



### Client Information

Name \_\_\_\_\_ Birthday \_\_\_\_\_

Address \_\_\_\_\_

Phone numbers: (home) \_\_\_\_\_ (cell) \_\_\_\_\_  
(ok to call? Y N) (ok to call? Y N)

email address: \_\_\_\_\_ (ok to email? Y N) Male ☐ Female ☐

Marital Status: Single Married Separated Divorced

NAME OF SPOUSE: \_\_\_\_\_

Occupation: \_\_\_\_\_

Employer: \_\_\_\_\_

Highest level of education: \_\_\_\_\_

Religious preference: \_\_\_\_\_ Do you regularly attend a place of worship? \_\_\_\_\_

Person to contact in case of emergency: \_\_\_\_\_ Relationship: \_\_\_\_\_

Home phone : \_\_\_\_\_

Work phone: \_\_\_\_\_

### FAMILY

	<u>AGE WHEN YOU MARRIED</u>	<u>DURATION OF MARRIAGE</u>	<u>REASON FOR TERMINATION</u>	<u>CHILDREN NAMES &amp; AGES</u>	
<u>1<sup>st</sup></u> <u>MARRIAGE:</u>					
<u>2<sup>nd</sup></u> <u>MARRIAGE:</u>					

### Medical information

Physician's Name \_\_\_\_\_ Phone number \_\_\_\_\_

Relevant health history: (hospitalizations, surgeries, major illnesses or conditions) \_\_\_\_\_

List any medications you are currently taking: \_\_\_\_\_

### Information related to counseling

Who may I thank for your referral? \_\_\_\_\_

Have you ever consulted a counselor before?      Yes      No      With whom? \_\_\_\_\_

Are you currently in counseling elsewhere?      Yes      No      With whom? \_\_\_\_\_

Outcome and/or Diagnosis : \_\_\_\_\_

Have you ever considered suicide?      Yes      No      Have you ever attempted suicide?      Yes      No

Do you have an addiction?      Yes      No      Uncertain      (Explain on reverse side)

Have you had any previous trauma?      Yes      No      Uncertain      (Explain on reverse side)

What concern has caused you to seek counseling at this time?

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What has been done about your concern up to this point?

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For each concern explained above, what changes/improvements will be signs of progress?

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CURRENT ISSUES :Check any of the following symptoms or problems that you are experiencing or have experienced in the past.

Present/Past

☐ ☐ Abortion

☐ ☐ Addiction or Alcohol Abuse

☐ ☐ Anger

☐ ☐ Anxiety or Panic Attacks

☐ ☐ Childhood issues

☐ ☐ Compulsive Behaviors

☐ ☐ Depression

Present/Past

☐ ☐ Divorce, Separation

☐ ☐ Eating Problems

☐ ☐ Emotional Abuse

☐ ☐ Fears, Phobias

☐ ☐ Financial Problems

☐ ☐ Grief or Loss

☐ ☐ Loneliness

Present/Past

☐ ☐ Parenting Problems

☐ ☐ Sexual Problems

☐ ☐ Relational Problems

☐ ☐ Self-Esteem

☐ ☐ Spiritual Issues

☐ ☐ Withdrawal/Isolating

☐ ☐ Work Problems

Please Use an "X" on the scale below to indicate how distressing your problem(s) are to you.

| \_\_\_\_\_ |

1            2            3            4            5            6            7            8            9            10

Minimally Distressing

Moderately Distressing

Extremely Distressing



## Practice Policies

### **Benefits and Risks of Counseling**

Research has shown that therapy is beneficial for a wide variety of problems. The majority of people who receive counseling make significant improvements. However, it should be understood that some people do not report themselves as significantly improved at the end of treatment and a small percent report that they feel worse after receiving treatment. Therefore, as with any treatment, whether it is psychological or medical, therapy should only be entered with proper consideration. A client always has the right to inquire and choose treatment modalities as well as terminate counseling at any time.

### **Confidentiality**

Therapists have an ethical and moral obligation to keep information revealed in sessions confidential. The release of information regarding services is controlled by the client. In an emergency situation when there is imminent danger to the client or another person, the counselor may breach confidentiality. In addition, the Tennessee Law requires that suspected child or dependent adult/elder abuse be reported to the Department of Human Services. Otherwise, your counselor will only release information regarding your treatment if she has your written permission.

Limitations to confidentiality only apply in the following circumstances, where disclosure is required by law:

1. if I present an imminent threat of harm to myself or to others,
2. when there is an indication of abuse of a child or dependent adult,
3. if I become gravely disabled, and
4. by court subpoena.

When working with minors, Rooted Counselors generally will not share the content of sessions with parents/guardians, though they reserve the right to disclose information due to their clinical judgment, such as safety purposes or if therapeutic judgment warrants sharing content for the welfare and health of the minor. Due to Tennessee State Law, a release form from a minor client age 16 and up will be required prior to disclosure to a parent /guardian.

### **Professional Consultation**

In order to enhance your counseling and therapeutic experience, and to maintain the highest standards of care and accountability, collaborative consultations may take place within a professional context. Such consultation is typically provided with protection of client's identity.

### **Fee Policy**

**FEE FOR SERVICE: \$ 130.00 Client Initials: \_\_\_\_\_**

All intakes are up to 75 minutes and cost \$175.00. The fee for a 50-minute therapy session varies depending on the therapist and will be discussed prior to the intake session and written above. There will be a \$15.00 fee for returned checks. Rooted Counseling **does not** bill for sessions, and payments are due by the end of the day of the session.

**Clients will be charged in full for appointments not cancelled 24 hours prior to their appointment.**

### **Credit Card Policy**

Rooted Counseling keeps a credit card on file for each client in order to ensure on-time payment and payments for late cancels or missed sessions. Please see page 6 for more information.

### **Professional Services**

Rooted Counselors are available for counseling appointments at scheduled times throughout the week between the hours of 9am – 8pm (availability varies depending on therapist). Each therapist will provide his or her clients with a phone number and email to use for contact between sessions. If a client is unable to reach their therapist or counselor, and they are in crisis and feeling suicidal, overwhelmed, or unsafe, they should call the Crisis Help Line at 615-726-0125, the YWCA Domestic Violence Center at 615-242-1199, or go to their nearest emergency room.



## Non-Secure Communication Policy

### **Email Confidentiality Agreement**

When communication via email, it is important to remember that confidentiality is limited. By signing below, the client is saying that they have considered and understand the limitation of confidentiality and agree that the client is responsible for keeping their email account private to the extent that they desire for it to be private.

### **Text Messaging Agreement**

Rooted Counselors are not permitted to text message clients. Any therapeutic processing should be reserved for sessions and/or phone consultation. By signing below, the client is agreeing that they have considered and understand the limits of confidentiality and agree that the client is responsible for keeping their text messages private to the extent that they desire them to be private.

### **Phone Sessions**

In some circumstances, phone counseling sessions are scheduled. All phone time (scheduled or unscheduled) is billed at \$30 per quarter hour, starting after 5 minutes. Insurance companies do not reimburse phone sessions.

### **Professional Boundaries**

Rooted Counselors avoid any other relationships with their clients outside of the therapeutic relationship, such as personal relationship, business relationship, or similar. Beyond confidentiality requirements, professional boundaries also play a role in respecting the privacy of Rooted clients outside of therapy. For example, if a client sees their therapist in a public setting, the therapist will not initiate communication with their client.

### **Social Media**

Counselors at Rooted Counseling are prohibited from engaging in a personal virtual relationship with individuals with whom they have a current counseling relationship (e.g., through social and other media) – ACA Code of Ethics A.5.e.

**I give permission for the therapist to correspond with me via email.**

Yes \_\_\_\_ No \_\_\_\_

**I understand that email is not necessarily secure \_\_\_\_\_ (initials)**

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

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

Signature of Responsible Party(ies): \_\_\_\_\_ Date: \_\_\_\_\_

**If for any reason you are in need of immediate help and cannot get in touch with your therapist,  
please call the mobile crisis hotline at 615-244-7444.**



### Informed Consent

#### **Lane Beatty, MAMFT, LMFT**

Lane has a Master's degree in Marriage and Family Therapy from Richmond University in Atlanta, GA, and she is a Licensed Marriage and Family Therapist in the state of Tennessee. Lane utilizes a systemic and integrative approach in working with clients. Lane's experience and specialties include marriage issues, family issues, substance abuse and addiction issues, healthy sexuality, military families, premarital counseling as a Certified PREPARE/ENRICH assessor/counselor, codependency, spirituality, infidelity, parenting, relationships, divorce and step-families.

By signing this document, you agree to and understand all of the information and guidelines presented in this paperwork and any questions have been answered. You as the client, parent, or guardian understand your rights, and your signature indicates that you are consenting to counseling from the date this document is signed.

**Do you have any questions about fees, confidentiality, or other matters? Yes\_\_\_\_\_ No\_\_\_\_\_**  
**Do you agree with the conditions of provisions of these Practice Policies? Yes \_\_\_\_\_ No\_\_\_\_\_**

*I have read, understand, and accept the policies stated above.*

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Guardian's Signature if client is a minor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Guardian's Signature if client is a minor

\_\_\_\_\_  
Date



### Credit Card Information:

#### **Cancellation Policy**

Clients will be charged for appointments not cancelled 24 hours prior to their appointment time.

- If you are choosing to turn in receipts for insurance reimbursement, the missed/cancelled sessions will not be counted as a treatment session, so you will not be reimbursed for the session
- All clients are required to keep a credit card on file to pay for those cancelled/missed sessions.
- Late cancellations, no shows, and or no calls will be charged in full (plus 3.5% convenience fee) for the treatment sessions missed on the day of the scheduled session.
- These sessions will be charged the day of the session using the credit card number provided below.

#### **Credit Card Policy**

In addition to payment in cash or check, clients may choose to keep a credit card on file to pay for sessions.

**A 3.5% convenience fee will be added to the session fee for all credit card transactions.**

<b>Type of Credit Card:</b> <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> AMEX	<b>Name on Card:</b> _____ <b>Billing Zip Code:</b> _____ <b>Email for receipts:</b> _____
<b>Card Number:</b> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<b>Expiration Date:</b> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <b>CCV code:</b> _____	

**Would you like to use this credit card to pay for all sessions?                      YES                      NO**

*I authorize Rooted Counseling to make charges to my credit card for payment of counseling services when I do not provide cash or check for those sessions. I understand the cancellation policy and give Rooted Counseling Permission to charge any missed or cancelled session on the credit card listed above.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date