Client Information Form

**Today’s Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Client’s Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **DOB:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Home Street Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Apt.** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**City:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **State:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Zip:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Home Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Work Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Cell Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **E-mail:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If the client is a minor or an adult with a legal guardian, please provide the following information about the parent or legal guardian:

**Parent/Guardian’s name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **DOB:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Home street address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Apt.** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**City:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **State:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Zip:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Home Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Work Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Cell Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **E-Mail:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Preferred way to contact you:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Emergency Contact:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Phone**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

If we have to contact you, we will be discreet. However, are there any restrictions we should know about calling you? (For example: please do not call at work, please do not leave messages): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

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

**Personal and cultural information:** We want to provide services that respect your personal and cultural background. Providing the following information can help us to do that. This information, however, is optional. We will not deny you services if you choose to omit this information. If you have any questions about this, please ask.

**Race/Ethnicity:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Religion/Faith:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Country of Birth:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Sexual Orientation:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Marital Status:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Gender Identity:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Preferred pronouns:** he/his she/her they/their other

**How comfortable are you communicating in English?** Completely A little Not at all

**How comfortable are you reading in English?** Completely A little Not at all

**Our staff communicates in English. Will you need an interpreter?** Yes No

**Insurance Information**: Please provide as much information as you have.

**Insurance Provider:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Effective Date of Coverage:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Identification/policy #** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Group or Enrollment #** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Policy Holder:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Policy Holder’s DOB:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Is there another (secondary) insurance policy?** If so, please provide as much information as you have.

**Insurance Provider:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Effective Date of Coverage:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Identification/policy #** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Group or Enrollment #** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Policy Holder:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Policy Holder’s DOB:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I authorize the release of any medical or other information necessary to process claims submitted to the named insurer. I authorize payment of health insurance benefits to Behavioral Health Solutions, PA for services furnished to me or to the client named above.

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

Client’s Name Signature of Client Date

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

Name of Parent/Legal Guardian Signature of Parent/Legal Guardian Date

Revised April 2020

**Coordination of Care Record**

**Client’s Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **DOB:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date of admission to services:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Therapist:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
| **Do you have a primary care provider?**    Yes No | **Name of primary care provider:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Phone, fax, email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Do you have a psychiatrist?**  Yes No | **Name of psychiatrist:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Phone, fax, email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Do you have an attorney or case worker?**  Yes No | **Name of attorney or case worker:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Phone, fax, email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Do you have a probation officer?**  Yes No | **Name of probation officer:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Phone, fax, email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Please list any medications you are taking**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Prescription Name | Dosage | # Times Day | Date Started | Prescribed by |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Psychological Evaluation**

**Procedures, Risks and Benefits, and Limits to Confidentiality**

You have been referred to us for a psychological evaluation. These evaluations are conducted when a third party wants an independent assessment of your psychological functioning. This type of evaluation may be requested by attorneys, judges, probation officers, caseworkers with social services, or other people.

**Evaluation Procedures**

Typically, a psychological evaluation consists of one or more personal interviews, a number of psychological tests, and a review of certain background records or materials.

**About Our Appointments**

We take our appointments with you very seriously. We ask that you make every effort to keep your appointments with us. If you are unable to keep an appointment, please contact us to let us know. If we are unable to keep a scheduled appointment, we will contact you as soon as possible to let you know. It is your responsibility to keep your contact information current.

If you arrive more than 10 minutes late without advance notice we will have to reschedule your appointment and you will be considered a “No Show”.

**Fees**

We charge $175.00 per hour for interviews and record reviews. We also charge $175.00 per hour for preparation of reports and other significant documentation. We do not charge for the time that it takes you to complete psychological tests. However, some tests may have scoring fees charged by the test developer, and these scoring fees must be paid by you. We reserve the right to withhold communication of my verbal opinion and/or sending the final report until all charges are paid.

**Risks and Benefits**

You should know about the risks and benefits of psychological evaluation so that you may make an informed decision to participate in the evaluation process. Known benefits of psychological evaluations are: information to the client, the referral source, the treating professional, and/or others as authorized by the client; increased documentation or understanding of certain psychological issues. Known risks of psychological evaluation are: emotional discomfort in being interviewed or tested; and disagreement with evaluation results.

**Confidentiality**

We take confidentiality very seriously. In most situations, we will need written permission from you (an Authorization to Release Information) to share your personal information with other people. However, there are also limits to doctor – patient confidentiality, and in some situations we will have to share information with other people, even without your permission. These situations are: suspicion of child neglect or abuse; suspicion of neglect or abuse of a disabled adult; an appropriate court order; likely dangerous behavior to self or others; likely commission of a felony or violent misdemeanor; and the need for emergency medical treatment. In the event that any of these become an issue, we may to share some confidential information about you with others.

Revised April 2020

Psychological Evaluation (continued)

When you have been referred for evaluation by a third party, you will be asked to sign an authorization to release information about the evaluation to the referring party.

In North Carolina, records of persons who are referred by their attorneys are protected under the attorney – client privilege (except in Workers Compensation cases). If we are asked to prepare a report or testify in a legal manner by the referring attorney, the client gives up the privilege of confidentiality at that time. In North Carolina, records of persons who are court ordered to undergo psychological evaluation are not confidential, and results will be made known to the Court.

**Culturally appropriate services**

We appreciate the impact of a person’s culture and background on mental health services. We are dedicated to providing effective and equitable services that respect our clients’ cultural and personal backgrounds. Please let us know the aspects of your cultural and personal background that are important to you and which we should understand to best work with you.

**Language Appropriate services**

We appreciate the importance of communicating clearly with our clients and the importance of our clients understanding the services we provide. We communicate in English. If you, the client, or people who are necessary to the client’s evaluation do not feel comfortable communicating in English, let us know. If necessary, we will arrange for interpretive services.

**Drugs & Alcohol Policy**

Clients (and people with clients, such as friends or family members) must be sober when in our office. Clients or other people who appear to be under the influence of drugs or alcohol when they arrive for an appointment will be asked to leave. A client who is asked to leave for this reason will be considered a “No Show.”

**Children**

Children under the age of 16 must be supervised by a responsible adult at all times. We do not provide supervision. This includes when they use the coffee machine and restroom. Minors who can drive themselves are expected to act appropriately.

**Animals**

Service animals and well-behaved emotional support animals are permitted in our office. Animals brought with you must be in your control at all times. Although we love animals, not everyone who visits our office feels the same way.

**Medical Emergencies while at our office**

If you experience a medical emergency while at our office, we are obligated by law to seek emergency treatment on your behalf.

**Cell Phones**

We strive to provide a quiet and peaceful environment for everyone. Please have your devices on silent, and take phone calls outside. Revised April 2020

Psychological Evaluation (continued)

**Complaint Procedures**

Our practice does not discriminate against clients because of age, sex, marital/family status, race, color, religious beliefs, ethnic origin, place of residence, veteran status, physical disability, health status, sexual orientation, gender identity, or criminal record unrelated to present dangerousness. We will always take steps to advance and support the values of equal opportunity, human dignity, and racial/ethnic/cultural diversity. If you believe you have been discriminated against, please bring the matter to our attention immediately.

If you are dissatisfied with our response to your grievance/complaint or if you do not feel comfortable filing a grievance/complaint directly with us, you have the right to file a grievance/complaint with companies and agencies outside of Behavioral Health Solutions.

For **Blue Cross Blue Shield** members:

Call **BCBSNC Customer Service** at 1-877-258-3334

For **CIGNA** members:

Call **CIGNA Customer Service** at 1-800-997-1654

For **United Healthcare** Members:

Call **United Healthcare Customer Service** at 1-800-842-8000

For **AETNA** members:

Call **AETNA Customer Service** at 1-800-872-3862

If you believe a licensed professional at Behavioral Health Solutions has acted unethically, you have the right to file a complaint with the relevant licensing board. Psychologists in North Carolina are licensed by the **North Carolina Psychology Board**.

To file a complaint with the **North Carolina Psychology Board**:

* Complete a Complaint/Inquiry Form at www.ncpsychologyboard.org
* You may call the Psychology Board at 1-828-262-2258 for more information.

Clients with disabilities may also contact **Disability Rights North Carolina** at:

* 1-877-235-4210 or 919-856-2195.
* The mailing address is 2626 Glenwood Avenue, Ste. 550, Raleigh, NC 27608
* The website is www.disabilityrighsnc.org.

Psychological Evaluation (continued)

Consent for Evaluation

I hereby agree to participate in this evaluation. I agree to the terms described in this document. I understand that I have the right to refuse participation in this evaluation, and that I have the right to end my participation at any time.

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

Client’s Name Signature of Client Date

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

Name of Parent/Legal Guardian Signature of Parent/Legal Guardian Date

Revised April 2020

**Patient’s Rights**

* **Right to Receive Treatment:** You have the right to receive treatment, including access to medical care and habilitation, regardless of your age or your degree of mental health, intellectual and development disability, or substance abuse disability.
* **Right to Least Restrictive Environment**: You have the right to receive care in the least restrictive environment suitable to meet your needs.
* **Right to Privacy**: You have the right to privacy and the expectation that your personal information will be kept confidential.
* **Right to Review:** You have the right to review you records with the exception of records sent to us by a third party. You will need to contact the sender of those records.
* **Right to Participate:** You have the right to participate in the development of an individualized, person-centered treatment plan. To obtain a copy of your treatment plan, please see your therapist or the office manager.
* **Right to Be Informed**: You have the right to be informed in advance of potential risks and benefits of treatment, and to consent to or refuse treatment. If treatment is refused we will discuss if other treatment is possible. Refusal of consent shall not be used as the sole grounds for termination/threat of termination of service unless there are no other viable treatment options available. Consent may be withdrawn at any time.
* **Right to be Free from Invasion of Privacy and Threat:** You have the right to be free from unwarranted invasion of privacy and from the threat or fear of unwarranted suspension or expulsion from services.
* **Right to Advance Directive:** You have the right to fill out an Advance Directive, which describes how you want to be cared for if you are ever unable to decide or speak for yourself
* **Right to Request Restrictions:** You have the right to request restrictions on certain uses and disclosures of protected health information about you. However, we are not required to agree to a restriction you request.
* **Right to Receive Confidential Communication by Alternative Means and at Alternative Locations:** You have the right to request and receive confidential communications of protected health information by an alternative means and at alternative locations. (For example, you may not want a family member to know that you are seeing us. Upon your request, we will send your bills to another address.)
* **Right to Inspect and Copy:** You have the right to inspect and/or obtain a copy of protected health information in our mental health and billing records used to make decisions about you for as long as the protected health information is maintained in the record. If you would like a copy of all or part of our records about you, we will copy those pages at a rate of 25¢ per page. We will not permit you to take the record out of this office to copy it. We may deny your access to protected health information under certain circumstances, but in some cases, you may have this decision reviewed. On your request, we will discuss with you the details of the request and denial process.
* **Right to Amend:** You have the right to request an amendment of your protected health information for as long as the protected health information is maintained in the record. We may deny your request. On your request we will discuss with you the details of the amendment process.
* **Right to an Accounting:** You generally have the right to receive an accounting of disclosures of protected health information for which you have neither provided consent nor authorization. On your request, we will discuss with you the details of the accounting process.
* **Right to a Paper Copy:** You generally have the right to obtain a copy paper of the notice from us upon Request, even if you have agreed to receive the notice electronically.

**Patient’s Rights**

I have read, or have had read to me, the Patient’s Right. I have discussed any points that I did not understand, and I have had my questions answered fully.

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

Signature of client (or person acting for client) Date

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

Printed Name

Relationship to client

Self Parent Legal Guardian

**Notice of Privacy Practices**

This notice describes how mental health and medical information

about you may be used and disclosed. Please review it carefully.

The Health Insurance Portability and Accountability Act of 1996 (HIPPA) imposes numerous requirements on private practitioners concerning the use and disclosure of individual health information. We are required to provide you with this **Notice** about our privacy procedures. This notice explains when, why, and how we would use and or disclose your personal health information.

I­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­. **Uses and Disclosures for Treatment, Payment, and Health Care Operations**

We may use or disclose your protected health information (PHI), for treatment, payment, and healthcare operation purposes with your consent. To help clarify these terms, here are some definitions:

* *“PHI”* (Protected Health Information) refers to information in your health record that could identify you.

It can contain data about your past, present, or future health or condition, the provision of health care services to you, or the payment for such health care.

* *“Treatment”* is when we provide, coordinate or manage your health care and other services related to

your health care. An example of treatment would be when we consult with another health care provider, such as your family physician or another psychologist. Also, when your therapist is away from the office for a few days, he or she may have asked a fellow therapist to “cover” for him/her. This therapist will be available to you in emergencies. Therefore, he or she needs to know about you. Of course, this therapist is bound by the same laws and rules to protect your confidentiality. We will note all consultations in your clinical record.

* *“Payment* “is when we obtain reimbursement for your healthcare. Examples of payment are when we

disclose your PHI to your health insurer to obtain reimbursement for your healthcare or to determine eligibility or coverage.

* *“Health Care Operations”* are activities that relate to the performance and operation of our practice.

Examples of health care operations are quality assessment and improvement activities, business related matters such as audits and administrative services, case management and care coordination.

* *“Use”* applies only to activities within our office such as sharing, employing, applying, utilizing,

examining, and analyzing information that identifies you.

* *“Disclosure”* applies to activities outside of our office, such as releasing, transferring, or providing access

to information about you to other parties.

II. **Uses and Disclosures Requiring Authorization**

We may use or disclose PHI for purposes outside of treatment, payment, and health care operations when your appropriate authorization is obtained. An “authorization” (also known as a “Release of Information”) is written permission above and beyond the general consent that permits only specific disclosures. This includes times when your records need to be seen by another professional (for example, if you want a physician to have access to the record of your treatment here) or anyone else (for example, if you want a family member to know details about your treatment). In those instances when we are asked for information for purposes outside of treatment, payment and health care operations, we will obtain an authorization from you before releasing this information. We will also need to obtain an authorization before releasing your psychotherapy notes. *“Psychotherapy Notes”* are notes we have made about our conversation during a private, group, joint,

Notice of Privacy Practices (continued)

or family counseling session, which we have kept separate from the rest of your medical record. These notes are given a greater degree of protection than PHI.

You may revoke authorization to release PHI or psychotherapy notes at any time. Each revocation must be in writing. You may not revoke an authorization to the extent that (1) we have relied on that authorization;

or (2) if the authorization was obtained as a condition of obtaining insurance coverage, and the law provides the insurer the right to contest the claim under the policy.

III. **Uses and Disclosures Needing Neither Consent nor Authorization**

State and federal laws **require or allow** that we share your health information with others in specific situations without your consent. Prior to disclosing your health information, we will evaluate each request to ensure that only the minimum necessary information will be disclosed. We will ensure any required circumstances for disclosure are met before confidential information is disclosed.

We are required or allowed to disclose health information about you for the following reasons:

* If there is cause to suspect child abuse, neglect, dependency, or death as the result of maltreatment, we must make a report to the Director of the Department of Social Services. In this context, a child is considered “dependent” if he/she has no parent, guardian, or custodian responsible for his/her care, or if the child’s parent, guardian, or custodian is unable to provide for the child’s care or supervision and lacks an appropriate alternative child care arrangement;
* If information you give us gives us reasonable cause to believe that a disabled adult is in need of protective services, we must report this to the Director of the Department of Social Services.
* To avert a serious threat to your health or safety, or there is a likelihood that you will commit a felony or violent misdemeanor;
* In response to a court order or subpoena;
* For public health activities, such as for the purpose of preventing or controlling disease; For purpose of activities related to monitoring an FDA-regulated product, to a person subject to the jurisdiction of the FDA;
* For health oversight activities, including, but not limited to, civil, administrative, and criminal proceedings;
* To a coroner, for purposes of identifying a deceased person, determining cause of death, or other duties required by law, or to funeral directors so they may carry out their duties;
* To a physician or other health care provider who is providing emergency medical services;
* To determine eligibility for or entitlement to benefits under laws administered by the Secretary of Veterans Affairs;
* For certain military, national security, and intelligence purposes;
* To a correctional institution or other law enforcement official if you are in custody;
* For worker’s compensation purposes;
* To your next of kin, if disclosure about the fact of your admission or discharge is determined to be in your best interest;

Notice of Privacy Practices (continued)

* To an internal client advocate, if it is necessary for him/her to perform his/her monitoring and advocacy functions;
* For the purpose of filing a petition of involuntary commitment or a petition for the adjudication of incompetency of the client and the appointment of a guardian, if it is in your best interest;
* To the clerk of court, district attorney or prosecuting officer, and the attorney of record for the client, if you are a defendant in a criminal case and a mental examination has been court ordered;
* To an attorney who represents either Behavioral Health Solutions or one of our employees, if such information is relevant to litigation, the operations of the facility, or to the provision of services by the facility.
* To staff attorneys of the Attorney General’s office when the information is necessary to the performance of the statutory responsibilities of the Attorney General’s office;
* To the Attorney General’s office, if it subpoenas information relevant to a criminal investigation of Medical Assistance provider fraud;
* To another facility when it is necessary to coordinate appropriate and effective care, treatment or habilitation for you;
* To another facility to conduct payment activities, such as providing determination of eligibility or coverage, coordination of benefits, and claim management;
* To fulfill our responsibilities in your evaluation, management, supervision or treatment if you have been committed to outpatient treatment;
* When Behavioral Health Solutions has entered into a written agreement with someone to provide support services. Anyone providing support services must agree to safeguard and not further disclose this information;
* When an advance instruction for mental health treatment or confidential information from an advance instruction must be disclosed to a physician, psychologist, or other qualified professional to give effect to or provide treatment in accordance with the advance instruction;
* To a physician or treatment provider who referred you to our office;
* To your next of kin, family members with a legitimate role in your therapeutic services, or other person you designate, if they request information about your admission, transfer, discharge, decision to leave treatment, referrals, and appointment information for treatment after discharge. We will disclose this information only after we have notified you that this information has been requested;
* To an area authority or county program that is responsible for administering Medicaid or other sources of public healthcare funding, when the area authority or county program determines that it needs information to develop, manage, monitor or evaluate its network of qualified providers; or
* For general research or clinical, financial, or administrative audits, but only when the client’s identity cannot be identified directly or indirectly in reports from that research or audit.

Notice of Privacy Practices (continued)

IV. **Our Duties**

* We are required by law to maintain the privacy of PHI and to provide you with a notice of our legal duties and

privacy practices with respect to PHI.

* We reserve the right to change the privacy policies and practices described in this notice. Unless we notify you of

such changes, however, we are required to abide by the terms currently in effect.

* If we revise our policies and procedures, we will provide you a copy.

V. **Questions and Complaints**

If you have questions about this notice, disagree with a decision we make about access to your records, or have other concerns about your privacy rights, you may contact us at Behavioral Health Solutions at 919-419-0524. If you believe that your privacy rights have been violated and wish to file a complaint with us, you may send your written complaint to Behavioral Health Solutions, 5318 Highgate Drive, Durham, NC 27713.

You may also send a complaint to the Secretary of the U.S. Department of Health and Human Services.

The U.S. Department of Health and Human Services  
200 Independence Avenue, S.W.  
Washington, D.C. 20201  
877-696-6775

You have specific rights under the Privacy Rule. We will not retaliate against you for exercising your right to file a complaint.

This notice will go into effect on November 19, 2014. We reserve the right to change the terms of this notice and to make the new notice provisions effective for all PHI that we maintain. We will provide you with a revised notice.

**Notice of Privacy Practices**

**Acknowledgement of Receipt Form**

I have read, or have had read to me, the Notice of Privacy Practices. I have discussed any points that I did not understand, and I have had my questions answered fully.

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Patient or Representative’s Signature Date

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

Printed Name

If the acknowledgement is signed by a representative for the patient, the name of the patient and a description of such representative’s authority to act for the patient must be provided.

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Patient’s Name

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

Authority to act for patient (example: parent or legal guardian)

Revised 04/04/20