concerning right now? _____

Regarding the reason(s) for coming to counseling, with whom are you most concerned? _____

What would you like to see because of counseling? _____

After achieving these goals, what might be different in your life and the lives of others close to you? _____

FAMILY HISTORY

Who lived in your home when you were a child? _____

Where are you in the birth order? _____

What words would you use to describe your family of origin? _____

Are you aware of any birth trauma your mother endured during her pregnancy with you, or any trauma you endured between birth and 3? _____

Did/do you have any significant concerns experiences with someone in your family? Please describe _____

Did you experience or witness any abuse as a child (physical, verbal, emotional, or sexual) or experience these outside your home? Please describe to the extent you feel comfortable _____

Have you experienced or witnessed any abuse in your adult life (physical, verbal, emotional, or sexual)? Please describe to the extent you feel comfortable _____

FAMILY CONCERNS

Please check any family concerns you may be experiencing:

- Fighting Feeling Distant Loss of fun Lack of honesty Physical fights
- Drug Use Alcohol Use Disagreeing about relatives Infidelity (Couple)
- Divorce Separation Remarriage (self or parent) Disagreeing about friends
- Education Finances Birth of a sibling Death of a family member
- Empty Nest In-laws Blended family concerns Leisure time
- Abuse Neglect Inadequate Housing Inadequate health insurance
- Gambling Internet Usage Employment/Underemployment Other _____

SYMPTOM CHECKLIST

Please check any of the items below that you currently or have been experiencing in the last 30 days.

Symptom	None	Mild	Moderate	Severe	Symptom	None	Mild	Moderate	Severe
Sadness/Depression					Increased or decreased appetite				
Crying					Unplanned weight gain				
Sleep disturbances					Unplanned weight loss				
Dissociation					Paranoid thoughts				
Hyperactivity					Poor concentration/indecisive				
Binging/Purging					Low energy				
Decreased sex drive					Excessive worrying				
Unresolved guilt					Low self-worth				
Irritability					Anger management problems				
Nausea/Acid indigestion					Spiritual concerns				
Anxiety					Hallucinations				
Self-mutilation/cutting					Racing thoughts				
Impulsivity					Restlessness				
Nightmares					Drug Use				
Hopelessness					Alcohol Use				
Elevated mood					Decreased creativity/productivity				
Mood swings					Easily distracted				
Disorganized					Memories of trauma/flashbacks				
Anorexia					Work issues				
Social isolation					Problems at home				
Phobia(s)					Panic attacks				
Obsessive thoughts					Feel panicky/anxious				
Grief					Suicidal thoughts				
Headaches					Attempts of suicide in the past				
Loneliness					Other				

ADDITIONAL INFORMATION

Is there anything else you would like to share that could be helpful in our work? _____

MINNESOTA NOTICE FORM
Notice of Parkdale Therapy Group, LLC
Policies and Practices to Protect the Privacy of Client Health Information

THIS NOTICE DESCRIBES HOW PSYCHOLOGICAL AND MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

I. Uses and Disclosures for Treatment, Payment, and Health Care Operations

I may use or disclose your *protected health information (PHI)*, for *treatment, payment, and health care operations* purposes with your *consent*. To help clarify these terms, here are some definitions:

- “*PHI*” refers to information in your health record that could identify you.
- “*Treatment, Payment, and Health Care Operations*”
 - *Treatment* is when I provide, coordinate or manage your health care and other services related to your health care. An example of treatment would be when I consult with another health care provider, such as your family physician or a psychologist.
 - *Payment* is when I obtain reimbursement for your healthcare. Examples of payment are when I disclose your PHI to your health insurer to obtain reimbursement for your health care or to determine eligibility or coverage.
 - *Health Care Operations* are activities that relate to the performance and operation of my practice. Examples of health care operations are quality assessment and improvement activities, business-related matters, such as audits and administrative services, and case management and care coordination.
- “*Use*” applies only to activities within my [office, clinic, practice group, etc.], such as sharing, employing, applying, utilizing, examining, and analyzing information that identifies you.
- “*Disclosure*” applies to activities outside of my [office, clinic, practice group, etc.], such as releasing, transferring, or providing access to information about you to other parties.

II. Uses and Disclosures Requiring Authorization

I may use or disclose PHI for purposes outside of treatment, payment, or health care operations when your appropriate authorization is obtained. An “*authorization*” is written permission above and beyond the general consent that permits only specific disclosures. In those instances when I am asked for information for purposes outside of treatment, payment or health care operations, I will obtain an authorization from you before releasing this information. I will also need to obtain an authorization before releasing your psychotherapy notes. “*Psychotherapy notes*” are notes I have made about our conversation during a private, group, joint, or family counseling session, which I have kept separate from the rest of your medical record. These notes are given different protection than PHI.

You may revoke all such authorizations (of PHI or psychotherapy notes) at any time, provided each revocation is in writing. You may not revoke an authorization to the extent that (1) I have relied on that authorization; or (2) if the authorization was obtained as a condition of obtaining insurance coverage, and the law provides the insurer the right to contest the claim under the policy.

III. Uses and Disclosures with Neither Consent nor Authorization

I may use or disclose PHI without your consent or authorization in the following circumstances:

- **Child Abuse:** If I know or have reason to believe a child is being neglected or physically or sexually abused or has been neglected or physically or sexually abused within the preceding three years, I must immediately report the information to the local welfare agency, police or sheriff's department.
- **Adult and Domestic Abuse:** If I have reason to believe that a vulnerable adult is being or has been maltreated, or if I have knowledge that a vulnerable adult has sustained a physical injury which is not reasonably explained, I must
 - Immediately report the information to the appropriate agency in this county. I may also report the information to a law enforcement agency.
- “*Vulnerable adult*” means a person who, regardless of residence or whether any type of service is received, possesses a physical or mental infirmity or other physical, mental, or emotional dysfunction:
 - (i) that impairs the individual's ability to provide adequately for the individual's own care without assistance, including the provision of food, shelter, clothing, health care, or supervision; and
 - (ii) because of the dysfunction or infirmity and the need for assistance, the individual has an impaired ability to protect the individual from maltreatment.
- **Health Oversight Activities:** The Minnesota Board of Marriage and Family Therapy or Board of Behavioral Health may subpoena records from me if they are relevant to an investigation it is conducting.
- **Judicial and Administrative Proceedings:** If you are involved in a court proceeding and a request is made for information about the professional services that I have provided you and/or the records thereof, such information is privileged under state law and I must not release this information without written authorization from you or your legally appointed representative, or a court order. This privilege does not apply when you are being evaluated for a third party or where the evaluation is court-ordered. I will inform you in advance if this is the case.
- **Serious Threat to Health or Safety:** If you communicate a specific, serious threat of physical violence against a specific, clearly identified or identifiable potential victim, I must make reasonable efforts to communicate this threat to the potential victim or to a law enforcement agency. I must also do so if a member of your family or someone who knows you well has reason to believe you are capable of and will carry out the threat. I also may disclose information about you necessary to protect you from a threat to commit suicide.

- **Worker's Compensation:** If you file a worker's compensation claim, a release of information from me to your employer, insurer, the Department of Labor and Industry or you will not need your prior approval.

IV. Client's Rights and Clinician's Duties

Client's Rights:

- *Right to Request Restrictions* – You have the right to request restrictions on certain uses and disclosures of protected health information. However, I am not required to agree to a restriction you request.
- *Right to Receive Confidential Communications by Alternative Means and at Alternative Locations* – You have the right to request and receive confidential communications of PHI by alternative means and at alternative locations. (For example, you may not want a family member to know that you are seeing me. On your request, I will send your bills to another address.)
- *Right to Inspect and Copy* – You have the right to inspect or obtain a copy (or both) of PHI (and psychotherapy notes) in my mental health and billing records used to make decisions about you for as long as the PHI is maintained in the record. I may deny your access to PHI under certain circumstances, but in some cases, you may have this decision reviewed. On your request, I will discuss with you the details of the request and denial process.
- *Right to Amend* – You have the right to request an amendment of PHI for as long as the PHI is maintained in the record. I may deny your request. On your request, I will discuss with you the details of the amendment process.
- *Right to an Accounting* – You generally have the right to receive an accounting of disclosures of PHI for which you have neither provided consent nor authorization (as described in Section III of this Notice). On your request, I will discuss with you the details of the accounting process.
- *Right to a Paper Copy* – You have the right to obtain a paper copy of the notice from me upon request, even if you have agreed to receive the notice electronically.

Clinician's Duties:

- I am required by law to maintain the privacy of PHI and to provide you with a notice of my legal duties and privacy practices with respect to PHI.
- I reserve the right to change the privacy policies and practices described in this notice. Unless I notify you of such changes, however, I am required to abide by the terms currently in effect.
- If I revise my policies and procedures, I will send you a copy by mail or give you a copy in session.

V. Questions and Complaints

If you have questions about this notice, disagree with a decision I make about access to your records, or have other concerns about your privacy rights, you may contact **Ms. Michelle A. Craveiro, MA @ 952-224-0399 ext 102.**

If you believe that your privacy rights have been violated and wish to file a complaint with *me/my* office, you may send your written complaint to:

**Parkdale Therapy Group, LLC
1660 Hwy 100 So, Suite 330
St. Louis Park, MN 55416-1573
952-224-0399 ext 102 Fax 952-224-0396**

You may also send a written complaint to the Secretary of the U.S. Department of Health and Human Services. The person listed above can provide you with the appropriate address upon request.

You have specific rights under the Privacy Rule. I will not retaliate against you for exercising your right to file a complaint.

VI. Effective Date, Restrictions and Changes to Privacy Policy

This notice became effective 4/14/03

We reserve the right to change the terms of this notice and to make the new notice provisions effective for all PHI that I maintain. I will provide you with a revised notice by mail or in session.

Your signature below indicates you have read this notice form and have been offered a copy of the HIPPA Notice Form described above and had the opportunity to clarify any questions.

Client Signature

Date

Thank you for taking the time and care to provide this information.