



INTAKE FORM

INTAKE DATE: _____ CLIENT LEGAL NAME: _____

NAME (If different) _____ (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.)

BIRTH DATE: _____ LEGAL SEX: _____ GENDER/PRONOUNS: _____

ADDRESS: _____ CITY: _____ STATE _____ ZIP _____

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

EMAIL: _____ Preferred Contact Method: _____

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

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

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

EMERGENCY CONTACT (Name and Phone): _____

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



Acknowledgement 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, 13105 W Bluemound Rd, Suite 100, Brookfield, WI, 53005.

Signature of Patient/Client Date

Signature of 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

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
- Acknowledgement 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 Client

Date

Consent for CHILD/ADOLESCENT Admission for Mental Health Evaluation and/or Treatment

1. Consent to Evaluate/Treat: I voluntarily consent that my child 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 my child, 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 child's 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 child's care. Per Wisconsin mental health law, information provided will be kept confidential with the following exceptions: 1) if my child is deemed to present a danger to herself/himself 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 my child 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 of my child 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 the 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 of my child. I also attest that I am the legal guardian and have the right to consent for the treatment of this child. I understand that I have the right to ask questions of my child's service provider about the above information at any time.

Signature of Minor age 14 years or older

Date

Signature of 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 Minor age 14 years or older

Date

Signature of Legal Representative

Date



Child/Adolescent Pre-Treatment Questionnaire

To better assess if we can meet your family’s 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: _____ Parent/Guardian’s Name: _____

1. Gender: _____ 2. Age: _____ Years 3. School: _____ Grade: _____

4. Ethnicity: _____ 5. Religion: _____

6. Please list any long periods of time your child/teen has been out of school for any reason including major illness, home schooling, expulsion, etc.

7. Child/teen lives with:

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

8. If child/teen is not living with one or both birth parents, what is the reason? _____

9. Is your child/teen currently under a physician’s care? (circle one) YES NO Date of last physical exam: _____

List any physicians, **current medical conditions**, medications, and dosage. (Add on the back if needed.)

| <u>Condition</u> | <u>Medication</u> | <u>Dosage</u> | <u>Physician</u> |
|------------------|-------------------|---------------|------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

CHILD / ADOLESCENT PRE-TREATMENT QUESTIONNAIRE

10. Has your child received prior counseling or related services? (circle one) YES NO

Name of therapist: _____ Where: _____

Length of treatment: _____ months/years How long ago? _____ months/years ago

Problem(s) treated: _____

Outcome: (circle one) 1 2 3 4 5 6 7 8 9 10
 Much worse Stayed the same Much better

Name of therapist: _____ Where: _____

Length of treatment: _____ months/years How long ago? _____ months/years ago

Problem(s) treated: _____

Outcome: (circle one) 1 2 3 4 5 6 7 8 9 10
 Much worse Stayed the same Much better

Name of therapist: _____ Where: _____

Length of treatment: _____ months/years How long ago? _____ months/years ago

Problem(s) treated: _____

Outcome: (circle one) 1 2 3 4 5 6 7 8 9 10
 Much worse Stayed the same Much better

11. When thinking about your child (or yourself if you are the patient), do they/you have past or current experiences of abuse of any kind, including physical, emotional, verbal, or sexual? Please share below or with your therapist.

CHILD / ADOLESCENT PRE-TREATMENT QUESTIONNAIRE

12. Please describe **current** substance use/abuse in the chart below. **Please mark N/A if not applicable.**

| | Typical Frequency of Use in Past 6 Months | | | | | Time of Last Use | | |
|------------------------------|---|------------------|------------------|------------------|----------------------|------------------|-------------------|------------------|
| | Daily | 1-6 Times A Week | Weekend Use Only | Few Times/ Month | Once a Month or Less | Within Past Week | Within Past Month | Over 1 Month Ago |
| Alcohol | | | | | | | | |
| Marijuana | | | | | | | | |
| Cocaine (Powder, Crack) | | | | | | | | |
| Amphetamines (Crystal Meth) | | | | | | | | |
| Sedatives | | | | | | | | |
| Minor Tranquilizers (Valium) | | | | | | | | |
| Hallucinogens | | | | | | | | |
| Barbiturates | | | | | | | | |
| Heroin | | | | | | | | |
| Other Opiates/Narcotics | | | | | | | | |
| Inhalants | | | | | | | | |
| Nicotine (Cigs, Vape) | | | | | | | | |
| Caffeine | | | | | | | | |
| Other: _____ | | | | | | | | |

CHILD / ADOLESCENT PRE-TREATMENT QUESTIONNAIRE

13. In general, how much of a problem do you think your child has with the following?

| | 1= least important | | | 5= most important | |
|---|--------------------|---|---|-------------------|---|
| | 1 | 2 | 3 | 4 | 5 |
| Family member wants me here | | | | | |
| Family problems | | | | | |
| Getting into trouble | | | | | |
| Getting along with his/her mother | | | | | |
| Getting along with his/her father | | | | | |
| Arguing with parent(s) | | | | | |
| Trouble following directions | | | | | |
| Getting along with adults other than his/her caregiver(s) | | | | | |
| Getting involved in activities like sports or hobbies | | | | | |
| Feel alone/trouble making friends | | | | | |
| Sexual orientation questions | | | | | |
| Gender identity questions | | | | | |
| Having fun | | | | | |
| Getting along with his/her sibling(s) | | | | | |
| Arguing with sibling(s) | | | | | |
| Getting along with other children his/her age | | | | | |
| Trouble staying organized | | | | | |
| Trouble concentrating | | | | | |
| Difficulty with loss or death | | | | | |
| Trouble controlling impulses | | | | | |
| Problematic or too much anger | | | | | |

CHILD / ADOLESCENT PRE-TREATMENT QUESTIONNAIRE

| (Continued) In general, how much of a problem do you think your child has with the following? | | | | | |
|---|--------------------|---|---|-------------------|---|
| | 1= least important | | | 5= most important | |
| | 1 | 2 | 3 | 4 | 5 |
| Learning/memory problems | | | | | |
| Abuse (physical/emotional/verbal/sexual) | | | | | |
| Trauma other than abuse (natural disaster, accident, crime witness, etc.) | | | | | |
| Feeling unhappy or sad | | | | | |
| Feeling nervous or worried | | | | | |
| Depression or anxiety | | | | | |
| Thinking of hurting self or someone else | | | | | |
| His/her behavior at school (or at work) | | | | | |
| Getting in trouble at school | | | | | |
| Learning his/her schoolwork (or doing his/her job) problems | | | | | |

14. How much has your child's behavior caused:

| | 1 = a little | | | 5 = a lot | |
|--|--------------|---|---|-----------|---|
| | 1 | 2 | 3 | 4 | 5 |
| Interruption of personal time? | | | | | |
| Disruption of family routines? | | | | | |
| Any family member having to do without things? | | | | | |
| Any family member to suffer negative mental or physical health? | | | | | |
| Financial strain for the family? | | | | | |
| Less attention paid to any family member because of attention given to your child? | | | | | |
| Disruption or upset relationships within your family? | | | | | |
| Disruption of family's social activities? | | | | | |
| You to miss work or neglect duties? | | | | | |

CHILD / ADOLESCENT PRE-TREATMENT QUESTIONNAIRE

15. Were there any difficulties with the pregnancy, birth, or early childhood of your child? If so, please explain.

16. What questions do you hope will be answered? _____

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

18. Who referred you to Pathways Counseling Center? _____

19. To get a better understanding of your child's symptoms, please complete the table below and bring to the first therapy appointment. Over the last 2 weeks, how often has your child 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 themselves – that they are a failure or have let themselves or your family down | | | | |
| Trouble concentrating, making simple decisions | | | | |
| Thoughts of death or suicide | | | | |
| Trouble falling asleep 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 them | | | | |
| Fear that they will be humiliated by their actions | | | | |
| Fear that people will notice that they are blushing, sweating, trembling, or showing other signs of anxiety | | | | |
| Knowing that their fear is excessive or unreasonable | | | | |

CHILD / ADOLESCENT PRE-TREATMENT QUESTIONNAIRE

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

Signature: _____ Date: _____