



Please answer the following questions to the best of your abilities. These questions are to help the therapist with the therapy process. This information is held to the same standards of confidentiality as our therapy. This questionnaire will take approximately 30 minutes to complete.

Client Information

Last Name: _____ First Name: _____ Initial: _____

Birth date: ____ / ____ / ____ Age: _____ Gender: Male Female

Address: _____ City: _____ State: ____ Zip: _____

Home phone: _____ May we leave a message? Yes No

Cell / Other: _____ May we leave a message? Yes No

Email: _____ May we email you?* Yes No *NOTE: Emails may not be confidential

Marital Status Never Married Partnered Married Separated Divorced Widowed

Name of Spouse: _____

Birth date: ____ / ____ / ____ Age: _____ Gender: Male Female

Name of Emergency contact: _____

Address: _____ City: _____ State: ____ Zip: _____

Home phone: _____ May we leave a message? Yes No

Cell / Other: _____ May we leave a message? Yes No

Please list all other children (including step and foster children) in the family

Name: _____ Age: ____ Grade: ____ Living in Home? Yes No

Name: _____ Age: ____ Grade: ____ Living in Home? Yes No

Name: _____ Age: ____ Grade: ____ Living in Home? Yes No

Referred by: _____

Client Mental Health and General Health Information

Have you ever received psychological services, professional counseling, psychiatric services, or any other mental health services? Yes No

Reason for change: _____

Are you currently taking any psychiatric prescription medication? Yes No

If yes, please list: _____

Name of Prescriber: _____

Have you been prescribed psychiatric prescription medication in the past? Yes No

If yes, please list: _____

Name of Prescriber: _____

Primary Care Physician: _____ Phone: _____

How is your physical health at the present time? Poor Unsatisfactory Satisfactory Good Very good

Please list any persistent physical symptoms or health concerns (e.g. chronic pain, headaches, asthma, etc.): _____

Are you on any medication for physical/medical issues? Yes No

If yes, please list: _____

Name of Prescriber: _____

Injuries/Illnesses/Hospitalizations:

Date: ____ / ____ / ____ Location: _____ Reason: _____

Outcome: _____

Date: ____ / ____ / ____ Location: _____ Reason: _____

Outcome: _____

Date: ____ / ____ / ____ Location: _____ Reason: _____

Outcome: _____

Please list any current medical problems, including allergies you have: _____

Are you having any problems with sleep? Yes No

If yes, select those that apply: Sleep too much Sleep too little Poor quality Disturbing dreams

Other: _____

Are there any changes or difficulties with your eating habits? Yes No

If yes, select those that apply: Eating less Eating more Bingeing Restricting Other: _____

Have you experienced a weight change in the last two months? Yes No

Explain: _____

Chief Complaint: Please explain your present concerns about yourself and what you think is causing the problem: _____

Onset: When did you first notice the concern / problem? What else was happening at that time that might be important? _____

What have you already tried in order to solve the problem? _____

Family Health and Mental Health History

Please list any family medical conditions: _____

The following is to provide information about your family mental health history. Check any that apply. If checked, please indicate the family member affected.

- | | |
|--|--|
| <input type="checkbox"/> Depression _____ | <input type="checkbox"/> Anxiety Disorders _____ |
| <input type="checkbox"/> Bipolar Disorder _____ | <input type="checkbox"/> Panic Attacks _____ |
| <input type="checkbox"/> Alcohol/Substance Abuse _____ | <input type="checkbox"/> Eating Disorder _____ |
| <input type="checkbox"/> Learning Disability _____ | <input type="checkbox"/> Trauma History _____ |
| <input type="checkbox"/> Domestic Violence _____ | <input type="checkbox"/> Obesity _____ |
| <input type="checkbox"/> Obsessive Compulsive Behavior _____ | <input type="checkbox"/> Schizophrenia _____ |

Other: _____

Current Symptom Checklist

Please place a check mark in the box next to any symptom you have observed or your child has reported in the past few weeks.

- | | | |
|--|--|---|
| <input type="checkbox"/> Nightmares or night terrors | <input type="checkbox"/> Low self-esteem | <input type="checkbox"/> Afraid to go out in public |
| <input type="checkbox"/> Feel a sense of dread | <input type="checkbox"/> Avoid certain things | <input type="checkbox"/> Feel worthless |
| <input type="checkbox"/> Feel I have no future | <input type="checkbox"/> Have frightening / disturbing thoughts | <input type="checkbox"/> Argumentative |
| <input type="checkbox"/> Isolation / social withdrawal | <input type="checkbox"/> Feel something bad will happen | <input type="checkbox"/> Low energy |
| <input type="checkbox"/> Mood swings | <input type="checkbox"/> Fears / Phobias | <input type="checkbox"/> Withdrawn socially |
| <input type="checkbox"/> Agitation or nervousness | <input type="checkbox"/> Worry a lot | <input type="checkbox"/> Body aches and pains |
| <input type="checkbox"/> Muscle tension or soreness | <input type="checkbox"/> Feel hopeless / helpless | <input type="checkbox"/> Feel lonely |
| <input type="checkbox"/> Stomach nausea or upset | <input type="checkbox"/> Appetite changes | <input type="checkbox"/> Perfectionist |
| <input type="checkbox"/> Having to check and re-check | <input type="checkbox"/> Excessive behaviors (spending, gambling, etc) | <input type="checkbox"/> Shortness of breath |
| <input type="checkbox"/> Worry about what others think | <input type="checkbox"/> Racing thoughts | <input type="checkbox"/> Enjoy things less |
| <input type="checkbox"/> Compare self to others | <input type="checkbox"/> Frequent headaches | <input type="checkbox"/> Self-conscious |
| <input type="checkbox"/> Obsessive thoughts | <input type="checkbox"/> Feel panicky or terrified | <input type="checkbox"/> Fearful when driving |
| <input type="checkbox"/> Compulsive behaviors | <input type="checkbox"/> Uncomfortable memories | <input type="checkbox"/> Trouble concentrating |
| <input type="checkbox"/> Feel my life is out of control | <input type="checkbox"/> Feel disconnected from reality | <input type="checkbox"/> Stress or tension |
| <input type="checkbox"/> Afraid something is wrong with me | <input type="checkbox"/> Dislike my body | <input type="checkbox"/> Thoughts of hurting yourself |
| <input type="checkbox"/> Faintness or dizziness | <input type="checkbox"/> Feel guilty or ashamed | <input type="checkbox"/> Thoughts of hurting someone |
| <input type="checkbox"/> Easily annoyed or irritated | <input type="checkbox"/> Cry often | <input type="checkbox"/> Cutting or self-injury |
| <input type="checkbox"/> Pain in heart or chest | <input type="checkbox"/> Feel life is not worth living | <input type="checkbox"/> Alcohol or drug use |
| <input type="checkbox"/> Feel over-sensitive | <input type="checkbox"/> Temper outbursts | <input type="checkbox"/> Prescription drug abuse |
| <input type="checkbox"/> Dislike crowds | <input type="checkbox"/> Heart pounds or races | <input type="checkbox"/> Anger management |
| <input type="checkbox"/> Difficulty remembering things | <input type="checkbox"/> Feel inferior to others | <input type="checkbox"/> Blackouts |
| <input type="checkbox"/> Feel suicidal | <input type="checkbox"/> Difficulty making decisions | <input type="checkbox"/> Depression/sadness |

Please list any other symptoms that would be helpful to know: _____

Confidentiality

In working with child clients, though legally the parent(s) or legal guardian(s) of the child is the client, age appropriate privacy is essential in the therapeutic relationship and setting for a child's therapy, we do honor what the child does or says in our sessions as confidential while providing parents and/or legal guardians summaries of treatment goals, plan and progress as well as recommendations.

In working with couples and families, the couple as an entity and the family as an entity is the client and we are not providing individual therapy for either individual in the relationship or for any one member of the family although sessions with individuals in the couple/family may be a part of the couples/family therapy. We will not be a "secret keeper" nor facilitate secret keeping. If anything significant is revealed in an individual session that your therapist feels the other party needs to be told, your therapist will require it be brought up in the next session together so we can work through it or counseling may have to be ended with a referral to another therapist.

In all but a few situations, your confidentiality and privacy is protected by state law and by the ethical rules of our profession. There are some exceptions as follows:

Limits to Confidentiality:

1. If you make a serious threat to harm yourself or another person, the law requires us to try to protect you or that other person by informing appropriate authorities.
2. If we have reason to believe a child or any adult dependent has been or will be abused or neglected, we are legally required to report this to the proper authorities.
3. If you are or will be involved in court proceedings and the records are ordered by a judge.
4. If a guardian ad litem (GAL) is appointed in a custody case involving child clients and she/he is ordered by the court to have access to mental health practitioners and records therein.
5. The Patriot Act of 2001 requires us in certain circumstances, to provide federal law agents with records, papers and documents upon request and prohibits us from disclosing to our clients that the FBI sought or obtained the items under the Act.
6. In professional supervision or consultation with other therapists; Shared office space, record storage and voicemail system with a fellow therapist. Peers, fellow therapists and any supervisor are bound by confidentiality as well.
7. Email, texting and voice phone communications cannot be guaranteed confidential. Please do not leave private health information in email, text or voicemail.
8. In the case of death or incapacitation, all clients will be contacted and records will be accessed by a designated mental health professional who will ensure confidentiality.
9. In the case we need to collect unpaid payments, a collection agency may be utilized.

Clinical Record

You should be aware that, pursuant to HIPAA, we keep information about all of clients in a collection of professional records. This constitutes your Clinical Record. There will be an administrative fee of \$25 charged for preparing the record for release upon your written request.

Complaints or Grievances

If you feel that there is basis for a formal complaint or grievance about anything related to the professional services we are providing, we invite you to first communicate your concerns to us directly so that we will be informed and have an opportunity to respond and resolve any potential misunderstanding. You have a right to file a complaint about us with our licensing board and may do so by contacting the board at the following address and phone number:

Florida Board of Clinical Social Work, Marriage & Family Therapy
and Mental Health Counseling Department of Health
850-245-433
4052 Bald Cypress Way, Bin C75
Tallahassee, Florida 32399-3260

Email Policy:

We will communicate with clients through email only about scheduling and payment issues. There is a charge for time spent reading emails that goes beyond brief exchanges about scheduling and payment issues. Please see fee outlines.

Voicemail Policy:

Voicemail is checked throughout the week unless on vacation or out of country for any reason. Phone calls within 24 hours Monday-Friday during normal business hours (9:00 a.m. to 5 p.m.) Therapists are not available when in session with other clients. We cannot guarantee absolute confidentiality with regard to phone service. Voicemail is password protected and secure to the best of ability. Please do not leave sensitive or detailed information in voicemail for protection of your privacy.

Vacation/Travel Policy:

When away from the office for vacation or business travel and unable to access voicemail and/or email your therapist will notify you in advance and will designate a professional counselor colleague to be on call in case of urgent and emergency issues.

Social Media Policy:

In order to protect your confidentiality we cannot accept friend or connection requests from clients on any social media platform. You may follow social media accounts that are open to the public but please do not comment in a way that will identify yourself as a client. If you do, your comments will be deleted and we will discuss in person at our next session.

Divorce and Custody Cases

We are not custody evaluators and cannot make any recommendations on custody. We can refer you to a list of evaluators who provide custody evaluation if needed.

Due to the sensitive nature of divorce and all potential issues that may arise in such cases, we have very specific policies to which you must agree before we enter a counseling relationship:

1. We require a copy of any standing court order demonstrating the custodial rights of each parent and/or the parenting agreement that is signed by both parents and the judge at the first intake session. We need to have contact and written/signed consent with/from both legal guardians before we see the child for counseling.
2. We will provide a one hour interview with any court-ordered Guardian ad Litem whom the court has ordered will have access to the child's records and that session time will be paid by the parents.
3. We will be in equal contact with both parent who share in the legal custody of the child being seen for counseling and will offer and encourage opportunities for both parents to participate in parent consultations along the way.
4. Family sessions will likely be recommended and depending on the case, may need to see the child with each parent separately along with siblings and/or other significant family members who live in the homes where the child lives.
5. We require all clients waive right to subpoena any of our therapists to court. This policy is set in order that we can preserve the integrity of the therapeutic progress and relationship with you and/or your child(ren).
6. In the case this policy is waived or disregarded and we are subpoenaed to appear in court even with this waiver – you will be charged the full standard fee for Court Related work of \$200/hour for professional time. Any time dedicated to any court-mandated appearance including preparing documentation, discussions with lawyers and/or the guardian ad litem in connection with the court appearance and any time spent waiting at the court house in addition to time on the stand as well as any travel time will be billed at \$200 per hour. Any reduced fee granted will not apply to court related work.

Scheduling and Cancellations (please also refer to Fee for Services Agreement):

We require 24 hours phone call or emailed notice of cancellation of any appointment.

If a client does not arrive for a scheduled appointment or cancels inside of 24 hours, there will be a charge for the full fee session. (Please see attached Fee for Services Agreement for full explanation)

On rare occasion, if there is what we determine to be a true, absolute, unavoidable emergency you may discuss this with your therapist and we may consider waiving the fee.

Session Parameters

- All initial Intake Sessions are 90 minutes.
- Individual Sessions are 50 minutes.
- Parenting Sessions are 50 minutes.
- Couples Counseling and Family Counseling Sessions are 90 minutes.
- Sessions will start and end on time. If you arrive late, the session will still end at the scheduled time.

Fees, Payment, Insurance

Therapists may be out of network mental health providers. At the end of each month, upon your request, we will submit a statement to file with your insurance company for out of network reimbursement.

Reduced Fees are available with application and are extended based on financial need and circumstances.

There is a \$25 fee for any returned checks. That \$25 fee is due at the time of your next session, along with the payment for that session. If a check is returned for insufficient funds, we will require that you pay using cash or credit card only from that point on. We accept MasterCard, Visa, American Express, and Discover.

**Checks should be made out to Sunshine State Counseling Center.

Please be advised that the fee for service is due at the time the service is rendered. If a child client is being seen, please be discreet in submitting payment and we ask that you never have the child involved in the payment process.

Fee Structure:

- Initial Intake Session (90 minutes): \$175
- Couples or Family Therapy Sessions (90 minutes long): \$175
- Individual Therapy Services (50 minutes): \$125
- Parent Session (50 minutes): \$125
- Email Counseling (anything other than brief updates and document exchange that requires us writing or reading more than 3-4 sentences): \$35/exchange or \$80 for 4 exchanges in one string of emails within 48 hours
- Phone Sessions (anything over 10 minutes on the phone initiated by the client): \$50/25 minutes or
- Preparation of Summaries of Treatment or Letters at request of client: \$25 per item requested.
- Court Related and/or Child Specialist Work for Collaborative Law Cases: \$200/hour of any and all time spent on the case.
- Administrative Fee for Record Copy Requests: \$25
- Check Return/Insufficient Funds Fee: \$25

After Hour Support and Emergencies

Sunshine State Counseling, LLC is not an emergency services agency. We do not provide emergency services. If you have a life threatening emergency you should call 911 or go to the hospital of your choice. Only contact us in an emergency after you have already obtained emergency assistance from 911 or your choice of medical support.

Other after hour Mental Health Resources (not to be substituted for calling 911):

- Florida Suicide Prevention Coalition -FSPC (TALK) 24 hours a day; 7 days a week 1-800-273-8255
- David Lawrence Center, Naples Campus (24 Hour Walk-In Access) 239-455-8500
- Salus Care (24-hour assessments of adults and children) 239-275-3222
- Abuse Counseling & Treatment, Inc. (24-Hour Hotline) 239-939-3112 or Emergency Shelter 239-939-3112

Fees for Services Agreement

All clients must fill out this form in its entirety prior to receiving services.

Please note, your entire record including this form is stored on HIPAA compliant electronic server.

Please initial below:

_____ Every time I schedule an appointment with my therapist I understand that I am entering into a contract with Sunshine State Counseling Center, LLC and for the professional time and services of my therapist.

_____ I recognize that professional services include time and services for preparation for my scheduled session, the actual time in session, time spent outside of session with case review, case notes, confidential consultations with supervisors or professional colleagues as outlined above.

_____ I understand my therapist's professional fees as outlined in our Agreement to Enter into Counseling Services for scheduled sessions.

_____ I understand I have a right to request information about reduced fee options at any time.

_____ I understand that Sunshine State Counseling Center, LLC has a cancellation policy requiring no less than 24 hours advance notice in order to be released from the contract for my therapist's time and services of preparation for my session.

_____ I understand and agree that if I fail to cancel my appointment inside of the 24 hour minimum time period prior to my session I will be charged a full session fee for the appointment.

I hereby authorize Sunshine State Counseling Center, LLC to charge my Credit Card.

I do not authorize Sunshine State Counseling Center, LLC to charge my Credit Card.

_____ I understand if there is an emergency situation that prohibits me from canceling within 24 hours I can discuss this with my therapist directly and request a waiver of this policy but I understand that Sunshine State Counseling Center, LLC and my therapist are not bound to grant that waiver and may, by this contract, proceed with charging my credit card as agreed herein.

_____ I understand if payment is not made before or during my scheduled session I am hereby authorizing Sunshine State Counseling Center, LLC to charge my afore-listed credit card for services rendered.

_____ I understand this agreement authorizes Sunshine State Counseling Center, LLC to charge my credit card for services requested and rendered outside of the office such as email counseling, phone sessions, preparation of documents requested by me or any court related proceedings.

Name on card _____ Visa Master Card Discover American Express

Credit Card Number _____

Expiration date _____

Card security code _____

Billing address _____ City _____ State _____ Zip _____

Privacy Protection Notice

This notice describes how your mental health records may be used and disclosed and how you can get access to this information. Please read it carefully.

I. Preamble

A recent United State Supreme Court decision held that communications between psychotherapists and their clients are privileged and, therefore, are protected from forced disclosure in cases arising under federal law. There is a difference between privileged conversations and documentation in your mental health records. Records are kept documenting your care as required by law, professional standards, and other review procedures. HIPAA very clearly defines what kind of information is to be included in your “Designated Medical Record” as well as some material, known as “Psychotherapy Notes” which is not accessible to insurance companies and other third-party reviewers and in some cases, not to the client himself/herself. HIPAA provides privacy protections about your personal health information, which is called “protected health information” (PHI) which could personally identify you. PHI consists of three (3) components: treatment, payment, and health care operations. Treatment refers to activities in which we provide, coordinate or manage your mental health care or other services related to your mental health care.

Health care operations are activities related to the performance of our practice such as quality assurance. In mental health care, the best example of health care operations is when utilization review occurs, a process in which your insurance company reviews our work together to see if your care is “really medically necessary.” The use of your protected health information refers to activities the office conducts for filing your claims, scheduling appointments, keeping records and other tasks within the office related to your care. Disclosures refer to activities you authorize which occur outside the office such as the sending of your protected health information to other parties (i.e., your primary care physician, the school your child attends).

II. Uses and Disclosures of Protected Health Information Requiring Authorization

The law requires authorization and consent for treatment, payment and healthcare operations. We may disclose PHI for the purposes of treatment, payment and healthcare operations with your consent. You have signed this general consent to care and authorization to conduct payment and health care operations, authorizing us to provide treatment and to conduct administrative steps associated with your care (i.e., file insurance for you). Additionally, if you ever want us to send any of your protected health information of any sort to anyone outside the office, you will always first sign a specific authorization to release information to this outside party. A copy of that authorization form is available upon the request. The requirement of your signing an additional authorization form is an added protection to help insure your protected health information is kept strictly confidential.

III. Business Associates Disclosures

HIPAA requires that we train and monitor the conduct of those performing ancillary administrative service for the practice and refers to these people as “Business Associates.” We do employ business associates to assist with administrative matters and these business associates are indeed trained and monitored so that your privacy is ensured at all times.

IV. Uses and Disclosures Not Requiring Consent nor Authorization

By law, protected health information may be released without your consent or authorization for the following reasons:

- Child Abuse
- Suspected Sexual Abuse of a Child
- Adult and Domestic Abuse
- Health Oversight Activities (i.e., Florida Board of Clinical Social Work, Marriage & Family Therapy & Mental Health Counseling Department of Health)
- Judicial or Administrative Proceedings (i.e., if you are ordered here by the court)
- Serious Threat to Health or Safety (i.e., out “Duty to Warn” Law, national security threats)
- Workers Compensation Claims (if you seek to have your care reimbursed under Workers Compensation, all of your care is automatically subject to review by your employer and/or insurer(s). We never release any information of any sort for marketing purposes.

V. Client’s Rights and Sunshine State Counseling Center, LLC Duties

You have a right to the following:

- The right to request restrictions on certain uses and disclosures of your protected health information, which we may or may not agree to, but if we do, such restrictions shall apply unless our agreement is changed in writing;
- The right to receive confidential communications by alternative means and at alternative locations. For example, you may not want your bills sent to your home address so we will send them to another location of your choosing;
- The right to inspect and receive a copy of your protected health information in the designated mental health record set and any billing records for as long as protected health information is maintained in the records;
- The right to amend material in your protected health information, although we may deny an improper request and/or respond to any amendment(s) you make to your record of care;
- The right to an accounting of non-authorized disclosures of your protected health information;
- The right to a paper copy of notices/information from us, even if you have previously requested electronic transmission of notices/information; and
- The right to revoke your authorization of your protected health information except to the extent that action has already been taken. For more information on how to exercise each of these aforementioned rights, please do not hesitate to ask us for further assistance on these matters. We are required by law to maintain the privacy of your protected health information and to provide you with a notice of your Privacy Rights and our duties regarding your PHI. We reserve the right to change our privacy policies and practices as needed with these current designated practices being applicable unless you receive a revision of our policies when you come for your future appointment(s). Our duties as Licensed Clinical Social Workers on these matters include maintaining the privacy of your protected health information, to provide you this notice of your rights and our privacy practices with respect to your PHI, and to abide by the terms of this notice unless it is changed and you are so notified. If for some reason you desire a copy of our internal policies for executing private practices, please let us know and we will get you a copy of these documents we keep on file for auditing purposes.

VI. Complaints

If you have any concerns of any sort that Sunshine State Counseling Center, LLC may have compromised your privacy rights, please do not hesitate to speak to us immediately about this matter. We are always willing to talk to you about preserving the privacy of your protected mental health information. You may also send a written complaint to the Secretary of the U.S. Department of Health and Human Services.

By law, We are required to secure your signature indicating you have received the Client Notification of Privacy Rights Document.

I, _____, understand and have been provided a copy of the Client Notification of Privacy Rights Document which provides a detailed description of the potential uses and disclosures of my protected health information, as well as my rights on these matters. I understand I have the right to review this document before signing this acknowledgment form.

I have read or had read to me all the information in this Information for New Clients. I have had a chance to review and ask questions and have had all questions answered to my satisfaction prior. I agree to abide by all the policies outlined herein including my full agreement to have Sunshine State Counseling Center, LLC Services. By signing this agreement, I am consenting to treatment; understand all the benefits and risks of counseling as outlined herein. I also hereby acknowledge that I have received and reviewed the HIPAA Privacy Policy notice form mentioned herein.

Client Signature or Parent if Minor/ Legal Guardian/Conservator or Authorized Representative, if Required

Date

Parent if Minor/ Legal Guardian/Conservator or Authorized Representative, if Required

Date

Signature of Sunshine State Counseling Center, LLC staff member

Date

Client refused to acknowledge receipt.



Permission to Obtain/Release Confidential Information to Primary Care Physician

Name of Client: _____ Date of Birth: _____

I hereby give consent to Sunshine State Counseling Center, LLC to exchange pertinent and relevant information with the Primary Care Physician identified below.

Name: _____ Agency: _____

Phone: _____ Fax: _____

Address: Street _____ City _____ State _____ Zip _____

Information obtained may include (check all that apply):

- Clinical Impressions and Records
- Academic Records (cumulative records, report cards, standardized test scores, etc.)
- Health Records
- Special Education Records/504 Plan Records (IEP, 504 Plans, PPT/Student Study Team minutes, evaluations)
- Psychiatric Evaluations
- Psychological Evaluations
- Social Work Evaluations
- Educational Evaluations
- Speech and Language Evaluations
- Other Evaluations (vocational, occupational, etc.)
- Other

Client/Parent/Guardian Signature

Print Name

Relationship to Client

Date