



New Client Information

Referred By: _____

Today's Date: ____/____/____

I. Client Information

Name: _____ Social Security #: _____

Birth Date: _____ Age: _____ Gender: Male Female

Address: _____ City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____ Fax #: _____

Email Address: _____

Work Phone: _____ Guardian's Work Phone (for minor): _____

Email: _____

Would you like to be added to our newsletter list?: yes / no

Would you be interested in completing a survey about your therapy experience? yes/ no

In case of emergency, please notify:

Name: _____ Phone: _____ Relationship: _____

Please complete this section for others residing in the client's home:

Name	Birth Date	Age	Relationship to Client	Gender

II. Occupational/Educational Status

Client currently employed? Yes/No If yes, Full-Time/Part-Time Occupation: _____

Spouse currently employed? Yes/No If yes, Full-Time/Part-Time Occupation: _____

For minor: Father currently employed? Yes/No If yes, Full-Time/Part-Time Occupation: _____

For minor: Mother currently employed? Yes/No If yes, Full-Time/Part-Time Occupation: _____

If guardian/s not employed, please check any of the following: Retired Unemployed Disability Student

III. Client's Health Status

Current or chronic medical issues: _____

Primary Care Doctor: _____ Phone: _____

IV. Client's Medication History

Have you previously taken medications for emotional/substance abuse problems? YES___ NO ___

Name: _____ Name: _____ Name: _____
 Dose (mg): _____ Dose (mg): _____ Dose (mg): _____
 Frequency: _____ Frequency: _____ Frequency: _____
 Are you currently taking any medications for emotional/substance abuse problems? YES ___ NO ___
 Name: _____ Name: _____ Name: _____
 Dose (mg): _____ Dose (mg): _____ Dose (mg): _____
 Frequency: _____ Frequency: _____ Frequency: _____

Other medications: _____
 Prescribing Physician: _____ Phone: _____

V. Client's Mental Health History

Have you had prior mental health related services? YES ___ NO ___

	Therapist/Facility	Date	Duration	Outcome
Prior Therapy	1)	1)	1)	1)
	2)	2)	2)	2)
	3)	3)	3)	3)
Prior Hospitalization(s)	1)	1)	1)	1)
	2)	2)	2)	2)
	3)	3)	3)	3)

VI. Problem Category (please check all that apply):

Emotional Health Family issues Work-related Financial
 Substance use/abuse Eating disorder Children Legal
 Suicide Risk Abuse/Violence Health-related Marital/Relationship issues
 Parent-Child issues Other: _____

VII. Family history

Describe any family behavioral health issues or diagnosis.

VIII. Client Background information

The following information is optional but will help us to better serve you.

Ethnicity American Indian/Alaskan Native Caucasian/White Asian or Pacific Islander Bi-Racial African-American/Black Multi-Racial Hispanic/Latino/a _____	Highest Level of Education of primary Guardian No High school Associate's Degree Some High school Bachelor's Degree High School Diploma Master's Degree Technical School Doctoral Degree Degree in: _____
Marital Status of parent's Living Together/Not Married Separated Married Divorced Widowed	Sexual Orientation Heterosexual Transgendered Gay/Lesbian Not sure/questioning Bisexual
Religious/Spiritual Affiliation:	



"Growing Great Kids"

Welcome to "Family Perspectives" unique program, "Growing Great Kids." We are honored that you have chosen to begin a process of change with us. It is our pleasure to be allowed to help you reach your family goals. At Growing Great Kids, it is our belief that being in your home will allow us to work more efficiently as we will be able to walk with you side by side using proven techniques together. It has been our experience that families who are committed to using our strategies faithfully have experienced wonderful long-lasting change in their family. This will take work on your part, but we are confident that the fruits of your labor will make it worth it. Our idea is to work with you so that you will be equipped to continue with the strategies well after we are no longer involved and reap the benefits with your whole family for years to come. We want you to achieve the happiness and togetherness that you deserve as a family.

Background

Each professional that works with Growing Great Kids has the minimum of a masters degree in the helping profession such as social work, counseling, psychology, or marriage and family therapy. All of our workers are experienced with children, families, and adults, with a wide range of specialties that supersede the regular discipline and parenting strategies that are used with our client-families.

The benefit of using a masters level therapist is that they can also evaluate for different kinds of behavioral health diagnoses such as ADHD, aspergers, depression, anxiety, and conduct disorders. They are also trained to look at each family as a unique entity, while considering different issues that effect families such as individual, community, or medical issues.

Procedures and goals of treatment

The therapeutic process is not easily described in general statements. It varies depending on the personalities of the therapist, the client, and the issues the client is experiencing. Each therapist's treatment approach will be slightly different, but should provide a safe, supportive environment for people to explore the areas of their life in which they feel a need to change. The company's strategies are evidence-based primarily hands-on behavioral and cognitive techniques.

Therapy and our interactive coaching is not like the passive experience of surgery or many other medical interventions in that therapy requires a very active effort on your part. In order for the experience to be most successful, you will have to work on things we talk about outside of the therapy session.

Therapy can have benefits and risks. Because therapy often involves discussing unpleasant aspects of life, you may experience uncomfortable feelings like sadness, guilt, anger, frustration, loneliness, and helplessness. Still, therapy has also been shown to have many benefits. Therapy often leads to improved relationships with self and others, solutions to specific problems, and significant reductions in or management of feelings of distress. The hope of therapy is that resolution of issues and personal growth comes at a faster rate than "braving it alone." But there are no guarantees of what you will experience.

There are some circumstances under which we are required to refer. For example, if the counselor does not have specialized training for working with substance addictions (meaning alcohol or other drugs) or process addictions (such as gambling or sex). When someone presents with these issues that therapist is ethically obligated to refer them to people who can help them. Rules of confidentiality still apply, so they will not contact these people for a client but will let the client know how to contact them. If the therapist that is working with you has those

specialties, the two of you can discuss whether working together on those issues would be something you both want to pursue.

Limits of confidentiality

In most situations the therapists can only release information about your treatment to others if you sign a written authorization form that meets certain legal requirements imposed by the Health Insurance Portability and Accountability Act (HIPAA). However, there are some situations where we are permitted or required to disclose information without either your consent or authorization. These situations will be discussed in detail during your first visit. Finally, there are some situations in which we are legally obligated to take action in an attempt to protect others from harm and may have to reveal some information about a client's treatment.

- If the counselor has reason to believe that a child under 18 is or has been the victim of injury, sexual abuse, neglect or deprivation of necessary medical treatment, the law requires that the counselor file a report with the appropriate government agency, usually the Office of Child Protective Services. Once such a report is filed, the counselor may be required to provide additional information.
- If the counselor has reason to believe that any adult client who is either vulnerable and/or incapacitated and who has been the victim of abuse, neglect or financial exploitation, the law requires that they file a report with the appropriate state official, usually a protective services worker. Once such a report is filed, the counselor maybe required to provide additional information.
- If a client communicates an explicit threat of imminent serious physical harm to a clearly identified or identifiable victim and the counselor believes that the patient has the intent and ability to carry out such threat, the counselor must take protective actions that may include notifying the potential victim, contacting the police, or seeking hospitalization for the client.

It is common practice for therapists to discuss cases with other professional colleagues to facilitate continued professional growth and so that clients benefit from a variety of professional expertise. No identifying information is released in the peer consultation process. I reserve the right to share personally identifiable information with my associate, Matt Slavsky, or to whomever might be on-call for me (typically Matt Slavsky) for coordination of care or in the event that I am unavailable or out of town to facilitate the coverage of your care in my absence.

Fees

Our counselors do not work directly with any insurance companies. Your insurance company may or may not reimburse you for services performed by out of network providers. If you choose to ask them for reimbursement, it will be up to you to find out if they will consider reimbursing you and what information they will require from the therapist.

Fees are due at each meeting unless you have made prior arrangements with the therapist. Payment can be made via cash or personal check. Missed appointments and appointments cancelled less than twenty-four hours in advance are charged at the rate of \$55 and must be paid no later than the end of the next session. Balances are not carried for clients because this turns the therapeutic relationship into a debtor/creditor relationship.

- In-home rates given at a 50 minute hour for the first hour.
- \$150 for a 50 minute appointment
- \$220 for an 80 minute appointment
- \$280 for a one hour 50 minute appointment
- \$345 for a 2 hour 20 minute appointment
- \$405 for a 2 hour 50 minute appointment

There is a \$10 extra fee for each 1-5 miles from the Ahwatukee office. A minimum of an 80 minute session is required for in-home services.

- In-office fees are \$115 for a 50 minute appointment. The first session is usually 80 minutes. Longer or shorter sessions are prorated from this basic fee.

Other services include letters, coordination of care with other professionals you have authorized, preparation of records or treatment summaries, and the time spent performing any other service you may request of us. These along with telephone calls and emails are charged at the case management rate of \$15 per 15 minute increment rounded up from eight minutes or down from seven minutes. There will be a 15 minute charge for information that takes more than 5 minutes to review/work on. There is a \$35 fee for bounced checks. We reserve the right to utilize a collections agency in the event of nonpayment.

Court services/considerations

Some of our professionals are hired as expert witnesses to provide professional opinions about mental health issues. It is a conflict of interest for a therapist to provide opinions or recommendations and treat the same client. We can be hired as an expert witness or as a treating therapist, but we are not able to play both roles. If a client has these expectations, it can affect their willingness to disclose personal information vital to treatment. If a court appearance is required of us or the records the fee is \$250 per hour for each hour of preparation time, related phone calls, travel from office to the court and back, deposition time, testimony time, and any unforeseen related expenses or uses of our time with a two hour minimum. Copying fees will be based on cost of copies and amount of time needed to complete and/or mail them.

A retainer of \$2500 will be required at least ten business days before the court date. Since there is a large amount of time set aside for depositions or testimonies, \$500 of the \$2500 will not be returned if the deposition or testimony is cancelled or postponed within five business days. We accept cash, check, or money order as form of payment for retainers or any amounts over \$500. If there is a balance due after the court service, the remaining amount must be paid to Family Perspectives within two weeks from the day of court. We have the right to charge 10% interest if the remaining amount is not paid on time.

Payment method

Payment is required at the time services are rendered and may be made by check or cash.

Cancellation policy

If you are unable to keep an appointment, please notify the office immediately. You will be billed for appointments canceled or missed with less than 24 hours prior notice. The fee is \$55.00. If 3 late cancellations or missed appointments occur within a 12 month period, we will discuss your options as scheduling appointments in advance will no longer be an option.

Professional records

The laws and standards for behavioral health professionals in Arizona require that the agency keeps treatment records. You are entitled to receive a copy of the records upon written request. Because these are professional records, they can be misinterpreted and/or upsetting to untrained readers. It is recommended that you review them in the counselor's presence in order to discuss the contents. Clients will be charged at the same rate as a regular counseling service (\$115 per hour prorated accordingly) for any time spent in preparing information requests.

Contacting your Counselor

Growing Great Kids offers a unique phone support service option that can be used between meetings. Some families feel assured to know that they have support between visits and that they have a place to call when things are especially difficult. It is easy to continue with the same habits when under pressure. You will be able to call for emotional support or coaching. This can be a great way to receive an extra "push" and encouragement.

Telephone support services are \$15 per 15 minute increment rounded up from eight minutes or down from seven minutes. There will be a charge for any telephone conversation lasting more than 5 minutes. Counselors will make all necessary actions to be available as immediately as possible, but in certain circumstances they will not be able to return calls until the following business day. In situations where the person calls and gets their counselor's voice mail and feels they cannot wait for a response, a state crisis hotline (Value Options) number is also available 24/7 and can be reached at 602-222-9444.

Acknowledgement of that I have received, read and understood the above four-page document. I understand that it is my responsibility to inform the child's other parent that I am seeking therapy services our child and that the other parent must agree to therapy.

Guardian Print Name

Guardian Sign Name

Date

Witness Print Name

Witness Sign Name

Date



Measurement Scale

How well would you say your child/children behave regarding:

	<u>Not at all</u>	<u>or poorly</u>									<u>Very well</u>	<u>or great</u>
• Listening to you within 1-2 requests?	1	2	3	4	5	6	7	8	9	10		
• Going to bed at night?	1	2	3	4	5	6	7	8	9	10		
• Temper tantrums?	1	2	3	4	5	6	7	8	9	10		
• Getting good grades in school?	1	2	3	4	5	6	7	8	9	10		
• Behavior in school?	1	2	3	4	5	6	7	8	9	10		
• Talking back?	1	2	3	4	5	6	7	8	9	10		
• Using foul language?	1	2	3	4	5	6	7	8	9	10		
• Fighting with siblings?	1	2	3	4	5	6	7	8	9	10		
• Getting along with other children?	1	2	3	4	5	6	7	8	9	10		
• Manners?	1	2	3	4	5	6	7	8	9	10		

For mom and dad:

• As parents do you agree on discipline for your children?	1	2	3	4	5	6	7	8	9	10
• Do you feel the amount of work at home is split up fairly?	1	2	3	4	5	6	7	8	9	10
• Do you argue about your children?	1	2	3	4	5	6	7	8	9	10



Treatment Plan

Client Name: _____

Please rate each concern on a scale of 1-10 with 1 being the mildest symptom, 10 being the worst, and 0 being no symptoms.

- | | | |
|---------------------------------------|------------------------------------|--------------------------------|
| ___ ADD/ADHD | ___ Anger Issues | ___ Anxious Mood |
| ___ Dependency | ___ Depressed Mood | ___ Employment Stressors |
| ___ Financial Stressors | ___ Grief | ___ Manic Symptoms |
| ___ Medical Problems | ___ Obsessive Compulsive Behaviors | ___ Phobias |
| ___ Racing Thoughts | ___ Relational Conflict | ___ Sexual Abuse |
| ___ Sleep difficulties | ___ Substance Abuse/Dependency | ___ Other _____ |
| ___ Child-behavior problems at school | ___ Child-disobeying at home | ___ Child-low grades at school |

Other concerns not listed above/ specific symptoms of concern:

Goals for counseling:

Interventions:

- | | | | | | |
|----------------------------|-------------------------------------|-----------------------------|---------------------|---------------------|-----------------------|
| ___ Assertiveness training | ___ Anger Management | ___ Cognitive Restructuring | ___ Grief therapy | ___ Problem Solving | ___ Stress Management |
| ___ Solution Focused | ___ Psychoeducation/Skills training | ___ Individual therapy | ___ Couples therapy | ___ Family therapy | |

I acknowledge my participation in the development of this treatment plan.

_____ Client Signature	_____ Date	_____ Review plan date	_____ Client Signature for review	_____ Date
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_____ Other Signature	_____ Date	_____ Review plan date	_____ Other Signature for review	_____ Date
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_____ Kim Romen, LCSW, (Therapist)	_____ Date	_____ Review plan date	_____ Kim Romen, LCSW	_____ Date
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ARIZONA NOTICE FORM

Notice of Policies and Practices to Protect the Privacy of Your 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 another 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 a greater degree of 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, 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* - I am required to report PHI to the appropriate authorities when I have reasonable grounds to believe that a minor is or has been the victim of neglect or physical and/or sexual abuse.
- *Adult and Domestic Abuse* - If I have the responsibility for the care of an incapacitated or vulnerable adult, I am required to disclose PHI when I have a reasonable basis to believe that abuse or neglect of the adult has occurred or that exploitation of the adult's property has occurred.
- *Health Oversight Activities* - If the Arizona Board of Psychological Examiners is conducting an investigation, then I am required to disclose PHI upon receipt of a subpoena from the Board.
- *Judicial and Administrative Proceedings* - If you are involved in a court proceeding and a request is made for information about the professional services I provided you and/or the records thereof, such information is privileged under state law, and I will not release information without the written authorization of you or your legally appointed representative or a court order. The privilege does not apply when you are being evaluated for a third party or where the evaluation is court ordered. You will be informed in advance if this is the case.

- **Serious Threat to Health or Safety** - If you communicate to me an explicit threat of imminent serious physical harm or death to a clearly identified or identifiable victim(s) and I believe you have the intent and ability to carry out such a threat, I have a duty to take reasonable precautions to prevent the harm from occurring, including disclosing information to the potential victim and the police and in order to initiate hospitalization procedures. If I believe there is an imminent risk that you will inflict serious harm on yourself, I may disclose information in order to protect you.
- **Worker's Compensation** - I may disclose PHI as authorized by and to the extent necessary to comply with laws relating to worker's compensation or other similar programs, established by law, that provide benefits for work-related injuries or illness without regard to fault.

IV. Patient's Rights and Psychologist's Duties

Patient'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 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. 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.

Psychologist'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 provide you a copy during one of our sessions or in the mail.

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 me at (480) 277-0049.

You may also send a written complaint to the Secretary of the U.S. Department of Health and Human Services. I 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 will go into effect on March 1st, 2007

I 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 either in person or by mail.



Credit Card Authorization Form

Please complete the following information. This form will be securely stored in your clinical file and may be updated upon request at any time.

I authorize Family Perspectives, LLC, to charge my credit/debit/HSA card for professional services as follows:

Please Initial each of the following except the first sentence unless applies:

_____ Recurring charges for services in the amount of \$_____ per visit.

_____ \$55 for cancellations with less than 24 hours notice and for appointments I miss without notice.

_____ Individual appointments I choose to pay by credit card.

_____ I understand that my card will be charged for returned checks for the amount of the check plus \$35 per check.

_____ Balances of charges not paid including fees incurred in phone or internet treatment without payment rendered for 7 days.

_____ I will not dispute charges for sessions I have received, appointments I have missed, or charges due to bounced checks.

I, _____, am authorizing Family Perspectives, LLC to bill my credit card in the even of any appropriate scenario initialed above.

Charges will appear on your credit card statement as familyperspectives@gmail.com 480-277-0049

Card Type (circle one): Visa MasterCard Discover American Express

Card #: _____

Expiration Date: _____

Name as Printed on Card: _____

Verification/Security Code (3-digit code on back by signature line-MC/Visa/Discover; code above card number, upper-right hand side-AmEx): _____

Billing Address: _____
(Street, City, State & Zip)

Signature: _____

Date: _____