

# INTAKE

Patient Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Phone(s): home: \_\_\_\_\_ cell: \_\_\_\_\_ work: \_\_\_\_\_

Email: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Relationship status: \_\_\_\_\_

Employed by: \_\_\_\_\_

Referred by: \_\_\_\_\_ Permission to contact: YES \_\_\_ NO \_\_\_

Patient #2 : \_\_\_\_\_ Relationship to above: \_\_\_\_\_

Address (if different): \_\_\_\_\_

Phone(s): home: \_\_\_\_\_ cell: \_\_\_\_\_ work: \_\_\_\_\_

Email: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Relationship status: \_\_\_\_\_

Employed by: \_\_\_\_\_

Person and number to contact in case of emergency:

\_\_\_\_\_

(Initial if OK to contact): \_\_\_\_\_

Medical Doctor(s) & phone #(s):

\_\_\_\_\_

Other therapists currently seeing:

\_\_\_\_\_

Current medications: \_\_\_\_\_

Dosage: \_\_\_\_\_ Prescribed by? \_\_\_\_\_

phone # \_\_\_\_\_

History of psychiatric hospitalizations:

## Acknowledgement of Receipt of Privacy and Practices Notices

I/We, \_\_\_\_\_, have received a copy of this office's notice of practice policies including the following:

\_\_\_\_\_ HIPPA NOTICE OF PRIVACY PRACTICES

\_\_\_\_\_ INFORMATION AND GENERAL OFFICE POLICIES

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

It is your right to refuse to sign this document.

### FOR OFFICE USE ONLY:

The reason that a standard acknowledgment (such as the above) of the receipt of the notice of privacy practices was not obtained:

\_\_\_\_ Patient refused to sign

\_\_\_\_ Communication barriers prohibited obtaining the acknowledgment.

\_\_\_\_ An emergency situation prevented this office from obtaining it.

\_\_\_\_ Others: \_\_\_\_\_

# Information and General Practice Policies

## THE PSYCHOTHERAPEUTIC PROCESS

Psychotherapy is one approach to focusing on the problems of life for the purpose of change. The success or failure of this approach rests upon many factors--client motivation and readiness for change, the therapist-client relationship, and the quality of the “match” between client and therapist are among them. Therapists can help individuals, couples and families learn better ways of dealing with the fundamental problems and conflicts of life with which we are all confronted. The therapeutic learning process occurs on many levels. When emotions are associated with intellectual learning there is a greater likelihood of change. Psychotherapy is hard work and can be emotionally painful--you may not always feel “better” at the end of a session.

## MY BACKGROUND

LMFT stands for Licensed Marriage and Family Therapist. I have been in private practice and have been licensed to practice psychotherapy in the state of California since 1980. I received my Master’s degree from California State University, Hayward. In addition to traditional “talk” therapy, I have specialized training to practice sex therapy, EMDR, and hypnotherapy. I have worked at numerous agencies doing both direct service and supervision and training over the years, and have taught and trained beginning therapists at a number of graduate schools in the Bay Area and at the Women’s Therapy Center in Berkeley.

## MY THEORETICAL ORIENTATION

I work from a relational model of psychotherapy that is based on the idea that a person’s sense of self develops within the psychological context of interpersonal relationships and therefore an empathic therapeutic relationship can help an individual grow as well as heal a wounded self. I help clients understand the impact of their early childhood experiences on themselves and what they bring to their adult relationships. I work in a flexible manner based on what each individual or each couple needs.

## CONFIDENTIALITY

Confidentiality is one of the cornerstones of successful psychotherapy. It is my practice that everything we talk about (even including the fact that you are in therapy) remains between just the two of us—or in the case of couple or family therapy, between those of us in the room. Ethically and legally, this is expected. However, California State law, Federal Law and the ethics of my profession have some permitted and some mandated exceptions to this. (The most notable among these are if I believe you will commit harm to yourself or others or if I have reason to suspect that a child, an elder or a dependent adult has been, or is being, physically abused or sexually molested. I encourage you to read the HIPPA NOTICE OF PRIVACY PRACTICES (which is attached and I am required by law to give to you) to be fully informed about your rights and the exceptions to confidentiality in my practice.

## CAUTIONS REGARDING TEXTING, EMAIL, CELL PHONE AND FAX COMMUNICATION

There may be times when email or texting may be the easiest way to transmit information, particularly about scheduling, between us. However, you should be aware that unauthorized people can sometimes access telecommunication, and therefore the privacy and confidentiality of such communications might be compromised.

## SOCIAL MEDIA

I do not accept friend or contact requests from current or former clients on any social networking site (Facebook, LinkedIn, etc). I believe that adding clients as friends or contacts on these sites can compromise confidentiality and our respective privacy. It may also blur the boundaries of our therapeutic relationship. At this time I do not tweet and do not follow current or former clients on blogs or Twitter. My reasoning is that I believe casual viewing of clients' online content outside of the therapy hour can create confusion in regard to whether it's being done as a part of your treatment or to satisfy my personal curiosity. In addition, viewing your online activities without your consent and without our explicit arrangement towards a specific purpose could potentially have a negative influence on our working relationship. If there are things from your online life that you wish to share with me please bring them into our sessions where we can view and explore them together, during the therapy.

## PHONE CALLS

You may always feel free to call me between sessions if something comes up. However, very extended phone calls will be charged at my hourly rate and are usually not as effective as scheduling an extra appointment. I try to return phone calls left on my voice mail as soon as possible, although I check for messages more regularly during the week than on weekends. If you need to talk to me urgently, you can try calling the number (510/219-3767) left on my outgoing message. If an emergency situation arises, please indicate it clearly in your message. If you need to talk to someone right away, you should call the 24-hour crisis line (880) 309-2131, the Police (911), or go to the nearest hospital.

## CANCELLATIONS

For therapy to be effective, it is important to attend sessions regularly, usually once or twice a week. Our sessions (unless a different agreement is made) will last 50 minutes. If we have regularly scheduled sessions I will always hold that hour for you. If you must cancel an appointment, give me at least 48 hours notice so you will not be charged for the session.

## FEES

Payment may be made by cash or check and is due at the beginning of each session. At this time, I am not a preferred provider on any insurance panels. If you think your insurance company might reimburse you or you want a monthly statement for any other reason, I can supply you with that. It will be your responsibility to determine and apply for reimbursement. You should be aware that insurance companies usually do not pay for missed appointments. Fees may be raised annually and you will always be given thirty days notice of any increase.

Thank you for taking the time to review this. If you have any questions or concerns about these policies and procedures, or anything else, please do not hesitate to ask. I look forward to working with you.

## HIPPA Notice of Privacy Practices

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

### II. I HAVE A LEGAL DUTY TO SAFEGUARD YOUR PROTECTED HEALTH INFORMATION (PHI)

I am legally required to protect the privacy of your PHI, which includes information that can be used to identify you that I've created or received about your past, present, or future health or condition, the provision of health care to you, or the payment of this health care. I must provide you with this Notice about my privacy practices, and such Notice must explain how, when, and why I will "use" and "disclose" your PHI. A "use" of PHI occurs when I share, examine, utilize, apply, or analyze such information within my practice; PHI is "disclosed" when it is released, transferred, has been given to, or is otherwise divulged to a third party outside of my practice. With some exceptions, I may not use or disclose any more of your PHI than is necessary to accomplish the purpose for which the use or disclosure is made. And, I am legally required to follow the privacy practices described in this Notice.

However, I reserve the right to change the terms of this Notice and my privacy policies at any time. Any changes will apply to PHI on file with me already. Before I make any important changes to my policies, I will promptly change this Notice and post a new copy of it in my office and on my website (if applicable). You can also request a copy of this Notice from me, or you can view a copy of it in my office or at my website, which is located at (insert website address, if applicable).

### III. HOW I MAY USE AND DISCLOSE YOUR PHI

I will use and disclose your PHI for many different reasons. For some of these uses or disclosures, I will need your prior authorization; for others, however, I do not. Listed below are the different categories of my uses and disclosures along with some examples of each category.

A. Uses and Disclosures Relating to Treatment, Payment, or Health Care Operations Do Not Require Your Prior Written Consent. I can use and disclose your PHI without your consent for the following reasons:

For treatment. I can disclose your PHI to physicians, psychiatrists, psychologists, and other licensed health care providers who provide you with health care services or are involved in your care. For example, if you're being treated by a psychiatrist, I can disclose your PHI to your psychiatrist in order to coordinate your care.

To obtain payment for treatment. I can use and disclose your PHI to bill and collect payment for the treatment and services provided by me to you. For example, I might send your PHI to your insurance company or health plan to get paid for the health care services that I have provided to you. I may also provide your PHI to my business associates, such as billing companies, claims processing companies, and others that process my health care claims.

For health care operations. I can disclose your PHI to operate my practice. For example, I might use your PHI to evaluate the quality of health care services that you received or to evaluate the performance of the health care professionals who provided such services to you. I may also provide your PHI to our accountants, attorneys, consultants, and others to make sure I'm complying with applicable laws.

Other disclosures. I may also disclose your PHI to others without your consent in certain situations. For example, your consent isn't required if you need emergency treatment, as long as I try to get your consent after treatment is rendered, or if I try to get your consent but you are unable to communicate with me (for example, if you are unconscious or in severe pain) and I think that you would consent to such treatment if you were able to do so.

**B. Certain Uses and Disclosures Do Not Require Your Consent.** I can use and disclose your PHI without your consent or authorization for the following reasons:

When federal, state or local law; judicial or administrative proceedings; or law enforcement requires disclosure. For example, I may make a disclosure to applicable officials when a law requires me to report information to government agencies and law enforcement personnel about victims of abuse or neglect; or when ordered in a judicial or administrative proceeding.

For public health activities. For example, I may have to report information about you to the county coroner. For health oversight activities. For example, I may have to provide information to assist the government when it conducts an investigation or inspection of a health care provider or organization.

For research purposes. In certain circumstances, I may provide PHI in order to conduct medical research.

To avoid harm. In order to avoid a serious threat to the PHI to law enforcement personnel or persons able to prevent or lessen such harm. For specific government functions.

I may disclose PHI of military personnel and veterans in certain situations. And I may disclose PHI for national security purposes, such as protecting the President of the United States or conducting intelligence operations.

For workers' compensation purposes. I may provide PHI in order to comply with workers' compensation laws.

Appointment reminders and health related benefits or services. I may use PHI to provide appointment reminders or give you information about treatment alternatives, or other health care services or benefits I offer.

**C. Certain Uses and Disclosures Require You to Have the Opportunity to Object.**

Disclosures to family, friends, or others. I may provide your PHI to a family member, friend, or other person that you indicate is involved in your care or the payment for your health care, unless you object in whole or in part. The opportunity to consent may be obtained retroactively in emergency situations.

**D. Other Uses and Disclosures Require Your Prior Written Authorization.** In any other situation not described in sections III A, B, and C above, I will ask for your written authorization before using or disclosing any of your PHI. If you choose to sign an authorization to disclose your PHI, you can later revoke such authorization in writing to stop any future uses and disclosures (to the extent that I haven't taken any action in reliance on such authorization) of your PHI by me.

#### **IV. WHAT RIGHTS YOU HAVE REGARDING YOUR PHI**

You have the following rights with respect to your PHI:

**A. The Right to Request Limits on Uses and Disclosures of Your PHI.** You have the right to ask that I limit how I use and disclose your PHI. I will consider your request, but I am not legally required to accept it. If I

accept your request, I will put any limits in writing and abide by them except in emergency situations. You may not limit the uses and disclosures that I am legally required or allowed to make.

**B. The Right to Choose How I Send PHI to You.** You have the right to ask that I send information to you to at an alternate address (for example, sending information to your work address rather than your home address) or by alternate means (for example, e-mail instead of regular mail) I must agree to your request so long as I can easily provide the PHI to you in the format you requested.

**C. The Right to See and Get Copies of Your PHI.** In most cases, you have the right to look at or get copies of your PHI that I have, but you must make the request in writing. If I don't have your PHI but I know who does, I will tell you how to get it. I will respond to you within 30 days of receiving your written request. In certain situations, I may deny your request. If I do, I will tell you, in writing, my reasons for the denial and explain your right to have my denial reviewed. If you request copies of your PHI, I will charge you not more than \$.25 for each page. Instead of providing the PHI you requested, I may provide you with a summary or explanation of the PHI as long as you agree to that and to the cost in advance.

**D. The Right to Get a List of the Disclosures I Have Made.**

You have the right to get a list of instances in which I have disclosed your PHI. The list will not include uses or disclosures that you have already consented to, such as those made for treatment, payment, or health care operations, directly to you, or to your family. The list also won't include uses and disclosures made for national security purposes, to corrections or law enforcement personnel, or disclosures made before April 15, 2003.

I will respond to your request for an accounting of disclosures within 60 days of receiving your request. The list I will give you will include disclosures made in the last six years unless you request a shorter time. The list will include the date of the disclosure, to whom PHI was disclosed (including their address, if known), a description of the information disclosed, and the reason for the disclosure. I will provide the list to you at no charge, but if you make more than one request in the same year, I will charge you a reasonable cost based fee for each additional request.

**E. The Right to Correct or Update Your PHI.** If you believe that there is a mistake in your PHI or that a piece of important information is missing, you have the right to request that I correct the existing information or add the missing information. You must provide the request and your reason for the request in writing. I will respond within 60 days of receiving your request to correct or update your PHI. I may deny your request in writing if the PHI is (i) correct and complete, (ii) not created by me, (iii) not allowed to be disclosed, or (iv) not part of my records. My written denial will state the reasons for the denial and explain your right to file a written statement of disagreement with the denial. If you don't file one, you have the right to request that your request and my denial be attached to all future disclosures of your PHI. If I approve your request, I will make the change to your PHI, tell you that I have done it, and tell others that need to know about the change to your PHI.

**F. The Right to Get This Notice by E-Mail.** You have the right to get a copy of this notice by e-mail. Even if you have agreed to receive notice via e-mail, you also have the right to request a paper copy of it.

## V. HOW TO COMPLAIN ABOUT MY PRIVACY PRACTICES

If you think that I may have violated your privacy rights, or you disagree with a decision I made about access to your PHI, you may file a complaint with the person listed in Section VI below. You also may send a written complaint to the Secretary of the Department of Health and Human Services at 200 Independence Avenue S.W., Washington, D.C. 20201. I will take no retaliatory action against you if you file a complaint about my privacy practices.

VI. PERSON TO CONTACT FOR INFORMATION ABOUT THIS NOTICE OR TO COMPLAIN ABOUT MY PRIVACY PRACTICES

If you have any questions about this notice or any complaints about my privacy practices, or would like to know how to file a complaint with the Secretary of the Department of Health and Human Services, please contact me at: 1409 Edith St., Berkeley, CA 94703; 510/526-4246.

VII. EFFECTIVE DATE OF THIS NOTICE

January 1, 2009