

## **COUPLES INTAKE FORM**

(Please Print)

Date: /	/		How did you hea	ar about us?									
☐ Ms. ☐ [	- 1	Full Name	) (Middle)										
Nick Name: Name You Pref								E	Birth date:	Age:	Sex:		
									/ /		□м	□F	
Parent/Guardi	an/Pow	er of Attor	ney: (if applicable	Social Se	curity# (Ir	Race:  White Asian Black Other: Hispanic							
CONTACT INFORMATION													
Street address: Suite/Apartment Number:													
City:				State:		ZIP Code:			May We Send I	Mail Here:	☐ Yes	□ No	
Mailing Addres	ss or Po	ost Office I	Вох:										
City:				State:		ZIP Code:			May We Send I	Mail Here:	☐ Yes	□ No	
Home Phone:	(	)						May V	Ve Leave a Mess	sage Here:	☐ Yes	□ No	
Mobile Phone:	(	)						May V	May We Leave a Message Here:   Yes  No				
Work Phone:	( )							May V	May We Leave a Message Here: ☐ Yes ☐ No				
Email Address:	(	)						May V	flay We Send Email Here: ☐ Yes ☐ No				
	EMERGENCY CONTACT												
Name:	Name: Relationship:												
Home Phone:	(	)				Mobile Phone:	(	)					
				EMPLOY	MENT	INFORMAT	ΓΙΟΝ						
Employer:						Length of Empl	oyment	:					
Occupation:						Average Hours	Worked	d Per V	Veek:				
Annual		□ B	Below \$80,000	□ \$80	,001 to \$9	90,000	□ \$90	),001 to	5 \$100,000				
Combined Household		□ \$	100,001 to \$110,	000 🗖 \$11	0,001 to \$	\$120,000 🗖 \$120,00			001 to \$130,000				
Income :		□ \$	130,001 to \$140,	000 🗖 \$14	0,001 to \$	\$150,000							
EDUCATION INFORMATION													
(Circle) Last	ear of	School Co	ompleted: 9 10	11 12 GED	Colle	ege: 1 2 3 4	4	Other:					
Are You Curre	ntly in S	School?	l Yes □ No	If Yes, What S	School:								
	RELATIONAL INFORMATION												
Current Status	<b>5</b> :					Are You Co	ontent w	rith You	ur Current Status	? 🗆 Yes	□ No		
□ Single □ Dating If No, Briefly Explain: □ Engaged □ Married □ Separated □ Divorced □ Widowed □ Living together													
If Married, Hov	w Long:		Numbe	r of Previous N	Marriages	for You:		_	For Your Partne	r:			
If Separated or Divorced, How Long: If Widowed, How Long:													



Partner's Name (Last, First, Middle):									☐ Mr. ☐ Ms. ☐ Miss.	☐ Mrs.☐ Dr.☐ Rev.☐	
How long Have You Known Your	A	\ge:	Preferred Name:								
Partner's Race: Partner's Sex:				Partner's Occupation:							
☐ White ☐ Asian ☐ Black ☐ Other: Hispanic		□М □F		Average Hours Wo							
(Circle) Last Year of School Partner Completed: 9 10 11 12 GED College: 1 2 3 4 Other:											
What Words Would You Use to Describe Your Partner:											
Is Your Partner Supportive of Yo	u Seeki	ng Counseling:	W	ith Whom Do You	. Current	ly Live (Check	All th	nat Apply):			
☐ Yes ☐ No ☐ Unsure ☐ I		-		Alone Children Parent(s)		Boyfriend Girlfriend Sibling(s)	yfriend ☐ Spous			_	
CHILDREN											
List Your Children (Living or Dec	eased):										
Name	Sex	Current Age of Year of Death		Relationship to Natural, Adopted	o You Living with I, Step You?			Describe Him/Her			
Have You Ever Placed a Child fo	r Adopt	ion: □ Yes □	l No	o If Yes, When	n:						
Have You Ever Had a Miscarriag	e or Me	edical Abortion:		Yes □ No	If Yes, W	/hen:					
			F	AMILY OF O	RIGIN						
List Mother, Father, Brothers, Sis	sters, St			-		Effected You	Posit	ively or Negativ	/ely:		
Name	Sex	Current Age of Year of Death		Relationship to (Mom, Dad, Sibling	o You g, Step)	Occupatio	n	Describe Him/	/Her		



PRIMARY PHYSICIAN INFORMATION								
Primary Physician:				Phone:	( )			
Address:		City:		Zip:				
Specialty (e.g. Family Pi	ractice, OB/GYN, Internal M		Date of last physical:					
Are You Currently Receiving Medical Treatment: ☐ Yes ☐ No ☐ If Yes, Please Specify:								
	esses, Surgeries, Hospitaliz							
MEDICATIONS								
List All Current Medications You Are Taking, Including those You Seldom Use or Take Only as Needed (Use Back if Necessary):								
Medication:		Dosage:		Improves	s □ Prevents □ Co	ntrols:		
Medication:		Dosage:		Improves	s □ Prevents □ Co	ntrols:		
Are You Taking these M	edication(s) According to Y	our Doctor's Recom	mendations:	☐ Yes	□ No			
If No, Briefly Explain:								
		HYSIOLOGIC	AL CVMD	TOME				
· ·	ne Following Physiological S							
	□ Past □ Present □ Past □ Present	Dizziness Sleep Trouble				□ Past □ Present		
	Past Present	Tension	Past	□ Preser	nt Rapid Heart Rate	□ Past □ Present		
	□ Past □ Present	Intestinal Trouble			nt Hearing Noises	Past 🗆 Present		
Change in Appetite	□ Past □ Present	Tiredness	Past	☐ Preser	nt Pain	Past Present		
Hearing Voices	Past 🛭 Present	Seeing Things	Past	☐ Preser	nt Other	Past Present		
Your Height:	Your Weight:	How ha	as Your Weig	ht Change	e in the Last 2-3 Months:			
CURRENT STATUS								
	Following Problems which		D.D	D D	A modern	D. Deed D. Deeder		
	Past Present Present Present	Nervousness				□ Past □ Present		
	Past Present	Unhappiness Apathy				□ Past □ Present		
	Past Present	Grief				Past Present		
	Past Present	Defective Feeling	⊒ rast	□ Preser	nt Loneliness	Past Present		
Shvness	Past Present	Fears				□ Past □ Present		
	Past Present	Communication				□ Past □ Present		
	Past 🛭 Present	Verbal Abuse	Past	☐ Preser	nt Sexual Abuse	Past D Present		
Temper	Past 🛭 Present	Anger			nt Aggressiveness	Past D Present		
	Past Present	Concentration			nt Racing Thoughts	Past Present		
	Past Present	Memory			nt Loss of Control	Past Present		
	Past Present	Self-Control			nt Compulsivity	Past Present		
	Past Present	Pregnancy	Past	⊔ Preser	nt Abortion	Past Present		
	Past Present	TraumaAlcohol Use	Past	⊔ Preser	It Eating Problems	Past Present		
	Past Present Present Present	And Ambition				☐ Past ☐ Present		
	Past D Present	Being a Parent				Past Present		
	Past Present	Disaster			nt Smoke Cinarettes	Past Present		
	Past Present	Hi Risk Behavior.			nt Zoning/blanking or	ıt □ Past □ Present		
Con Flammann		LEVEL OF			2011119/Blainking oc	t = 1 dot = 1 losont		
Indicate How Distressed	LVou Are by Placing on "V"				ss: 10 - Extrema Dietros	6):		
Indicate How Distressed You Are by Placing an "X" on the Scale Below (1 = Very' Little Distress; 10 = Extreme Distress):								
1	2 3 4	_	6	7	8 9	10		
-	ng Any Suicidal Thoughts?				ing Them in the Past?	☐ Yes ☐ No		
Have You Ever Attempted Suicide: ☐ Yes ☐ No If Yes, When and How:								
•	-		iue. 🗕 Yes	□ INO				
If Yes, When and Who:								

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PRESENTING ISSUES AND GOALS							
Please Describe Why You Are Coming to Counseling (i.e. What Are Your Issues, Problems?):							
Why Have You Decided to Come for Counseling Now:							
What Do You Hope to Gain or Change by Coming for Counseling:							
How Long Do You Believe Counseling Should Last:							
Activities, Interests and Strengths:							
1. What are your Strengths?							
2. What are your Needs?							
3. What are your Abilities?							
4. What are your Preferences, if any?							
What issues could inhibit progress towards treatment?							
During the last 12 months, any behaviors concerning to you when trying to stop/cut down on spending? Describe briefly:							
During the last 12 months, have you experienced challenges with avoiding family/friends from observing how much you are spending? Describe briefly:							
PREVIOUS COUNSELING							
List Any Previous Counseling, Psychiatric Treatment, or Residential/In-Patient Care You Have Received (Use Back If Necessary):							
Therapist: Location: Dates: Reason:							
Therapist: Location: Dates: Reason:							
RELIGIOUS BACKGROUND							
Please describe your religious involvement if any. Are there any special religious, cultural or ethnic considerations we should be aware of?							
Church attendance? If so, what is the name?							
Would you like spiritual principles incorporated into your counseling? ☐ Yes ☐ No							
If yes, at what level? ☐ Minimally ☐ Occasionally ☐ Often ☐ Very Often ☐ Intensively							
TERMS OF SERVICE							
I hereby give Milestone Counseling permission to provide counseling services for the patient mentioned above:							
Signed: Date:							



## **RELATIONSHIP QUESTIONNAIRE**

This questionnaire is intended to estimate the current satisfaction with your relationship. Circle the number between 1 (completely satisfied) to 10 (completely unsatisfied) beside each issue. Focus on the present & not the past.

1.	List the things that your partner does that please you:
2.	What would you like your partner to do more often?
3.	What would your partner like you to do more often?
4.	How do you contribute to difficulties in the relationship?
5.	What are you prepared to do differently in the relationship?
6.	Is there a problem of alcohol/substance abuse?
7.	Have you or your partner participated in any of the following activities:  Swinging Pornography Extra-Marital Affair Compulsions/Addictions: (Specify)
8.	Do you often try to anticipate your partner's wishes so that you can please them?
9.	What are you goals or what do you hope to accomplish?

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Milestone Counseling



# CIRCLE THE APPROPRIATE RESPONSE FOR EACH

1= Completely Unsatisfied	A Little Sa	tisfied	5=Some	what Satis	sfied	Mostly S	Satisfied	10= (	Completely	/ satisfied
General Relationship	1	2	3	4	5	6	7	8	9	10
Personal Independence	1	2	3	4	5	6	7	8	9	10
Spouse Independence	1	2	3	4	5	6	7	8	9	10
Couples Time Alone	1	2	3	4	5	6	7	8	9	10
Social Activities	1	2	3	4	5	6	7	8	9	10
Occupational or Academic Prog	ress 1	2	3	4	5	6	7	8	9	10
Sexual Interactions	1	2	3	4	5	6	7	8	9	10
Communication	1	2	3	4	5	6	7	8	9	10
Financial Issues	1	2	3	4	5	6	7	8	9	10
Household/Yard Responsibility	1	2	3	4	5	6	7	8	9	10
Parenting	1	2	3	4	5	6	7	8	9	10
Daily Social Interaction	1	2	3	4	5	6	7	8	9	10
Trust in Each Other	1	2	3	4	5	6	7	8	9	10
Decision Making	1	2	3	4	5	6	7	8	9	10
Resolving Conflicts	1	2	3	4	5	6	7	8	9	10
Problem Solving	1	2	3	4	5	6	7	8	9	10
Support of One Another	1	2	3	4	5	6	7	8	9	10

#### TERMS OF SERVICE

I hereb	v aive	Milestone	Counseline	a and its'	staff	permission to	provide couns	elina	services	for the	patient	mentione	d above

Signed:	Date:

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## **FINANCIAL POLICY**

#### **Payment Policy:**

We are committed to providing you with the best possible care. Payment for service (including co-payments) are **due at the time of service**.

It is essential that you compete these forms in their entirety and provide Milestone Counseling with all the necessary information regarding **ALL** your insurance providers.

Our fees:

- Your Sessions are \_\_\_\_\_per hour per fee schedule and policies
- Groups are \$\_\_\_\_ per hour.
- Additional counselor Service: Treatment Summary Requests, Professional Letters, Emails or Phone/Conference calls, if requested, will be billed in 15minute increments at the your therapeutic rate listed above.
- Administrative Services by staff: Letters from the front office, insurance forms, authorization requests will be billed a \$15 per 15 minutes of billable services with a \$15 minimum.
- Court Appearances and Depositions are billed door to door at \$300 per hour with a minimum \$1000 retainer.
- · Returned checks are subject to a \$30 fee.
- No-show fees are charged for appointments canceled or broken without 24 hours advance notice unless there is an emergency or illness. The no-show fee is equivalent to your normal session fee.
- Insurance clients who accrue 3 no call/late call (less than 24 hours notice) or no shows for appointments may have services terminated.
- In the event there are changes to the client's insurance plan(s), co-pays, deductibles, and/or charges not paid by insurance are the responsibility of the client. A credit/debit card authorization form will be provided to pay for these charges.

#### **Policy on Insurance Reimbursement:**

If you have Insurance that provides coverage for mental health counseling, we can help you receive your maximum allowable benefits.

We will be happy to provide you with a receipt to forward to your insurance company. You are responsible for generating the claim and mailing it to the insurance company and tracking your reimbursement.

We will gladly discuss your proposed treatment and answer any questions relating to your insurance. You must realize, however, that

- 1. Your insurance is a contract between you, your employer and the insurance company. We are not a party to that contract.
- 2. Our fees are considered to fall within the acceptable range by most companies, called "Usual, Customary and Reasonable" (UCR). Some companies pay a percentage of the UCR for a given area. However, some companies reimburse based on an arbitrary "schedule" of fees, which bears no relationship to the current standard and cost of care in this area.
- 3. Not all services are a covered benefit in all contracts. Some insurance companies arbitrarily select certain services they will not cover.
- 4. If your company requests a report from us in order to process your claim, we will need to receive our normal hourly fee from you for this service.

#### **Rate Calculation Policy:**

- Mandated counseling is subject to a \$20 per hour surcharge, couples & family counseling a \$10 per hour surcharge, below \$50,000 household income, & a \$20 per hour surcharge, above \$60,000 household income.
- Mediation services are billed at \$140.00 per hour.
- Late evening appointments, 6 p.m. & later, will be subject to a \$20 per hour surcharge
- Fees listed are for one clinical one hour. Longer sessions are calculated by .5 hour increments
- Hourly fees are calculated and based on previous year's total household income and/or support from all sources
  including, but not limited to, hourly wages, salaries, bonuses, investment income, Social Security, disability, retirement
  income, child support, alimony, welfare, unemployment compensation, food stamps, public or private childcare
  assistance, company vehicle, public or private housing assistance, board, etc.
- Proof of income may be required. All financial information kept confidential.
- · Discounts for multiple clients or weekly sessions, from the same family, may be arranged on a case by case basis.

Signature Date

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# Informed Consent & Release of Liability

n is to document that I (please print) give my consent and
on for Milestone Counseling to provide mental health therapy services to myself and/or
orint), who is my child or for whom I am legal guardian, custodian, or legal Attorney.
stand the following:
Although I expect benefits from this treatment, such benefits or particular outcomes cannot be guaranteed.
Due to the counseling or therapy, I may experience emotional strains, feel worse during treatment, and make life changes that could be distressing.
This therapist is not providing an emergency service, and I have been informed of whom to call in an emergency or during weekend and evening hours.
Regular attendance will produce maximum benefits, but I am free to discontinue treatment at any time.
Conversations with the therapist will be almost always confidential. However, the therapist, by law, must report actual or suspected child, spouse, or elder abuse to the appropriate authorities. The therapist also has a legal responsibility to protect anyone I may threaten with violence, harmful, or dangerous actions (including those to myself) and may break the confidentiality of our communications if such a situation arises. The therapist will make reasonable efforts to resolve these situations before breaking confidentiality.
I am financially responsible for this treatment and any portion of the fees not reimbursed or covered by insurance are payable by me.
I have been informed that for the protection of clients and therapists, all sessions with persons under the age of 18 may be videotaped.
I know of no reasons that I should not undertake this therapy and I agree to participate fully and voluntarily.
I acknowledge that I have the right to request a printed copy of the Milestone Counseling Client Handbook.
I have read and received the Office Policies & General Information Agreement for Psychotherapy Services and I agree to the policies. I have also received a copy of the HIPAA Notice of Privacy Practices. I have discussed any concerns about the policies with the therapist prior to signing this consent.
e: Date:



## 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 this document carefully.

The Health Insurance Portability & Accountability Act of 1996 (HIP AA) requires all health care records and other individually identifiable health information (protected health information) used or disclosed to us in any form, whether electronically, on paper, or orally, be kept confidential. This federal law gives you, the patient, significant new rights to understand and control how your health information is used. HIP AA provides penalties for covered entities that misuse personal health information. As required by HIP AA, we have prepared this explanation of I how we are required to maintain the privacy of your health information and how we may use and disclose your health information.

Without specific written authorization, we are permitted to use and disclose your health care records for the purposes of treatment, payment

Without specific written authorization, we are permitted to use and disclose your health care records for the purposes of treatment, payment, and health care operations.

- Treatment means providing, coordinating, or managing health care and related services by one or more health care providers. Examples of treatment would include psychotherapy, medication management, etc.
- Payment means such activities as obtaining reimbursement for services, confirming coverage, billing or collection activities, and utilization review. An example of this would be billing your insurance company for your services.
- Health Care Operations include-the business aspects of running our practice, such as conducting quality assessment and improvement activities, auditing functions, cost-management analysis, and customer service. An example would include a periodic assessment of our documentation protocols, etc.

In addition, your confidential information may be used to remind you of an appointment (by phone or mail) or provide you with information about treatment options or other health-related services. We will use and disclose your PROTECTED HEALTH INFORMATION when we are required to do so by federal, state or local law. We may disclose your PROTECTED HEALTH INFORMATION to public health authorities that are authorized by law to collect information; to a health oversight agency for activities authorized by law included but not limited to: response to a court or administrative

order, if you are involved in a lawsuit or . similar proceeding; response to a discovery request, subpoena, or other lawful process by another party involved in the dispute, but only if we have made an effort to inform you of the request or to obtain an order protecting the information the party has requested. We may release **PROTECTED HEALTH** vour INFORMATION to a medical examiner or coroner to identify a deceased individual or to identify the cause of death. We may use and disclose your PROTECTED INFORMATION HEALTH necessary to reduce or prevent a serious threat to your health and safety or the health and safety of another individual or the public. Under these circumstances, we will only make disclosures to a person or organization able to help prevent the threat.

Any other uses and disclosures will be made only with your written authorization. You may revoke such authorization in writing and we are required to honor and abide by that written request, except to the extent that we have already taken actions relying on your authorization.

- You have certain rights in regards to your PROTECTED HEALTH INFORMATION, which you can exercise by presenting a written request to our Privacy Officer at the practice address listed below:
  - The right to request restrictions on certain uses and disclosures of PROTECTED HEALTH INFORMATION, including those related to disclosures to family members, other relatives, close personal friends, or any other person identified by you. We are, however, not required to agree to a requested restriction. If we do agree to a restriction, we must abide by it unless you agree in writing to remove it.
  - The right to request to receive confidential communications of PROTECTED HEALTH INFORMATION from us by alternative means or at alternative locations.
  - The right to request an amendment to your PROTECTED HEALTH INFORMATION.
  - The right to obtain a paper copy of this notice for us upon request. We are required by law to maintain the privacy of your PROTECTED HEALTH INFORMATION and to provide you with notice of our legal duties and privacy practices with respect to PROTECTED HEALTH INFORMATION.

We are required to abide by the terms of the Notice of Privacy Practices currently in effect. We reserve the right to change the terms of our Notice of Privacy Practices and to make the new notice provisions effective for all PROTECTED HEALTH INFORMATION that we maintain. Revisions to our Notice of Privacy Practices will be posted on the effective date and you may request a written copy of the Revised Notice from this office. You have the right to file a formal, written complaint with us at the address below, or with the Department of Health & Human Services, Office of Civil Rights, in the event you feel your privacy rights have been violated. We will not retaliate for filing a complaint.

For more information about our Privacy Practices, please contact: The Privacy Officer of Milestone Counseling 205 Hatteras Ave. Clermont Fl. 34711 352-348-8858 For more information about HIPAA or to file a complaint:

The U.S. Department of Health & Human Services Office of Civil Rights 200 Independence Avenue, S.W. Washington, D.C 20201 877.696.6775 (toll-free)

**KEEP FOR YOUR RECORDS** 

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## **Credit Card Authorization Form**

Please complete all fields. You may cancel this authorization at any time by contacting us.

This authorization can be used to settle any outstanding balances due, co-payments, deductibles, fees and/or charges not provided by insurance.

For your convenience, this form can be used to pay for sessions in advance, out of office appointments and/or to create a payment plan. This form will remain on file until completion of therapy and payments have been fully processed.

Credit Card Information									
Card Type:	☐ MasterCard		□ Discover	$\square$ AMEX					
	□Other								
Cardholder N	Name (as shown on	card):							
Card Number	r:								
Expiration D	Date (mm/yy):								
Cardholder ZIP Code (from credit card billing address):									
I,	, au	thorize	to c	harge my credit					
	0 1 1		nd that my information v	will be saved to file					
for future tra	insactions on my ac	count.							