

# CLIENT INFORMATION



Information contained in this form will not be released to anyone unless authorized by you or required by the law as explained in our consent to treatment. **Please fill out completely.**

**Name** \_\_\_\_\_ **Date** \_\_\_\_\_

Age \_\_\_\_\_ Gender \_\_\_\_\_ Cell Phone (\_\_\_\_\_) \_\_\_\_\_

**Referred By:**

- Friend/Relative
- Internet/Website
- Client
- Staff
- Church: \_\_\_\_\_
- School: \_\_\_\_\_
- Other: \_\_\_\_\_

**Office Location**

(Circle one):      Orange      Los Alamitos      Brea      Costa Mesa      Torrance

**Name of Therapist** \_\_\_\_\_



# FAMILY PERSONAL DATA

This is a confidential record of your personal history. Information contained in it will not be released to anyone unless authorized by you or required by the law as explained in our consent to treatment.

Date \_\_\_\_\_ Referred By \_\_\_\_\_

Client: Family Name \_\_\_\_\_

| Names | Date of Birth | Age | Gender | Marital Status<br>(married, single,<br>divorced, other) | Occupation | Highest Grade Completed |
|-------|---------------|-----|--------|---|------------|-------------------------|
|       |               |     |        |   |            |                         |
|       |               |     |        |   |            |                         |
|       |               |     |        |   |            |                         |
|       |               |     |        |   |            |                         |
|       |               |     |        |   |            |                         |
|       |               |     |        |   |            |                         |

Address \_\_\_\_\_ City \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone(\_\_\_\_\_) \_\_\_\_\_ Cell Phone(\_\_\_\_\_) \_\_\_\_\_ Minor's Cell Phone(\_\_\_\_\_) \_\_\_\_\_

Person to notify in case of emergency \_\_\_\_\_ Phone Number \_\_\_\_\_

Ethnicity \_\_\_\_\_

Would the family like spirituality/religious issues to be a part of your therapy? Y / N / Don't Know

NOTE: It is important for the family and therapist to determine together what part spiritual/religious issues will or will not take in therapy.

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

**What changes would you like to see in your family as a result of therapy?**

**How have you attempted to deal with this problem thus far?**

**FAMILY MEDICAL HISTORY**

Please indicate with an "X" how often you experience any of the following:

|   | <b>NEVER</b>             | <b>SELDOM</b>            | <b>SOMETIMES</b>         | <b>OFTEN</b>             | <b>NAME OF FAMILY MEMBER</b> |
|---|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------|
| Loss of Appetite                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Lack of sleep                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Back Pain                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Asthma                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Headaches                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Phobias (Fears)                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Nausea                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Allergies                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Nervousness                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Loss of temper                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Fatigue                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Depression                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Constipation                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Diarrhea                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Over-eating                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Mood swings                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Smoking                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Amount _____                 |
| Alcohol Intake                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Amount _____                 |
| Self-injury                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Hearing/Seeing things<br>that are not there | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |

**FAMILY MEDICATION AND TREATMENT HISTORY**

|                         | <b>DAILY</b>             | <b>FREQUENTLY</b>        | <b>OCCASIONALLY</b>      | <b>NEVER</b>             | <b>NAME OF FAMILY MEMBER</b> |
|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------|
| Appetite Suppressants   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Aspirin                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Sedatives/Tranquilizers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Sleeping Pills          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Stimulants              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Vitamins                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                              |
| Other (please specify)  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                        |

Please list current medications \_\_\_\_\_

***FAMILY TREATMENT/THERAPY HISTORY***

Have you ever had any previous counseling or psychotherapy? Y  N  If YES, please list from most recent:

| PROBLEM | DATES | THERAPIST & LOCATION | Was Therapy Successful? |
|---------|-------|----------------------|-------------------------|
|         |       |                      |                         |
|         |       |                      |                         |

**Have you ever attempted suicide?** Y  N  If YES, when? \_\_\_\_\_

If YES, method used: \_\_\_\_\_

Were you ever hospitalized for psychiatric reasons? Y  N  If Yes, when? \_\_\_\_\_ Length of hospital stay \_\_\_\_\_

**FAMILY OF ORIGIN INFORMATION**

| <i>Husband/Partner</i> |     |              |            |                | <b>Wife/Partner</b> |              |            |                |
|------------------------|-----|--------------|------------|----------------|---------------------|--------------|------------|----------------|
|                        | Age | Marital Stat | Occupation | Alive/Deceased | Age                 | Marital Stat | Occupation | Alive/Deceased |
| Father                 |     |              |            |                |                     |              |            |                |
| Mother                 |     |              |            |                |                     |              |            |                |
| Siblings               |     |              |            |                |                     |              |            |                |

**Briefly describe the relationship you have/had with your family of origin (husband/male)**

**Briefly describe the relationship you have/had with your family of origin (wife/female)**



## CONSENT TO INITIAL INTAKE/TREATMENT

Welcome to the Center for Individual & Family Therapy, a Christian counseling center. The following is an agreement to enter into an INITIAL INTAKE/TREATMENT PROCESS.

**INITIAL INTAKE SESSION:** The first session is an initial intake. It is sometimes necessary to refer you to another CIFT clinician who can better meet your needs. If, for some reason we are not able to help you at CIFT, we will provide referrals to an outside therapist.

**APPOINTMENTS:** It is your responsibility to notify your therapist at least 48 hours in advance if you are unable to attend your appointment. **Cancellations of appointments less than 48 hours in advance and "no shows" are subject to the full fee charge for the appointment time.**

**TELECOMMUNICATION AND EMERGENCY PROCEDURES:** Your therapist may offer communication through their CIFT voicemail and email. Emails to your therapist may not include therapeutic content, including information regarding danger to one's self or others. If you choose to contact your therapist via e-mail, or any other electronic means, we cannot guarantee privacy. Your therapist is not available 24 hours a day; in case of emergency, please call 911 or go to the nearest hospital emergency room.

**TREATMENT:** CIFT therapists approach treatment by employing varying schools of thought including, but not limited to, Cognitive-Behavioral (CBT), Psychodynamic, and Family System therapies. Cognitive-Behavioral therapies look at the interaction of thoughts and behaviors while Psychodynamic therapies explore intra-psychic processes and their interplay with interpersonal relationships. Family System therapies view the family as an emotional unit and examines the feedback loop between each individual in the family and the family as a whole. Although the research suggests that these and other treatment approaches can be helpful, please note that therapy may be a challenging process and no outcome can be guaranteed. You may not feel better or happier and disruptions to relationships may take place. Your therapist is available to discuss these issues, including therapeutic approaches, at any time during your treatment.

**PAYMENT & FEES:** **Payment is expected for services at the time they are rendered, unless other arrangements have been made.** Services are rendered and charged to the client, not to the insurance company. **Payments are made by credit/debit cards only.** Upon request, your therapist will provide you with a receipt to submit to your insurance company for reimbursement. You may also incur charges for phone calls lasting more than 15 minutes, letters and testing fees. Your fee may be subject to an annual increase. Fees for any extra time required by the therapist for legal proceedings will be charged at a higher rate than session fees. If you do not pay your fee, we are legally permitted to contact a collection agency.

**I, the client, agree to be responsible for the payment of \$\_\_\_\_\_ per session (45 minutes) which is payable at the time of the session. (credit or debit card only)** I understand that I am responsible for full payment, even though I may be reimbursed by my insurance company. This is the entire agreement between the parties and cannot be changed except in writing by both parties.

**Client Initials \_\_\_\_\_**

**LIMITS ON CONFIDENTIALITY:** All information disclosed within sessions and the written records pertaining to those sessions are confidential. Your therapist may not reveal any information to anyone without written permission by all parties, except where disclosure is required by law. Disclosure may be required in the following circumstances: (1) where there is a reasonable suspicion of child, dependent, or elder abuse or neglect; (2) where a client presents a danger to self, to others, or is gravely disabled, and (3) pursuant to a legal proceeding. The law protects the privacy of all communications between a client and a therapist. In most situations, your therapist can only release information about your treatment if you sign a written Authorization Form. **However, your therapist is permitted or required to disclose information without either your consent or authorization under the following circumstances:**

- **CONSULTATION:** Your therapist may seek advice from other professionals. During a consultation, he or she will make every effort to avoid revealing the identity of any client. The other professionals are also legally bound to keep the information confidential. Your therapist may not discuss these consultations with you. All consultations are noted in your Clinical Record.
- **GOVERNMENT AGENCIES:** If a government agency is requesting the information for health oversight activities pursuant to their legal authority, your therapist may be required to provide it to them.
- **LAWSUITS:** If a client files a complaint or lawsuit against his/her therapist, information may be disclosed regarding that client without client consent in order for the therapist to defend himself/herself.

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## NOTICE OF POLICIES AND PRACTICES TO PROTECT THE PRIVACY OF YOUR HEALTH INFORMATION

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THIS NOTICE DESCRIBES HOW MENTAL HEALTH INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION AS PER THE HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT (HIPAA) REQUIREMENTS. PLEASE REVIEW IT CAREFULLY.

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### *I. Disclosures for Payment*

A CIFT therapist may use or disclose your protected health information (PHI), for payment without your authorization.

### *II. Disclosures with Authorization*

A therapist may disclose PHI when your appropriate authorization is obtained. When we are asked for information your therapist will obtain an authorization from you before releasing this information. You may revoke or modify all such authorizations (of PHI or psychotherapy notes) at any time; however, the revocation or modification is not effective until we receive it.

### *III. Uses and Disclosures with Neither Consent nor Authorization*

A therapist may use or disclose PHI without your consent or authorization in the following circumstances:

- **Child Abuse:** Whenever a therapist, in his or her professional capacity, has knowledge of or observes a child he or she knows or reasonably suspects has been the victim of child abuse or neglect, he or she must immediately report to CPS. Also, if a therapist has knowledge of or reasonably suspects that mental suffering has been inflicted upon a child or that his or her emotional well-being is endangered in any other way, the therapist may report such to the above agencies.
- **Serious Threat to Health or Safety:** If you communicate to me a serious threat of physical violence against an identifiable victim, I must make reasonable efforts to communicate that information to the potential victim and the police. If I have reasonable cause to believe that you are in such a condition, as to be dangerous to yourself or others, I may release relevant information as necessary to prevent the threatened danger.
- **Adult and Domestic Abuse:** If a therapist, in his or her professional capacity, has observed or has knowledge of an incident that reasonably appears to be physical abuse, abandonment, abduction, isolation, financial abuse, or neglect of an elder or dependent adult; if a therapist is told by an elder or dependent adult that he or she has experienced these; or if a therapist reasonably suspects such, the therapist must report the known or suspected abuse immediately to the local law enforcement agency.  
A therapist is not required to report such an incident if the therapist has been told by an elder or dependent adult that he or she has experienced behavior constituting physical abuse, abandonment, abduction, isolation, financial abuse or neglect and the therapist is not aware of any independent evidence that corroborates the statement that the abuse has occurred; (a) the elder or dependent adult has been diagnosed with a mental illness or dementia, or is the subject of a court-ordered conservatorship because of a mental illness or dementia; and (b) in the exercise of clinical judgment, the therapist reasonably believes that the abuse did not occur.
- **Judicial or Administrative Proceedings:** If you are involved in a court proceeding and a request is made about the professional services that I have provided you, I cannot release your information without (a) your written authorization or the authorization of your attorney or personal representative; (b) a court order; or (c) a subpoena duces tecum (a subpoena to produce records) where the party seeking your records provides me with a showing that you or your attorney have been served with a copy of the subpoena, affidavit and the appropriate notice, and you have not notified me that you are bringing a motion in the court to quash (block) or modify the subpoena. The privilege does not apply when you are being evaluated by a third party or where the evaluation is court-ordered. I will inform you in advance if this is the case. If a complaint is filed against a therapist with the California Board of Psychology or the California Board of Behavioral Science, the Board has the authority to subpoena confidential mental health information from the therapist relevant to that complaint
- **Worker's Compensation:** If you file a worker's compensation claim, I must furnish a report to your employer, incorporating my findings about your injury and treatment, within five working days from the date of your initial examination, and at subsequent intervals as may be required by the administrator of the Worker's Compensation Commission in order to determine your eligibility.

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IV. *Client's Rights and Therapist's Duties*

**Patient's Rights:**

- *Right to Request Restrictions* –You have the right to request restrictions on certain uses and disclosures of protected health information about you. However, I am not required to agree to a restriction you request.
- *Right to Receive Confidential Communications by Alternative Means and at Alternative Locations* – You have the right to request and receive confidential communications of PHI by alternative means and at alternative locations. (For example, you may not want a family member to know that you are seeing me. Upon your request, I will send your bills to another address.)
- *Right to Inspect and Copy* – You have the right to inspect or obtain a copy of PHI in my mental health and billing records used to make decisions about you for as long as the PHI is maintained in the record. I may deny your access to PHI under certain circumstances, but in some cases you may have this decision reviewed. On your request, I will discuss with you the details of the request/denial process.
- *Right to Amend* – You have the right to request an amendment of PHI for as long as the PHI is maintained in the record. I may deny your request. On your request, I 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 PHI for which you have neither provided consent nor authorization (as described in Section III of this Notice). On your request, I will discuss with you the details of the accounting process.
- *Right to a Paper Copy* – You have the right to obtain a paper copy of the notice from me upon request, even if you have agreed to receive the notice electronically.

**Therapist's Duties:**

- I am required by law to maintain the privacy of PHI and to provide you with a notice of my legal duties and privacy practices with respect to PHI.
- I reserve the right to change the privacy policies and practices described in this notice. Unless I notify you of such changes, however, I am required to abide by the terms currently in effect.

V. *Complaints*

- If you are concerned that a therapist has violated your privacy rights, or you disagree with a decision they have made about access to your records, you may contact the Clinical Director at 714-558-9266.
- You may also send a written complaint to the Secretary of the U.S. Department of Health and Human Services. The person listed above can provide you with the appropriate address upon request.

VI. *Effective Date, Restrictions and Changes to Privacy Policy*

This notice went into effect on May 1, 2005. CIFT reserves the right to change the terms of this notice and to make the new notice provisions effective for all PHI that our therapists maintain. Please feel free to discuss any concerns you may have with your therapist as they arise or contact our Clinical Director at 714-558-9266.

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|                  |                            |      |
|------------------|----------------------------|------|
| Client Signature | Client Name (Please Print) | Date |
|------------------|----------------------------|------|

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|                                 |  |      |
|---------------------------------|--|------|
| Client Representative Signature | (If Rep., Print Name & Relationship to Client) | Date |
|---------------------------------|--|------|