Tommy Montanarella, MC, NCC, LAC

9929 North 95th Street, Bldg Q Suite 101 • Scottsdale, AZ 85258 • (623) 252-9732

Full Name: _____

Patient (if other than above):_____

Patient Date of Birth: _____ Referred by: _____

Address: _____ City/State:_____ Zip: _____

Home Phone:_____ Cell Phone:_____ Work Phone:_____

Email:_____

Informed Consent for Assessment and Treatment

Welcome to Therapy with Tommy. I am committed to our work together that will be designed to help you obtain your therapeutic goals. A counseling situation offers a unique relationship between the two of us. Therapy has the ability to allow one to process, grow, and heal. I am a Licensed Associate Counselor in an independent private practice where I work under a supervisor while obtaining my professional license. My credentials include a Bachelors Degree in Psychology, Masters Degree in Counseling Psychology, I am licensed by the Arizona Board of Behavioral Health Examiners and nationally through the National Board of Certified Counselors.

I offer counseling, psychotherapy, and coaching services to individuals, children/teenagers, couples, and families in the areas of mental health, relationships, adjustment, personal development, family transition (i.e. divorce), parenting and skill development issues. I utilize a multimodal approach to therapy that is geared towards self-improvement and personal growth. I employ therapeutic techniques and interventions that specifically cater towards each individual, couple, or family. In order to start our therapeutic relationship in a healthy way, I have put together this document to ensure that there are no misunderstandings about the various aspects of the counseling and psychotherapy services. If you have any questions, please do not hesitate to ask.

Purpose, limitations, and risks of treatment: Counseling, like most endeavors in the helping professions, is not an exact science. While the ultimate purpose of counseling is to reduce your distress through a process of personal change, there are no guarantees that the treatment provided will be effective or useful. Moreover, the process of counseling usually involves working through tough personal issues that could result in some emotional or psychological pain for the client. Attempting to resolve issues that brought you to therapy in the first place may result in changes that were not originally intended. Psychotherapy may result in decisions about changing behaviors, employment, substance use, schooling, housing, relationships, or virtually any other aspect of your life. Sometimes a decision that is positive for one family member is viewed quite negatively by another family member. Change will sometimes be easy and swift, but more often it will be slow and even frustrating. There is no guarantee that psychotherapy will yield positive or intended results. In the case of marriage and family counseling, interpersonal conflict can increase as we discuss family issues. I value my approach to proactive therapy. Treatment plans and goals will be discussed and a plan of action will be established.

Treatment process and rights: Your counseling will begin with one or more sessions devoted to an initial assessment so that I can get a good understanding of the issues, your background, and any other factors that may be relevant. When the initial assessment process is complete, we will discuss ways to treat the problem(s) that have brought you into counseling and develop a treatment plan. You have the right and the obligation to participate in treatment decisions, development of and periodic review and/or revision of your treatment plan. You also have the right to refuse any recommended treatment or to withdraw consent to treat, and to be advised of the potential consequences of such refusal or withdrawal.

Privacy, confidentiality, and records: Our communications and records created in the process of counseling are held in the strictest confidence. There are exceptions to this; those exceptions would include danger to yourself, danger to others, or matters of abuse or neglect. I will not be used to testify in legal matters related or unrelated to therapy. I also ask by signing this form, you will not be requesting records for use in Court or other legal matters, such as divorce or litigation.

- **This counselor will *not* be used to testify in legal matters related or unrelated to therapy.**
  Signature _____

- **I also agree, there will be no recording of sessions unless asked and agreed upon by this therapist.**
  Signature _____

I also participate in a process called supervision, where selected cases are discussed with my supervisor or other professional colleagues to facilitate my continued professional growth, licensing requirements and to get you the benefit of a variety of professional experts. While no identifying information is released in this peer consultation process, the dynamics of the problems and the people are discussed along with the treatment approaches and methods.

During times when I am out of town or otherwise unavailable, I will typically have another licensed therapist on call for me. I reserve the right to disclose confidential information from your records and our time together, including personally identifiable information, to this on-call therapist to facilitate the coverage of your care in my absence.

There are also numerous other circumstances when information may be released including when disclosure is required by the Arizona Board of Behavioral Health Examiners, when a lawsuit is filed against me, to comply with worker compensation laws, to comply with the USA Patriot Act and to comply with other federal, state or local laws. The rules and laws regarding confidentiality, privacy, and records are complex.

In the event of my death or incapacity, the records for my clients that are actively receiving services (seen within the last month) will be given to one or more local behavioral health professionals to facilitate the continuation of treatment. In such a situation, you have the right to continue treatment with this professional, discontinue treatment, or ask for a referral. Records for my inactive clients will be handled by a "records custodian," which may be an individual or company. The custodian will be responsible for satisfying records requests and destroying records when the legal timeframes for records retention are satisfied.

Availability of services: My practice does not have the capability to respond immediately to counseling emergencies. True emergencies should be directed to the community emergency services (911) or to the local hotlines (Empact – 480-784-1500, Banner Helpline - 602-254-4357, Value Options – 602-222-9444). I attempt to return phone calls within the same day if left during office hours or within a 24/48 hour period. Also, **I do *not* communicate via email.** Once you are an established client, you may schedule/cancel/re-schedule appointments via text message (same cancellation policy applies). I will respond to each text at my earliest opportunity. A quick or immediate response in one situation does not constitute a commitment of rapid response in another situation. If you do not get a response from me, you can assume I did not receive your text. Remember: It is not in my practice to do any type of therapeutic communication/counseling via text message…appointment scheduling only.

I understand that texting/emailing is not confidential. *Signature* _____

Appointments/Financial: There are sometimes misunderstandings about the length of sessions. Therapy sessions, as defined by the American Medical Association Current Procedural Terminology coding, are 50 minutes, not one hour. This is known as a "therapeutic hour." Longer appointments are sometimes useful and can be scheduled if you let me know you would like to do this ahead of time. Please note that some insurance companies will not pay for an appointment outside of the traditional 50 minutes.

Payment is expected at the time the service is rendered. By signing this document, you are agreeing to pay for the services rendered and any additional expenses that may be accrued in collecting said fees. The fee for a 50 minute individual counseling session, family, couples, Court ordered, or parenting session is $150.00.

All intake sessions will be billed at $150.00 as well. Telephone sessions versus in-office sessions are billed at the regular session fee. Time spent providing special services, such as document reviews, telephone time, case consultations, and time spent discussing treatment with other professionals are billed at $50.00 per 15 minutes. Additional time added to the clinical session will be billed at the same additional rate. Refunds are not made after the services have been rendered.

Regular attendance at your scheduled appointments is one of the keys to a successful outcome in counseling. I reserve a 50 minute window for each appointment with a client. Appointments cancelled at the last minute are very detrimental to my practice. Therefore, I ask that you notify me a minimum of one full business day (24 hours, Tuesday through Friday) prior to your appointment if you need to cancel. Appointments on weekends or Mondays must be canceled by the prior Friday at 3:00 P.M. All appointments considered after school/work, appointments 3:00pm or later must be canceled by 3:00pm the previous day. I do not initiate reminder phone calls so I do ask that you create a system that works for you to ensure you keep track of all scheduled appointments. You will be billed the full rate ($150.00) for appointments you fail to cancel or do not show for, in accordance with this policy your credit card may be charged. Please note that these are personal financial obligations that you are responsible for; not the obligations of your insurance company.

I understand the cancellation policy. Signature _____

Insurance: I am not a preferred provider for health plans in this locality. If you are using one of these plans to pay for your treatment it would be your responsibility to call your insurance company to find out your mental health benefits. If you are using an insurance program, I will supply you with a superbill that you can turn into your insurance company so they can reimburse you. Your insurance company or managed care company may limit the number of sessions based on their assessment of medical necessity or other factors. Their determination may or may not match what you want or need in treatment. In the event that they will not authorize additional sessions or you exhaust the sessions that your insurance will provide, you understand that you will have to pay for the additional services rendered. All services are payed immediately following the therapeutic session. In all cases however, payment for services is the responsibility of the client, not the insurance company. Once again, please discuss this with me if you have any questions.

Phone Contact: I have a strong preference to face-to face contact when doing counseling. I believe that personal contact facilitates a greater depth of understanding and makes our time together more productive. However, there may be times when some limited telephone counseling is warranted. Telephone counseling should be scheduled for a mutually agreeable time and will be billed at $50.00 for each 15 minute period of counseling. If a “session” (50-minute) is scheduled, the full session fee will be charged. After a release is signed, phone consults with other professionals may be required. These consults/collaborations will be billed at the same rate: $50 per 15 minute period.

Appointment availability varies with the client load at the time. High demand appointments (off hours, late afternoons, late evenings, weekends, etc.) are likely to be sporadic in their availability. I reserve the right to limit my commitments of high demand appointment times to any particular client in order to meet the needs of all my clients and balance my workload.

Dispute Management: If there is ever a time when you believe that you have been treated unfairly or disrespectfully, please talk with me about it. It is never my intention to cause this to happen to my clients, but sometimes misunderstandings can inadvertently result in hurt feelings. I want to address any issues that might get in the way of the therapy as soon as possible. This includes administrative or financial issues as well. Should we be unable to resolve the situation, you may contact my supervisor Stacey Bruen (LPC-10342) at (480) 948-1123, or the Arizona Board of Behavioral Health Examiners at (602) 542-1882.

Consent for evaluation and treatment: Consent is hereby given for evaluation and treatment under the terms described in this consent document. I acknowledge that I have printed a copy of this informed consent agreement for myself. It is agreed that either of us may discontinue the evaluation and treatment at any time and that you are free to accept or reject the treatment provided. In the case of a minor child, I hereby affirm that I am a custodial parent or legal guardian of the child and that I authorize services for the child under the terms of this agreement.

Signature: _____ Date: _____

In the case of a minor child, please specify the following:

Full name of minor : _____ DOB _____ Relationship: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

*** Confidential - contains Privileged Communications protected under A.R.S. § 32-3283 and ***
*** Federal Confidentiality Rules (42 CFR Part 2 & 45 CFR Parts 160 & 164) - Unauthorized disclosure is prohibited ***

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Information Pertaining to Person Financially Responsible

Full Name: _____

Patient (if other than above):_____

Patient Date of Birth: _____Referred by:_____

Address:_____City/State: _____Zip: _____

Home Phone:_____ Cell Phone:_____ Work Phone:_____

Email: _____

Office Policy and Financial Responsibility Statement

I UNDERSTAND THAT:

- Sessions are **50 minutes** in length and are billed at **$150.00 per session** for all counseling sessions. ***All intake sessions will be billed at $150.00.*** Sessions of late arrivals will end on time.
- *Parents/Guardians who provide transportation are required to stay at the office while their young child(ren) are being seen. If a parent/guardian is late for pick-up of a teen, I understand my child/teen will be waiting in the reception area.*
- The rate of $50.00 per 15 minutes will also apply to time spent providing special services, such as telephone sessions, phone calls, document reviews, or case consultations, and time spent discussing treatment with other authorized professionals. Additional time added to the clinical session will be billed at the aforementioned rate. ***This counselor does not communicate via email or participate in any type of therapy over text communication.**
- Due to confidentiality with technology, if set boundaries are crossed and this counselor receives continual emails or therapy information via text (after a warning), a $25 charge per email/text will apply.
- Tommy Montanarella does not participate with third party payers, such as managed care organizations and insurance companies. By signing this form, I am agreeing to pay the entire bill at the time of service. If requested, I may receive a "super-bill" as a receipt to submit to a third party payer. There are no-refunds.
- ****Monday** appointments must be cancelled by Friday at 3:00pm; 3:00PM or later appointments must be cancelled by 3:00PM the previous day; and for all other appointments, I must give 24 hour notice of appointment cancellation or I will be billed IN FULL for "no show" or late cancelled appointments and my credit card on file may be charged.**
- Payment of cash, check or credit card is expected at the end of each visit. If you choose to pay with a credit card, a 3.5% transaction processing fee will be assessed to each transaction. I understand my credit card may be charged for late canceled appointments/no show

Signature: _____ Date:_____

Credit card #:_____ Expiration:_____ 3/4 digit code:_____ Zip:_____

Please note that if Tommy Montanarella is not available, you can leave a message and your phone call will be returned, although this may take 24 - 48 hours. In the event of an emergency, please do not hesitate to call 911 or to go to the closest emergency room or call local hotlines such as Empact, Banner Help Line, and Value Options listed on your Informed Consent Form.

I understand that I am financially responsible for any and all charges incurred for the treatment of the above-named. I have read the above office policy regarding length of sessions, late arrivals, charges, missed appointments, etc. **I understand and agree to the stated terms.**

_____ _____

Signature of Client (or Parent of Minor child) Date

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Adult Questionnaire:

Client Psychosocial History and Status

Name: _____Birthdate: _____Age: _____

Home Phone: _____Cell Phone: _____

Briefly describe your reason for seeking help:_____

_____

_____

Who suggested you contact me? _____

What is your religious affiliation?_____None ❑

Education/Degrees: _____

Occupation: _____How Long? _____

Place of Employment: _____How Long? _____

If not employed, how long has it been since you worked? _____

What kind of job did you have? _____

What caused you to stop working? _____

Marital Status: ❑ Single ❑ Married ❑ Divorced ❑ Separated ❑ Widowed ❑ Living Together

Marriages/Significant Relationships

To Whom	*Length of Relationship*	*Termination of Relationship (if applicable)*	*Children from that Relationship (if any)*

If married, separated or living together, briefly describe your relationship: _____

_____

Age of spouse: _____Religion:_____

Education, degrees? _____Occupation: _____

Is he/she currently employed? ❑ Yes ❑ No How Long? _____

Has your spouse been previously married? ❑ Yes ❑ No Number of times:_____

How long since his/her last marriage? _____

Number of children from previous marriages: _____Ages of children: _____

Extended Family: Parents, Siblings, And Others Close To You

Name	Relationship	Age	Occupation	Challenges: i.e. Alcohol, History Mental Illness

How was it to grow up in your family? _____

_____

_____

With whom are you currently living?

Name	Relationship	Age	Use of Alcohol/Drugs	How do you get along?

Medical Information

When were you last examined by a physician? _____ Name of Doctor: _____

List any health problems for which you currently receive treatment: _____

_____

List any past health problems including accidents: _____

_____

List any medications you currently take: _____

List any allergies you may have: _____

Women only:

How many pregnancies have you had? _____Are you pregnant now? ❑ Yes ❑ No

Any miscarriages or abortions? ❑ Yes ❑ No How many? _____

Men and women:

Are you sexually active? ❑ Yes ❑ No Beginning at what age? _____

Do you use birth control methods? ❑ Yes ❑ No If yes, what?_____

Have you ever had concern about eating habits? ❑ Yes ❑ No

Psychological/Emotional Information

Have you ever sought help or been treated for psychological or emotional reasons? ❑ Yes ❑ No

If so, when and where?_____

Have you ever thought about suicide? ❑ Yes ❑ No If so, did you have a plan? ❑ Yes ❑ No

Have you ever attempted suicide? ❑ Yes ❑ No If so, how many times?_____

Alcohol/drug use history

Do you feel you have a drug or alcohol problem? ❑ Yes ❑ No

Have you ever had any previous treatment for drug / alcohol abuse? ❑ Yes ❑ No

If so, when and where?_____

List all drugs, including alcohol, that you currently use, or have used in the last year (indicate frequency and amount):

_____

Legal

Please list and describe any arrests or legal problems (including driving violations):_____

_____

_____

Circle any problem that pertains to you at the present:

Anger	Education	Sexual Problems	Work
Drug Use	Loneliness	Bowel Troubles	Marriage
Fatigue	Ambition	Stomach Problems	Divorce
Finances	My Appearance	Suicidal Thoughts	Future
Friends	Concentration	Nightmares	Temper
My thoughts	Parenthood	Health Problems	Age
Nervousness	Relaxation	Making Decisions	Stress
Self-esteem	Sexual Orientation	Physical Abuse	Anxiety
Separation	Energy	Inferiority	Appetite
Sexual Abuse	Children	Career Choices	Weight
Shyness	Legal Matters	Self Control	Memory
Sleep	Under / Over eating	Alcohol Use	Overeating
Unhappiness	Depression	Headaches	Fears

Circle everything that has happened to you in the past three years:

Death of a spouse/partner	Marriage Problems	Changes in marital status
Death of another family member	Family Problems (Children, in-laws)	Loss of Job
Major illness or injury–yourself	Financial Problems	Move to another city or state
Major illness or injury–family member	Legal Problems	Other: _____

Please list any additional information that you feel may be helpful:_____

_____

_____

_____

_____

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Authorization to Release/Exchange Information

Name(s) of Client(s): _____ Date of Birth(s): _____

_____ _____

I, _____, hereby authorize **Tommy Montanarella, MC, NCC, LAC**

☑ **to release to:** ☑ **to receive from:**

Name and full address of person/facility:

…the specific information indicated below with regard to the services provided to the above named client(s) for the following purpose(s):

- □ Coordination of treatment with another mental health professional involved in your care.
- □ Coordination of treatment with another type of health professional involved in your care.
- □ To obtain insurance or other third party benefits under a managed care agreement.
- □ For processing of my insurance, employee benefits claim or other financial arrangements.
- □ Coordination with another type of professional (e.g., attorney, custody evaluation, etc.)
- □ Other, specify _____

Such disclosure of written or oral conversations shall be limited to the following specific types of information:

- □ Assessment, diagnosis, treatment plan, compliance, functionality, test results, and response to treatment.
- □ Information pertaining to substance abuse or substance dependency.
- □ Sensitive relationship issues, family dynamics, sexual issues, and other highly personal information.
- □ Other, specify All Available Information_____

Such The specific use of Protected Health Information (PHI) to be discussed or released are as follows:

- □ Coordination of response to psychotropic medications prescribed by a psychiatrist, physician, or licensed nurse practitioner.
- □ Coordination of other medical treatment with mental health, marital, or family treatment.
- □ Coordination of marital or family treatment with individual treatment.
- □ Case management and/or utilization review under a managed care agreement.
- □ Review of treatment and/or functionality to obtain benefits of non-health-insurance related programs.
- □ Other, _____

I understand that the information to be released includes records in any form, and oral conversations with Tommy Montanarella, MC, NCC, LAC. I understand that I have a right to receive a copy of this authorization. I understand that any cancellation or modification of this authorization must be in writing. I understand that I have the right to refuse to sign this authorization. I understand that I have the right to revoke this authorization at any time unless Tommy Montanarella has taken action in reliance upon it. And, I also understand that such revocation must be in writing and received by Tommy Montanarella at the above stated address to be effective.

This authorization shall remain valid until:_____ (6 month duration)

Client/Patient Signature:_____ Date_____