***CLIENT DATA FORM***

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

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**City/State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip code: \_\_\_\_\_\_\_\_\_\_\_**

**Phone: (h)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (cell) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (work)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**COUPLES INFORMATION:**

**PARTNER’S NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PHONE NUMBER\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**DOB:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Emergency contact**: Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

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

 Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **I**nsurance Information:

**Responsible party for payment. Circle one:**

 **HMO/PPO (COMMERICIAL) CENTENNIAL CARE (MEDICAID) PRIVATE PAY**

**If insurance card is available skip to next section, INSURED PARTY.**

Primary:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Secondary:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Member:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Group # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Group #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Policy #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Policy #:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If **INSURED PARTY** is other than the client, please give the following information:

Insured person’s name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Insured person’s DOB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Insured person’s relationship to client: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**OFFICE USE ONLY:** CLIENT DX\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ THERAPIST\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Patient Portal Verification Code: \_\_\_\_\_\_\_\_\_\_\_\_\_

Name of person who referred you: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Referral’s Contact Information: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do we have permission to inform your referral source of your treatment here?

 YES NO Initials\_\_\_\_\_\_\_\_\_\_

Name of Primary Care Physician: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Psychiatric MD: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do we have your permission to be in contact with your Doctors? If “YES” you will be asked to sign a Release of Information form.

 YES NO

 Initials: \_\_\_\_\_\_\_

**Past Medical and Behavioral Health Diagnoses:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Issues you wish to addressed in therapy:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**MEDICATIONS**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name dose When taken?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name dose When taken?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name dose When taken?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name dose When taken?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name dose When taken?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

name dose When taken?

**Outpatient Services Contract:**

Welcome to BMH! This document contains important information about our professional services and business policies. Please read it carefully and ask if you have any questions or concerns. We will be happy to discuss and clarify it with you.

Psychotherapy is a process that works from within the client. There are many different approaches that are used to help alleviate or resolve difficulties you may be experiencing. Unlike visiting a medical doctor, psychotherapy requires a very active effort on your part. To be most successful, you must work on things we talk about during our sessions and sometimes, between sessions.

Your first session(s) will involve an evaluation of your needs. By the end of the evaluation, we will be able to offer some initial impressions of what our work will include and an informal treatment plan if you decide to continue. Because therapy involves a large commitment of time, money and energy, it is important that you feel comfortable working with your therapist. If you are not, please let us know. We will find another suitable therapist for you. Our intention is to have a working relationship that will be a productive and positive experience. All the guidelines that follow are meant to create clarity and prevent misunderstandings. Please tell us if you are ever uncomfortable with any aspects of the therapy or business arrangements.

**Confidentiality:** In general, law protects the confidentiality of all aspects of our work together. With your written consent, you can request that we share confidential information with others of your choice. If you become involved in a legal matter, the court can subpoena your records from us and we are required to comply with the court order. If, at any time, we feel you are a danger to yourself or others, we are required by law to inform appropriate people and agencies to protect you and other parties from danger. If we were to become aware of the physical, mental or sexual abuse of a child, the elderly or disabled persons we are required by law to report the situation to Protective Services. If you have a medical emergency while visiting us we are legally obligated to contact emergency services.

 **Your initials**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Contacting Your Therapist:** We are sometimes not available by phone. During regular business hours, we may not answer the phone while we are serving other clients. When we are unavailable, you will receive our voice mail system. We will make every effort to return your call on the same day except for weekends and holidays. Be sure to leave a clear message with a name and phone number where you can be reached. You also have access to your therapist through our Patient Portal Secure Messaging system. It is set up through our front office staff at the time of intake. If Secure Messaging takes more than 10 minutes of your therapist's time you will be charged $10 per 10 minute units of time. This is not covered by insurance and will be due at the time of your next appointment.

 **Your initials**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Emergencies:** If you have an emergency and you feel you cannot wait for us to return your call, please do the following: call 911, or call your Primary Care Physician or the ER at the nearest hospital, asking for the psychiatrist on call. You can also call the **University of New Mexico Mental Health Center Crisis Line at 272-2800.**  The UNM-MHC provides high-quality emergency service 24 hours a day, 7 days a week.

 **Your initials \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Outpatient Service Contract (continued)**

**Technology:** Please indicate the best method to contact you (circle one) **Phone Email Text**

Secure emailing can be done through our Valant Patient Portal which you will set up on or before the initial visit. Clinical questionnaires used for therapy will not be charged. Please keep in mind emails taking more than 10 minutes of your therapist's time will be charged. Insurance does not cover this service.

 **Your Initials\_\_\_\_\_\_\_\_\_\_\_\_**

**Insurance:** **If your insurance changes and/or terminates at any time during your treatment it is your responsibility to inform the administrative staff and your therapist of any changes.** If these changes result in non-payment by the payer (insurance company) you are responsible for the payment of these sessions. A payment plan can be arranged to pay any visits not paid for by insurance. We are out–of-network with some insurance plans. If your plan is out-of-network, you will be expected to pay at the same rate your insurance company would reimburse us. **If your insurance carrier should deny coverage, you will be responsible for payment of your treatment.** We reserve the right to send outstanding balances to collections after 90 days.

 **Your Initials\_\_\_\_\_\_\_\_\_\_\_\_**

**Co-pays and deductibles: All Co-pays and deductibles are due at the time of services rendered.** We can verify insurance, however it is only a quote of benefits. It may not be exact or accurate. The most accurate information is given to us in an Explanation of Benefits (EOB) from the insurance company. If the co-pay is incorrect you may pay by credit card, a payment plan can be set up or if you've overpaid, a credit can be issued for future visits. If you have overpaid and services are terminated, a refund will be issued. All services must be paid by insurance companies before a refund check is issued. We reserve the right to send outstanding balances to collections after 90 days.

 **Your initials: \_\_\_\_\_\_\_\_\_\_\_\_**

**Payment:** We accept Cash, Check, Credit or Debit Cards and HSA Cards for payment of copays, deductibles or private pay. If you chose to use a Credit or Debit Card, we charge a convenience fee of $1.25 per transaction.

 **Your initials: \_\_\_\_\_\_\_\_\_\_\_\_**

**Private Pay Fee and Out-of-Network Fee: BMH rate for a 50-min individual session is $135.00 plus tax. A Couple session is $150.00 plus tax**. Payment is due at the time of service. There will be a private fee for letters, reports and evaluations that we are asked to prepare on your behalf. Telephone consultations running over 10 min will be billed at the private pay amount. We reserve the right to send outstanding balance to collections after 90 days.

 **Your initials: \_\_\_\_\_\_\_\_\_\_\_\_**

**Outpatient Service Contract (continued)**

**Records Request**: We charge a $25.00 plus tax for retrieval and copying fee of all records requests. A Payment and Release of Records form will need to be signed. Please allow a minimum of one week to process any records request. Please be aware that if it has been more than 2 years since you were seen in the office it may take longer to retrieve your records.

 **Your initials: \_\_\_\_\_\_\_\_\_\_\_\_**

**Cancellation Policy:** We anticipate your compliance with scheduled appointments. If you must cancel we require a 24-hour notice unless we both agree that you were unable to attend due to circumstances that were clearly beyond your control. Please note that insurance companies do not cover missed appointments. The fee for an unexcused/missed appointment or late cancellation is $75.00. These charges will be your responsibility. We ask that a credit card be on file to charge for a No Show or late cancellation fees. This information is strictly confidential and will not be shared with any other organizations or entities.

Credit Card Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Visa, Master Card, AMEX, Discover, Flex Account)

Name on Credit Card: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Credit Card #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Expiration Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ CVV Code: \_\_\_\_\_\_\_\_

Patient Signature for Credit Card: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **Your initials: \_\_\_\_\_\_\_\_\_\_\_**

**Your signature indicates that you have read and agree to the policies outlined above.**

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

**Printed Name of client and/or guardian:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**HIPAA 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.

This notice of Privacy Practices describes how we may use and disclose your protected health information (PHI) to carry out treatment, payment or health care operations (TPO) and for other purposes that are permitted or required by law. It also describes your rights to access and control your protected health information. “Protected health information” is information about you, including demographic information, that may identify you and that relates to your past, present or future physical or mental health or condition and related health care services.

1.Use and Disclosures of Protected Health Information

Your protected health information may be used and disclosed by Bosque Mental Health Associates, Inc., the office staff and others outside this office who are involved in your care and treatment for the purpose of providing health care services to you,to pay your health care bills, to support the operation of this practice, and any other use required by law.

Treatment: Bosque Mental Health will use and disclose your protected health information such as, but not limited to, diagnosis, insurance information to provide, coordinate or manage your health care and any related services. This includes the coordination or management of your health care with a third party. For example,your protected health care information may be provided to a therapist or clinic to which you have been referred to ensure they have the necessary information to diagnose or treat you.

Payment: Your protected health care information will be used, as needed, to obtain payment for your health care services. For example, for billing and collection, or when obtaining approval for therapy may require that your relevant protected health care information be disclosed to the health plan.

Healthcare Operations: We may use or disclose, as-needed, your protected health care information in order to support the business activities of this practice.These activities include, but are not limited to, quality assessment activities, employee review activities,training of students, licensing, and conducting or arranging for other business activities. For example, we may use or disclose your protected health information, as necessary, to contact you to remind you of your appointment.

We may use or disclose your protected health care information in the following situations without your authorization. These situations include Public Health issues as required by law; Communicable Diseases; Health Oversight; Abuse or Neglect to prevent potential physical harm to someone; Research; Criminal Activity, Military Activity and National Security; Workers” Compensation;Inmates; 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.

Other Permitted and Required Uses and Disclosures Will be Made Only with your Consent., Authorization or Opportunity to Object unless required by law.

You May Revoke this Authorization at any time in writing, except to the extent that Bosque Mental Health has taken an action in reliance on the use or disclosure indicated in the authorization.

Your Rights

Following is a statement of your rights with regard to your protected health information:

You have the right to inspect and copy your protected health information. 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.

You have the right to request a restriction of your protected health information. This means you may ask us not to use or disclose any part of your protected health information for the purposes of treatment, payment or health care operations. You may also request that any part of your protected health information not be disclosed to family members or friends who may be involved in your care or for notification purposes described in the Notice of Privacy Practices.Your request must state the specific restriction requested and to whom you want the restriction to apply.

Bosque Mental Health is not required to agree to a restriction that you may request. If Bosques Mental Health believes it is in your best interest to permit use and disclosure of your protected health information,your protected health information will not be restricted. You then have the right to use another Healthcare Professional.

You have the right to request to receive confidential communications from us by alternative means or at an alternative location. You have the right to receive a paper copy of this notice from us upon request, even if you have agreed to accept this notice alternatively, i.e. electronically.

You may have the right to have your provider amend your protected health information. If we deny your request for 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 such rebuttal.

You have the right to receive an accounting of certain disclosures we have made, if any, of your protected health information. We reserve the right to change the terms of this notice and will inform you by mail of any changes. You then have the right to object or withdraw as provided in this notice.

Complaints

You may complain to us or to the Secretary of the Department of Health and Human Services if you believe we have violated your privacy rights by us. You may file a complaint with us by notifying our privacy contact of your complaint. We will not retaliate against you for filing a complaint.

This notice was published and becomes effective on/or before April 14, 2003.

We are required by law to maintain the privacy of, and provide individuals with, this notice of our legal duties and privacy practices with respect to protected health information. If you have any questions about this notice or our health information privacy policies or any objections to this form, please ask to speak with Cathy Schuler, LPAT, LISW, in person or by phone at 255-8682, Ext 138.

Your signature below is acknowledgement that

 1) You have received this Notice of Our Privacy Practices and

2) You consent to use and disclosure of your health information as described in this notice.

If you do not sign this consent form agreeing to what is in this Notice of Privacy Practices, we cannot treat you.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of client or his or her personal representative Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed name of client or personal representative

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Description of personal representative’s authority