

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

### New Client Registration

**YOUR NAME:** \_\_\_\_\_ Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Relationship status: \_\_\_\_\_ Height: \_\_\_\_' \_\_\_\_" Weight \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Home Phone: (\_\_\_\_) \_\_\_\_\_ Work: (\_\_\_\_) \_\_\_\_\_  
 Cell Phone: (\_\_\_\_) \_\_\_\_\_ Other: (\_\_\_\_) \_\_\_\_\_  
 E-mail (print neatly!): \_\_\_\_\_ Alternate e-mail: \_\_\_\_\_  
 Occupation: \_\_\_\_\_ If employed, employer name: \_\_\_\_\_  
 If in relationship, how long? \_\_\_\_\_ Previously married? \_\_\_\_\_ If so, how often, and how long? \_\_\_\_\_

**SPOUSE OR SIGNIFICANT OTHER (complete even if s/he is not participating in therapy)**

Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Relationship status: \_\_\_\_\_ Height: \_\_\_\_' \_\_\_\_" Weight \_\_\_\_\_  
 Address (if not living with you): \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Home Phone: (\_\_\_\_) \_\_\_\_\_ Work: (\_\_\_\_) \_\_\_\_\_  
 Cell Phone: (\_\_\_\_) \_\_\_\_\_ Other: (\_\_\_\_) \_\_\_\_\_  
 E-mail: \_\_\_\_\_ Alternate e-mail: \_\_\_\_\_  
 Occupation: \_\_\_\_\_ If employed, employer name: \_\_\_\_\_  
 Previously married? \_\_\_\_\_ If so, how often, and how long? \_\_\_\_\_

**Who else lives in your home?** Name \_\_\_\_\_ Age: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Name \_\_\_\_\_ Age: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Name \_\_\_\_\_ Age: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Name \_\_\_\_\_ Age: \_\_\_\_\_ Relationship: \_\_\_\_\_

**Any children who live outside the home?** (give names and ages) \_\_\_\_\_

**Insurance Plan:** \_\_\_\_\_ **Full Name of primary insured:** \_\_\_\_\_

**If primary insured is not you, give their date of birth:** \_\_\_\_/\_\_\_\_/\_\_\_\_ **and their employer:** \_\_\_\_\_

**Emergency Contact (not partner):** \_\_\_\_\_ Phone:(\_\_\_\_) \_\_\_\_\_ Relationship: \_\_\_\_\_

**Primary Doctor:** \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Doctor's address: \_\_\_\_\_ City: \_\_\_\_\_

**Psychiatrist (if any):** \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Psychiatrist's address: \_\_\_\_\_ City: \_\_\_\_\_

**Health Issues/Allergies:** \_\_\_\_\_

**Medications and Over-the-Counter Drugs taken regularly** (include dosages and why you take them): \_\_\_\_\_

**Alcohol:** Average number of drinks per week \_\_\_\_\_ Average number of drinks when you drink: \_\_\_\_\_

**Marijuana / other non-prescription drugs** (drug you use, how much use, how often): \_\_\_\_\_

**Has anyone ever been concerned about your alcohol or drug use?** \_\_\_\_\_ If so, who? \_\_\_\_\_

**Cigarettes:** Average use per day: \_\_\_\_\_ Desire to quit? \_\_\_\_\_

**Who referred you to my practice?** \_\_\_\_\_ **Did you look at my website before coming?** \_\_\_\_\_

**Word or sentence to describe your life or how you feel:** \_\_\_\_\_

**NOTICE OF PRIVACY PRACTICES**

**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.**

I am required by law to maintain the privacy and security of your protected health information (“PHI”) and to provide you with this Notice of Privacy Practices (“Notice”). I must abide by the terms of this Notice, and I must notify you if a breach of your unsecured PHI occurs. I can change the terms of this Notice, and such changes will apply to all information I have about you. The new Notice will be available upon request, in my office, and on my website.

Except for the specific purposes set forth below, I will use and disclose your PHI only with your written authorization (“Authorization”). It is your right to revoke such Authorization at any time by giving me written notice of your revocation.

**Uses (Inside Practice) and Disclosures (Outside Practice) Relating to Treatment, Payment, or Health Care Operations Do Not Require Your Written Consent.** I can use and disclose your PHI without your Authorization for the following reasons:

1. **For your treatment.** I can use and disclose your PHI to treat you, which may include disclosing your PHI to another health care professional. For example, if you are being treated by a physician or a psychiatrist, I can disclose your PHI to him or her to help coordinate your care, although my preference is for you to give me an Authorization to do so.
2. **To obtain payment for your 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 to get paid for the health care services that I have provided to you, although my preference is for you to give me an Authorization to do so.
3. **For health care operations.** I can use and disclose your PHI for purposes of conducting health care operations pertaining to my practice, including contacting you when necessary. For example, I may need to disclose your PHI to my attorney to obtain advice about complying with applicable laws.

**Certain Uses and Disclosures Require Your Authorization.**

1. **Psychotherapy Notes.** I do not keep “psychotherapy notes” as that term is defined in 45 CFR § 164.501; rather, I keep a record of your treatment and you may request a copy of such record at any time, or you may request that I prepare a summary of your treatment. There may be reasonable, cost-based fees involved with copying the record or preparing the summary.
2. **Marketing Purposes.** As a psychotherapist, I will not use or disclose your PHI for marketing purposes.
3. **Sale of PHI.** As a psychotherapist, I will not sell your PHI in the regular course of my business.

**Certain Uses and Disclosures Do Not Require Your Authorization.** Subject to certain limitations mandated by law, I can use and disclose your PHI without your Authorization for the following reasons:

1. When disclosure is required by state or federal law, and the use or disclosure complies with and is limited to the relevant requirements of such law.
2. For public health activities, including reporting suspected child, elder, or dependent adult abuse, or preventing or reducing a serious threat to anyone’s health or safety.
3. For health oversight activities, including audits and investigations.
4. For judicial and administrative proceedings, including responding to a court or administrative order, although my preference is to obtain an Authorization from you before doing so.
5. For law enforcement purposes, including reporting crimes occurring on my premises.
6. To coroners or medical examiners, when such individuals are performing duties authorized by law.
7. For research purposes, including studying and comparing the mental health of patients who received one form of therapy versus those who received another form of therapy for the same condition.
8. Specialized government functions, including, ensuring the proper execution of military missions; protecting the President of the United States; conducting intelligence or counter-intelligence operations; or, helping to ensure the safety of those working within or housed in correctional institutions.
9. For workers’ compensation purposes. Although my preference is to obtain an Authorization from you, I may provide your PHI in order to comply with workers’ compensation laws.
10. Appointment reminders and health related benefits or services. I may use and disclose your PHI to contact you to remind you that you have an appointment with me. I may also use and disclose your PHI to tell you about treatment alternatives, or other health care services or benefits that I offer.

*(continued on back)*

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

1. **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.

**YOUR RIGHTS YOUR REGARDING YOUR PHI**

You have the following rights with respect to your PHI:

1. **The Right to Request Limits on Uses and Disclosures of Your PHI.** You have the right to ask me not to use or disclose certain PHI for treatment, payment, or health care operations purposes. I am not required to agree to your request, and I may say “no” if I believe it would affect your health care.
2. **The Right to Request Restrictions for Out-of-Pocket Expenses Paid for In Full.** You have the right to request restrictions on disclosures of your PHI to health plans for payment or health care operations purposes if the PHI pertains solely to a health care item or a health care service that you have paid for out-of-pocket in full.
3. **The Right to Choose How I Send PHI to You.** You have the right to ask me to contact you in a specific way (for example, home or office phone) or to send mail to a different address, and I will agree to all reasonable requests.
4. **The Right to See and Get Copies of Your PHI.** Other than “psychotherapy notes,” you have the right to get an electronic or paper copy of your medical record and other information that I have about you. I will provide you with a copy of your record, or a summary of it, if you agree to receive a summary, within 30 days of receiving your written request, and I may charge a reasonable, cost-based fee for doing so.
5. **The Right to Get a List of the Disclosures I Have Made.** You have the right to request a list of instances in which I have disclosed your PHI for purposes other than treatment, payment, or health care operations, or for which you provided me with an Authorization. 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. 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.
6. **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 from your PHI, you have the right to request that I correct the existing information or add the missing information. I may say “no” to your request, but I will tell you why in writing within 60 days of receiving your request.
7. **The Right to Get a Paper or Electronic Copy of this Notice.** You have the right get a paper copy of this Notice, and you have the right to get a copy of this notice by e-mail. And, even if you have agreed to receive this Notice via e-mail, you also have the right to request a paper copy of it.

**HOW TO COMPLAIN ABOUT MY PRIVACY PRACTICES**

If you think I may have violated your privacy rights, you may file a complaint with me, as the Privacy Officer for my practice, and my address and telephone number are: \_\_\_\_\_.

You can also file a complaint with the U.S. Department of Health and Human Services Office for Civil Rights by:

1. Sending a letter to 200 Independence Avenue, S.W., Washington, D.C. 20201;
2. Calling 1-877-696-6775; or,
3. Visiting [www.hhs.gov/ocr/privacy/hipaa/complaints](http://www.hhs.gov/ocr/privacy/hipaa/complaints).

I will not retaliate against you if you file a complaint about my privacy practices.

**EFFECTIVE DATE OF THIS NOTICE**

This notice went into effect on \_\_\_\_\_.

## COUPLES THERAPY TREATMENT AGREEMENT

**Please initial in each box on the left after reading the text to the right:**

INITIAL BELOW	
	<p><b>FEES:</b> The fee per 50-minute session is \$_150_____ (except for the first session, which is \$_____). This is due at the time of our session in cash, check, or credit card, unless I am billing your insurance, in which case you must pay your copayment and/or deductible at the session.</p>
	<p><b>CANCELLATION:</b> Sessions are by appointment only. While I hate charging for missed sessions, I do reserve that time for you. Therefore, you will be charged \$__50_ (not just a copayment) for missed sessions or for those cancelled without 24-hour notice, except in medical emergency. <u>Insurance will not pay for missed sessions.</u> Since your time is also valuable, if I forget a session, you get one session free.</p>
	<p><b>INSURANCE:</b> <u>If I am a provider with your plan:</u> I will submit claims for you, but at our session you must pay any copayment or coinsurance or any portion not covered by your plan. There may be a deductible (an amount you will need to pay out of pocket) before your plan begins covering sessions. If insurance does not pay as expected, you will remain responsible for the balance. You have the right to waive using insurance coverage, if desired.</p> <p><u>If I am NOT a provider for your plan:</u> You will pay me in full at the session. I can give you an invoice if you wish to seek reimbursement from your plan. Many plans do not cover sessions with a provider who is not in their network.</p>
	<p><b>SECONDARY INSURANCE:</b> It is your responsibility to tell me about all possible insurance plans that might cover my services (ex. if you have Medicare in addition to a secondary policy, or coverage through your work and a family member's work). If you do not, you may be responsible in full if claims are denied.</p>
	<p><b>DIAGNOSIS:</b> Please be aware that if you use insurance I will be required to provide a diagnosis on invoices and claims, and coverage may be limited to certain mental conditions that are covered by your plan.</p>
	<p><b>LIMITS OF MEDICAL COVERAGE:</b> Even if you have insurance coverage for unlimited sessions, health plans may review treatment for medical necessity, limit length of treatment or frequency of sessions, and request treatment notes. While I may check coverage for you, you are responsible for verifying and understanding the limits of your coverage. Although I am happy to assist your efforts in obtaining insurance reimbursement, I am unable to guarantee whether your health plan will provide payment for the services provided.</p>
	<p><b>CONFIDENTIALITY:</b> What you say in therapy, your records, and your attendance are all confidential. Exceptions include when your records are subpoenaed for legal reasons, when reporting is required or allowed by law (ex. suspected child abuse or neglect, extreme danger to self, suspected elder abuse, or danger to others), when you give written permission to release information, and other exceptions outlined in my <i>Notice of Privacy Practices</i>.</p>
	<p><b>WHO IS MY CLIENT?</b> When I work with couples, I consider you both to be my client. While I may have to designate one of you as the main client on an insurance claim/invoice or treatment plan, I do not see either one of you as the source of any problems. I know that each person has their part in relationship patterns.</p>
	<p><b>INDIVIDUAL SESSIONS:</b> During the course of our work, I may see one or both of you individually for one or more sessions. In these sessions, I will not take on the role of individual therapist -- these sessions are simply being done with the goal of furthering your couples work, unless otherwise indicated. If you feel the need for additional individual support, I am happy to refer you to an individual therapist, if needed.</p>

	<p><b>NO-SECRETS POLICY:</b> There may be times (ex. in an individual session or an email/text) where you might want to reveal something to me that you do not want shared with your partner. However, if I am to effectively serve you as a couple, I cannot hold a secret in this way. Instead, I will urge you to discuss secrets you have shared with me with your partner. If you do not, and in my clinical judgment this secret could be negatively impacting therapy I may feel it necessary to share it in a couples session. Thus, if you feel it necessary to talk about topics you are unwilling to have shared with your partner, you might want to consult an individual therapist. This “no secrets” policy is intended to help me be transparent with both partners at all times, and to avoid being put a situation where I would have to end couples treatment. <i>(continued)</i></p>
INITIAL BELOW	<i>Treatment Agreement (continued from Page 1)</i>
	<p><b>INFORMATION/RECORDS RELEASE:</b> One medical record is kept for the couple, where I keep all session notes (whether for individual, couples, or family sessions) and significant emails, payment records, etc.. If I receive a request for information about treatment or for records, I would be legally and ethically required to get a written release from both members of the couple before releasing information to anyone. This is true even for individual session notes. Exceptions to confidentiality are outlined above under "Confidentiality." If records are subpoenaed, I will always assert the psychotherapist-patient privilege on behalf of both members of the couple.</p>
	<p><b>LEGAL MATTERS:</b> If you become involved in legal proceedings that require my participation, you agree by signing this Agreement to pay me at my regular full fee for any time I must spend on your case, including but not limited to time spent to appear in court or give depositions, and lost income for sessions I must miss.</p>
	<p><b>IN AN EMERGENCY:</b> Leave an e-mail and voicemail message, then call my 24-hour answering service at XXX-XXX-XXXX. Tell them it is an emergency. You may also go to the emergency room or dial 911.</p>
	<p><b>E-MAIL/SOCIAL MEDIA:</b> In general, e-mail is the quickest way to reach me. I use e-mail to arrange/change appointments. I do not do therapy by e-mail or video. When cancelling, please leave BOTH a voicemail and e-mail. Please do not e-mail me information related to your therapy, as e-mail is not completely confidential, and important issues should be reserved for sessions. Be aware that e-mails between us become part of your legal record. I do not accept friend requests or contact requests from clients on social networking sites (Facebook, LinkedIn, etc.) out of concern for your confidentiality and my privacy. It may also blur the boundaries of our therapy relationship.</p>
	<p><b>REFERRALS/GROUP:</b> A referral to another provider may become necessary if it becomes clear in my opinion that your issues would be better treated by a professional with different expertise. It is unethical for me to practice beyond the level of my competence, education, training, or experience. I am not responsible for the care received from professionals to whom I refer you. Agreements made between you and I do not involve other professionals in the office suite, who each operate independent solo practices, and are not part of a group.</p>
	<p><b>ENDINGS:</b> If you are unhappy with any aspect of therapy, please don't just leave – I ask that you talk to me to see we can work it out. Even if we can't, endings usually feel better this way. Of course, you may end therapy at any time and I am happy to assist with referrals. It is my ethical duty to provide therapy only when I feel you are actively participating and benefiting from the sessions. I may end treatment if there have been repeated no-shows, late cancellations or other treatment interruptions.</p>
	<p><b>PATIENT RIGHTS:</b> You have the right to ask any questions about your treatment or refuse to participate in treatment at any time. This office does not discriminate in the delivery of health care services based on race, ethnicity, national origin, citizenship or immigration status, religion, gender, age, mental or physical disability, medical condition, sexual orientation, medical history, evidence of insurability, or source of payment.</p>
	<p><b>COMPLAINTS:</b> The _____ [name of licensing board] receives and responds to complaints regarding services provided within the scope of practice of _____ [license name]. You may contact the Board online at _____, or by calling (XXX) XXX-XXXX.</p>

**PRIVACY PRACTICES:** By initialing here and signing below, you acknowledge receipt of my *Notices of Privacy Practices*, which provides information about how I may use/disclose your private health information. I encourage you to read it in full. My *Notice of Privacy Practices* is subject to change. If I change my Notice, I will give you a revised Notice. If you have left treatment, you may obtain the revised notice from me at the above address and phone number.

**PLEASE SIGN IF USING YOUR INSURANCE OR EAP:** "I authorize the release of any information necessary (Including notes, treatment summaries and diagnosis) to process claims, to prove medical necessity for treatment, to request additional sessions, or to comply with treatment reviews or mandated administrative chart reviews from the insurance plan. If my therapist is a network provider, I authorize payment of benefits to be made to him/her."

(Client #1: Sign here) :**X** \_\_\_\_\_

(Client #2: Sign here) :**X** \_\_\_\_\_

By signing below, I acknowledge that I have read and understand the above rights and policies.

**X** \_\_\_\_\_ **X** \_\_\_\_\_ **X** \_\_\_\_\_  
Signature, Client #1 Printed Name, Client #1 Date

**X** \_\_\_\_\_ **X** \_\_\_\_\_ **X** \_\_\_\_\_  
Signature, Client #2 Printed Name, Client #2 Date