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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

Date 1st contact 03/30/2024 Rep on intake call Jennifer Rosa, 1st contact name

n/a

1st contact phone

1st contact relationship

n/a

n/a

Administrator

Location: Step Into Recovery Centers INC

Primary Therapist: Jamila Charles Cometa, LMFT

HNJS: none

**Slueprint** 

J&C

Admission Date 03/30/2024 07:00 AM Referrer

Contact?

Anticipated Discharge Date

No

08/30/2024 01:00 PM

Discharge/Transition Date

Discharge/Transition

05/10/2024 12:38 PM

#### PARTICIPANT INFORMATION HAS NOT BEEN VALIDATED - PLEASE VALIDATE

#### participant Information

Jorge Marrero

Current Address: 2404 N Brighton St C Burbank, CA 91504

Date of Birth: 04/10/1980 SSN: \*\*\*-\*\*-2030

Birth Sex: Male

Pronouns:

Preferred Language:

Marital Status: Single

Race: Ethnicity:

#### **Payment Method**

Insurance

#### **Insurance Information**

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Policy No. Insurance Effective Date Termination Date Status Insurance Type/Priority Active

Anthem Blue Cross LTB203W151

19

Internal ID / External ID Group Plan Name Plan Type Payor Type Insurance Phone Group ID 040 126670034 / 27644M240 626-279-3000

Rx Name Rx Group Rx BIN Rx PCN Rx Phone Plan Period

**Claims** 

Street Address 1 Street Address 2 Claims Fax

PO Box 8504

City State ZIP Code Country

Mason 45040 Subscriber SSN DOB

Gender Relationship of Patient to Subscriber \*\*\*-\*\*-2030 Self 04/10/1980 Jorge Marrero Male

Subscriber Address Street Subscriber Address Street 2 Subscriber City 2404 N Brighton St C Burbank

Subscriber Address Zip Subscriber Address State Subscriber Address Country

91504 CA

#### **Concurrent Reviews**

Start Date End Date # of Days Auth Date Authorization Number Status Managed Level of Care

04/14/2024 MH PHP New Yes LCD Next LOC Next LOC Date Next Review Days of Week Hours per Day Davs per Week Frequency

04/23/2024 Daily No

Insurance Policy No Anthem Blue Cross LTB203W15119

4/22-updated UR needed to send in for concurrent review. Will fax in UR when completed.

4/25-updated UR needed to send in for concurrent review. Will fax in UR when completed.

Start Date End Date # of Days Auth Date Authorization Number Status Managed Level of Care 03/30/2024 04/13/2024 MH PHP 15 04/04/2024 UM59249804 Approved Yes Next LOC Date Next Review Hours per Day Days per Week Next LOC Days of Week Frequency LCD

04/15/2024 Daily No Insurance Policy No.

Anthem Blue Cross LTB203W15119

4/4-cm is Jamar T. at 844-595-2239 ext. 1661023520. Next review will be a fax in or v/m review. Will need

an updated UR by 4/15.

#### Contacts

#### Allergies and Food Restrictions

#### **Allergies**

No Known Allergies/NKA

#### **Diets**

Regular Diet

#### Lab Testing

Lab Bill To Lab Guardian Lab Patient Class Lab Guarantor Type Lab Guarantor Unassigned Unassigned Unassigned Unassigned Not Applicable

Lab Secondary Insurance Lab Primary Insurance

Unassigned Unassigned

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participant Record Source: N/A

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### **Completed Group Sessions**

Saturday, Mar 30, 2024

#### Maintain Progress 01:00 PM PDT by Jennifer Rosa, Administrator

Status: attended Start: 03/30/2024 01:00 PM PDT - End: 03/30/2024 02:30 PM Duration: 01:30

PDT

Attendees: 11 Absent: 0

Topic

**Process Group** 

Individual Assessment/Intervention

Upon arrival to group client appeared (attitude). Throughout the group client (behavior). While group was in process client (Interaction). Client (was/was not) able to (assess/interact/ admit/understand etc.) (group topic). (identify what client expressed there struggle was.) (Express the plan of action and clients goal)

Group Description

Clients are given the opportunity to work together to communicate the functionality of daily life and the occurrences of events and triggers that may interfere with treatment. Clients give communication with peer on the step and importance of setting and striving to reach goals and encourage peers as well as encouraging others and sharing resources

Jamila Charles Cometa, LMFT (Staff), 04/08/2024 03:42 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### **Completed Group Sessions**

Saturday, Mar 30, 2024

#### CBT 02:30 PM PDT by Jennifer Rosa, Administrator

Status: attended Start: 03/30/2024 02:30 PM PDT - End: 03/30/2024 04:00 PM Duration: 01:30

PDT

Attendees: 11 Absent: 0

Topic CBT

Individual Assessment/Intervention

Upon arrival to group client appeared (attitude). Throughout the group client (behavior). While group was in process client (Interaction). Client (was/was not) able to (assess/interact/ admit/understand etc.) (group topic). (identify what client expressed there struggle was.) (Express the plan of action and clients goal)

Group Description

The therapist helps you within a group system to identify negative thought patterns that are impacting your behaviors and emotions. CBT groups empower you to reshape your experience by getting to the root of the thought It can be used to treat a variety of conditions including but not limited to emotional trauma, anxiety, depression, post-traumatic stress disorder (PTSD), and attention deficit hyperactivity disorder

Jamila Charles Cometa, LMFT (Staff), 04/08/2024 03:41 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### **Completed Group Sessions**

Saturday, Mar 30, 2024

#### Process Group 04:30 PM PDT by Jennifer Rosa, Administrator

Status: attended Start: 03/30/2024 04:30 PM PDT - End: 03/30/2024 06:00 PM Duration: 01:30

PDT

Attendees: 9 Absent: 0

Topic

Process Group

Individual Assessment/Intervention

Upon arrival to group client appeared (attitude). Throughout the group client (behavior). While group was in process client (Interaction). Client (was/was not) able to (assess/interact/ admit/understand etc.) (group topic). (identify what client expressed there struggle was.) (Express the plan of action and clients goal)

Group Description

Clients are given the opportunity to work together to communicate the functionality of daily life and the occurrences of events and triggers that may interfere with treatment. Clients give communication with peer on the step and importance of setting and striving to reach goals and encourage peers as well as encouraging others and sharing resources

Jamila Charles Cometa, LMFT (Staff), 04/08/2024 03:32 PM

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#### Jorge Marrero ♂ SIR2024-27

ambulatory?

Birthdate: 04/10/1980 Allergies: No Known Allergies/NKA Admission: 03/30/2024 Care Team Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US & Canada) Pre-Admission Assessment 03/30/2024 04:50 PM Date/Time of 03/30/2024 04:50 PM **Assessment:** Race: Hispanic **Marital Status:** Single Number of Marriages: 0 **Living Arrangements** With whom does the patient live: self Does the patient wish to return to current living ☐ Yes ✓ No situation? Does the client have No children children? Are you pregnant? N/A Are you employed? Yes Does your employer know you are No here? If yes, when are you supposed to return to N/A work? Do you have any mobility Denied issues/concerns? Are you No

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#### Presenting Problem/Crisis/Precipitating Events leading to seeking treatment at this time:

Has experienced severe depression and anxiety. Passed out and waking up not remembering what happened.

#### **Contributing Factors Leading to Seeking Treatment:**

- · Deterioration of Health
- Deterioration of Family Relationships

#### **Outpatient Providers**

	Name of Treating Providers	Phone Numbers and/or Locations	Last Visit (Month/Year)
Psychiatrist	n/a		
Therapist/Counselor	n/a		
PCP/Other Specialist	n/a		

#### **Previous Substance Abuse/Psychiatric Treatments**

		Previous	Substance Abus	e/Psychiat	ric i realmen	ilS	
Treatment History:	✓ Non	e					
			Medical	History			
Current Me	edical Conditions	None					
Current Me	edications: 🕡 N	one					
Allergies:							
Allergen	Allergy Type	Reaction	Reaction Type	Onset	Treatment	Status Type	Source

#### **Substance Abuse History**

#### Substance History:

**Psychiatric Conditions: None** 

	First Used	Last Used	Frequency/Duration	Amount	Method	Pattern of Use (Episodic, Experimental, Binge, Continued)
Alcohol	13	3/25/24	Daily	18 beers	oral	Continued
Marijuana	13	3/25/24	daily		smoke and edibles	continued
Cocaine (Powder)	n/a					
Crack Cocaine	n/a					
Crystal Meth	n/a					
Heroin	n/a					

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Suboxone/Zubsolv	n/a				
Oxycontin	n/a				
Methadone	n/a				
Other Opiates	n/a				
Benzodiazepines	n/a				
Hallucinagens	n/a				
Amphetamines	n/a				
Inhalants	n/a				
Ketamine (Special K)	n/a				
Triple C's	n/a				
Codeine	n/a				
Ecstasy	n/a				
Bath Salts	n/a				
Flakka	n/a				
MDMA/Molly	n/a				
Steroids	n/a				
K2Spice	n/a				
Kratom	n/a				
Kava	n/a				
Other OTC drugs	n/a				
Other	n/a				
Current Signs and Symptoms of Withdrawal  Yawning , Nausea , Anxiety , Sweats , Chills , Muscle Cramps , Hypertencion , Cravings, scale::  History of High Risk/Severe Withdrawal Symptoms:					
	Good			s and Sympto	ms
Sleep Patterns:	Good		Poor ✓		
Hours per Night:					
5					
Sleep	Night Sweats .				

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Interruptions:

Nightmares

Fair Appetite: Unanticipated weight gain? No Unanticipated weight loss? No Yes Loss or gain over the following time  $\checkmark$ period? Suicidal/Homicidal Lethality Risk Assessment Suicidal Ideation: None How long has the client had these n/a thoughts? Does the Client have a No plan? Past history of suicide No attempts? How was the attempt No attempt made? Homicidal Ideation? None **History of Violent Behavior** None (describe) **Self Abuse History** Does patient have a history of self No mutilation? How and where does client typically disfigure Denies him/herself? Eating Disorders: None **Preadmission Mental Status** Speech: Normal Judgment:Fair Insight: Awareness of Illness Thought Organized Process: Memory: Intact

Jorge Marrero MR SIR2024-27 DOB: 04/10/1980 Male Anthem Blue Cross F33.2 Major depressive disorder, Recurrent episode, Severe,F41.1 Generalized anxiety disorder,F43.10 Posttraumatic stress disorder,F41.0 Panic disorder

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Attention: Confused

Affect: Sad , Anxious

#### **Family History**

Father: Alcoholism , Drug Abuse , Actively

Drinking

Mother: Alcoholism , Actively

Drinking

Siblings: Actively Drinking

Spouse: None

Children: None

Other: None

#### **Rationale for Treatment**

Admission:

n/a

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Jennifer Rosa, Administrator (Staff), 03/30/2024 06:04 PM

Marked Closed by: Ashley Banali, 05/17/2024 12:40 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### **Completed Group Sessions**

Saturday, Mar 30, 2024

#### Life Skills Coaching 06:00 PM PDT by Jennifer Rosa, Administrator

Status: attended Start: 03/30/2024 06:00 PM PDT - End: 03/30/2024 07:30 PM Duration: 01:30

PDT

Attendees: 9 Absent: 0

Topic

Developing Life Skills

Individual Assessment/Intervention

Upon arrival to group client appeared (attitude). Throughout the group client (behavior). While group was in process client (Interaction). Client (was/was not) able to (assess/interact/ admit/understand etc.) (group topic). (identify what client expressed there struggle was.) (Express the plan of action and clients goal)

Group Description

Life skills aims to developclients' abilities and motivations to make use of all types of information. The approach interactive, using role plays, games, puzzles, group discussions, and a variety of other couching techniques to encourage clients to utilize all resources.

Jamila Charles Cometa, LMFT (Staff), 04/08/2024 03:32 PM

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#### Jorge Marrero ♂ SIR2024-27 Birthdate: 04/10/1980 Allergies: No Known Allergies/NKA Admission: 03/30/2024 Care Team Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US & Canada) Initial Treatment Plan (OPTIONAL) 04/01/2024 04:26 PM ☐ INTENSIVE INPATIENT ☐ RESIDENTIAL ☑ PHP ☐ IOP ☐ OP Date Established: 04/01/2024 04:26 PM Date Resolved / 03/31/2024 **Discharge Date** Resolved | Improved | Minimal Progress Status at Discharge: **PROBLEM:** Client is in need of orientation to program. RELATED TO AND EVIDENCED BY: Client admitted to this facility and lacks education and understanding of facility program. GOAL: Client will be oriented to facility and develop a therapeutic rapport with therapist, staff, and group peers. **Short Term Goal/Objectives** Intervention/Modality/Plan Frequency/Duration A. Client will receive orientation to facility policies, A. Staff will provide orientation to Client and 24 hours rules and standards. provide necessary details on date of admission. Date/Comment Ву **Target date** Status B. Client will attend all assessment appointments B. Staff will provide recommendations for Client 2x/wk PRN and follow all recommendations for Client care. care, medication needs and follow-up care. **Date/Comment Target date** Status Ву C. Will monitor patient for Post Acute Withdrawal C. Staff will educate patient in a structured milieu Daily/PRN Symptoms. environment on how to increase confidence and ability in remaining clean and sober.

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Status

**Target date** 

Date/Comment

Ву

D. Client will meet with primary therapist and develop an Individualized Treatment Plan and Problem List.

D. Staff will provide 1:1 session for treatment planning purposes.

Status

1:1 session/1 hr

E. Client will have a physical examination within 3 days of admission unless provided within 30 days
of treatment.

E. Physician/ARNP/PA will conduct or review previous physical examination.

1:1 session/30 mins

By

Target date

**Target date** 

Status

Date/Comment

Date/Comment

Ву

F. A standardized outcomes measure assessment F. Staff will administer the assessment to client. will be completed on date of admission.

Once/30 mins

Target date

Status

Date/Comment

Ву

**Additional items** 

**Target date** 

Status

Date/Comment

Ву

CRITERIA FOR DISCHARGE AND DISCHARGE PLANNING: Client to complete treatment by gaining insight into substance abuse; needing to continue treatment in less restrictive treatment modality; having secured stable housing. Client to gain insight for need to continue self-help programs in the community. Discharge planning will include housing, continued treatment, medication compliance and need for follow-up and aftercare.

Client Statement: I have participated in the development and review of this treatment plan, have received a copy of this treatment plan and I agree to participate in this part of my treatment to the best of my ability.

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### Problem List 04/04/2024 04:26 AM

**Date of Service:** 04/04/2024 04:26 AM

**Problem List: Total Problems: 11** 

Problem Anger	Status Active	Behavioral Definition/As evidenced by
		• N/A
Anxiety	Active	• N/A
Family Conflicts	Active	• N/A
Impulsivity	Active	• N/A
Living Environment Deficiency	Active	• N/A
Relapse Proneness	Active	• N/A
Self-Harm	Active	• N/A
Substance Use Disorders	Active	• N/A
Suicidal Ideation	Active	• N/A
Posttraumatic Stress Disorder (PTSD)	Active	• N/A
Unipolar Depression	Active	• N/A

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### LOCUS Assessment with Scoring 04/04/2024 04:26 AM

04/04/2024 04:26 AM

Date/Time:

### I. Risk of Harm

2 Low Risk of Harm (2)

#### **Evidence**

Passive suicidal ideation: George's passive suicidal ideation indicates that he may be at risk for self-harm and requires immediate intervention and support.

#### II. Functional Status 2 Mild Impairment (2)

#### **Evidence**

Jorge demonstrates limited understanding of his health conditions, treatment options, medication instructions, or preventive health measures, this may indicate a need for PHP. Health literacy deficits can hinder effective self-management, decisionmaking, and communication with healthcare providers.

5Social isolation or lack of support: IJorge lacks access to social support networks, community resources, or healthcare providers who can assist him in managing his health, this suggest a need for PHP. Social support plays a crucial role in promoting resilience, treatment adherence, and overall well-being. Unhealthy lifestyle behaviors: Evidence of Jorge engaging in unhealthy behaviors such as smoking, excessive alcohol consumption, poor diet, lack of physical activity, or risky sexual practices may indicate a need for PHP. Addressing these behaviors through education, counseling, and support can improve Jorge's health outcomes

#### III. Co-occurring

3 Significant Co-Morbidity (3)

#### **Disorders**

#### **Evidence**

Diagnosis of anxiety, depression, and PTSD: George has a history of anxiety, depression, and PTSD, which are serious mental health cond. Family history of depression, bipolar disorder, and substance use: George's family history of mental health conditions and substance use suggests a genetic predisposition to these issues, which may contribute to his own struggles. Passive suicidal ideation: George's passive suicidal ideation indicates that he may be at risk for self-harm and requires immediate intervention and support.

IV. Recovery Environment Based on the information provided, George meets the criteria for admission to a Partial Hospitalization Program (PHP) level of care according to Locus standards.

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- 1. Diagnosis of anxiety, depression, and PTSD: George has a history of anxiety, depression, and PTSD, which are serious mental health conditions that require intensive treatment and support.
- 2. History of neighborhood violence and negative self-talk: George's history of neighborhood violence and continuous negative self-talk indicate that he is experiencing significant psychological distress and may be at risk for self-harm.
- 3. Family history of depression, bipolar disorder, and substance use: George's family history of mental health conditions and substance use suggests a genetic predisposition to these issues, which may contribute to his own struggles.
- 4. Living in a toxic environment: George reports that he is currently living in a toxic environment, which can exacerbate his mental health symptoms and make it difficult for him to recover.
- 5. Passive suicidal ideation: George's passive suicidal ideation indicates that he may be at risk for self-harm and requires immediate intervention and support.

Overall, George's combination of mental health diagnoses, traumatic history, family history, living situation, and risk of self-harm meet the criteria for admission to a PHP level of care according to Locus standards. This level of care will provide him with intensive therapy, support, and monitoring to help him stabilize and work towards recovery.

A) Level of Stress

4 Highly Stressful Environment (4)

#### **Evidence**

B) Level of Support

4 Minimal Support in Environment

(4)

#### **Evidence**

History of neighborhood violence and negative self-talk: George's history of neighborhood violence and continuous negative self-talk indicate that he is experiencing significant psychological distress and may be at risk for self-harm.

Family history of depression, bipolar disorder, and substance use: George's family history of mental health conditions and substance use suggests a genetic predisposition to these issues, which may contribute to his own struggles.

Living in a toxic environment: George reports that he is currently living in a toxic environment, which can exacerbate his mental health symptoms and make it difficult for him to recover.

V. Treatment and

1 Full Response to

**Recovery History** 

Treatment/Recovery Mgmt (1)

#### **Evidence**

Client history of mental health struggles, traumatic experiences, and family history of depression and substance use, he may be at risk for relapse if not provided with adequate support. Placing him in a PHP can help reduce the risk of relapse by offering ongoing treatment, monitoring, and support.

VI. Engagement

3 Limited Engagement (3)

#### Evidence

Jorge consistently attributes his mental health struggles or treatment outcomes to external factors beyond his control (such as family dynamics, past trauma, societal factors), rather than acknowledging his own agency and ability to make positive changes, this external locus of control belief may contribute to limited engagement in treatment. Jorge feels overwhelmed, hopeless, or powerless in the face of his mental health challenges, he may exhibit learned helplessness, a belief that his

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actions have little impact on his circumstances. This belief can lead to limited engagement in treatment due to a lack of motivation or belief in the effectiveness of interventions. Jorge relies on maladaptive coping mechanisms (such as avoidance, substance use, self-harm) to manage stress or emotional distress, this may indicate a limited engagement with more adaptive coping strategies taught in therapy. Difficulty implementing new coping skills or resistance to change may be evident in his treatment progress.

#### Composite Score

Level 1 - 10-13

Level 2 - 14-16

Level 3 - 17-19

Level 4 - 20-22

Level 5 - 23+

Placement Grid Level of Care - LOC Level 3: PHP

(19)

Clinician Recommended LOC Level 3: PHP

## Clinical Justification if Placement Grid LOC is different than Clinician Recommended LOC

Jorge is a43 male who identifies as Male diagnosed withF33.2 Major depressive disorder, Recurrent episode, Severe, F41.1 Generalized anxiety disorder, F43.10 Posttraumatic stress disorder, F41.0 Panic disorder. Client is experiencing severe symptoms of depression, anxiety, and disordered eating, as evidenced by frequent panic attacks, suicidal ideation, and significant weight loss. These symptoms are impacting the ability to function in daily life and are putting client at risk for further deterioration. Client has tried outpatient therapy and medication management in the past, but these interventions have not been effective in adequately addressing her symptoms. Client has not shown significant improvement despite consistent treatment efforts, indicating the need for a higher level of care. Client has a history of self-harm and suicidal ideation, and has made multiple suicide attempts in the past. Client is currently expressing thoughts of hopelessness and worthlessness but has no plan. These safety concerns necessitate a more intensive level of care to ensure her safety and well-being. Overall, based on the severity of Client's symptoms, lack of improvement with previous treatments, safety concerns, lack of support, and functional impairment, a PHP level of care is clinically justified by locus standards to provide with the intensive treatment and support the client needs to address mental health concerns effectively.

Client states that appetite is fair due to anxiety client states it's hard to keep food down when the anxiety is high

#### **Preliminary Recommendations Based on Assessment:**

MH PHPis recommended with diagnosis of F33.2 Major depressive disorder, Recurrent episode, Severe, F41.1 Generalized anxiety disorder, F43.10 Posttraumatic stress disorder, F41.0 Panic disorder

Jorge is a43 male who identifies as Male diagnosed withF33.2 Major depressive disorder, Recurrent episode, Severe, F41.1 Generalized anxiety disorder, F43.10 Posttraumatic stress disorder, F41.0 Panic disorder. Client is experiencing severe symptoms of depression, anxiety, and disordered eating, as evidenced by frequent panic attacks, suicidal ideation, and significant weight loss. These symptoms are impacting the ability to function in daily life and are putting client at risk for further deterioration. Client has tried outpatient therapy and medication management in the past, but these interventions have not been effective in adequately addressing her symptoms. Client has not shown significant improvement despite consistent treatment efforts, indicating the need for a higher level of care. Client has a history of self-harm and suicidal ideation, and has made multiple suicide attempts in the past. Client is currently expressing thoughts of hopelessness and worthlessness but has no plan. These safety concerns necessitate a more intensive level of care to ensure her safety and

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well-being. Overall, based on the severity of Client's symptoms, lack of improvement with previous treatments, safety concerns, lack of support, and functional impairment, a PHP level of care is clinically justified by locus standards to provide with the intensive treatment and support the client needs to address mental health concerns effectively.

Marked Closed by: Ashley Banali, 05/17/2024 12:40 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### Clinical Individualized Treatment Plan - Anxiety 04/04/2024 04:27 AM

**Date Established:** 04/04/2024 04:27 AM

Problem (in patient's own words):

Modality: Clinical Problem: Anxiety

Goal 1

Enhance ability to effectively cope with the full variety of life's worries and anxieties.

Objective 1

Complete psychological testing or objective questionnaires for assessing the client's anxiety.

Plan 1

Administer psychological tests or objective measures to help assess the nature and degree of the client's worry and anxiety and their impact on functioning (e.g., the Penn State Worry Questionnaire; OQ-45.2; Symptom Checklist-90-R; Beck Anxiety Inventory; Hamilton Anxiety Rating Scale; or State-Trait Anxiety Inventory); evaluate the results and give feedback to him/her; re-administer as needed to assess treatment response.

Objective 2

A standardized outcomes measure assessment will be completed on date of admission and per assessment schedule thereafter.

Plan 1

Staff will administer the assessment to client.

Client Statement: I have participated in the development and review of this treatment plan, have received a copy of this treatment plan and I agree to participate in this part of my treatment to the best of my ability.

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### Assignment of Care Team - CUSTOMIZE 04/30/2024 07:10 PM

**Date/Time of** 04/30/2024 07:10 PM

**Assignment:** 

**Primary Therapist:** 

Primary Therapist Assigned on

Jamila Charles Cometa,

04/01/2024

Case Manager:

Case Manager Assigned on

None

**LMFT** 

**Primary Nurse:** 

Primary Nurse Assigned on

None

**Primary Physician:** 

Primary Physician Assigned on

None

Tester:

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Jennifer Rosa, Administrator (Staff), 04/30/2024 07:11 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980
Allergies: No Known Allergies/NKA
Admission: 03/30/2024 Care Team
Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US & Canada)
Utilization Review
Mental Status Exam
Appearance:
Ungroomed , Baggy Clothes , Unkempt
Attitude:
Cooperative , Easily distracted , Defensive
Behavior:
Guarded , Tearful
Eye Contact:
Avoidant
Mood:
Depressed , Sad , Apprehensive , Irritable , Anxious
Affect
Depressed , Anxious
Speech:
Slow
Thought Process:
Flight of ideas
Thought Content:
Obsessions
Perception

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Congruent with mood & content	thought
Orientation:	
Person , Place , Time , Situation	
Memory:	
Impaired memory Insight:	
Limited	
Judgment:	
Limited	
Impulse Control:	
Poor	
Hours of sleep:	3 Hours
Sleep details:	
	It to fall asleep due to racing thoughts and the inability to calm thought processes and sleep is tay asleep due to using dreams, night, terrors consistent worry about the next day, event,
Appetite Details:	
Client states that appet	tite is fair due to anxiety client states it's hard to keep food down when the anxiety is high
ADL's Checklist	
Bathing	Independent
Grooming	Needs Help
Dressing	Independent
Oral Care	Independent
Toileting	Independent
Transferring	Independent
Walking	Independent
Climbing Stairs	Independent

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Eating Needs Help

Shopping Independent

Cooking Independent

Managing Medications

Independent

Using the phone

Independent

Housework Independent

Doing Laundry Independent

**Driving** Independent

Managing Finances Needs Help

Vitals

Blood Pressure (systolic/diastolic)

Temperature

Pulse

Respiration

O2 Saturation

Comments

## **Current Medications**

Medications below include all current active orders logged via Doctor's Orders. These may include medications self-reported by the patient that were logged, medication orders entered at the facility, and medications brought to the facility by the patient ordered to be continued upon admission. If the patient is not being treated in a residential/inpatient setting, this list may not be inclusive of all medications taken by the patient outside of the facility.

Current as of 04/30/2024 07:10 PM:

#### **Current Symptoms**

Nausea , Body Aches , Irritability , Abdominal Cramps , Headache , Poor appetite , Sleep disturbance

## Biomedical condition and how its a barrier in treatment

Gastrointestinal conditions, specifically IBS has interfered with treatment in the past for anxiety and depression by causing digestive issues, pain, and discomfort that can worsen mental health symptoms.

#### **Progress**

Client has attended six days of PHP level of care, and progress has improved in the following ways

- 1. Increased engagement: client has been more actively participating in therapy sessions, group activities, and treatment planning, indicating a growing willingness to work on his mental health challenges. However continues to need redirection in group and is prone to verbally aggressive outbursts when in high emotional state
- 2. Improved mood: client has reported feeling slightly better or more hopeful compared to when he first started the program, indicating that he is benefiting from the support and interventions provided in PHP level of care

#### **Specific**

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#### Goals

- 1. Improve coping skills: client set a goal to learn and utilize healthy coping mechanisms to manage stress, anxiety, and depressive symptoms effectively. And decrease negative self talk
- 2. Increase self-awareness: client aim to develop a deeper understanding of his thoughts, emotions, and behaviors that contribute to his mental health challenges. Client has come to understand how his thought process and statements contribute to his passive, suicidal ideation.
- 3. Enhance emotional regulation: client will work towards improving his ability to regulate and express his emotions in a healthy and constructive manner.
- 4. Build social support: client will focus on establishing and maintaining supportive relationships with peers, family, or friends to enhance his overall mental well-being.
- 5. Improve daily functioning: client will strive to enhance his ability to perform daily tasks, maintain routines, and engage in activities that promote his mental health and overall well-being.
- 6. Address underlying issues: client set a goal to explore and address any underlying issues or traumas that may be contributing to his anxiety and depression.
- 7. Increase self-care practices: client will prioritize self-care activities such as exercise, meditation, proper nutrition, and adequate sleep to support his mental health recovery.

#### Assignments being worked on

- 1. Thought records: Client will be asked to keep a journal of his thoughts and feelings throughout the day, noting any negative or self-critical thoughts that arise. By identifying and challenging these thoughts, Client can begin to reframe them in a more positive and realistic light.
- 2. Cognitive restructuring: Client will engage in cognitive restructuring exercises with a therapist to identify and challenge negative thought patterns that contribute to his passive suicidal ideation. By reframing negative thoughts and replacing them with more adaptive beliefs, Client can learn to manage his emotions more effectively.
- 3. Gratitude journaling: Client will be encouraged to keep a gratitude journal where he writes down three things he is grateful for each day. This practice can help shift his focus towards positive aspects of his life and cultivate a sense of appreciation and hope.
- 4. Mindfulness exercises: Client will practice mindfulness techniques such as deep breathing, meditation, or body scans to increase awareness of his thoughts and emotions without judgment. These practices can help Client stay present in the moment and reduce rumination on negative thoughts.
- 5. Safety planning: Client will work with his therapist to create a safety plan that outlines coping strategies, supportive contacts, and resources to use in times of crisis. Having a safety plan in place can provide Client with a sense of control and support during moments of distress.
- 6. Behavioral activation: Client will engage in activities that bring him a sense of pleasure or accomplishment, such as exercise, hobbies, or socializing with friends. Engaging in positive and rewarding activities can help improve Client 's mood and reduce feelings of hopelessness.
- 7. Psycho education: Client will participate in educational sessions on suicide prevention, mental health awareness, and coping strategies to increase his understanding of his mental health challenges and develop skills to manage them effectively.

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## Barriers to step-down/need for 24x7 monitoring

Passive si and negative self talk need for redirection

#### Discharge/Aftercare plan

Client is expected to step down on April 3 top IOP level of care

#### Family Sessions Update

not scheduled. His family is a trigger and is currently unwilling to participate.

#### Participation in Treatment

Client actively participates but still requires coaching to attend on time

medication find is currently met with the doctor regarding some of the issues he has been experiencing. Client has started taking trazodone 50 mg at bedtime, as well as.starting dosage of Fluoxetine 20 mg qam

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

## Step Into Recovery Centers INC Self Harm-Agreement

Client Name: Jorge Marrero MR #: SIR2024-27 DOB: 04/10/1980

I agree to refrain from harming, injuring, and/or endangering myself in any way including attempting suicide while I remain in treatment at Step Into Recovery Centers INC.

I agree to seek the assistance of a staff member immediately if and when I have any thoughts of self-harm and/or harm to others, regardless of the time of day or night.

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Jorge Marrero (participant), 04/30/2024 07:10 PM Staff present: Jennifer Rosa, Administrator

Jennifer Rosa, Administrator (Staff), 04/30/2024 07:11 PM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### Drug Screen 05/07/2024 11:54 AM

Date:	05/07/2024
Requisition #:	
Breathalyzer:	
Temperature:	
Drug Screen Res	ult:
Attachments/Sca	ns:

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### Breathalyzer Test Results 05/07/2024 11:54 AM

Date:	05/07/2024
Type of Test:	
Breathalyzer:	
Attachments/Sca	ns:

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### Clinical Individualized Treatment Plan - Unipolar Depression 05/07/2024 01:57 PM

**Date Established:** 05/07/2024 01:57 PM

#### Problem (in patient's own words):

Client stated "

#### **Modality: Clinical**

#### **Problem: Unipolar Depression**

Goal 1

Develop healthy thinking patterns and beliefs about self, others, and the world that lead to the alleviation and help prevent the relapse of depression.

Objective 1

A standardized outcomes measure assessment will be completed on date of admission and per assessment schedule thereafter.

Plan 1

Staff will administer the assessment to client.

Frequency 1

1x Weekly

Plan Status

Target date Status Date/Comment By Signature

05/14/2024 Open Jennifer Rosa, Administrator 05/07/2024

Client Statement: I have participated in the development and review of this treatment plan, have received a copy of this treatment plan and I agree to participate in this part of my treatment to the best of my ability.

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

## Clinical Individualized Treatment Plan - Posttraumatic Stress Disorder (PTSD) 05/07/2024 02:01 PM

**Date Established:** 05/07/2024 02:01 PM

#### Problem (in patient's own words):

Client stated "

#### **Modality: Clinical**

#### **Problem: Posttraumatic Stress Disorder (PTSD)**

Goal 1

Reduce the negative impact that the traumatic event has had on many aspects of life and return to the pretrauma level of functioning.

Objective 1

A standardized outcomes measure assessment will be completed on date of admission and per assessment schedule thereafter.

Plan 1

Staff will administer the assessment to client.

Frequency 1

1x Weekly

Plan Status

Target date Status Date/Comment By Signature

05/14/2024 Open Jennifer Rosa, Administrator 05/07/2024

Client Statement: I have participated in the development and review of this treatment plan, have received a copy of this treatment plan and I agree to participate in this part of my treatment to the best of my ability.

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

## Step Into Recovery Centers INC Activities Release and Waiver of Liability

**Notice:** This form contains a release and waiver of liability and when signed is a contract between the undersigned participant and Step Into Recovery Centers INC with legal consequences. Please read this Agreement, consisting of one (1) pages in its entirety, carefully before signing your name at the bottom of the page. This form must be signed in the presence of one (1) witness who should sign as a witness.

#### Date of Execution of Release and Waiver of Liability:

The undersigned agrees that this "Activities Release and Waiver of Liability" form agreement is valid from the date of execution through the date of discharge.

#### **Acknowledgments and Representations by Client:**

The undersigned is currently a client of Step Into Recovery Centers INC. The undersigned has voluntarily consented to participate in voluntary sports activities or voluntary physical activities such as volleyball, aerobics, and other such types of voluntary sports or physical activities, which may not be specifically identified herein while being a client at such facility. The undersigned acknowledges and represents that their participation in such sports activities and physical activities is not a mandatory requirement of Step Into Recovery Centers INC, and that any participation by the undersigned in any and all sports-related activities and physical activities, is purely voluntary and of the undersigned's own free will. The undersigned acknowledges and represents that there has been no coercion or force on the part of Step Into Recovery Centers INC for the undersigned to execute this release and waiver of liability agreement. The undersigned has knowingly, freely, and voluntarily consented to execute this release and waiver of liability agreement. The undersigned acknowledges and understands that it is the undersigned's sole decision to participate in such voluntary activities. The undersigned acknowledges and represents that he has been informed that he has an absolute right to refuse to participate in any and all sports-related activities or physical activities.

**To Step Into Recovery Centers INC, Inc.:** In consideration of the opportunity afforded to me, by Step Into Recovery Centers INC, to participate in voluntary sports activities or voluntary physical activities such as volleyball, aerobics, and any other similar types of voluntary sports or physical activities which may not be specifically identified herein, the undersigned client freely agrees to make the following contractual representations and agreements with Step Into Recovery Centers INC.

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The undersigned client, does hereby knowingly, freely, and voluntarily assume all liability for any damage or injury that may occur as a result of my (or my dependent/ward) participation in the activities described herein and agree to release, waive, discharge, and covenant not to sue Step Into Recovery Centers INC, its officers, agents, employees, and volunteers from any and all liability or claims that may be sustained by me or a third party directly or indirectly in connection with, or arising out of participation in the activities described herein, whether caused in whole or in part by the negligence of Step Into Recovery Centers INC, or otherwise.

The undersigned client, has read this form, fully understand its terms, and understand that, I have given up substantial rights by signing it and have signed it freely and without any inducement or assurance of any nature and intend it to be a complete and unconditional release of any and all liability to the greatest extent allowed by law, and I agree that if any portion of this contract is held to be invalid the balance notwithstanding, shall continue in full legal force and effect.

I also agree, that the rules provided to me by the Step Into Recovery Centers INC, will be followed during the course of my voluntary participation in the activities described herein. Otherwise, my privilege of participating in such activities will be revoked immediately. Each client must sign a release and waiver of liability form in order to participate in the voluntary activities described herein. I acknowledge that due to the nature of the activities described herein, Step Into Recovery Centers INC staff will not be able to prevent injuries from occurring during the course of such activities; therefore, I am choosing to participate in such activities at my own risk and agree to assume all risks associated therewith.

Indemnification of Step Into Recovery Centers INC: The undersigned client shall at all times hereafter indemnify, hold harmless and, at Step Into Recovery Centers INC Attorney's option, defend or pay for an attorney selected by Step Into Recovery Centers INC to defend Step Into Recovery Centers INC, its officers, agents, servants, and employees against any and all claims, losses, liabilities, and expenditures of any kind, including attorney fees, court costs, and expenses, caused by negligent act or omission of the client, other clients, Step Into Recovery Centers INC, its employees, agents, servants, or officers, or accruing, resulting from, or related to the undersigned client engaging in any voluntary sports activities or voluntary physical activities such as volleyball, aerobics, and any other similar types of voluntary sports or physical activities which may not be specifically identified herein, including, without limitation, any and all claims, demands, or causes of action of any nature whatsoever resulting from injuries or damages sustained by any person or property. The provisions of this section shall survive the expiration or earlier termination of this Agreement or the discharge of the client from the residential/outpatient facility operated by Step Into Recovery Centers INC.

**Venue:** This Agreement shall be interpreted and constructed in accordance with and governed by the laws of the State of California Venue for litigation concerning this Agreement shall be in County.

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Jorge Marrero (participant), 03/30/2024 05:51 PM

Staff present: Sandy Rosa

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Marked Closed by: Ashley Banali, 05/17/2024 12:40 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Admission Orientation Checklist

Name: Jorge Marrero MR#: SIR2024-27 DOB: 04/10/1980

Upon admission, I have been oriented and understand the following as indicated by a checkmark next to each requirement and my signature below.

A description of services to be provided
✓ Consent for treatment
$\label{eq:copy} \begin{picture}(100,0) \put(0,0){\line(0,0){100}} \put(0,$
✓ Advanced Directives used at the facility
✓ A copy of individual rights
✓ A copy of the grievance process and procedure
✓ Program rules
✓ Infection control procedures
✓ Treatment Schedule
✓ Fire exits and emergency evacuations procedures
✓ Emergency Services
Responsibilities for participation in treatment
✓ A summary of the facility's admission and discharge criteria

My signature confirms that I have engaged in an orientation process with Step Into Recovery Centers INC staff member. It further confirms that I was given the opportunity to ask questions for clarification purposes and that I understand the aspects of the program listed above.

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Jorge Marrero (participant), 03/30/2024 05:52 PM

Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:40 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Client Rights

All individuals who apply for services, regardless of sex, race, age, color, creed, financial status, or national origin, are assured that their lawful rights as Clients shall be guaranteed and protected. While being served, you the Client are assured and guaranteed the following rights:

- 1. To be treated with respect and dignity.
- 2. To receive timely treatment by qualified professionals.
  - a. Every effort will be made to use the least restrictive, most appropriate treatment available, based on Client needs.
  - b. Each Client shall be afforded the opportunity to participate in activities designed to enhance self-image.
  - c. An individualized treatment plan shall be developed for each Client in accordance with the provisions established for each program component.
- 3. To receive quality treatment that is best suited to his/her needs and shall include appropriate services, whether they be medical, vocational, social, educational, and/or rehabilitative services.
- 4. To express by signature an informed consent of the right to release information for communication purposes with other agencies.
- 5. To receive communication and correspondence from individuals.
- 6. To privacy for interview/counseling sessions.
- 7. To practice your religious practices.
- 8. To be provided humane care and protection from harm.
- 9. To contract and consult with legal counsel and private practitioners of your choice at your expense.
- 10. To exercise your constitutional, statutory, and civil rights.
- 11. To be free of physical restraint or seclusion.
- 12. To be informed of the nature of treatment or rehabilitation, the known effects of receiving the treatment or rehabilitation, and alternative treatment or rehabilitation programs.
- 13. To be provided with information on an ongoing basis regarding your treatment or rehabilitation.

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- 14. To be provided services in accordance with standards of practice, appropriate to your needs, and designed to afford you a reasonable opportunity to improve your condition.
- 15. To confidentiality of the Client being in treatment and of the Client's records. The Federal rules restrict any use of information to criminally investigate or prosecute any alcohol or drug abuse Client. Federal regulations state any person who violates any provision of the law shall be fined not more than \$500.00 in the case of the first offense and not more than \$5,000.00 in the case of each subsequent offense, except where noted in the Federal Law of Confidentiality, 42 CFR, Part 2, Section 2.22, which includes the following:
  - a. The limited circumstances of release of Client information include, crimes on program premises or against program personnel, medical emergencies, mandated reports of child abuse or neglect, elderly abuse, threats to harm self or others, research, audit, and evaluations, or court orders.
- 16. To receive full information regarding the treatment process.
- 17. To refuse treatment.
- 18. To all other constitutional and legal rights, including the right to personal clothing and effects.
- 19. To be informed of the Client grievance procedure upon request.

### Confidentiality of Alcohol and Drug Abuse Patient Records/Limits to Confidentiality

The confidentiality of alcohol and drug abuse Client records maintained by this program are protected by Federal law and regulations. Generally, the program may not say to a person outside the program that the Client attends the program or disclose any information identifying a client as an alcohol or drug abuser unless:

- 1. The Client consents in writing
- 2. The disclosure is allowed by a court order; or
- 3. The disclosure is made to medical personnel
- 4. The disclosure to a qualified person for research, audit, or program evaluation; or
- 5. The disclosure is made to protect self or others or a crime has been committed; or
- 6. The disclosure in the event of threats of harm to self or others (Duty To Warn).

Violation of the Federal law and regulations by a program is a crime. Suspected violations may be reported to appropriate authorities in accordance with Federal regulations.

Federal law and regulations do not protect any information about a crime committed by the Client either at the program or against any person who works for the program or about any threat to commit such a crime.

Federal laws and regulations do not protect any information about elderly abuse, suspected child abuse or neglect, threats to harm to self or others from being protected. These may be released under State law to appropriate State or local authorities beyond Federal CFR42-Regulations.

(See 42 U.S.C. 290dd-3 and 42 U.S.C. 290ee-3 for Federal laws and 42 CFR Part 2 for Federal regulations,)

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#### **Grievance Procedure:**

- 1. Any person(s) who believes that their rights have been violated or has a complaint or grievance may file a complaint pursuant to the procedures set forth below, on their behalf or on the behalf of another person. All persons are encouraged to file a grievance. By filing a complaint the individual will not subject themselves to any form of adverse action, reprimand, retaliation, or otherwise negative treatment by Step Into Recovery Centers INC. The client shall have immediate access to the grievance form; a posting of the grievance procedure will be within the facility with the levels of appeals, and in the Patient Handbook.
- 2. The processing procedures for grievances and complaints are as follows:
  - a. The Client is encouraged to discuss any problems with their therapist. The Client and therapist will try to find a resolution. The therapist will correspond with the Clinical Director on the grievance and/or complaint and any resolution.
  - b. All grievances shall first be filed with the Clinical Director by completing a "Client Grievance" form. The Human Resources Director and/or Designee shall give the Client a receipt of the filed grievance and log the grievance. The Director will conduct an internal investigation and render an initial determination and resolution within 2 days of receipt of the complaint in writing.
  - c. If the complaint is not satisfied or if the complaint is not resolved with the results achieved in Step 2, the complaint may file an appeal and/or the grievance shall be forwarded to the Executive Director and this meeting shall be held within five working days of the date it is requested.
  - d. The Client shall be presented with a resolution and response to their grievance in writing.
  - e. In the event that the Client does not feel a resolution has been reached they may contact the state regulatory department and the applicable client advocacy institution.
- 3. The Clinical Director and the Executive Director shall take steps to ensure an appropriate investigation of each complaint to determine its validity. These rules contemplate informally, but thorough, investigations affording all interested persons and their representatives, if any, an opportunity to submit evidence relevant to the complaint.
- 4. Any allegations of physical or sexual abuse by a therapist shall immediately be brought to the attention of the Clinical Director and the police shall be notified. The Client will be afforded the opportunity to contact the Police, state Abuse Hotline, the state department of family services, and the state disability rights department where applicable. The telephone numbers of the hotlines are posted within the facility.

I, Jorge Marrero, hereby acknowledge receipt of and understand the "Client Rights" statement.

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Jorge Marrero (participant), 03/30/2024 05:52 PM

Staff present: Sandy Rosa

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Marked Closed by: Ashley Banali, 05/17/2024 12:40 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Confidentiality Policy

The following information is provided to assist you in your counseling experience at Step Into Recovery Centers INC.

Counseling and treatment is a personal and confidential relationship between a clinician and individual, group, or family.

We work from a team approach at Step Into Recovery Centers INC. Therefore, there may be times when it is necessary for us to consult with other professional staff either individually or at our clinical team meetings in an effort to provide you with the highest consideration and quality. Our clinicians are all Mastered prepared and professionally licensed, graduate student interns, or clinicians working toward certification in substance abuse counseling.

No information will be released from Step Into Recovery Centers INC regarding counseling or consultation sessions without your expressed written consent. If you wish for information to be released to anyone, it will be necessary for you to complete a Release of Information form, stipulating the professional to whom the information is being sent. The law stipulates that in the event of imminent danger to yourself or others, we <u>must</u> breach confidentiality. We must also act in accordance with any applicable state laws regarding mandatory disclosure of child, elder, or other abuse.

I have read the above policies and procedures and understand them.

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Jorge Marrero (participant), 03/30/2024 05:52 PM

Staff present: Sandy Rosa

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Marked Closed by: Ashley Banali, 05/17/2024 12:40 PM

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### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Universal Precautions for Infection Control

Universal Precautions refer to the usual and ordinary steps you need to take in order to reduce the risk of infectious diseases such as HIV or Hepatitis C.

The prevention of transmission of infectious diseases is based on the avoidance of skin and mucous membrane contact with blood and other body fluids.

### **AVOID UNNECESSARY RISKS**

- If a fellow patient or client needs assistance, please call a staff member immediately.
- When avoidable, don't expose yourself to another person's blood or body fluids.
- Never share needles, razors, or any other personal sharp objects.
- Always call on trained individuals to clean up blood or other body fluid spills.

### **PROTECT YOURSELF**

- Use barrier protection to prevent skin and mucous membrane contact with blood and other body fluids.
- Wear face protection if blood or body fluid droplets may be generated during a procedure.
- Wear protective clothing if blood or body fluids may be splashed during a procedure.
- Wash hands and skin immediately and thoroughly if contaminated with blood or body fluids.
- · Wash hands immediately after gloves are removed.
- Use care when handling sharp instruments and needles. Place used sharps in labeled, puncture-resistant containers.
- If you have sustained an exposure or puncture wound, immediately flush the exposed area and notify a staff member.

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Jorge Marrero (participant), 03/30/2024 05:56 PM

Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Universal Precautions for HIV

Universal Precautions refer to the usual and ordinary steps we need to take in order to reduce the risk of infection with HIV, the virus that causes AIDS. These measures are intended to prevent transmission of HIV.

The prevention of the transmission of HIV is based on the avoidance of skin and mucous membrane contact with blood and body fluids.

Protecting yourself from HIV

- · Avoid risky behavior
- Protect yourself from sharp injuries
- Wear gloves when in contact with body fluids, if possible
- · Wear mask and eye protection when splash injuries are possible
- Call on trained individuals to clean up blood spills

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Jorge Marrero (participant), 03/30/2024 05:56 PM

Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC

# Transportation Release and Waiver of Liability

**Notice:** This form contains a release and waiver of liability and when signed is a contract between the undersigned Client and Step Into Recovery Centers INC with legal consequences. Please read this agreement in its entirety carefully before signing your name. This form must be signed in the presence of a witness who will sign as a witness.

#### Client's Information:

**Activities:** This includes, but is not limited to <u>Transportation to the facility from the Client's residence, from the facility to the Client's residence, medication pick-up, and transportation to the nearest mental health Receiving Facility.</u>

**Date of execution of Release and Waiver of Liability:** n/a. The undersigned agrees that this Release and Waiver of Liability Agreement is valid from the date of execution through the date of discharge from Step Into Recovery Centers INC.

Name of Facility: Step Into Recovery Centers INC

Client's Full Name: Jorge Marrero

Parent/Guardian's Full Name: n/a

Client/Parent/Guardian Phone Number: n/a

Name and telephone number of emergency contact: n/a

### **Acknowledgments and Representations by Client:**

The undersigned Client, Jorge Marrero, is currently a client at the Partial Hospitalization or Intensive Outpatient Program operated by Step Into Recovery Centers INC. This Client will be participating in the Transportation Services provided by Step Into Recovery Centers INC. This includes, but is not limited to <u>Transportation to the facility from the Client's residence, from the facility to the Client's residence, medication pick-up, emergency medical care, and transportation to the nearest mental</u>

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health Receiving Facility.

The undersigned client, Jorge Marrero (or parent/guardian of the individual named herein), does knowingly, freely, and voluntarily assume all liability for any and all damage or injury that may occur as a result of his/her (or his/her dependent's/ward's) participation in the activities described herein and agrees to release, waive, discharge, and covenant not to bring suit against Step Into Recovery Centers INC, its officers, agents, employees, and volunteers from/for any and all liability or claims that may be sustained by me or by a third party, directly or indirectly, in connection with or arising out of his/her dependent's/ward's) participation in the activities described herein, whether caused in whole or in part by the negligence of Step Into Recovery Centers INC or otherwise.

The undersigned Client, Jorge Marrero, (or parent/guardian of the individual named herein), has read the form, fully understands its terms, and understand that he/she (or his/her dependent/ward) has given up substantial rights by signing it and has signed it freely and without any inducement or assurance of any nature and intend it to be a complete and unconditional release of any and all liability to the greatest extent allowed by law and agree that if any portion of this contract is held to be invalid, the balance notwithstanding shall continue in full legal force and effect.

Indemnification of Step Into Recovery Centers INC: The undersigned Client (or his/her parent/guardian) shall at all times hereafter indemnify, hold harmless and, at Step Into Recovery Centers INC's Attorney's option, defend or pay for an attorney selected by the Board to defend Step Into Recovery Centers INC, its officers, agents, servants, and employees against any and all claims, losses, liabilities, and expenditures of any kind, including attorney fees, court costs, and expenses, caused by negligent act or omission of the Client, other clients, Step Into Recovery Centers INC, its employees, agents, servants, or officers, or accruing, resulting from, or related to the undersigned Client in the following situations including, but not limited to, Transportation to the facility from the Client's residence, from the facility to the Client's residence, medication pick-up, medical emergency, and transportation to the nearest mental health Receiving Facility, including, without limitation, any and all claims, demands, or causes of action of any nature whatsoever resulting from injuries or damages sustained by any person or property. The provisions of this section shall survive the expiration or earlier termination of this agreement or the discharge of the client from Step Into Recovery Centers INC.

**Venue:** This Agreement shall be interpreted and constructed in accordance with and governed by the laws of the State o  $\underline{n/a}$ . Venue for litigation concerning this agreement shall be in County.

I, Jorge Marrero, have read and fully understand the contents herein.

Executed this n/a.

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Jorge Marrero (participant), 03/30/2024 05:56 PM

Staff present: Sandy Rosa

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Jorge Marrero (participant), 03/30/2024 05:56 PM

Staff present: Sandy Rosa

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Safety Contract

I, Jorge Marrero, understand and agree to comply with the following recommendations. I understand that this contract has been created for my safety and well-being. By signing this contract, I agree to the following:

- I will take my medication as prescribed.
- I will inform an appropriate professional to call 911 (or transport me to the hospital) if I am in crisis.
- I will go to an appropriate professional to discuss any dangerous thoughts or feelings; such as suicidal ideations or thoughts of self-harm.
- At this time, I do not have any suicidal or homicidal thoughts or plans and my safety needs are being met.
- I am committed to leading a healthy lifestyle and recognize that I am a valuable and worthwhile person.
- I am committing myself to honor this contract for the remainder of my time in this program.
- I understand that my emergency contact will be called in the event that I need to be safely transitioned to a facility that is more appropriate to handle my mental health needs.

I understand that if I do not comply with these requirements, I will be referred to a facility that will appropriately meet my mental health needs.

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Jorge Marrero (participant), 03/30/2024 05:55 PM

Staff present: Sandy Rosa

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Uses and Disclosure of Health Information

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 is effective as of April 15, 2003

### **USES AND DISCLOSURE OF HEALTH INFORMATION**

Step Into Recovery Centers INC is committed to protecting the privacy of the personal and health information we collect or create as part of providing health care services to our clients, known as "Protected Health Information" or "PHI". PHI typically includes your name, address, date of birth, billing arrangements, care, and other information that relates to your health, health care provided to you, or payment for the health care provided to you. PHI DOES NOT include information that is de-identified or cannot be linked to you.

This notice of Health Information Privacy Practices (the "Notice") describes Step Into Recovery Centers INC's duties with respect to the privacy of PHI, Step Into Recovery Centers INC's use of and disclosure of PHI, client rights, and contact information for comments, questions, and complaints.

### Step Into Recovery Centers INC'S PRIVACY PROCEDURES AND LEGAL OBLIGATIONS

Step Into Recovery Centers INC obtains most of its PHI directly from you, through care applications, assessments, and direct questions. We may collect additional personal information depending upon the nature of your needs and consent to make additional referrals and inquiries. We may also obtain PHI from community health care agencies, other governmental agencies, or health care providers as we set up your service arrangements.

Step Into Recovery Centers INC is required by law to provide you with this notice and to abide by the terms of the Notice currently in effect. Step Into Recovery Centers INC reserves the right to amend this Notice at any time to reflect changes in our

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privacy practices. Any such changes will be applicable to and effective for all PHI that we maintain including PHI we created or received prior to the effective date of the revised notice. Any revised notice will be mailed to you or provided upon request.

Step Into Recovery Centers INC is required by law to maintain the privacy of PHI. Step Into Recovery Centers INC will comply with federal law and will comply with any state law that further limits or restricts the uses and disclosures discussed below. In order to comply with these state and federal laws, Step Into Recovery Centers INC has adopted policies and procedures that require its employees to obtain, maintain, use and disclose PHI in a manner that protects client privacy.

### **USES AND DISCLOSURES WITH YOUR AUTHORIZATION**

Except as outlined below, Step Into Recovery Centers INC will not use or disclose your PHI without your written authorization. The authorization form is available from Step Into Recovery Centers INC (at the address and phone number below). You have the right to revoke your authorization at any time, except to the extent that Step Into Recovery Centers INC has taken action in reliance on the authorization.

The law permits Step Into Recovery Centers INC to use and disclose your PHI for the following reasons without your authorization:

**For Your Treatment:** We may use or disclose your PHI to physicians, psychologists, nurses and other authorized healthcare professionals who need your PHI in order to conduct an examination, prescribe medication, or otherwise provide health care services to you.

**To Obtain Payment:** We may use or disclose your PHI to insurance companies, government agencies, or health plans to assist us in getting paid for our services. For example, we may release information such as dates of treatment to an insurance company in order to obtain payment.

For Our Health Care Operations: We may use or disclose your PHI in the course of activities necessary to support our health care operations such as performing quality checks on your employee services. We may also disclose PHI to other persons not in Step Into Recovery Centers INC's workforce or to companies who help us perform our health services (referred to as "Business Associates") we require these business associates to appropriately protect the privacy of your information.

As Permitted or Required By The Law: In some cases, we are required by law to disclose PHI. Such as disclosers may be required by statute, regulation court order, government agency, we reasonably believe an individual to be a victim of abuse, neglect, or domestic violence: for judicial and administrative proceedings and enforcement purposes.

**For Public Health Activities:** We may disclose your PHI for public health purposes such as reporting communicable disease results to public health departments as required by law or when required for law enforcement purposes.

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For Health Oversight Activities: We may disclose your PHI in connection with governmental oversight, such as for licensure, auditing, and the administration of government benefits.

**To Avert Serious Threat to Health and Safety:** We may disclose PHI if we believe in good faith that doing so will prevent or lessen a serious or imminent threat to the health and safety of a person or the public.

**Disclosures of Health-Related Benefits or Services:** Sometimes we may want to contact you regarding service reminders, health-related products or services that may be of interest to you, such as health care providers or settings of care or to tell you about other health-related products or services offered at Step Into Recovery Centers INC. You have the right not to accept such information.

**Incidental Uses and Disclosures:** Incidental uses and disclosures of PHI are those that cannot be reasonably prevented are limited in nature and that occur as a by-product of a permitted use or disclosure. Such incidental uses and disclosures are permitted as long as Step Into Recovery Centers INC use reasonable safeguards and use or disclose only the minimum amount of PHI necessary.

**To Personal Representatives:** We may disclose PHI to a person designated by you to act on your behalf and make decisions about your care in accordance with state law. We will act according to your written instructions in your chart and our ability to verify the identity of anyone claiming to be your personal representative.

To Family and Friends: We may disclose PHI to persons that you indicate are involved in your care or the payment of care. These disclosures may occur when you are not present, as long as you agree and do not express an objection. These disclosures may also occur if you are unavailable, incapacitated, or facing an emergency medical situation and we determine that a limited disclosure may be in your best interest. We may also disclose limited PHI to a public or private entity that is authorized to assist in disaster relief efforts in order for that entity to locate a family member or other person that may be involved in caring for you. You have the right to limit or stop these disclosures.

### YOUR RIGHTS CONCERNING PRIVACY

Access to Certain Records: You have the right to inspect and copy your PHI in a designated record set except where State law may prohibit client access. A designated record set contains medical and billing and case management information. If we do not have your PHI recordset but know who does, we will inform you how to get it. If our PHI is a copy of the information maintained by another health care provider, we may direct you to request the PHI from them. If Step Into Recovery Centers INC produces copies for you, we may charge you up to \$1.00 per page up to a maximum fee of \$50.00. Should we deny your request for access to the information contained in your designated record set, you have the right to ask for the denial to be reviewed by another healthcare professional designated by Step Into Recovery Centers INC.

Amendments to Certain Records: You have the right to request certain amendments to your PHI if, for example, you believe

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a mistake has been made or a vital piece of information is missing. Step Into Recovery Centers INC is not required to make the requested amendments and will inform you in writing of our response to your request.

**Accounting of Disclosures:** You have the right to receive an accounting of disclosures of your PHI that were made by Step Into Recovery Centers INC for a period of six (6) years prior to the date of your written request. This accounting does not include for purposes of treatment, payment, health care operations, or certain other excluded purposes, but includes other types of disclosures, including disclosures for public health purposes or in response to a subpoena or court order.

**Restrictions:** You have the right to request that we agree to restrictions on certain uses and disclosures of your PHI, but we are not required to agree to your request. You cannot place limits on uses and disclosures that we are legally required or allowed to make.

**Revoke Authorizations:** You have the right to revoke any authorizations you have provided, except to the extent that Step Into Recovery Centers INC has already relied upon the prior authorization.

**Delivery by Alternate Means or Alternate Address:** You have the right to request that we send your PHI by alternate means or to an alternate address.

Complaints & How to contact us: If you believe your privacy rights have been violated, you have the right to file a complaint by contacting Step Into Recovery Centers INC at the address and/or phone number indicated below. You also have the right to file a complaint with the Secretary of the United States Department of Health and Human Services in Washington, D.C. Step Into Recovery Centers INC will not retaliate against you for filing a complaint.

If you believe your privacy rights have been violated, you may make a complaint by contacting\_\_\_\_\_\_, HIPAA Privacy Officer at (\_\_\_\_\_) \_\_\_\_ or the Secretary for the Department of Health and Human Services. No individual will be retaliated against for filing a complaint.

The U.S.Department of Health and Human Services 200 Independence Avenue, S.W.

Washington, D.C. 20201

Toll-Free: 1-877-696-6775

#### **RESTRICTION REQUEST:**

I request a restriction on the Use or Disclosure of my following information:

n/a

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### CLIENT TO BE GIVEN A COPY ALONG WITH A COPY TO FILED IN CLIENT CHART

I acknowledge that I have received a copy of this notice regarding the use and disclosure of my health information.

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Jorge Marrero (participant), 03/30/2024 05:55 PM

Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Consent for Reporting Communicable Diseases

I hereby give my permission to release to the California Public Health Department, Disease Control Division any information regarding the below:

California Statutes provide that any attending practitioner licensed in Florida to practice medicine who diagnoses or suspects the existence of a communicable disease among humans or from animals to humans shall immediately report that fact to the Department of Public Health.

The Public Health Unit serves as the department's representative in this reporting requirement.

Modifiable diseases or conditions which are to be reported immediately to the County Health unit are listed below:

 Outbreaks of any disease, any case, cluster of cases, or exposure to an infectious or non-infectious disease, condition, or agent found in the general community or any defined setting (e.g., hospital, school, other institution) not listed that is of urgent public health significance

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- Anthrax
- · Amebic encephalitis
- Arboviral diseases not otherwise listed
- Botulism, foodborne, wound, and unspecified
- Brucellosis
- Chikungunya fever, locally acquired
- Cholera (Vibrio cholerae type O1)
- Dengue fever
- Diphtheria
- Glanders
- Haemophilus influenzae invasive disease in children <5 years old</li>
- Hantavirus infection
- Hemolytic uremic syndrome (HUS)
- Hepatitis A
- Herpes B virus, possible exposure

- Influenza A, novel or pandemic strains
- Influenza-associated pediatric mortality in children <18 years old</li>
- Listeriosis
- Measles (rubeola)
- Melioidosis
- Meningococcal disease
- Neurotoxic shellfish poisoning
- Paratyphoid fever
   (Salmonella serotypes
   Paratyphi A, Paratyphi B,
   and Paratyphi C)
- Pertussis
- Plague
- Poliomyelitis
- Rabies, animal or human
- Rabies, possible exposure
- Ricin toxin poisoning
- Rubella

- Severe acute respiratory disease syndrome (SARS) associated with coronavirus infection
- Smallpox
- Staphylococcal enterotoxin B poisoning
- Staphylococcus aureus infection, intermediate or full resistance to vancomycin (VISA, VRSA)
- Syphilis in pregnant women and neonates
- Tularemia
- Typhoid fever (Salmonella serotype Typhi)
- Typhus fever, epidemic
- Vaccinia disease
- Venezuelan equine encephalitis
- Viral hemorrhagic fevers
- Yellow fever
- Zika fever

Other: n/a

Modifiable diseases or conditions which are to be reported within 48 hours to the County Health unit are listed below:

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- Acquired immune deficiency syndrome (AIDS)
- Arsenic poisoning
- Babesiosis
- Botulism, infant
- California serogroup virus disease
- Campylobacteriosis
- Cancer, excluding nonmelanoma skin cancer and including benign and borderline intracranial and CNS tumors
- Carbon monoxide poisoning
- Chancroid
- Chikungunya fever
- Chlamydia
- · Ciguatera fish poisoning
- · Congenital anomalies
- Conjunctivitis in neonates
   <14 days old</li>
- Creutzfeldt-Jakob disease (CJD)
- Cryptosporidiosis
- Cyclosporiasis
- Eastern equine encephalitis
- Ehrlichiosis/anaplasmosis
- Escherichia coli infection, Shiga toxin-producing
- Giardiasis, acute

- Gonorrhea
- Granuloma inguinale
- Hansen's disease (leprosy)
- Hepatitis B, C, D, E, and G
- Hepatitis B surface antigen in pregnant women and children <2 years old</li>
- Herpes simplex virus (HSV)
   in infants <60 days old with
   disseminated infection and
   liver
   involvement; encephalitis;
   and infections limited to skin,
   eyes, and mouth; anogenital
   HSV in children <12 years
   old</li>
- Human immunodeficiency virus (HIV) infection
- HIV-exposed infants <18 months old born to an HIVinfected woman
- Human papillomavirus (HPV)-associated laryngeal papillomas or recurrent respiratory papillomatosis in children <6 years old; anogenital papillomas in children ≤12 years old
- Lead poisoning (blood lead level ≥5 µg/dL)
- Legionellosis
- Leptospirosis
- Lyme disease

- Lymphogranuloma venereum (LGV)
- Malaria
- Meningitis, bacterial or mycotic
- Mercury poisoning
- Mumps
- Neonatal abstinence syndrome (NAS)
- Pesticide-related illness and injury, acute
- Psittacosis (ornithosis)
- Q Fever
- Rocky Mountain spotted fever and other spotted fever rickettsioses
- St. Louis encephalitis
- Salmonellosis
- Saxitoxin poisoning (paralytic shellfish poisoning)
- Shigellosis
- Streptococcus pneumoniae invasive disease in children <6 years old
- Syphilis
- Tetanus
- Trichinellosis (trichinosis)
- Tuberculosis (TB)
- Varicella (chickenpox)
- Vibriosis (infections of Vibrio species and closely related organisms, excluding Vibrio cholerae type O1)
- West Nile virus disease

Other: n/a

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JM

Jorge Marrero (participant), 03/30/2024 05:53 PM Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Drug and Alcohol Use Policy

I, Jorge Marrero hereby agree to participate fully in all aspects of my treatment while at Step Into Recovery Centers INC.

I understand that while I am in treatment at Step Into Recovery Centers INC, I am expected to:

Please initial the following statements:

- I understand that if I am prescribed any medication by any provider, I am expected to inform my attending clinician immediately.
- JM Abstain from the use of all illegal/non-prescribed substances and alcohol.
- JM I understand that frequent and random urinalysis and random breathalyzers are part of substance abuse treatment.
- JM I agree to provide a urine sample and/or breathalyzer upon request.
- JM I understand the refusal to provide a urinalysis or a breathalyzer when requested will be considered positive and may lead to discharge from the program.
- I understand that absolutely no alcohol, drugs, or drug paraphernalia is permitted on the premises. I understand that anyone suspected of being under the influence of drugs or alcohol or who possesses any illicit drugs or alcohol may be required to leave the program immediately.
- JM I understand that I cannot wear any clothing that glorifies or endorses the use of alcohol or drugs.

The above conditions have been explained to me and I fully understand my obligations while in treatment at Step Into Recovery Centers INC and agree to abide by the conditions stated above.

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Jorge Marrero (participant), 03/30/2024 05:53 PM

Staff present: Sandy Rosa

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Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Group Confidentiality

To reinforce the feelings of closeness and willingness to share with others your feelings, thoughts, and consequences of your dependency, confidentiality is a must in group therapy. Use this as your golden rule: **What is said in Group**, **stays in Group** To break this rule violates the trust of the total group and the effectiveness of group therapy is lost.

The following guidelines will help you maintain this rule:

- 1. Group issues are not discussed with others outside your group.
- 2. Do not discuss group issues with your roommate unless he/she is in your group.
- 3. Do not discuss at any outside meetings or places where others may overhear you.

Your group therapists have the same responsibilities for group confidentiality as you, with the exception that your therapists share group issues and your participation in the group process with other staff members. This is a vital part of the staff team's approach to assist you in your recovery.

The staff values your confidentiality so highly that anyone who breaks confidentiality - whether to another patient of Step Into Recovery Centers INC or to family, significant others, etc., may be subject to discharge from this program.

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Jorge Marrero (participant), 03/30/2024 05:54 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Liability Waiver for Gym, Pool, and Sporting Events

The undersigned and the undersigned's heirs, executors, and administrators hereby waive and forever release and discharge Step Into Recovery Centers INC, its owners, staff, and sponsors of and from any and all claims, suits, or rights for damages for personal property damage and/or physical injury which may be sustained or which occurs during participation in physical and/or recreational activities at either the gym or the pool utilized by or at Step Into Recovery Centers INC that may occur to or from the physical and/or recreational activity, whether or not such injury or property damage or loss is caused by, is connected to, or arises out of any acts or omissions or the negligence of Step Into Recovery Centers INC, its owners, staff, and sponsors.

According to Federal Regulations for Client Confidentiality and Protected Health Information, I agree not to disclose to any and all persons while at the gym that I am a client of Step Into Recovery Centers INC, about my own or others' purpose for being at and/or participating in any and all activities.

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Jorge Marrero (participant), 03/30/2024 05:54 PM

Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Notice of Privacy Practices

### Your Information. Your Rights. Our Responsibilities.

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.

# **Your Rights**

When it comes to your health information, you have certain rights. This section explains your rights and some of our responsibilities to help you.

### Get an electronic or paper copy of your medical record

- You can ask to see or get an electronic or paper copy of your medical record and other health information we have about you. Ask us how to do this.
- We will provide a copy or a summary of your health information, usually within 30 days of your request. We may charge a reasonable, cost-based fee.

### Ask us to correct your medical record

- You can ask us to correct health information about you that you think is incorrect or incomplete. Ask us how to do
  this.
- We may say "no" to your request, but we'll tell you why in writing within 60 days.

### Request confidential communications

- You can ask us to contact you in a specific way (for example, home or office phone) or to send mail to a different address.
- We will say "yes" to all reasonable requests.

#### Ask us to limit what we use or share

- You can ask us **not** to use or share certain health information for treatment, payment, or our operations.
  - We are not required to agree to your request, and we may say "no" if it would affect your care.
- If you pay for a service or health care item out-of-pocket in full, you can ask us not to share that information for the

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purpose of payment or our operations with your health insurer.

• We will say "yes" unless a law requires us to share that information.

#### Get a list of those with whom we've shared information

- You can ask for a list (accounting) of the times we've shared your health information for six years prior to the date you ask, who we shared it with, and why.
- We will include all the disclosures except for those about treatment, payment, and health care operations, and certain other disclosures (such as any you asked us to make). We'll provide one accounting a year for free but will charge a reasonable, cost-based fee if you ask for another one within 12 months.

### Get a copy of this privacy notice

• You can ask for a paper copy of this notice at any time, even if you have agreed to receive the notice electronically. We will provide you with a paper copy promptly.

### Choose someone to act for you

- If you have given someone medical power of attorney or if someone is your legal guardian, that person can exercise your rights and make choices about your health information.
- We will make sure the person has this authority and can act for you before we take any action.

### File a complaint if you feel your rights are violated

- You can complain if you feel we have violated your rights by contacting us using the information on page 1.
- You can file a complaint with the U.S. Department of Health and Human Services Office for Civil Rights by sending a letter to 200 Independence Avenue, S.W., Washington, D.C. 20201, calling 1-877-696-6775, or visiting <a href="https://www.hhs.gov/ocr/privacy/hipaa/complaints/">www.hhs.gov/ocr/privacy/hipaa/complaints/</a>.
- We will not retaliate against you for filing a complaint.

### **Your Choices**

For certain health information, you can tell us your choices about what we share. If you have a clear preference for how we share your information in the situations described below, talk to us. Tell us what you want us to do, and we will follow your instructions.

In these cases, you have both the right and choice to tell us to:

- · Share information with your family, close friends, or others involved in your care
- Share information in a disaster relief situation
- Include your information in a hospital directory
- Contact you for fundraising efforts

If you are not able to tell us your preference, for example, if you are unconscious, we may go ahead and share your information if we believe it is in your best interest. We may also share your information when needed to lessen a serious and imminent threat to health or safety.

In these cases we never share your information unless you give us written permission:

- Marketing purposes
- Sale of your information

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Most sharing of psychotherapy notes

#### In the case of fundraising:

We may contact you for fundraising efforts, but you can tell us not to contact you again.

### **Our Uses and Disclosures**

How do we typically use or share your health information? We typically use or share your health information in the following ways.

#### Treat you

• We can use your health information and share it with other professionals who are treating you.

Example: A doctor treating you for an injury asks another doctor about your overall health condition.

### Run our organization

• We can use and share your health information to run our practice, improve your care, and contact you when necessary.

Example: We use health information about you to manage your treatment and services.

### Bill for your services

• We can use and share your health information to bill and get payment from health plans or other entities.

Example: We give information about you to your health insurance plan so it will pay for your services.

How else can we use or share your health information? We are allowed or required to share your information in other ways – usually in ways that contribute to the public good, such as public health and research. We have to meet many conditions in the law before we can share your information for these purposes.

For more information see www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/index.html.

### Help with public health and safety issues

- We can share health information about you for certain situations such as:
  - Preventing disease
  - Helping with product recalls
  - · Reporting adverse reactions to medications
  - Reporting suspected abuse, neglect, or domestic violence
  - · Preventing or reducing a serious threat to anyone's health or safety

### Do research

• We can use or share your information for health research.

### Comply with the law

• We will share information about you if state or federal laws require it, including with the Department of Health and Human Services if it wants to see that we're complying with federal privacy law.

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### Respond to organ and tissue donation requests

• We can share health information about you with organ procurement organizations.

#### Work with a medical examiner or funeral director

• We can share health information with a coroner, medical examiner, or funeral director when an individual dies.

### Address workers' compensation, law enforcement, and other government requests

- We can use or share health information about you:
  - For workers' compensation claims
  - For law enforcement purposes or with a law enforcement official
  - · With health oversight agencies for activities authorized by law
  - For special government functions such as military, national security, and presidential protective services

### Respond to lawsuits and legal actions

• We can share health information about you in response to a court or administrative order, or in response to a subpoena.

# **Our Responsibilities**

- We are required by law to maintain the privacy and security of your protected health information.
- We will let you know promptly if a breach occurs that may have compromised the privacy or security of your information.
- We must follow the duties and privacy practices described in this notice and give you a copy of it.
- We will not use or share your information other than as described here unless you tell us we can in writing. If you tell us we can, you may change your mind at any time. Let us know in writing if you change your mind.

For more information see www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/noticepp.html.

### **Changes to the Terms of This Notice**

We can change the terms of this notice, and the changes will apply to all information we have about you. The new notice will be available upon request, in our office, and on our web site.

Effective Date: October 11, 2013

### This Notice of Privacy Practices applies to the following organizations.

Step Into Recovery Centers INC

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Jorge Marrero (participant), 03/30/2024 05:54 PM Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Program Rules

- 1. The use of alcohol or other drugs is grounds for immediate discharge from the program.
- 2. Possession of weapons, sharp objects, acts of violence, or threats of violence are grounds for immediate discharge.
- 3. Smoking, vaping, or the use of smokeless tobacco products are allowed in designated outside areas only.
- 4. All Clients must sign out and in whenever they leave or return, as well as their destination.
- 5. Clients must attend all treatment activities unless excused by staff.
- 6. If you drive your car to the facility, keys must be turned into and kept by staff at all times. The use of your vehicle is by staff permission only.
- 7. Negative contracts involving major rule violations not reported to staff will result in consequences or discharge.
- 8. Clients will respect the personal property of other Clients and staff. Clients will not borrow the property of others.
- 9. Clients are responsible for their behavior and are expected to communicate, cooperate, and show respect to other Clients and staff.
- 10. Failure to abide by the rules may result in the restriction of privileges. In more serious cases, repeated violations, or disregard for program rules will result in an administrative discharge.
- 11. Being on time for all scheduled activities is required.
- 12. All treatment assignments are to be completed in a timely manner.
- 13. All assigned work responsibilities must be completed.
- 14. When you do not know what to do, do not assume.....ask the staff.
- 15. No profanity or verbal abuse of staff or other Clients is allowed.
- 16. Gambling is not permitted.
- 17. Logos on clothing that are explicit, gang, or drug-related are not permitted.
- 18. No tank tops, halter-tops, backless or low-cut clothing. No short shorts or other tight clothing is permitted.
- 19. Undergarments must be worn at all times.
- 20. No cameras, tape recorders, or other recording devices are permitted.
- 21. No material other than recovery related material.
- 22. Knowledge and awareness of all rules are expected.
- 23. All passes and clinical visits must be approved by the clinical staff and the Clinical Director.
- 24. All pass requests must be turned in weekly to the designated staff member each week.
- 25. No perfumes or any glass bottles are permitted.
- 26. No straight edge razors are permitted, electric razors are permitted.

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- 27. No alcohol-based hand sanitizers are permitted.
- 28. No stuffed animals are permitted.
- 29. No safety pins or knives are permitted.
- 30. No mouthwash with alcohol is permitted.
- 31. I understand that if I am suspected of using alcohol/drugs, I will be asked to undergo a blood and/or urine test. If the results are positive, I may be asked to leave the program with an appropriate referral.
- 32. I am aware that regular attendance is a requirement of the program; I understand that breaking this rule can result in discharge from the program.
- 33. I understand that information discussed in groups is confidential and should not be discussed outside of the program.

Behavior that undermines treatment rules and expectations will not be tolerated. Violation of these rules will result in consequences and may result in dismissal from the program. Illegal activity is subject to criminal prosecution.

Step Into Recovery Centers INC rules have been explained to me so that I understand them and I have received a copy of these rules.

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Jorge Marrero (participant), 03/30/2024 05:54 PM

Staff present: Sandy Rosa

Marked Closed by: Ashley Banali, 05/17/2024 12:41 PM

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## Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC (GMT-08:00) Pacific Time (US &

Canada)

## **Step Into Recovery Centers INC**

## Assignment of Benefits / Release of Medical Information

I hereby authorize and request that payment of benefits by my Insurance Company(s), Anthem Blue Cross, be made directly to Step Into Recovery Centers INC for services furnished to me or my dependent. I understand that my Insurance Company may only cover a portion of the total bill. I further understand that I may be responsible for all charges not covered by this assignment.

In addition, I authorize Step Into Recovery Centers INC to disclose any and all written information from the above named to my above named Insurance Company and/or its designated representatives, or other financially responsible parties; at the determination of Step Into Recovery Centers INC. Such disclosure shall be for reimbursement purposes for those services received.

I hereby release Step Into Recovery Centers INC and its officers, agents, employees, and any clinician associated with my case from all liability that may arise as a result of the disclosure of information to the above named Insurance Company(s) or their designated representatives.

By signing this Assignment of Benefits and Release of Information, I acknowledge:

- I am aware and understand that this authorization will not be used unless the above-named Insurance Company(s) or their designated representatives request records of information for reimbursement purposes, or seek to take action for the referred payment for treatment services.
- I agree to participate and assist Step Into Recovery Centers INC or its designated representatives with any appeal process necessary to collect payment for the services rendered.
- I am aware and have been advised of the provisions of Federal and State Statutes, rules, and regulations that provide for my right to the confidentiality of these records.
- I understand that this assignment and authorization is subject to revocation at any time except to the extent that action has been taken in reliance thereon. In any event, this authorization will expire once reimbursement for services rendered is complete.
- Step Into Recovery Centers INC is acting in filing for insurance benefits assigned to Step Into Recovery Centers INC and it can assume no responsibility for guaranteeing payment of any charges from the Insurance Company(s).
- Billing may be done by a firm contracted by Step Into Recovery Centers INC for billing and collection purposes.
- Step Into Recovery Centers INC is appointed by me to act as my representative and on my behalf in any proceeding that may be necessary to seek payment from my insurance carrier.
- Should an overpayment take place, a refund check will be mailed to the authorized party that is due the overpayment.
- Step Into Recovery Centers INC shall be entitled to the full amount of its charges without offset.

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I acknowledge receipt of a completed and signed copy of this assignment and release form:

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Jorge Marrero (participant), 07/22/2024 05:50 AM

Staff present: Jennifer Rosa, Administrator

Jennifer Rosa, Administrator (Staff), 07/22/2024 05:50 AM

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#### Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

# Step Into Recovery Centers INC Coordination of Benefits and Pre-existing Conditions

This will confirm that upon admission to Step Into Recovery Centers INC, I, Jorge Marrero:

☐ Have been employed for the past eighteen months and do not have Cobra coverage;

☐ Am presently unemployed, but did not work within the past eighteen months for the company identified below, but do not have Cobra coverage;

☐ Am presently employed with n/a (employer), but DO NOT have any hospital/medical/health insurance coverage;

☐ The only benefits available to me during my stay at Step Into Recovery Centers INC is from n/a, (Name of Insurance);

☐ I have never been treated for this condition prior to my admission to Step Into Recovery Centers INC;

☐ Enrolled as a dependent of n/a, who is my n/a (Relationship).

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Jorge Marrero (participant), 07/22/2024 05:50 AM Staff present: Jennifer Rosa, Administrator

Jennifer Rosa, Administrator (Staff), 07/22/2024 05:50 AM

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# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

#### **Golden Thread**

Goal: Enhance ability to effectively cope with the full variety of life's worned anxieties.	04/04/2024 rries	in progress	04/04/202
Objective: Complete psychological testing or objective questionnaires assessing the client's anxiety.	o4/04/2024 of for		
Intervention: Administer psychological tests or objective measures	04/04/2024 to		
help assess the nature and degree of the client's worry and anxiety		ct on	
functioning (e.g., the Penn State Worry Questionnaire; OQ-45.2; Sy	mptom Checkl	ist-90-R;	
Beck Anxiety Inventory; Hamilton Anxiety Rating Scale; or State-Tra	ait Anxiety Inve	ntory);	
evaluate the results and give feedback to him/her; re-administer as treatment response.	needed to asso	ess	
·	04/04/2024		
Objective: A standardized outcomes measure assessment will be			
completed on date of admission and per assessment schedule therea	after.		
Intervention: Staff will administer the assessment to client.	04/04/2024		
	04/04/2024	_	

Date Established Status

Updated At

## Posttraumatic Stress Disorder (PTSD) - (Active)

Clinical: Treatment Plan	05/07/2024	Active	05/07/2024
Goal: Reduce the negative impact that the traumatic event has had on	05/07/2024	in progress	05/07/2024
many aspects of life and return to the pretrauma level of functioning.			
Objective: A standardized outcomes measure assessment will be	05/07/2024		
completed on date of admission and per assessment schedule thereafte	r.		
Intervention: Staff will administer the assessment to client.	05/07/2024		
Status: Open	05/07/2024		
	05/14/2024		

#### **Unipolar Depression - (Active)**

Clinical: Treatment Plan	05/07/2024	Active	05/07/2024
Goal: Develop healthy thinking patterns and beliefs about self, others, and	05/07/2024	in progress	05/07/2024

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#### the world that lead to the alleviation and help prevent the relapse of depression.

Objective: A standardized outcomes measure assessment will be	05/07/2024
completed on date of admission and per assessment schedule there	after.
Intervention: Staff will administer the assessment to client.	05/07/2024
Status: Open	05/07/2024
	05/14/2024

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#### **Insurance Information**

Insurance Policy No. Effective Date Termination Date Status Insurance Type/Priority

Anthem Blue Cross LTB203W1511 Active

9

Rx Name Rx Group Rx BIN Rx PCN Rx Phone Plan Period

**Claims** 

Street Address 1 Street Address 2 Claims Fax

PO Box 8504

City State ZIP Code Country

Mason 45040

Subscriber Relationship of Patient to Subscriber SSN DOB Gender

Jorge Marrero Self \*\*\*-\*\*-2030 04/10/1980 Male

Subscriber Address Street 2 Subscriber City
2404 N Brighton St C Burbank

Subscriber Address Zip Subscriber Address State Subscriber Address Country

91504 CA

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## **Vital Signs**

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

**Blood Pressure Blood Pressure** 

Date Systolic Diastolic Temperature Oxygen Saturation Pulse Respiration Comments Logged By Logged At

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# **Glucose Logs**

No records available.

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## Weights

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

No height/weight records.

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## Heights

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

Date Height Logged By Logged At

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# **Orthostatic Vital Signs**

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

Lying Sitting Standing

Date BP HR BP HR BP HR Resp. Temp. O2 Comments Logged At Logged By

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#### CIWA-Ar

No CIWA-Ar assessment logged

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#### CIWA-B

No CIWA-B assessment logged

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#### cows

No COWS assessment logged

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## **Medications Brought In**

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

No Medications Brought In Logged.

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#### **Rounds**

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

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Canada)

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#### **MAT Orders**

# Jorge Marrero ♂ SIR2024-27

Birthdate: 04/10/1980

Allergies: No Known Allergies/NKA

Admission: 03/30/2024 Care Team

Location: Step Into Recovery Centers INC

(GMT-08:00) Pacific Time (US &

Canada)

Current/Active Order No Current/Active Order.

**Order History** 

Start Date End Date Phase Order Type Medication Dose Instructions Ordered By Entered By Discontinued By Status

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