

Demographic Information and Symptom Checklist

Name: _____ Sex: _____ Birth Date: _____ Age: _____

Address: _____

Home Phone: _____ Ok to leave message

Cell Phone: _____ Ok to leave message/text

Work Phone: _____ Ok to leave message

Email: _____ Ok to send message/account statement

Emergency contact name: _____ Phone: _____

What would you like help with: _____

How were you referred to us: _____

Who is your psychiatrist/primary care doctor/pediatrician: _____

Please check any of the following that apply:

- | | | |
|--|--|--|
| <input type="checkbox"/> Feeling sad/depressed | <input type="checkbox"/> Weight change | <input type="checkbox"/> Doing activities over and over |
| <input type="checkbox"/> Low energy | <input type="checkbox"/> Thoughts of suicide | <input type="checkbox"/> Unable to get rid of thoughts |
| <input type="checkbox"/> Problems sleeping | <input type="checkbox"/> Change in eating | <input type="checkbox"/> Feeling hopeless |
| <input type="checkbox"/> Feeling anxious/nervous | <input type="checkbox"/> Not enjoying activities | <input type="checkbox"/> Withdrawing/Isolating |
| <input type="checkbox"/> Easily frustrated | <input type="checkbox"/> Irritable | <input type="checkbox"/> Feeling restless |
| <input type="checkbox"/> Feeling overwhelmed | <input type="checkbox"/> Feeling guilty | <input type="checkbox"/> Thoughts to hurt yourself |
| <input type="checkbox"/> Thoughts to hurt others | <input type="checkbox"/> Feeling lonely | <input type="checkbox"/> Temper/Aggression |
| <input type="checkbox"/> Excessive energy | <input type="checkbox"/> Excessive fear | <input type="checkbox"/> Difficulty concentrating |
| <input type="checkbox"/> Relationship problems | <input type="checkbox"/> Being over active | <input type="checkbox"/> Less interest in activities |
| <input type="checkbox"/> Recent family changes | <input type="checkbox"/> Drug use | <input type="checkbox"/> Suicide attempt |
| <input type="checkbox"/> Obsessive thoughts | <input type="checkbox"/> Excessive alcohol use | <input type="checkbox"/> Physical/Emotional/Sexual abuse |
| <input type="checkbox"/> Low self-esteem | <input type="checkbox"/> Feeling worthless | <input type="checkbox"/> Guilt |
| <input type="checkbox"/> Panic attack | <input type="checkbox"/> Stressed | <input type="checkbox"/> Fear of dying |
| <input type="checkbox"/> Phobias | <input type="checkbox"/> Fear of going crazy | <input type="checkbox"/> Not thinking clearly/confusion |
| <input type="checkbox"/> Losing track of time | <input type="checkbox"/> Recent loss | <input type="checkbox"/> Medical condition |
| <input type="checkbox"/> Problems at school | <input type="checkbox"/> Problematic Anger | <input type="checkbox"/> Other: _____ |

Client Insurance Information Form

To help ensure that the therapy and psychological testing process is not interrupted by insurance issues, we ask that you briefly contact your insurance company. This is essential because mental health benefits can be significantly different than your medical benefits and may even be through a different insurance company. You being knowledgeable about your mental health coverage will allow you to maximize your insurance benefits and prevent billing problems. **Please bring this completed form to your first appointment.**

Name of insurance company _____

Type of plan: PPO HMO OTHER _____

Member name on card _____

Member ID _____ Group No. _____

Name and date of birth of client being seen _____

For your convenience we have provided a basic script for obtaining the information from your insurance company:

Please call the customer service number on the back of the card. Follow the prompts or press "0" to speak with a customer advocate. Once you reach a customer advocate, state you are calling to check your mental health/behavioral health benefits, ask the questions listed below, and record their responses:

Is my plan currently active?: Yes No

Do I have mental health benefits?: Yes No

Does (insert your insurance company name) provide my mental health benefits? Yes No

-If no, please ask the name of the company that does, as well as their number.

Do I need pre-approval for outpatient (private practice) mental health services?: Yes No

Is there a limit to my mental health services? (# of sessions per year? Or lifetime?)

Do I have a copay?: Yes No

-If yes, what is the copay for an office visit to a mental health provider? \$ _____

Do I have a deductible?: Yes No

- If yes, what is my individual deductible? \$ _____ Family deductible? \$ _____

- For the current year, how close am I to meeting my deductible? \$ _____ out of \$ _____

Thank you for obtaining this information **prior to your first session**. Please bring this completed form and the new client paperwork form to your first session. Also, please remember to **bring your ID and insurance card**. Feel free to contact us with any questions.