



**CLIENT INTAKE FORM**

Legal Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle \_\_\_\_\_

Preferred Name \_\_\_\_\_ Preferred Pronouns: She \_\_\_ He \_\_\_ Other: \_\_\_\_\_

Client's Social Security Number \_\_\_\_\_ Age \_\_\_\_\_ Date of Birth \_\_\_\_\_

Gender \_\_\_\_\_ Relationship Status: Married \_\_\_ Partnered \_\_\_ Divorced \_\_\_ Single \_\_\_ Widowed \_\_\_

Home Telephone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

May we contact you at Home **Yes No?** Work **Yes No?** Cell Phone **Yes No?** Email **Yes No?**

Name of Spouse [if applicable] \_\_\_\_\_ Spouse's Date of Birth \_\_\_\_\_

Name(s) of Children and Date of Birth(s) [if applicable] \_\_\_\_\_

Emergency Contact Name and Telephone Number: \_\_\_\_\_

**Employer Information**

Are you (please choose one) [ ] Employed [ ] Unemployed [ ] Student [ ] Disabled [ ] Retired

Client's Employer Name: \_\_\_\_\_ Telephone Number \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code \_\_\_\_\_

**Primary Insurance Information/Employee Assistance Program Information**

Primary Insured Name \_\_\_\_\_ Address \_\_\_\_\_ Home Telephone \_\_\_\_\_

Name of Insurance Company/EAP \_\_\_\_\_ Insurance/EAP (800) Phone \_\_\_\_\_

Insurance Member # \_\_\_\_\_ Plan # \_\_\_\_\_ Date of Birth of Insured \_\_\_\_\_

Insured's Employer \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

**Referred By/How Did You Hear About Us?**

- I am a former client returning
- Employee Assistance Program
- Physician, Dr. \_\_\_\_\_
- Yellow Pages
- Relative
- Minister/Priest/Rabbi
- Another Therapist
- Other \_\_\_\_\_
- Friend/Family
- Insurance Company
- Website
- Court/Legal
- School
- Internet

**As a courtesy, we offer appointment reminders. Please choose one of the following options:**

- Please call me for my appointment reminder at \_\_\_\_\_
- Please email my appointment reminder to \_\_\_\_\_
- Please do not give me any appointment reminders

**Print Authorized Person or Patient's Name:** \_\_\_\_\_

**Authorized Person or Patient's Signature:** \_\_\_\_\_

Name: \_\_\_\_\_  
ID: \_\_\_\_\_  
DOB: \_\_\_\_\_

\_\_\_\_\_ Intake Date  
\_\_\_\_\_ Therapist Initials

**COMPASSIONATE MINDS THERAPY, LLC**  
**HIPPA NOTICE OF PRIVACY PRACTICES**

**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.**

**Effective date: MARCH 18, 2019**

Compassionate Minds Therapy, LLC has been and always will be committed to maintaining our clients' confidentiality. We will only release your health care information in accordance with federal and state laws and the code of ethics for the counseling profession.

This notice describes our policies related to the use and disclosure of your health care information.

**Uses and disclosures of your health information for the purposes of:** Providing treatment services, collecting payment and conducting healthcare operations. These are necessary activities for provided our client's quality care. State and federal laws allow us to use and disclose your health information for these purposes.

**TREATMENT:** We may need to use or disclose health information about you to provide, manage or coordinate your care or related services. This may include include consultants and potential referral sources.

**PAYMENT:** Information needed to verify insurance coverage and/or benefits with your insurance carrier, to process your claims, as well as information needed for billing and collection purposes. We may also bill the person in your family who is identified as the primary insurance holder or responsibility party.

**HEALTHCARE OPERATIONS:** We may need to use information about you to review our treatment procedures and business activity. Information may be used for certification, compliance and licensing activities.

**Other uses or disclosures of your information, which does not require your consent:** There are some instances where we may be required to use and disclose information without your consent. For example, but not limited to: Information you and/or your child or children report about physical or sexual abuse. In this circumstance, in accordance with Nebraska State Law, we are obligated to report this to Child Protective Services. If you provide information that informs us that you are in danger of harming yourself or others. Information shared with law enforcement if a crime is committed on our premises or against one of our staff. Any other instances as required by law such as a subpoena or court order. Information to remind you of /or to reschedule appointments or other treatment alternatives.

Clinical records, psychotherapy notes, and other disclosures require a separate signed release of information. You have a right to or will receive notification of a breach of any unsecured personal health information. You have a right to restrict any disclosure of personal health information where you have paid for services out-of-pocket and in full.

Name: \_\_\_\_\_  
ID: \_\_\_\_\_  
DOB: \_\_\_\_\_

\_\_\_\_\_ Intake Date  
\_\_\_\_\_ Therapist Initials

## **COMPASSIONATE MINDS THERAPY, LLC**

### **CLIENT RIGHTS**

#### **Right to request how we contact you.**

It is our normal practice to communicate with you at your home address and via the daytime phone number you provided us when you scheduled your appointment, about health matters, billing information, and appointment reminders (if requested). If permitted by you, we may sometimes leave messages on your voicemail. You also reserve the right to request that our office communicate with you in a different way.

#### **Right to release your medical records.**

You may consent in writing to release your records to others that you identify. You have the right to revoke this authorization, in writing, at any time. However, please note that a revocation is not valid to the extent that we acted in reliance on such authorization.

#### **Right to inspect and copy your medical and billing records.**

You have the right to inspect and obtain a copy of your information contained in our medical records. To request access to your billing or health information, please contact the office manager. Under limited circumstance we may deny your request to inspect and copy. If you ask for a copy of any information, we may charge a reasonable fee for the costs of copying, mailing and supplies.

#### **Right to add information or amend your medical records.**

If you feel that information contained in your medical record is incorrect or incomplete, you may ask us to add information to amend the record. We will make a decision on your request within 60 days, or in some cases within 90 days. Under certain circumstances, we may deny your request to add or amend information. If we deny your request, you have a right to file a statement that you disagree. Your statement and our response will be added to your record. To request an amendment, you must contact the office manager. We will require you to submit your request in writing and to provide an explanation concerning the reason for your request.

#### **Right to an accounting of disclosures.**

You may request an accounting of any disclosures, if any, we have made related to your medical information, except for information we used for treatment, payment, health care operational purposes, information that was shared with you or your family, or information that you gave us specific consent to release. This also excludes information we were required to release. To receive information regarding disclosure made for a specific time period no longer than seven years, please submit your request in writing to Compassionate Minds Therapy, LLC Privacy Officer. We will notify you of the cost involved in preparing this list.

#### **Right to request restrictions on uses and disclosures of your health information.**

You have the right to ask for restrictions on certain uses and disclosures of your health information. This request must be in writing and submitted to our office manager. However, please note that we are not required to agree to such a request.

#### **Right to complain.**

If you believe your privacy rights have been violated, please contact us personally, and discuss your concerns. If you are not satisfied with the outcome, you may file a written complaint with the U.S. Department of Health and Human Services. An individual will not be retaliated against for filing such a complaint.

#### **Right to receive changes in policy.**

You have the right to receive any future policy changes secondary to changes in state and federal laws.

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**COMPASSIONATE MINDS THERAPY, LLC**  
**MARTI FINKEL, LCSW, LIMHP, LADC**

**INFORMED CONSENT**

Thank you for choosing Marti Finkel, LCSW, LIMHP, LADC. Today's appointment will take approximately 60 minutes. We realize that starting counseling is a major decision and you may have many questions. This document is intended to inform you of our policies, State and Federal Laws and your rights. If you have other questions or concerns, please ask and we will try our best to give you all the information you need. Marti Finkel is a Nebraska Licensed Independent Mental Health Practitioner, Licensed Alcohol and Drug Counselor and a Certified Master Social Worker. She began working with clients 12 years ago. Marti has worked in a variety of settings to include; adolescent residential care, outpatient therapy serving adults and adolescents struggling with mental health and addiction issues and in an acute psychiatric hospital. Her counseling experience ranges from treating adults, adolescents and families. Marti provides substance abuse evaluations and recommendations. . Treatment philosophy and practices will be discussed with you today.

**CONFIDENTIALITY AND EMERGENCY SITUATIONS:** Your verbal communication and clinical records are strictly confidential except for the following situations: a) information (diagnosis and dates of service) shared with your insurance company to process your claims; b) information you and/or your child or children report about physical, sexual, or elder abuse; then, by Nebraska State Law, this information must be reported to the Department of Children and Family Services; c) where you sign a release of information to have specific information shared; d) if you provide information that you are in danger of harming yourself or others; or e) when required by law. If an emergency situation for which you feel immediate attention is necessary, please call the office to have a counselor paged. If no call is received within 15 minutes, you as the client or guardian understand that you are to contact the emergency services in the community (911) for those services. Marti Finkel, LCSW, LIMHP, LADC will follow those emergency services with standard counseling and support as needed.

**HOURS:** Our front desk is open to take telephone calls Monday through Thursday from 8:30 am until 8:00 pm, Fridays 8:30 am until 2:00 pm. These hours may vary. Furthermore, your therapist may offer different and/or additional appointment times. Voicemail is available to leave a message when the office is closed, as well as, when all lines are busy during the day. Messages left overnight or on the weekend will be attended to the next business day. In the case of an emergency, please contact 911 or go directly to the nearest hospital emergency room.

**COORDINATION OF TREATMENT:** It is important that all health care providers work together. As such, we would like your permission to communicate with your primary care physician and/or psychiatrist. Your consent is valid for six months. **Please understand that you have the right to revoke this authorization, in writing, at any time by sending notice.** If you prefer to decline consent no information will be shared.

**If consent is granted, you will be provided a release of information form to be completed for each treatment provider.**

\_\_\_\_ You may inform my physician(s)

\_\_\_\_ I decline to inform my physician

**NOTICE OF PRIVACY PRACTICES AND CLIENT RIGHTS:**

I/We have read and received a copy of the:

'Notice of Privacy Practices' and the 'Client Rights' document.

Initials \_\_\_\_\_

Date \_\_\_\_\_

Name: \_\_\_\_\_  
ID: \_\_\_\_\_  
DOB: \_\_\_\_\_

\_\_\_\_\_ Intake Date  
\_\_\_\_\_ Therapist Initials

## FINANCIAL INFORMATION

**FINANCIAL/INSURANCE ISSUES:** As a courtesy we will bill your insurance company, HMO, responsible party or third party payer for you if you wish. We ask that at each session you pay your co-payment or coinsurance amount. In the event you have not met your deductible, the full fee is due at each session until the deductible is satisfied. If your insurance company denies payment or does not cover counseling, we request that you pay the balance due at that time. **If your balance exceeds \$200.00 we will need to ask that you pay for services when rendered.** In the event that an account is overdue and turned over to our collection agency, the client or responsible party will be held responsible for any collection fee charged to our office to collect the debt owed. We ask that every client authorize payment of medical benefits directly to Marti Finkel, LCSW, LIMHP, LADC. You may put a credit card on file to pay for charges not covered by your insurance.

Following this meeting we ask you to notify us immediately as to any change in your health insurance, place of employment, home address or other information pertinent to our records. (Failure to do this may result in our no longer being able to process insurance claims for you and you would be held responsible for full payment of each session not covered by your insurance). The financial responsibility for your treatment is ultimately yours.

**Policy on Non-Covered Services:** In order to offer you consistent quality care and to coordinate this care with other providers or organizations, we may need to charge for services that are not typically covered or reimbursed by your insurance company. A list of these services is provided below. When we provide these services, we will bill you directly. These services are billed at the standard hourly rate for your therapist or doctor. If you have any questions regarding this policy, please ask our staff. The following are a list of some of the services not covered by insurance companies. These services are billed at the standard hourly rate:

- Court ordered and legal related services
- Preparing reports or letters for other providers or organizations
- Completing documents (for disability claims, insurance reviews, workers' compensation, etc.)
- Consultations by telephone or e-mail
- Duplication of your medical records
- Evaluating, testing or treatment services not covered by your insurance

We sincerely appreciate your cooperation and at any time you have questions regarding insurance, fees, balances or payments please feel free to ask one of our billing staff.

**Missed Appointment Cancellation Policy:** We consider it an honor and privilege to be of service & hope for a long and mutually satisfying relationship. We do understand that there may be extenuating circumstances; however, we request that any cancellation or rescheduling of your appointment be made at least **24 hours in advance**. We value your time and hope that you value ours. Missed appointments or appointments cancelled less than 24 hours in advance affect us all and prevent us from being able to serve others in need. Because of this, we have created a cancellation and missed appointment policy outlined here.

Name: \_\_\_\_\_  
ID: \_\_\_\_\_  
DOB: \_\_\_\_\_

\_\_\_\_\_ Intake Date  
\_\_\_\_\_ Therapist Initials

You will be charged a **\$100.00** fee for missed appointments or appointments not cancelled at least 24 hours in advance of the scheduled visit. If you are new to our practice and cancel or are a no-show within 24 hours of your first visit and wish to reschedule, a cancellation fee of **\$35.00** will be applied to your bill at the time of your rescheduled appointment.

We provide reminder calls before your appointment as a courtesy. You are still responsible for remembering your scheduled appointments. Stating that you did not receive a reminder call or that the call was made after the 24-hour deadline, does not make your missed or cancelled appointment an exception. Furthermore, we have a **3 late cancel/no show policy**. If you late cancel or no show for 3 appointments, you will not be rescheduled. We appreciate your consideration of our time and will express the same consideration for yours.

We realize that there may be emergency situations where a 24-hour cancellation notice is not possible, and those situations will be dealt with individually. Questions? Please ask your therapist.

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I, the undersigned, agree and consent to participate in the mental health care offered and provided by Marti Finkel, a mental health professional as defined by Nebraska Law.

I understand that I am consenting and agreeing only to those mental health services that the above-named professional is qualified to provide within the scope of the professional's license, certifications, and training.

Please Print Patient's Name: \_\_\_\_\_

**Patient Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Witness Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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## PARENTAL CONSENT FOR MENTAL HEALTH TREATMENT OF A MINOR

Child's Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

As the parent or legal guardian with the authority to consent on behalf of the minor child named above, I hereby give my consent for the minor to seek counseling services by

**Marti Finkel, LCSW, LIMHP, LADC**

This consent will be valid until the minor reaches the age of 19, but can be revoked at any time by written notification.

Any questions relating to this form or the proposed treatment can be directed to Marti Finkel, LCSW, LIMHP, LADC at 402-238-1431 ext. 1004.

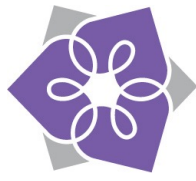
\_\_\_\_\_  
(Print Name of Parent/Guardian)

\_\_\_\_\_  
(Signature of Parent/Guardian)

\_\_\_\_\_  
(Date)

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(Therapist Signature)



# compassionate minds THERAPY

## Mental and Physical Health Questionnaire

### Current Symptoms (Check Symptoms You Have Recently Experienced)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Depressed Mood              | <input type="checkbox"/> Loss of Interest           | <input type="checkbox"/> Sleep Disturbances       |
| <input type="checkbox"/> Appetite Changes            | <input type="checkbox"/> Avoidance                  | <input type="checkbox"/> Crying Spells            |
| <input type="checkbox"/> Feelings of Guilt           | <input type="checkbox"/> Unable to Enjoy Activities | <input type="checkbox"/> Fatigue                  |
| <input type="checkbox"/> Feelings of Helplessness    | <input type="checkbox"/> Feelings of Worthlessness  | <input type="checkbox"/> Low Self-Esteem          |
| <input type="checkbox"/> Feelings of Hopelessness    | <input type="checkbox"/> Thoughts of Death          | <input type="checkbox"/> Suicidal Thoughts        |
| <input type="checkbox"/> Racing Thoughts             | <input type="checkbox"/> Excessive Worry            | <input type="checkbox"/> Self-Harm Behaviors      |
| <input type="checkbox"/> Concentration Problems      | <input type="checkbox"/> Impulsivity                | <input type="checkbox"/> Homicidal Thoughts       |
| <input type="checkbox"/> Feelings of Panic           | <input type="checkbox"/> Frequent Mood Swings       | <input type="checkbox"/> Increased Risky Behavior |
| <input type="checkbox"/> Hallucinations              | <input type="checkbox"/> Excessive Energy           | <input type="checkbox"/> Increased Irritability   |
| <input type="checkbox"/> Feeling Keyed Up or On Edge | <input type="checkbox"/> Gastrointestinal Upset     | <input type="checkbox"/> Headaches                |

Have you ever participated in outpatient therapy?  Yes  No If Yes please provide names & approximate treatment dates for each provider seen in the space provided below.

Provider: \_\_\_\_\_ Dates: \_\_\_\_\_

Provider: \_\_\_\_\_ Dates: \_\_\_\_\_

Provider: \_\_\_\_\_ Dates: \_\_\_\_\_

Have you ever had inpatient treatment for psychiatric purposes?  Yes  No If Yes please provide the name(s) of the treatment facilities & the approximate dates for each stay.

Facility: \_\_\_\_\_ Dates: \_\_\_\_\_

Facility: \_\_\_\_\_ Dates: \_\_\_\_\_

Facility: \_\_\_\_\_ Dates: \_\_\_\_\_

Have you ever been diagnosed with any mental health conditions?  Yes  No If Yes please list all diagnoses below:

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



Please list all psychotropic medications (with dosages) that you are currently being prescribed.

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

Allergies: Please list any food, medication, or other allergies you have.

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

Are you currently being treated by a psychiatrist?  Yes  No If Yes who are you currently seeing?

Provider: \_\_\_\_\_ Dates: \_\_\_\_\_

Have you ever attempted suicide?  Yes  No - If Yes when? \_\_\_\_\_

### Physical Health Information

Please list any past health conditions including major illnesses, broken bones, and surgeries which required medical treatment. Please also list any hospitalizations for medical conditions.

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

Please list all medications (with dosages) for physical health reasons that you are currently being prescribed.

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

Is there any additional family medical history?  Yes  No If Yes, please explain \_\_\_\_\_

When your mother was pregnant with you, were there any complications during the pregnancy or birth?

Yes  No If Yes, please explain: \_\_\_\_\_

Have you participated in regular exercise/sports/recreation (about 3 times a week) to keep fit  Yes  No

Have you been dieting to lose weight?  Yes  No

Use of Caffeine: Indicate how often in a day you drink beverages containing caffeine including pop, coffee, tea, or energy drinks. \_\_\_\_\_ Daily \_\_\_\_\_ Weekly \_\_\_\_\_ Monthly

## Substance Use History

Have you smoked cigarettes on a daily basis? \_\_\_\_ Yes \_\_\_\_ No If yes, # per day: \_\_\_\_\_

How often in the past month did you drink alcohol? (please circle your answer)

A. I do not drink at all B. About once a month C. 2 to 3 times a month D. 2 to 3 times a week E. Once a day or more

On days that you drink, how many servings of beer/wine/spirits/ do you consume? \_\_\_\_\_

How often in the past month have you used illicit drugs? (please circle your answer)

A. I do not use drugs at all B. About once a month C. 2 to 3 times a month D. 2 to 3 times a week E. Once a day or more

Please list the names of any illicit drugs and the quantity consumed.

\_\_\_\_\_

\_\_\_\_\_

Have you ever been hospitalized for chemical dependency treatment? \_\_\_\_ Yes \_\_\_\_ No If Yes please provide the name(s) of the treatment facilities & the approximate dates for each stay.

Facility: \_\_\_\_\_ Dates: \_\_\_\_\_

Facility: \_\_\_\_\_ Dates: \_\_\_\_\_

Facility: \_\_\_\_\_ Dates: \_\_\_\_\_

## Family Background

Where were you born? \_\_\_\_\_ Where did you grow up? \_\_\_\_\_

Were you adopted? \_\_\_\_ Yes \_\_\_\_ No

Father's Name: \_\_\_\_\_ Age: \_\_\_\_\_ Occupation: \_\_\_\_\_

Mother's Name: \_\_\_\_\_ Age: \_\_\_\_\_ Occupation: \_\_\_\_\_

List your sibling's names and ages: \_\_\_\_\_

Did your parents divorce? \_\_\_\_ Yes \_\_\_\_ No If Yes, how old were you when they divorced? \_\_\_\_\_

If your parents divorced, whom did you live with? \_\_\_\_\_

Are you currently:  Married  Partnered  Divorced  Divorced  Single  Widowed

How long? \_\_\_\_\_

If not married, are you currently in a relationship?  Yes  No If Yes, How long? \_\_\_\_\_

How would you identify your sexual orientation? \_\_\_\_\_

What is our spouse or significant other's occupation? \_\_\_\_\_

Describe the relationship with your spouse or significant other: \_\_\_\_\_

Do you have any children?  Yes  No If Yes, list names and ages: \_\_\_\_\_

Describe the relationship with your children: \_\_\_\_\_

### **Educational/Occupational/Legal Background**

Education – Years completed or highest degree earned \_\_\_\_\_

Military Service:  Yes  No If Yes,  Present  Past How long? \_\_\_\_\_ Rank \_\_\_\_\_

Employer Name: \_\_\_\_\_ Length of employment: \_\_\_\_\_

Recent/Current Legal Issues:  Yes  No If Yes please provide a description of current legal issues.

Financial Problems:  Yes  No

Are there any other concerns that you wish to share with your therapist? \_\_\_\_\_