



INTAKE FORM

INTAKE DATE: _____ CLIENT: LEGAL NAME _____

NAME (If different) _____ BIRTH DATE: _____ GENDER _____

While Pathways recognizes a variety of genders, many insurance companies and legal entities unfortunately do not. Please be aware that the name and sex you have listed on your insurance must be used on documents pertaining to insurance, billing and correspondence.

IF A MINOR, GUARDIAN'S NAME: _____ RELATIONSHIP _____

EMERGENCY CONTACT (Name and Phone): _____

ADDRESS: _____ CITY: _____ STATE _____ ZIP _____

PHONE: H (____) _____ W (____) _____ C (____) _____

Is it okay to leave a voicemail? YES NO Is it okay to text/Appointment reminders? YES NO

EMAIL _____ Preferred Contact Method _____

REFERRAL SOURCE: Another Professional Existing Patient Website/Online Friend/Family

Other: _____

PRIMARY INSURANCE COMPANY INFORMATION

CARD HOLDER'S NAME: _____ BIRTH DATE: _____

RELATIONSHIP TO PATIENT? SELF SPOUSE PARENT LEGAL GUARDIAN

CARDHOLDER ADDRESS _____ CARDHOLDER PHONE _____

INSURANCE COMPANY NAME: _____ PHONE: _____

MEMBER ID# _____ GROUP# _____ EFFECTIVE DATE: _____

CARD HOLDER'S EMPLOYER: _____

SECONDARY INSURANCE COMPANY INFORMATION

CARD HOLDER'S NAME: _____ BIRTH DATE: _____

INSURANCE COMPANY NAME: _____ PHONE: _____

MEMBER ID# _____ GROUP# _____ EFFECTIVE DATE: _____

*******PLEASE READ AND SIGN BELOW*******

INSURED/CLIENT OR AUTHORIZED PERSON'S SIGNATURE

I authorize **payment** of any medical benefits to Pathways Counseling Center. I also understand that I am responsible for my bill. I authorize **release** of any medical or other information necessary to process this claim. I permit a copy of these signatures to be used in place of the originals.

SIGN DATE

Office Use Only: Diagnosis (ICD-10 CODE): _____ THERAPIST: _____
Intake Date _____ Intake Time _____ am/pm

Acknowledgment of Notice of Privacy Practices

Patient/Client Name: _____

DOB: _____

I hereby acknowledge that I have been given an opportunity to read a copy of Pathways Counseling Center’s Notice of Privacy Practices (laminated, two-sided Notice). I understand that if I have any questions regarding the Notice or my privacy rights, I can contact David Bedrin or Lynn Dusold at Pathways Counseling Center, 13015 W. Bluemound Road, Suite 100, Brookfield, WI 53005.

Signature of Patient/Client Date

Signature or Parent, Guardian or Personal Representative* Date

*If you are signing as a personal representative of an individual, please describe your legal authority to act for this individual (power of attorney, healthcare surrogate, etc.).

Patient/Client Refuses to Acknowledge Receipt

Signature of Staff Member Date

Email, Text, and Social Media

It may become useful during the course of treatment to communicate by email, text message (e.g. “SMS”) or other electronic methods of communication. Be informed that these methods, in their typical form, are not confidential means of communication. If you use these methods to communicate with your therapist, there is a reasonable chance that a third party may be able to intercept and eavesdrop on those messages. The kinds of parties that may intercept these messages include, but are not limited to:

- People in your home or other environments who can access your phone, computer, or other devices that you use to read and write messages
- Your employer, if you use your work email to communicate with your therapist.
- Third parties on the Internet such as server administrators and others who monitor Internet traffic

If there are people in your life that you don’t want accessing these communications, please talk with your therapist about ways to keep your communications safe and confidential. **As a practice policy, we do not communicate with patients and/or their families via social media nor accept any “friend” requests.**

Consent for Transmission of Protected Health Information by Non-Secure Means

I consent to allow you to use unsecured email and mobile phone text messaging to transmit to me the following protected health information:

- Information related to the scheduling of meetings or other appointments
- Information related to billing and payment
- Acknowledgment of emails and phone calls received
- _____

I have been informed of the risks, including but not limited to my confidentiality in treatment, of transmitting my protected health information by unsecured means. I understand that I am not required to sign this agreement in order to receive treatment. I also understand that I may terminate this consent at any time.

Signature of Patient/Client

Date

Consent for ADULT Admission For Mental Health Evaluation and/or Treatment

1. **Consent to Evaluate/Treat:** I voluntarily consent that I will participate in a mental health (e.g. psychological or psychiatric) evaluation and/or treatment by staff from Pathways Counseling Center. I understand that following the evaluation and/or treatment, complete and accurate information will be provided concerning each of the following areas:
 - a. The benefits of the proposed treatment
 - b. Alternative treatment modes and services
 - c. The manner in which treatment will be administered
 - d. Expected side effects from the treatment and/or the risks of side effects from medications (when applicable).
 - e. Probable consequences of not receiving treatment
2. A psychotherapist, a psychologist, a psychiatric nurse practitioner, a psychiatrist, a licensed therapist or an individual supervised by any of the professionals listed will conduct the evaluation or treatment. Treatment will be conducted within the boundaries of Wisconsin Law for Psychological, Psychiatric, Nursing, Social Work, Professional Counseling, or Marriage and Family Therapy.
3. **Benefits to Evaluation/Treatment:** Evaluation and treatment may be administered with psychological interviews, psychological assessment or testing, psychotherapy, medication management, as well as expectations regarding the length and frequency of treatment. It may be beneficial to me, as well as the referring professional, to understand the nature and cause of any difficulties affecting my daily functioning, so that appropriate recommendations and treatments may be offered. Uses of this evaluation include diagnosis, evaluation of recovery or treatment, estimating prognosis, and education and rehabilitation planning. Possible benefits to treatment include improved cognitive or academic/job performance, health status, quality of life, and awareness of strengths and limitations.
4. **Charges:** Fees are based on the length or type of the evaluation or treatment, which are determined by the nature of the service. I will be responsible for any charges not covered by insurance, including co-payments and deductibles. I have received a fee schedule pertaining to my therapist.
5. **Confidentiality, Harm, and Inquiry:** Information from my evaluation and/or treatment is contained in a confidential record at Pathways Counseling Center, and I consent to disclosure for use by Pathways Counseling Center staff for the purpose of continuity of my care. Per Wisconsin mental health law, information provided will be kept confidential with the following exceptions: 1) if I am deemed to present a danger to myself or others; 2) if concerns about possible abuse or neglect arise; or 3) if a court order is issued to obtain records.
6. **Discharge Policy:** There are circumstances under which I may be involuntarily discharged. I have read and understand the discharge policy of the clinic.
7. **Right to Withdraw Consent:** I have the right to withdraw my consent for evaluation and/or treatment at any time by providing a written request to the treating clinician.
8. **Expiration of Consent:** This consent to treat will expire 12 months from the date of signature, unless otherwise specified.

I have read and understand the above, have had an opportunity to ask questions about this information, and I consent to the evaluation and treatment. I also attest that I have the right to consent for treatment. I understand that I have the right to ask questions of my service provider about the above information at any time.

Signature of client age 18 years or older or legal representative

Date

Signature of witness

Date

Patient Bill of Rights

Please note the framed poster in the lobby regarding Patient Rights. Every patient at Pathways Counseling Center has the right to:

1. Be treated fairly regardless of race, national origin, sex, gender, age, religion, disability, or sexual orientation.
2. Receive prompt and adequate treatment.
3. Participate in their treatment planning.
4. Be informed of their treatment and care, including alternatives to and possible side effects of treatment.
5. Refuse treatment and medications unless court-ordered.
6. Be free from unnecessary or excessive medications.
7. Be treated with dignity and respect by all staff.
8. Be informed of their rights.
9. Be informed of any costs of their care.
10. Refuse drastic treatment measures.
11. Not to be filmed or taped without their consent.
12. File complaints about violations of their rights. If you feel your rights have been violated, you may:
 - a. Discuss the matter with staff about any concerns. However, you do not have to do this before filing a formal complaint.
 - b. If you want to file a written complaint, you may use the "Client Rights Grievance Form" available from the receptionist.
13. Be free from any retribution for filing complaints.

Rights regarding Record Privacy and Access:

1. Staff must keep patient information confidential.
2. Records cannot be released without patient consent with some exceptions.
3. Patients may see their records.
4. During treatment, access may be limited if the risks outweigh the benefits.
5. Patients may challenge the accuracy, completeness, timeliness or relevance of entries in their records.

Signature of client age 18 years or older or legal representative

Date

Adult Pre-Treatment Questionnaire

To better assess if we can meet your needs, please fill out as completely as you can and bring with you to your first therapy appointment. Use additional sheets of paper as needed. The information you provide is confidential and protected by law. We look forward to meeting you.

Date Completed: _____

Name: _____ Spouse/Partner's Name: _____

1. Gender: I identify as... Male ___ Female ___ Transgender ___ 2. Age: ___ Years

3. Ethnicity _____ 4. Religion _____

5. Partner/Marital Status: _____ Please describe more about your current and past relationships and the quality of those relationships:

- Never Married _____
- Living together _____
- Married _____
- Separated _____
- Divorced _____
- Widowed _____

6. Current Employment

- Full-time
- Part-time
- Homemaker
- Unemployed
- Laid off
- Student
- Disabled
- Retired

7. Education

- Grade 8 or less
- Some high school
- High school graduate
- Some college
- College graduate
- College beyond BS/BA

Please describe more about your current and past schooling/employment. Are you satisfied with your school/work?

8. Who lives in your home?

<u>Name</u>	<u>Gender</u>	<u>Age (list)</u>	<u>Relationship?</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Heroin								
Other Opiates/Narcotics								
Inhalants								
Nicotine (Cig, Vape)								
Caffeine								
Other: _____								

13. Please describe any current or past legal trouble (criminal and family) you are in or have had:

14. Please check up to 3 of the most important reasons listed below which led you to seek treatment:

- | | |
|--|--|
| <input type="checkbox"/> Depression or anxiety | <input type="checkbox"/> Thinking of harming self or others |
| <input type="checkbox"/> Worry about drinking or drug use | <input type="checkbox"/> Learning/memory problems |
| <input type="checkbox"/> Communication problems | <input type="checkbox"/> Difficulty with loss or death |
| <input type="checkbox"/> Desire to improve sexual relations | <input type="checkbox"/> Want relationship to be better |
| <input type="checkbox"/> Parent/child conflict | <input type="checkbox"/> Divorce counseling |
| <input type="checkbox"/> Sexual orientation questions | <input type="checkbox"/> Individual counseling |
| <input type="checkbox"/> Problematic or too much anger | <input type="checkbox"/> Pre-marital counseling |
| <input type="checkbox"/> Social isolation or other social challenges | <input type="checkbox"/> Family counseling |
| <input type="checkbox"/> Trouble controlling impulses | <input type="checkbox"/> Couples counseling |
| <input type="checkbox"/> Abuse (physical/sexual/emotional/verbal) | <input type="checkbox"/> Partner/family member wanted me to come |
| <input type="checkbox"/> Trauma other than abuse (natural disaster, accident, crime witness, etc.) | <input type="checkbox"/> Gender identity/transition |
| | <input type="checkbox"/> Other: _____ |

15. Regarding the **most important** reason that brings you here, please rate the following:

Reason 1. _____

How often does issue happen?

- Happens rarely
- Happens 1-2 times a week
- Happens 3-5 times a week
- Happens daily
- Happens several times a day

How does it affect your functioning?

- I can do all the things I need and want to do
- I struggle a bit but am able to do all I need and want to do
- I can only do some of the things I need and want to do
- I can barely do the things I need to do
- I am unable to work or care for myself

Reason 2. _____

How often does issue happen?

- Happens rarely
- Happens 1-2 times a week
- Happens 3-5 times a week
- Happens daily
- Happens several times a day

How does it affect your functioning?

- I can do all the things I need and want to do
- I struggle a bit but am able to do all I need and want to do
- I can only do some of the things I need and want to do
- I can barely do the things I need to do
- I am unable to work or care for myself

Reason 3. _____

How often does issue happen?

- Happens rarely
- Happens 1-2 times a week
- Happens 3-5 times a week
- Happens daily
- Happens several times a day

How does it affect your functioning?

- I can do all the things I need and want to do
- I struggle a bit but am able to do all I need and want to do
- I can only do some of the things I need and want to do
- I can barely do the things I need to do
- I am unable to work or care for myself

16. Who referred you to Pathways Counseling Center?

17. What questions do you hope will be answered through therapy?

18. Please describe some of your personal strengths you possess:

19. Please describe some of your personal challenges or obstacles in your way:

20. How will you know that things are getting better?

21. Is there anything else you want the therapist or counselor to know before your first session?

22. To get a better understanding of your symptoms, please complete the table below and bring to your first therapy appointment.

Over the last 2 weeks, how often have you been bothered by the following symptoms?

	Never	Several days	More than half the days	Daily
Sadness, hopelessness, feeling down				
Poor appetite or overeating; weight loss or gain				
Loss of interest or pleasure in doing things				
Fatigue or loss of energy				
Feeling bad about yourself – that you are a failure or have let yourself or your family down				
Trouble concentrating, making simple decisions				
Thoughts of death or suicide				
Trouble falling or staying asleep, restless and unsatisfying sleep, or sleeping too much				
	Never	Several days	More than half the days	Daily
Restlessness, feeling keyed-up, or on edge				
Being easily tired				
Problems concentrating or mind goes blank				
Irritability				
Muscle tension				
Trouble falling or staying asleep, or restless and unsatisfying sleep				
	Never	Several days	More than half the days	Daily
An intense and persistent fear of a social situation in which people might judge you				
Fear that you will be humiliated by your actions				
Fear that people will notice that you are blushing, sweating, trembling, or showing other signs of anxiety				
Knowing that your fear is excessive or unreasonable				

Please provide any other information that you feel is important for the therapist to know:

Signature: _____ Date: _____