

Intake Packet for Adults

This packet includes:

- Personal History Questionnaire
- Office Policy and HIPAA privacy notices signature page. (you do not have to print this out)
- Signature Page

Link to insurance page: <http://willamettehealthandwellness.com/insurance/>

If using insurance, call your insurance provider to verify coverage

Questions to ask your insurance company prior to your first visit:

- Is Provider's name a part of my behavioral health *preferred provider* (PP) network?
 - If not a PP: Does my policy include *out of network* (OON) benefits?
 - What are my OON benefits?
- What is my PP or out of network *co-pay/co-insurance* and *deductible*?
 - If yes to *deductible*: What amount still needs to be satisfied?
 - What is a deductible?
 - To whom do I pay my deductible?
- Does my policy require *authorizations*?
 - If yes: How do I get the *authorization(s)*?
- Does my policy have *limitations*?
 - If yes: What are my limitations?

Link to fee schedule: <http://willamettehealthandwellness.com/fee-schedule/>

Come prepared for your appointment

Patients with incomplete paperwork may be asked to reschedule

Check List

- Bring the completed Personal History Questionnaire
- Read the office policies and HIPAA privacy notice
- Bring completed the signature page.
- Check our website for address and parking instructions

http://willamettehealthandwellness.com/wp-content/uploads/2013/10/WHW-parking-guide-2016_2_4.pdf

- Bring medical history information if you feel it would be beneficial
- Bring insurance card (if using insurance)
- Bring method of payment (cash, check or debit/credit card)
- Arrive 10 minutes early

Personal History Questionnaire: Adult

GENERAL

Today's Date:

Name:		DOB	Age:	Gender:
Address:		City:	State:	Zip:
Telephone: (home):		(work):	(cell):	
May I leave a message for you at home? <input type="checkbox"/> yes <input type="checkbox"/> no		At work? <input type="checkbox"/> yes <input type="checkbox"/> no	On Cell? <input type="checkbox"/> yes <input type="checkbox"/> no	
May I contact you by email? <input type="checkbox"/> yes <input type="checkbox"/> no If so, email:		How did you hear about me/us?		
Emergency Contact:		Relationship:	Phone:	
Preference for appointment reminders: (choose one)				
<input type="checkbox"/> Email:		<input type="checkbox"/> Call:	<input type="checkbox"/> Text:	
Name of Current therapist/psychiatric provider:			phone number:	
Relationship Status: <input type="checkbox"/> Single <input type="checkbox"/> married/partnered <input type="checkbox"/> divorced <input type="checkbox"/> separated <input type="checkbox"/> other:				
If applicable, name of spouse/partner:				

Please provide the names, ages and relationship of those living with you.

Name	Age	Relationship to you?

Please list names and ages of any children not living with you:

REASON(S) FOR VISIT

Describe your reason for making this appointment:

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Describe any recent changes that may contribute to this issue:

Why do you think you have this issue?

When did you first experience this issue?

MENTAL HEALTH/PSYCHIATRIC HISTORY

Please mark any symptoms you believe you experience Currently or in the Past.

C	P		C	P		C	P	
<input type="checkbox"/>	<input type="checkbox"/>	depressed/sad mood	<input type="checkbox"/>	<input type="checkbox"/>	muscle tension	<input type="checkbox"/>	<input type="checkbox"/>	relationship problems
<input type="checkbox"/>	<input type="checkbox"/>	reduced interest in activities	<input type="checkbox"/>	<input type="checkbox"/>	excessive worry	<input type="checkbox"/>	<input type="checkbox"/>	eating problems
<input type="checkbox"/>	<input type="checkbox"/>	appetite/weight change	<input type="checkbox"/>	<input type="checkbox"/>	panic symptoms	<input type="checkbox"/>	<input type="checkbox"/>	drug or alcohol problems
<input type="checkbox"/>	<input type="checkbox"/>	frequent crying/tearfulness	<input type="checkbox"/>	<input type="checkbox"/>	boredom	<input type="checkbox"/>	<input type="checkbox"/>	gambling problems
<input type="checkbox"/>	<input type="checkbox"/>	low self-esteem	<input type="checkbox"/>	<input type="checkbox"/>	impulsivity	<input type="checkbox"/>	<input type="checkbox"/>	sexual problems
<input type="checkbox"/>	<input type="checkbox"/>	low motivation	<input type="checkbox"/>	<input type="checkbox"/>	distractibility	<input type="checkbox"/>	<input type="checkbox"/>	computer addiction
<input type="checkbox"/>	<input type="checkbox"/>	social isolation	<input type="checkbox"/>	<input type="checkbox"/>	hyperactivity	<input type="checkbox"/>	<input type="checkbox"/>	problems with pornography
<input type="checkbox"/>	<input type="checkbox"/>	feelings of hopelessness	<input type="checkbox"/>	<input type="checkbox"/>	abnormally elevated mood for several uninterrupted days	<input type="checkbox"/>	<input type="checkbox"/>	work/school problems
<input type="checkbox"/>	<input type="checkbox"/>	seasonal mood changes			racing thoughts	<input type="checkbox"/>	<input type="checkbox"/>	parenting problems
<input type="checkbox"/>	<input type="checkbox"/>	loneliness	<input type="checkbox"/>	<input type="checkbox"/>	excessive energy	<input type="checkbox"/>	<input type="checkbox"/>	suspiciousness/paranoia
<input type="checkbox"/>	<input type="checkbox"/>	feelings of guilt/shame	<input type="checkbox"/>	<input type="checkbox"/>	flashbacks	<input type="checkbox"/>	<input type="checkbox"/>	hearing or seeing things
<input type="checkbox"/>	<input type="checkbox"/>	sleeping too much or too little	<input type="checkbox"/>	<input type="checkbox"/>	nightmares	other:		
<input type="checkbox"/>	<input type="checkbox"/>	low energy/fatigue	<input type="checkbox"/>	<input type="checkbox"/>	easily startled	other:		
<input type="checkbox"/>	<input type="checkbox"/>	excessive thoughts of death	<input type="checkbox"/>	<input type="checkbox"/>	anger outbursts	other:		
<input type="checkbox"/>	<input type="checkbox"/>	poor concentration	<input type="checkbox"/>	<input type="checkbox"/>	excessive fears	other:		
<input type="checkbox"/>	<input type="checkbox"/>	restlessness or feeling on edge/keyed up	<input type="checkbox"/>	<input type="checkbox"/>	excessive social discomfort			
<input type="checkbox"/>	<input type="checkbox"/>	difficulty thinking or making decisions	<input type="checkbox"/>	<input type="checkbox"/>	obsessions/compulsions			
<input type="checkbox"/>	<input type="checkbox"/>	irritability	<input type="checkbox"/>	<input type="checkbox"/>	fear away from home			
<input type="checkbox"/>	<input type="checkbox"/>	frequent anxiety	<input type="checkbox"/>	<input type="checkbox"/>				

Are any of the above symptoms affecting your:

- ability to engage in your normal daily activities
 work
 school
 housing
 finances
 recreational activities
 legal status
 relationships
 health
 happiness
 spirituality
 self esteem
 sexual activity

Have you been diagnosed with mental health/psychiatric problems in the past? Yes No

Diagnosis	Dates treated or age	By whom

Please list medications you have previously taken for mental health reasons.

Name of medication	How long did you take?	Dosage	Usefulness/Side Effects/Concerns

Have you been psychiatrically hospitalized? Yes No When?
Why?

Have you ever attempted suicide? Yes No When? How?

Have you ever engaged in self-harm behavior? Yes No When? How?

Please list any other outpatient mental health treatment (e.g. therapy, medication management by PCP, medication management by psychiatric provider).

Name/Place	Approximate Dates	Outcome/Experience
	-	
	-	
	-	
	-	

Please note presence of family history of mental health problems:

	Relationship to you	Age of diagnosis?	Treatment?
<input type="checkbox"/> Depression			
<input type="checkbox"/> Anxiety			
<input type="checkbox"/> Schizophrenia			
<input type="checkbox"/> Bipolar (manic/depression)			
<input type="checkbox"/> Post-traumatic stress disorder			
<input type="checkbox"/> Alcohol abuse			
<input type="checkbox"/> Other substance abuse			
<input type="checkbox"/> ADHD/ADD			
<input type="checkbox"/> Suicide or attempted suicide			
<input type="checkbox"/> Other, specify:			

Review of Systems:

Below please check any of the following health problems that you currently experiencing or have experienced in the last three months.

General	<input type="checkbox"/> Sores that won't heal	Vascular
<input type="checkbox"/> Weight loss or gain	Neck	<input type="checkbox"/> Pain in lower leg when walking
<input type="checkbox"/> Fatigue	<input type="checkbox"/> Lumps	<input type="checkbox"/> Leg cramping
<input type="checkbox"/> Fever or chills	<input type="checkbox"/> Swollen glands	Musculoskeletal
<input type="checkbox"/> Weakness	<input type="checkbox"/> Pain	<input type="checkbox"/> Muscle or joint pain
<input type="checkbox"/> Trouble sleeping	<input type="checkbox"/> Stiffness	<input type="checkbox"/> Stiffness
Skin	Breasts	<input type="checkbox"/> Back pain
<input type="checkbox"/> Rashes	<input type="checkbox"/> Lumps	<input type="checkbox"/> Redness of joints
<input type="checkbox"/> Lumps	<input type="checkbox"/> Pain	<input type="checkbox"/> Swelling of joints
<input type="checkbox"/> Itching	<input type="checkbox"/> Discharge	<input type="checkbox"/> Trauma
<input type="checkbox"/> Dryness	<input type="checkbox"/> Breast feeding (if applicable)	Neurologic
<input type="checkbox"/> Color changes	Respiratory	<input type="checkbox"/> Dizziness
<input type="checkbox"/> Hair and nail changes	<input type="checkbox"/> Cough	<input type="checkbox"/> Fainting
Head	<input type="checkbox"/> Sputum	<input type="checkbox"/> Seizures
<input type="checkbox"/> Headache	<input type="checkbox"/> Coughing up blood	<input type="checkbox"/> Weakness
<input type="checkbox"/> Head injury	<input type="checkbox"/> Shortness of breath	<input type="checkbox"/> Numbness
<input type="checkbox"/> Neck pain	<input type="checkbox"/> Wheezing	<input type="checkbox"/> Tingling
Ears	<input type="checkbox"/> Painful breathing	<input type="checkbox"/> Tremor
<input type="checkbox"/> Decreased hearing	Cardiovascular	<input type="checkbox"/> Memory loss
<input type="checkbox"/> Ringing in ears	<input type="checkbox"/> Chest pain or discomfort	<input type="checkbox"/> Incoordination
<input type="checkbox"/> Earache	<input type="checkbox"/> Tightness	<input type="checkbox"/> Feeling of restlessness in legs, especially at night
<input type="checkbox"/> Drainage	<input type="checkbox"/> Palpitations	<input type="checkbox"/> Feelings of internal restlessness made worse by medication
Eyes	<input type="checkbox"/> Shortness of breath with activity	<input type="checkbox"/> Involuntary movements of the tongue, lips, mouth
<input type="checkbox"/> Vision loss/change	<input type="checkbox"/> Difficulty breathing lying down	<input type="checkbox"/> Involuntary movements of other parts of body. Which ones?
<input type="checkbox"/> Glasses or contacts	<input type="checkbox"/> Swelling	<input type="checkbox"/> Hyper reflexes
<input type="checkbox"/> Pain	<input type="checkbox"/> Sudden awakening from sleep with shortness of breath	Hematologic
<input type="checkbox"/> Redness	Gastrointestinal	<input type="checkbox"/> Bruise easily
<input type="checkbox"/> Blurry or double vision	<input type="checkbox"/> Swallowing difficulties	<input type="checkbox"/> Bleed easily
<input type="checkbox"/> Flashing lights	<input type="checkbox"/> Heartburn	Endocrine
<input type="checkbox"/> Specks	<input type="checkbox"/> Change in appetite	<input type="checkbox"/> Heat or cold intolerance
<input type="checkbox"/> Glaucoma	<input type="checkbox"/> Nausea	<input type="checkbox"/> Hot flashes
<input type="checkbox"/> Cataracts	<input type="checkbox"/> Change in bowel habits	<input type="checkbox"/> Frequent urination
Nose	<input type="checkbox"/> Rectal bleeding	<input type="checkbox"/> Excessive thirst
<input type="checkbox"/> Stuffiness	<input type="checkbox"/> Constipation	<input type="checkbox"/> Change in appetite or weight
<input type="checkbox"/> Discharge	<input type="checkbox"/> Diarrhea	<input type="checkbox"/> Night sweats
<input type="checkbox"/> Itchiness	<input type="checkbox"/> Yellow eyes or skin	<input type="checkbox"/> Excessive sweating
<input type="checkbox"/> Hay fever	<input type="checkbox"/> Abdominal Pain	Other
<input type="checkbox"/> Nosebleeds	Urinary	<input type="checkbox"/>
<input type="checkbox"/> Sinus pain	<input type="checkbox"/> Frequency	<input type="checkbox"/>
Mouth/Throat	<input type="checkbox"/> Urgency	<input type="checkbox"/>
<input type="checkbox"/> Bleeding	<input type="checkbox"/> Burning or pain	<input type="checkbox"/>
<input type="checkbox"/> Dentures	<input type="checkbox"/> Blood in urine	<input type="checkbox"/>
<input type="checkbox"/> Sore tongue	<input type="checkbox"/> Incontinence	<input type="checkbox"/>
<input type="checkbox"/> Dry mouth	<input type="checkbox"/> Change in urinary strength	<input type="checkbox"/>
<input type="checkbox"/> Sore throat	<input type="checkbox"/> Frequent night time waking to urinate.	<input type="checkbox"/>
<input type="checkbox"/> Hoarseness	How often?	<input type="checkbox"/>
<input type="checkbox"/> Thrush		<input type="checkbox"/>

Please check any of the following health problems that you currently have, have had in the past, or that family members have had. (Please include parents, siblings, children, aunts/uncles, grandparents)

	Past history? ✓	Current? ✓	Family History? ✓	Relationship to you?
Anemia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Asthma	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cancer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Chronic Pain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Diabetes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Head Injury	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Heart Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
High Blood Pressure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
High Cholesterol	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
HIV+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Kidney Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Liver Disease (including hepatitis)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Seizures/Epilepsy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Stomach/GI Problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Thyroid Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other, Specify:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other, Specify:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Do you exercise at least once a week? <input type="checkbox"/> Yes <input type="checkbox"/> No		How Often?
What kind of exercise?		Why do you exercise?
Describe what you ate yesterday:		
Do you have any worries about your eating habits?		
Have you ever binged, purged, over exercised or significantly restricted caloric intake for the purpose of managing weight or body image? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please describe:		
What strategies do you use for stress management?		
What activities do you enjoy?		

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Substance used current or past...	First Use?	How Much?	How Often?	Last Use?	Consequences of use? Tolerance, withdrawal, legal or relationship consequences?	Has it ever been a problem?
Caffeine						
Tobacco						
Alcohol						
Drugs Type: _____						
Medications not prescribed to you? Type: _____						

ADDICTION/RECOVERY

Have you experienced problems (past or present) with any of the following? <input type="checkbox"/> Alcohol <input type="checkbox"/> Drugs <input type="checkbox"/> Gambling <input type="checkbox"/> Sex/Love Addiction <input type="checkbox"/> Food <input type="checkbox"/> Loved one's Addictions <input type="checkbox"/> Other: <input type="checkbox"/> None	
If you marked "None" Please skip to next section.	
Please briefly describe your addiction history:	
Do you describe yourself as currently "in recovery"? <input type="checkbox"/> Yes <input type="checkbox"/> No	How Long?
Use of 12 Step Program? <input type="checkbox"/> Yes <input type="checkbox"/> No	Other Recovery Program? <input type="checkbox"/> Yes <input type="checkbox"/> No List:
Please describe nature of your recovery:	

SOCIAL/FAMILY HISTORY

Where were you born and raised?	Who raised you?
List Siblings: Current relationship with siblings?	Parents Deceased? <input type="checkbox"/> Yes <input type="checkbox"/> No Current relationship with parents?

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Did anyone else live in your home growing up other than parents and siblings? Yes No If so whom?

Are you currently in a committed relationship? <input type="checkbox"/> Yes <input type="checkbox"/> No	With whom and for how long?
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Please describe current relationship:

Please check any environmental factors present during your childhood/adolescence.

<input type="checkbox"/> Parental divorce/separation	<input type="checkbox"/> Death in the family	<input type="checkbox"/> Parental illness
<input type="checkbox"/> Frequent moves	<input type="checkbox"/> Unemployment of parent(s)	<input type="checkbox"/> Financial stress
<input type="checkbox"/> Family member disability	<input type="checkbox"/> Crime victim	<input type="checkbox"/> Emotional abuse
<input type="checkbox"/> Physical abuse	<input type="checkbox"/> Sexual abuse	<input type="checkbox"/> Violence in home
<input type="checkbox"/> Substance abuse by self/parent	Other:	Other:

Have you ever been in the military? <input type="checkbox"/> Yes <input type="checkbox"/> No	Branch?
	Service Dates:

How was your experience in the military?

Please list any legal history (arrests, convictions, lawsuits, DHS involvement, parental custody, guardianship):
 None

Completed high school? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> GED How did you do in school?	College? Graduate Studies? Explain:
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Please briefly describe work history:

Currently employed <input type="checkbox"/> Yes <input type="checkbox"/> No	Current Employer:
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Please describe your ethnic, cultural, and/or religious/spiritual background:

Please describe any further concerns/issues not addressed elsewhere in this questionnaire:

Please describe outcomes you would like from this visit/treatment from this provider.

Patient Signature

Date

Office Policy Statement

Confidentiality

Information related to your seeking and receiving services will remain confidential. Information will not be disclosed without your written consent. There are a few exceptions:

- When there is reason to believe, you may be in danger of harming either yourself or another person.
- When there is reasonable cause to believe abuse or neglect of a child, elder, or someone with disabilities has occurred.
- When a court order is received.
- For insurance billing purposes.
- When an emergency requires sharing of information.
- Other situations required by law.

Confidentiality and Treatment of Children and Adolescents

Those individuals under the age of 14 and who are not emancipated are required by law to have a parent/guardian consent for treatment. Treatment records may be reviewed by the parent/guardian. Willamette Health & Wellness (WHW) operates under the belief that privacy of patients is of utmost importance and will be maintained except in those instances listed above and for any necessary communication with parent/guardian for treatment planning. Families play a vital role in the recovery process and as such parent/guardian participation in treatment of minors is very important and in most circumstances, is required for effective treatment. Oregon law allows clients 14 years and older to consent to their own mental health treatment by a nurse practitioner but requires the nurse practitioner to involve the parents prior to the ending of treatment except in rare instances.

Children in the Waiting Room

There may be times when you wish to leave a minor child in the waiting room while you are in session with one of our clinicians. Please note that we are unable to provide supervision for children who are unattended in the waiting room. Please note that administrative staff are happy to respond to questions or needs of anyone visiting our offices but they are not able to provide the supervision necessary for a child who requires this. If your child requires supervision you are welcome to bring someone along to attend them. If you have any concerns, please speak to your clinician.

Client Participation/Rights

Treatment will only be effective if the client is engaged and actively involved; this includes family members of children and adolescents seeking treatment. It is important to ask questions about treatment if you are unclear about any aspect of treatment goals or plans. This office is compliant with federal privacy laws and you will be provided with a document outlining your rights under these laws.

Appointments/Cancellation/Missed Appointments

Sessions in this clinic are arranged by appointment only. Appointment times vary in length related to individual needs, clinician recommendation, prearranged treatment plan, and as other treatment factors dictate. An initial evaluation will determine if WHW clinicians are appropriate for your treatment needs. Once this has been established a treatment plan will be developed and will guide follow-up appointments. If one of our clinicians is late we will make up the missed time. If you are late, you may lose that portion of time from your session. If you arrive more than 25% into your allotted period, you may have to reschedule and if so will be charged for a late cancellation fee. Appointments are the responsibility of the patient. If an appointment is cancelled within 24 hours of appointment (telephone message may suffice) a fee of \$75 will be charged. If you miss your appointment without a call before appointment time, you will be charged \$125. We allow one “no show”/ “late cancellation” without charge. If an appointment is cancelled with more

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than 24 hour notice no fees will apply. *Fees for missed or late cancelled appointments are not reimbursable by insurance companies.* If cancelling appointments or no shows become a regular occurrence you may be notified of risk for discontinued treatment.

Telephone Calls and Emergency/Urgent Services

Your provider can be reached during their scheduled business hours. Generally, your non-urgent calls will be returned within two business days. Unless otherwise stated on outgoing voicemail message, we check voicemail at least once per day, more often during business hours and attempt to return all calls within 24 hours of receipt of voicemail. We do not carry 24 hour pagers. During weekend hours and when out of town you will be directed to covering provider(s) who will be assisting with URGENT matters only.

In the case of emergency, call 911 or go to the nearest emergency department. In the event of a crisis in which you need assistance before someone can return your call you may also contact:

- Multnomah County Crisis Line 503-988-4888
- Clackamas County Crisis Line 503-655-8401
- Clark County Crisis Line 360-696-9560
- Washington County Crisis Line: 503-291-9111
- Marion County Crisis Line: 503-585-4949
- Poison Control: 800-222-1222
- Alcohol and Drug Help Line 503-244-1312 or 1-800-923-HELP
- Call to Safety (Domestic Violence crisis line): 1-888-235-5333
- Rape Crisis Center: 503-640-5311
- Cascadia Urgent Walk-in Clinic at 2415 SE 43rd Ave, 7am-10:30pm
- Additional crisis assistance may be found at:

<https://multco.us/mhas/mental-health-crisis-intervention>

<http://namimultnomah.org/resources/crisis-services/>

If you are hospitalized, please attempt to call your provider within 12 hours or have the hospital call so we can coordinate your care.

Email Communication

We generally do not use email as a form of clinical communication. Treatment assessment and interventions are provided in person and under certain circumstances by phone. There are some situations in which you and/or your provider may decide to use email for communication. Please note that email is not a secure form of communication per HIPAA. Though you may send email to Willamette Health & Wellness at your own risk, we will only be able to reply or initiate clinically appropriate emails if you provide written consent. **Email is not intended for urgent communications.**

Medication Management

All medication has potential to cause side effects as well as interact with other prescription/over-the-counter medications or herbal remedies. However, there is no way of predicting all the potential effects a medication may have on a specific individual. Please be advised that medications used in psychiatry are often prescribed “off-label.” This means that such medication may be used to treat/manage symptoms other than those for which it was originally approved by the FDA. This will be discussed during treatment planning. Potential risks, benefits and alternatives will be discussed prior to setting a treatment plan. It is important to update all providers about changes in your medications including prescription, herbal and over-the-counter medications.

Prescription Refills

Prescription refills will be available at your regularly scheduled appointments. Please ensure that you attend appointments to receive them. A prescription refill is not an emergency and requests by phone should be infrequent. Please *allow one week for refill*.

Fee Schedule

Charges are based on length, complexity, and type of service provided as well as licensure of your provider. You may find the fee schedule for your provider on our website.

Payment

As a courtesy, we bill all insurances. Payment in full (or copay/coinsurance) is due at time of service. We accept checks, cash and major credit cards. Payment of any outstanding balance must be made within 60 days or by other arrangement with Willamette Health & Wellness. Outstanding balances older than 90 days may be subject to a collections agency. Failure to make payments may result in discontinuation of services and/or may be turned over to an outside collection agent.

It is advisable to call your insurance carrier to find out details of your insurance benefits, including pre-authorization if needed. Most plans limit the services for which they will pay. If you request or agree to a service for which your insurance company or its agent later denies payment, then you assume responsibility for paying the entire balance. Insurance companies often request treatment information which would require release of confidential treatment information before payment is made.

Treatment/Length of Treatment

We approach psychiatric/mental health care as a collaborative process. We work with you and, if you desire, your other providers to create a plan for treatment and recovery. If you are ever unclear about the goals you establish with your provider or about any other aspects of your treatment, please ask your provider. Individuals in therapy often are seen weekly or bi-weekly. Medication appointments begin with appointments weekly and/or semi-monthly and after stabilization will decrease in frequency to monthly or every other month or as mutually agreed with your provider. Length of time recommended for use of medication is based on an individual's symptoms and history of symptoms, response to medication and the individual's desire to continue medication. We strongly suggest individuals who are receiving medication should also be in therapy, either with your prescribing provider or another clinician. Discontinuation of treatment may occur when goals have been met, by agreement that another provider may be of better assistance, or when deemed necessary by your provider. Generally, we will discuss ending treatment with you well in advance.

Termination of Treatment

Please let your provider know if you are considering discontinuing treatment. Should you not schedule an appointment for a period of 45 days and make no arrangement with your provider in writing, you may no longer be considered in active treatment. If you "no show" or "late cancel" for two consecutive appointments, "no show"/"late cancel" for one appointment without rescheduling within thirty days, or you are otherwise not engaged in treatment, you will be considered to have terminated treatment. When treatment is terminated for any reason and you wish to re-engage treatment with a provider at Willamette Health & Wellness, we will discuss with you options at that time.

Court Testimony

Please be aware and understand that WHW and our clinicians do not wish to be party to any legal proceedings against current or former patients, or their parents. By entering treatment with us you are agreeing to not involve us in legal/court proceedings or attempt to obtain records for legal/court proceedings when marital or family therapy has been unsuccessful at resolving disputes. Having this expectation reduces the chance that treatment will be misused for legal objectives. If you are involved in, or anticipate being involved in legal or court proceedings, please notify us as soon as

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possible. It is important for us to understand how, if at all, your involvement in these proceedings might affect our work together. Also, entering treatment for therapy is not the same as a forensic or custody evaluation. If you need such an evaluation, we would be willing to assist you in finding a provider that offers this service.

If we are subpoenaed, we will make every attempt to protect your confidentiality, but as outlined in the Office Policy Statement, be advised that there may be limitations. Please note that we will charge for our testimony, including travel time, wait time, copies of records, and preparation/consultation time. ***We will charge current legal rate as well as expenses incurred in copying and sending records. You will be responsible for these fees as insurance companies will not pay for this.***

Grievance Procedures

If you have a complaint or concern about your treatment, we encourage you to discuss this with your provider so s/he can address your concerns. Willamette Health & Wellness also has a grievance procedure that you should feel free to use. Grievance forms are available upon request. In the event this is not satisfactory you may also speak to your insurance company or contact the Board of your provider.

HIPAA Privacy Notice

Notice of Privacy Practices

Effective Date: September, 2013

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.

What is this Notice? Who will follow this Notice and Why is it Important? As of April, of 2003, a new federal law (“HIPAA”) went into effect. This law requires that health care practitioners create a notice of privacy practices for you to read. This notice tells you how Willamette Health & Wellness, LLC will protect your medical information, how this information may be used or disclosed, and describes your rights. If you have any questions about this notice, please contact the Human Resources Coordinator directly at Willamette Health & Wellness, LLC.

Understanding Your Health Information During each appointment, we record clinical information and store it in your chart. Typically, this record includes a description of your symptoms, your recent stressors, your medical problems, a mental status exam, any relevant lab test results, diagnoses, treatment, and a plan for future care. This information, often referred to as your medical or health record, serves as a basis for planning your care and treatment. Typically, we may use your health information and share it to:

- *Treat you and communicate with other professionals who are treating you.*
For example: Your primary care physician or your psychotherapist might call us to discuss your treatment, and in that situation, we would disclose information about your diagnosis, your medications, and so on.
- *Run our practice, improve your care, and contact you when necessary.*
For example: Occasionally, we dictate notes from visits, usually for letters to other clinicians. In that case, your health information will be disclosed to the transcriptionist.
- *Bill and get payment from health plans or other entities.*
For example: To get paid for our services, we have our billing office send a bill to you or your insurance company. The information on the bill may include information that identifies you, as well as your diagnosis, and type of treatment. In other cases, we fill out authorization forms so your insurance company will pay for extra visits, and this includes some information about you, including your diagnosis. We use an electronic health record which may also include information that identifies you including specific health information.

We may be allowed or required to use your information in other ways- usually ways that contribute to the public good, such as public health and research. We must 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/consumer/index.html.

These additional uses and disclosures may include:

- Sharing 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.
- Using or sharing your information for health research.
- Sharing 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.
- Sharing information about you with organ procurement organizations.
- Sharing information with a coroner, medical examiner, or funeral director when someone dies.
- Using or sharing health information about you for worker’s compensation claims, for law enforcement purposes or with 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.
- Sharing information about you in response to a court or administrative order in response to a subpoena.

Your Health Information Rights

You have the following rights related to your medical record:

- *Obtain a copy of this 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.
- *Authorization to use your health information.*
Before I use or disclose your health information, other than as described in this notice, I will obtain your written authorization, which you may revoke at any time to stop future use or disclosure.
- *Access to your health information.*
You may 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 reasonable, cost-based fee.
- *Change your health information.*
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 may request that when we communicate with you, we do so in a specific way (e.g. at a certain mail address or phone number). We will make every reasonable effort to agree to your request.
- *Accounting of disclosures.*
You may request a list 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 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.
- *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.
- *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 payment or our operations with your health insurer. We will say “yes” unless a law requires us to share that information.
- *File a complaint if you feel your rights were violated.*
You can complain if you feel we have violated your rights by contacting us. You can file a complaint with the US Department of Health and Human Services for Civil Rights by sending a letter to 200 Independence Ave, SW, Washington, DC 20201, calling 877-696-6775, or visiting www.hhs.gov/ocr/privacy/hipaa/complaints/. We will not retaliate against you for filing a complaint.

Our Responsibilities

- We are required by law to protect the privacy of your health information, to provide this notice about our privacy practices, and to abide by the terms of this notice.
- We will let you know promptly if a breach occurs that may have compromised the privacy or security of your information.
- We reserve the right to change our policies and procedures for protecting health information. When we make a significant change in how we use or disclose your health information, we will also change this notice.
- Except for the purposes related to your treatment, to collect payment for our services, to perform necessary business functions, or when otherwise permitted or required by law and as described above, we will not use or

disclose your health information without your authorization. You have the right to revoke your authorization at any time.

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

Will We Disclose Your Health Information to Family and Friends? While the new law allows such disclosures without your specific consent (if it contributes to your treatment), our office policy is that we will generally not share your clinical information with your family without a signed authorization from you. The **BIG EXCEPTION** to this is if I believe you pose an immediate danger to yourself or someone else—in that case, we will do whatever is necessary, even if that means breaching confidentiality.

For More Information or to Report a Problem. If you have questions, would like additional information, or want to request an updated copy of this notice, you may contact us at Willamette Health & Wellness at any time. If you feel your privacy rights have been violated in any way, please let us know and we will take appropriate action.

You may also send a written complaint to:

Department of Health & Human Services, Office of Civil Rights,
Hubert H. Humphrey Building 200 Independence Avenue
S.W. Room 509 HHH Building
Washington, D.C. 20201

Authorizations and Informed Consent

Print Patient name: _____ **Patient date of birth:** _____

Acknowledgement of Office Policies

Initial here I have received, read, understand, and agree to the office policy updates as outlined in the Office Policy Update Statement for Willamette Health & Wellness, LLC (WHW).

Consent for Treatment

Initial here I freely and voluntarily consent to treatment provided by Willamette Health & Wellness, LLC. I understand that I have the right to terminate my participation at any time.

Authorization for Release Information and Assignment of Insurance Benefits

Initial here Willamette Health & Wellness, LLC has my permission to communicate with my insurance company and to provide information necessary for the purposes of obtaining authorization for services, provision of services and coordination of care. Willamette Health & Wellness, LLC has my permission to bill my insurance company and to provide necessary information for the purposes of obtaining authorization for services, benefit information and payment. I understand the professional services rendered are charged to me and, as a courtesy, Willamette Health & Wellness, LLC will bill my insurance company. I authorize Willamette Health & Wellness, LLC to bill my insurance company, and accept payment from that company on my behalf for all services relating to my care. I understand that I am financially responsible for all charges not covered by my insurance and for any appointment that I fail to keep or cancel with less than 24 hours or one business days' notice prior to that appointment time. I acknowledge that any money credited as overpayment due to me will be refunded after completion of treatment upon request.

Use of Email

Initial here I request that WHW use email as a form of communication as deemed necessary and appropriate. I acknowledge that email is an unsecured method of communication.

Billing and Insurance

For billing purposes, I authorize the below the person(s) to discuss insurance and/or payment.

Initial here Print Name: _____ Relationship: _____

Initial here Print Name: _____ Relationship: _____

My signature below verifies my agreement to all initialed agreements above.

Signature of patient: _____ **Date:** _____

Signature of guardian: _____ **Date:** _____
(if applicable)

Print Guardian Name: _____ **Relationship to patient:** _____