

Adult Client Information Form

Date: _____

A. Identification

Your name: _____ Date of birth: _____ Age: _____

Home street address: _____ Apt.: _____

City: _____ State: _____ Zip: _____

Email address: _____ Phone: _____

Calls will be discreet, but please indicate any restrictions: _____

B. Referral: Who gave you my name to call?

Name: _____ Phone: _____

Address: _____

May I have your permission to thank this person for the referral? Yes No Initial _____

C. Your medical care: From whom or where do you get your medical care?

Clinic/doctor's name: _____ Phone: _____

Address: _____

Current medications: _____

D. Your current employer

Employer: _____ Address: _____

Work phone: _____

E. Your education, training, and military history

<u>Dates</u>		<u>Schools</u>	<u>Adjustment to school</u>	<u>Did you graduate?</u>
<u>From</u>	<u>To</u>			
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

F. Family-of-origin history

FAMILY MEMBER	LIVING (Y/N)	AGE	HEALTH			If deceased, cause of death
			GOOD	FAIR	POOR	
Father						
Mother						
Brothers						
Sisters						

Check condition and indicate relationship of any blood relative that has or has had any of the conditions listed below:

Alcoholism/Substance Abuse _____

Birth Defects _____

Cancer _____

Depression _____

Heart Attack _____

High Blood Pressure _____

Migraine _____

Mental Illness _____

Learning/Attention Problems _____

Suicide/Suicide Attempt _____

G. Significant relationships

Name of person	Person's age		Your age		Reasons for ending
	started	ended	started	ended	
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Date of current marriage: _____ Spouse's name: _____ Spouse's age: _____

H. Children (Indicate which are from a previous relationship with the letter P in the last column)

Name	Current age	Sex	School	Grade	Adjustment problems?	P?
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

J. Spiritual Life

Would you like to incorporate spiritual or religious beliefs in your treatment? Yes/ No Initial _____



Agreement to Pay for Professional Services

I, the client, request that Linda Roberts, LPC, provide professional services to me and I agree to pay this therapist's fee of \$140 per 60 minute session. This same fee will be applied per each hour of consultation, assessment, or other therapeutic activity unless otherwise negotiated in writing.

I agree that this financial relationship with this therapist will continue as long as the therapist provides services or until I inform her, in person or by certified mail that I wish to end it. I agree to meet with this therapist at least once before stopping therapy. I agree to pay for services provided to me up until the time I end the relationship.

I understand that if I do not pay for services that the services provided may be terminated by the therapist. Continued non-payment of fees may result in further consequences such as my case being referred to a collection agency. I agree that I am responsible for the charges for services provided by this therapist to me, although other persons or insurance companies may make payments on my account. If my any part of my fees is being paid by an insurance company or other third-party payer, I understand that this may result in limitations to my confidentiality.

Signature of client (or person acting for client)

Date

Printed name

I, the therapist, have discussed the issues above with the client. My observations of the person's behavior and responses give me no reason to believe that this person is not fully competent to give informed and willing consent.

Signature of therapist

Date

CONSENT FOR TREATMENT FOR ADULTS

Therapy sessions and file information are confidential.

Except in cases of: (a) court orders/subpoenas, (b) to defend legal action against Linda Roberts, (c) need to prevent harm to self or others, (d) suspected child abuse/neglect; (e) third party billing and lawsuits I bring related to mental health issues may also limit the confidentiality of my file; (f) If therapist becomes incapacitated or dies, I understand Ms. Roberts' Professional Executors (Shelley Madden or Tonna Deal) will have access to my record.

I consent to use of electronic communication via text or email.

The privacy of any electronic communication cannot be assured. Consent is given to the therapist to text or email information regarding appointments and resources. Consent is given by the client for therapist to respond to private conversations initiated by the client through text or email. Specific restrictions on the use of texting and emailing of information will be discussed and documented in client's file for treatment.

There are some limitations to my access to my file.

While I have the right to access my file, I understand that doing so may jeopardize the therapeutic process. I agree to consult with my therapist about any questions I have concerning the content of my file or sessions.

I must sign release forms before information can be exchanged with others.

The privacy of any electronic communication cannot be assured. Do not use email for urgent matters. I may request restrictions on the use/disclosure of information in my file for treatment, payment and health care operations, but the therapist is not bound to agree with my request. Due to privacy constraints, I am unable to connect with you via social media (e.g., Facebook, Instagram etc.)

Linda Roberts does not provide after-hours or emergency services (use 911 for after-hours crises).

The practice of psychology and related disciplines is not an exact science.

Psychotherapy involves discussing in detail your concerns, giving background information and talking about areas that may cause you emotional pain, all for the purpose of trying to develop more effective methods of coping with problem areas in your life. As a result, it is possible that symptoms may worsen as the result of participating in counseling. You are free to withdraw from therapy at any time.

The therapist is not a medical doctor and cannot prescribe medications.

I agree to pay my clinic bill. Payment is due the day of scheduled session and I must cancel at least 24 hours before my session or I am responsible for the cost of the session.

Clients who have not had a counseling session within the past 90 days and who have not made prearrangement with Ms. Roberts, will be discharged from counseling.

I acknowledge that my therapist has reviewed the General Consent for Treatment with me.

Signature of Therapist

Signature of Client

Date

CONSENT FOR TELE-COUNSELING SERVICES

According to Oklahoma state law, "Telemedicine" means the practice of health care delivery, diagnosis, consultation, evaluation, treatment, transfer of medical data, or exchange of medical education information by means of audio, video, or data communications. Telemedicine uses audio and video multimedia telecommunication equipment which permits two-way real-time communication between a health care practitioner and a patient who are not in the same physical location. Telemedicine shall not include consultation provided by telephone or facsimile machine; In the following section "you" refers to the person receiving mental health services from Linda Roberts, LPC, including adults, children, teens, and any family member or others in the home. Ms. Roberts uses a HIPAA compliant platform called "Zoom" which provides secure audio and video transmission specifically for the purpose of providing tele-counseling services.

Benefits of tele-counseling include but are not limited to:

- Receiving services at times or in places where the service may not otherwise be available.
- Receiving services in a fashion that may be more convenient and less prone to delays than in-person meetings.
- Receiving services when you are unable to travel to the service provider's office.

Risks of tele-counseling services include but are not limited to:

- Internet connections and cloud services could cease working or become too unstable to use. Interruptions may disrupt services at important moments, and your provider may be unable to reach you quickly via other tools such as via telephone, email, or in-person.
- Cloud-based service personnel, IT assistants, and malicious actors ("hackers") may have the ability to access your private information that is transmitted or stored in the process of telemental health-based service delivery.
- Computer or smartphone hardware can have sudden failures or run out of power, or local power services can go out.
- Due to video or audio quality, your counselor may miss verbal or behavioral cues, therefore not acting on those cues and subsequently hindering or causing a degradation in your mental health.

Ongoing assessment for the appropriateness of tele-counseling services

During the first session and all subsequent sessions, your mental health provider will assess the appropriateness of providing mental health services to you. If the counselor believes that your treatment is being hindered by tele-counseling or would be better served via in-person counseling, she will switch to in-person sessions, a combination of in-person and tele-counseling sessions, or refer you to a different mental health provider.

Tele-counseling environment

By Oklahoma state law, you are required to inform the counselor of your physical location (physical address) at the beginning of each counseling session. You will be responsible for creating a safe and confidential space during tele-counseling sessions. You should use a space that is free of other people. It should also be difficult or impossible for people outside the space to see or hear your interactions with your provider during the session. You will be responsible for guarding against excessive interruptions or outside noises (dogs barking, trucks, etc). You will be responsible for providing adequate lighting in your space to aid in video transmission. Your environment should have good wi-fi connection or cellular signal. If you or your counselor determine that the environment is not conducive for counseling, or if the wi-fi or cellular connection is inadequate, the session may end and be conducted via telephone or rescheduled.

Danger to self or others and mandated reporting

Just as with in-person sessions, your mental health therapist has legal and ethical mandates to follow if you should become a danger to yourself or others. If your therapist believes that you are in danger of hurting yourself or others, she may call the police in your local area and ask them to do a "wellness check". In such situations, your therapist is not bound by confidentiality and may share any information she feels is required for your and others safety. You are asked to identify a person in the home or near your physical location for the therapist to contact and ask to check on you, if your mental health degrades and the counselor is unable to reach you.

Mandated reporting

Just as in in-person counseling sessions, your therapist is required by law to report any allegations or suspicions of child/elder abuse or neglect to the Oklahoma Department of Human Services.

I have read and understand the Tele-Counseling Consent for Treatment

Signature of Client

Signature of Client

Date:

Date:

Emergency Contact Name and Number

Notice of Privacy Practices

This notice talks about **privacy information**. We've always taken great care to safeguard your privacy. What is new is a government regulation requiring us to explain your rights. This notice describes how mental health information about you may be used and disclosed and how you can get access to this information. Please review it carefully.

We are required by applicable federal and state law to maintain the privacy of your health information. We are required to give you this Notice about our privacy practices, our legal duties, and your rights concerning your health information. We are required to abide by the terms of this Notice of Privacy Practices. We may change the terms of our notice at any time. The new notice will be effective for all protected health information that we maintain at that time. In the event that the notice is changed, a new notice will be sent to you by mail or at the time of your next appointment. You may request a copy of our Notice at any time. This takes effect January 2011, and will remain in effect until we replace it.

Uses and Disclosures of Protected Health Information

You will be asked to sign a consent form. Once you have consented to the use and disclosure of your protected health information for treatment by signing the consent form, this agency will use or disclose your protected health information as described below.

- **Treatment:** We may use and disclose, as needed, your protected health information to provide, coordinate, or manage your health care and any related services.
- **Health Operations:** We may use and disclose, as needed, your health information in connection with our operations. Healthcare operations include quality assessment and improvement activities, reviewing the competence or qualifications of mental healthcare professionals, evaluating practitioner and provider performance, employee review activities, conducting training programs, accreditation, certification, licensing or credentialing activities, and conducting or arranging for other business activities.
- **Uses and Disclosures of Protected Health Information Based Upon Your Written Authorization:** Will be made only with your written authorization, unless otherwise permitted or required by law. You may revoke this authorization, at any time, in writing. Your revocation will not affect any use or disclosures permitted by your authorization while it was in effect. Unless you give us a written authorization, we cannot use or disclose your health information for any reason except those described in the notice.
- **Emergencies:** We may use or disclose your protected health information in an emergency treatment situation. In the event of your incapacity or emergency circumstances, we will disclose health information based on determination using our professional judgment, disclosing only health information that is directly relevant to the person's involvement in your healthcare.

Other permitted and Required Uses and Disclosures That May Be Made Without Your Consent, Authorization or Opportunity to object

We may use or disclose your protected health information in the following situations without your consent or authorization. These situations include:

- **Required by Law:** We may use or disclose your protected health information to the extent that the use or disclosure is required by law. The use or disclosure will be made in compliance with the law and will be limited to the relevant requirements of the law.
- **Health Oversight:** We may disclose your protected health information to a health oversight agency for activities authorized by law, such as audits, investigations, and inspections.
- **Abuse or Neglect:** We may disclose your protected health information to the Department of Human Services which is authorized by law to receive reports of child abuse or neglect. In addition, we may disclose your protected health information if we believe that you have been a victim of abuse or neglect to the Department of Human Services.

- **Legal Proceedings:** We may disclose your protected health information in the course of any judicial proceedings, in response to an order of a court or administrative tribunal (to the extent such disclosure is expressly authorized), in certain conditions in response to a subpoena, discovery request or other lawful process.
- **Law Enforcement:** Consistent with applicable federal and state laws, we may disclose your protected health information, if we believe that the use or disclosure is necessary to prevent or lessen a serious and imminent threat to the health or safety of a person or the public.
- **National Security:** We may disclose to military authorities the health information of Armed Forces personnel under certain circumstances. We may disclose to authorized federal officials, health information required for lawful intelligence, counterintelligence, and other national security activities.
- **Appointment Reminders:** We may use or disclose your health information to provide you with appointment reminders (such as voicemail messages or letters).

Required Uses and Disclosures: Under the law, we must make disclosures to you and when required by the Secretary of the Department of Health and Human Services to investigate or determine our compliance with the requirements of Section 164.500 et.seq.

Client Rights Access: You have the right to inspect and copy your protected health information. We will use the format you request unless we cannot practicably do so. You must submit your request in writing to obtain access to your health information. We will charge you a reasonable cost-based fee for expenses such as copies and staff time. If you request copies, we will charge you \$1.00 for the first page, and \$.25 each page thereafter to locate and copy your health information plus postage if you want the copies mailed to you.

Under federal law, however, you may not inspect or copy the following records; psychotherapy notes; information compiled in reasonable anticipation of, or use in, a civil, criminal, or administrative action or proceeding, and protected health information that is subject to law that prohibits access to protected health information.

Restriction: You have the right to request restriction of your protected health information. You may also request that any part of your protected health information not be disclosed by family members or friends who may be involved in your care or notification purposes as described in this Notice of Privacy Practices. Your request must be in writing and state the specific restriction requested and to whom you want the restriction to apply. If we agree to the additional restrictions, we will be able to abide by our agreement (except in an emergency). We are not required to agree to a restriction that you may request. If we believe it is in your best interest to permit use and disclosure of your protected health information, your protected information will not be restricted.

Amendment Request: You have the right to request that we amend your protected health information. Your request must be in writing and explain why the information should be amended. In certain cases, we may deny your request for an amendment. If we deny your request for you amendment, you have the right to file a statement of disagreement with us and we may prepare a rebuttal to your statement and will provide you with a copy of any such rebuttal.

Disclosure Accounting: You have the right to receive an accounting of certain disclosures we have made, if any, of your protected health information. This right applies to disclosures for purposes other than treatment or healthcare operations as described in this Notice of Privacy Practices.

Questions and Complaints: You may complain to us or to the Secretary of Health and Human Services if you believe your privacy rights have been violated by us. You may file a complaint with us by notifying our privacy contact of your complaint. We support your right to the privacy of your protected health information. We will not retaliate in any way if you choose to file a complaint with us or with the U.S. Department of Health and Human Services.

I have read and understand the Notice of Privacy Policy.

Client's
signature _____

Date _____

ADULT CHECKLIST OF CONCERNS

Name: _____

Date: _____

Please mark all of the items below that apply, and feel free to add any others at the bottom under "Any other concerns or issues."

- Abuse—physical, sexual, emotional, neglect (of children or elderly), cruelty to animals
- Aggression, violence
- Alcohol use
- Anger, hostility, arguing, irritability
- Anxiety, nervousness
- Attention, concentration, distractibility
- Career concerns, goals, and choices
- Childhood issues (your own childhood)
- Children, child management, child care, parenting
- Codependence
- Confusion
- Compulsions
- Custody of children
- Decision making, indecision, mixed feelings, putting off decisions
- Delusions (false ideas)
- Dependence
- Depression, low mood, sadness, crying
- Divorce, separation
- Drug use—prescription medications, over-the-counter medications, street drugs
- Eating problems—overeating, undereating, vomiting (see "Weight and diet issues")
- Emptiness
- Failure
- Fatigue, tiredness, low energy
- Fears, phobias
- Financial or money troubles, debt, impulsive spending, low income
- Friendships
- Gambling
- Grieving, mourning, deaths, losses, divorce
- Guilt
- Headaches, other kinds of pains
- Health, illness, medical concerns, physical problems
- Inferiority feelings
- Interpersonal conflicts
- Impulsiveness, loss of control, outbursts, risk taking
- Irresponsibility

(cont.) **Adult Checklist of Concerns**

- Legal matters, charges, suits
- Loneliness
- Marital conflict, distance/coldness, infidelity/affairs, remarriage
- Memory problems
- Menstrual problems, PMS, menopause
- Mood swings
- Motivation, laziness
- Nervousness, tension
- Obsessions, compulsions (thoughts or actions that repeat themselves)
- Oversensitivity to rejection
- Panic or anxiety attacks
- Perfectionism
- Pessimism
- Procrastination, work inhibitions, laziness
- Relationship problems
- School problems (see also "Career concerns . . .")
- Self-centeredness
- Self-esteem
- Self-neglect, poor self-care
- Sexual issues, dysfunctions, conflicts, desire differences, other (see also "Abuse")
- Shyness, oversensitivity to criticism
- Sleep problems—too much, too little, insomnia, nightmares
- Smoking and tobacco use
- Spiritual or religious concerns
- Stress, relaxation, stress management, stress disorders, tension
- Suspiciousness
- Suicidal thoughts
- Temper problems, self-control, low frustration tolerance
- Thought disorganization and confusion
- Threats, violence
- Weight and diet issues
- Withdrawal, isolating
- Work problems, employment, workaholism/overworking, can't keep a job

Any other concerns or issues:

Please look back over the concerns you have checked off and choose the one that you most want help with. It is: _____

This is a confidential patient medical record. Redislosure or transfer is prohibited by law.