

*New Vistas Counseling*  
**Jeri L. Kramer, Psy.D., LPC, NCC**  
3509 E Shea Blvd, Ste 117 • Phoenix, AZ 85028 • (602) 690-7763

**Client Psychosocial History and Status**

Name: \_\_\_\_\_ Birth date: \_\_\_\_\_ Age: \_\_\_\_\_

Address: \_\_\_\_\_ City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Briefly describe your reason for seeking help: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How did you hear about me? \_\_\_\_\_

What is your religious affiliation? \_\_\_\_\_ None

Education/Degrees: \_\_\_\_\_

Occupation: \_\_\_\_\_ How Long? \_\_\_\_\_

Place of Employment: \_\_\_\_\_ How Long? \_\_\_\_\_

If not employed, how long has it been since you worked? \_\_\_\_\_

What kind of job did you have? \_\_\_\_\_

What caused you to stop working? \_\_\_\_\_

Marital Status:  Single  Married  Divorced  Separated  Widowed  Living Together

**Marriages/Significant Relationships**

To Whom	Length of Relationship	Termination of Relationship <i>(if applicable)</i>	Children from that Relationship <i>(if any)</i>
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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If married, separated or living together, briefly describe your relationship: \_\_\_\_\_

\_\_\_\_\_

Age of spouse: \_\_\_\_\_ Religion: \_\_\_\_\_

Education/degrees? \_\_\_\_\_ Occupation: \_\_\_\_\_

Is he/she currently employed?  Yes  No How Long? \_\_\_\_\_

Has your spouse been previously married?  Yes  No Number of times: \_\_\_\_\_

How long since his/her last marriage? \_\_\_\_\_

Number of children from previous marriages: \_\_\_\_\_ Ages of children: \_\_\_\_\_

**With whom are you currently living?**

Name	Relationship	Age	Use of Alcohol/Drugs	How do you get along?

**Extended Family: Parents, Siblings, And Others Close To You**

Name	Relationship	Age	Occupation	Challenges: i.e. Alcohol, History Mental Illness

How was it to grow up in your family? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Medical Information**

When were you last examined by a physician? \_\_\_\_\_ Name of Doctor: \_\_\_\_\_

List any health problems for which you currently receive treatment: \_\_\_\_\_  
 \_\_\_\_\_

List any past health problems including accidents: \_\_\_\_\_  
 \_\_\_\_\_

List any medications you currently take: \_\_\_\_\_

**Women only:**

How many pregnancies have you had? \_\_\_\_\_ Are you pregnant now?  Yes  No

Any miscarriages or abortions?  Yes  No How many? \_\_\_\_\_

**Men and women:**

Are you sexually active?  Yes  No Beginning at what age? \_\_\_\_\_

Do you use birth control methods?  Yes  No If yes, what? \_\_\_\_\_

Have you ever had concern about eating habits?  Yes  No

## Psychological/Emotional Information

Have you ever sought help or been treated for psychological or emotional reasons?  Yes  No

If so, when and where? \_\_\_\_\_

Was it helpful? \_\_\_\_\_

Have you ever thought about suicide?  Yes  No If so, did you have a plan?  Yes  No

Have you ever attempted suicide?  Yes  No If so, how many times? \_\_\_\_\_

### Alcohol/drug use history

Do you feel you have a drug or alcohol problem?  Yes  No

Have you ever had any previous treatment for drug / alcohol abuse?  Yes  No

If so, when and where? \_\_\_\_\_

List all drugs, including alcohol, that you currently use, or have used in the last year (indicate frequency and amount):

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

### Legal

Please list and describe any arrests or legal problems (including driving violations): \_\_\_\_\_

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

### Circle any problem that pertains to you at the present:

Anger	Education	Sexual Problems	Work
Drug Use	Loneliness	Bowel Troubles	Marriage
Fatigue	Ambition	Stomach Problems	Divorce
Finances	My Appearance	Suicidal Thoughts	Future
Friends	Concentration	Nightmares	Temper
My thoughts	Parenthood	Health Problems	Age
Nervousness	Relaxation	Making Decisions	Stress
Self-esteem	Sexual Orientation	Physical Abuse	Anxiety
Separation	Energy	Inferiority	Appetite
Sexual Abuse	Children	Career Choices	Weight
Shyness	Legal Matters	Self Control	Memory
Sleep	Under / Over-eating	Alcohol Use	Overeating
Unhappiness	Depression	Headaches	Fears

Other: \_\_\_\_\_

### Circle everything that has happened to you in the past three years:

Death of a spouse/partner	Marriage Problems	Changes in marital status
Death of another family member	Family Problems (Children, in-laws)	Loss of Job
Major illness or injury--yourself	Financial Problems	Move to another city or state
Major illness or injury--family member	Legal Problems	Other: _____

Please list any additional information that you feel may be helpful: \_\_\_\_\_

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

## Office Policy and Financial Responsibility Statement

Responsible party if other than patient: \_\_\_\_\_

### I UNDERSTAND THAT:

- Sessions are **45-50 minutes** in length and are billed at **\$ 125.00 per session** for individual counseling sessions and **\$150.00 per session** for couple sessions.
- Sessions of late arrivals will end on time and be billed the full fee.
- *Parents/Guardians who provide transportation are required to stay at the office while their child(ren) are being seen.*
- The rate of \$125.00/\$150.00 per hour (\$25.00/\$30.00 per 10 minutes) will also apply to time spent on providing special services, such as telephone sessions, phone calls, case consultations, and time spent discussing treatment with other authorized professionals.
- Payment of cash/check is expected at the start of each visit. Alternatively, I may complete the credit card authorization form below and my card will be charged after each amount billed.
- Jeri Kramer does not participate with third party payers, such as managed care organizations and insurance companies. By signing this form, I am agreeing to pay the entire bill at the time of service. If requested, I may receive a “super-bill” as a receipt to submit to a third party payer.
- **I must give 24 hour notice of appointment cancellation or I will be billed IN FULL.**  
**\*\*Monday\*\* appointments must be cancelled by Friday at 5:00pm.**  
**I will be billed IN FULL for “no show” or late cancelled appointments.      initial \_\_\_\_\_**

I understand that I am financially responsible for any and all charges incurred for the treatment of the above-named. I have read the above office policy regarding length of sessions, late arrivals, charges, missed appointments, etc. **I understand and agree to the stated terms.**

\_\_\_\_\_  
Signature of Client (or Parent of Minor child)

\_\_\_\_\_  
Date

### OPTIONAL FOR INDIVIDUALS WISHING TO PAY BY CREDIT CARD:

I authorize Jeri L. Kramer, PsyD, to charge my credit card for fees as outlined in this Financial Responsibility Statement.

\_\_\_\_\_  
card number

\_\_\_\_\_  
expiration date

\_\_\_\_\_  
name as it appears on card

\_\_\_\_\_  
billing zip code

\_\_\_\_\_  
card holder's signature

\_\_\_\_\_  
date

## Consent for Evaluation and Treatment

Your signature below indicates that you have received a copy of the INFORMED CONSENT and the HIPPA PRIVACY NOTICE that follow, and that you agree to abide by their terms during our professional relationship.

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Name of client

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Signature of client (or guardian if client is a minor)

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Date

## **Informed Consent for Assessment and Treatment** **(Keep the following pages for your records.)**

Welcome to my counseling practice. This document contains important information about my professional services and business policies. Please read this carefully before our next session because it contains information important to your care. The law requires that I obtain your signature acknowledging that I have given you this information before we can continue with therapy.

Background and Services. I am a professional counselor in an independent private practice. My credentials include a Doctorate degree in clinical psychology. I am licensed by the Arizona Board of Behavioral Health Examiners. In addition, I am certified by the National Board of Certified Counselors as a National Certified Counselor. I offer counseling and psychotherapy to individuals and couples in the areas of mental health, relationships, adjustment, personal development, family transition, and skill development issues.

The primary focus of my practice is working with adults who have known abuse and or neglect. I also treat a wide variety of other concerns, including depression, anxiety, mood disorders, relationship problems and grief. Clients that present in counseling with substance dependence, diagnosed eating disorders, sexually abusive or violent behaviors, severe mental disorders, or certain personality disorders as their primary problem will be referred to other professions or programs that specialize in these areas. I reserve the right to refer a client to another therapist or appropriate resource at any time if their needs in therapy are not a good match for my skills or experience.

Purpose, limitations, and risks of treatment. Psychotherapy has been scientifically demonstrated to be of benefit to most people in many different situations. People who are depressed may find their mood lifting. Others may feel less afraid, angry, or anxious. Psychotherapy provides a chance to talk things out fully until feelings are relieved and problems are resolved. Relationship skills improve, and clients are more able to cope with stressful situations. They may receive more satisfaction from social, personal and family relationships. Their personal goals and values may become clearer. They may grow in many directions—as individuals, in their close relationships, in their work or schooling, and in the ability to enjoy their lives.

There are also risks in therapy. By opening up unexamined areas in your life, you may feel worse for a while. People around you can also be affected and may not like the resulting emotions or the changes you decide to make in yourself. Therapy often triggers you to question areas of your life such as career, lifestyle, parenting style, relationships and values. This can all be very uncomfortable. Finally, even with our best efforts, there is a risk that therapy may not be as effective as you would like. Therapy cannot make life less complex. It is designed to give you internal and external tools and resources to deal with life's complexities. As with many things in life, you get out of therapy only what you put in. The people who seem to make the most progress are those who consistently want to know how to change themselves (as opposed to those who want to change others).

Treatment process and rights. Your counseling will begin with one or more sessions devoted to an initial assessment so that I can get a good understanding of the issues, your background, and any other factors that may be relevant. When the initial assessment process is complete, we will discuss ways to treat the problem(s) that have brought you into counseling and develop a treatment plan. You have the right and the obligation to participate in treatment decisions and in the development and periodic review and revision of your treatment plan. You also have the right to refuse any recommended treatment or to withdraw consent to treat and to be advised of the consequences or such refusal or withdrawal.

Most of my clients see me once a week for two to three months. After that, we may meet less often for several more months. The process of ending therapy is a very valuable part of our work. Stopping therapy should not be done casually, although either of us may decide to end it if we believe it is in your best interest. If you wish to stop therapy at any time, I ask that you agree to meet for at least one more

session to review our work together. We will review our goals, the work we have done, and any future work that needs to be done. If you would like to take a “time out” from therapy to try it on your own, we should discuss this. We can discuss how to make the “time out” more helpful.

Privacy, confidentiality, and records. Ordinarily, all communications and records created in the process of counseling are held in the strictest confidence. However, there are numerous exceptions to confidentiality defined in the state and federal statutes. The most common of these exceptions are when there is a real or potential life or death emergency, when the court issues a subpoena, or when child or vulnerable adult abuse or neglect is involved. This counselor will not be used to testify in legal matters related or unrelated to therapy. I also participate in a process where selected cases are discussed with other professional colleagues to facilitate my continued professional growth and to get you the benefit of a variety of professional experts. While no identifying information is released in this peer consultation process, the dynamics of the problems and the people are discussed along with the treatment approaches and methods.

During times when I am out of town or otherwise unavailable, I will typically have another licensed therapist on call for me. I reserve the right to disclose confidential information from your records and our time together, including personally identifiable information, to this on-call therapist to facilitate the coverage of your care in my absence.

There are also numerous other circumstances when information may be released including when disclosure is required by the Arizona Board of Behavioral Health Examiners, when a lawsuit is filed against me, to comply with worker compensation laws, to comply with the USA Patriot Act and to comply with other federal, state or local laws. The rules and laws regarding confidentiality, privacy, and records are complex.

Please be aware that my primary phone number is a cell phone. Although it is a very rare occurrence, cellular calls can sometimes be overheard by third parties. Please let me know if this is a concern for you.

In the event of my death or incapacity, the records for my clients that are actively receiving services (seen within the last month) will be given to one or more local behavioral health professionals to facilitate the continuation of treatment. In such a situation, you have the right to continue treatment with this professional, discontinue treatment, or ask for a referral. Records for my inactive clients will be handled by a “records custodian,” which may be an individual or company. The custodian will be responsible for satisfying records requests and destroying records when the legal timeframes for records retention are satisfied.

Our relationship. The client/counselor relationship is unique in that it is exclusively therapeutic. In other words, it is inappropriate for a client and a counselor to spend time together socially, to bestow gifts, or to attend family or religious functions. If we encounter each other in the community, I may nod or smile, but I will not acknowledge you as anyone I know. I’m not trying to be rude, but attempting to maintain your confidentiality. Even though you might invite me, I will not attend your family gatherings, such as parties or weddings. As your therapist, I will not celebrate holidays or give you gifts; I may not notice or recall your birthday. I also ask that you refrain from giving gifts to me. The purpose of these boundaries is to ensure that you and I are clear in our roles for your treatment and that your confidentiality is maintained.

If there is ever a time when you believe that you have been treated unfairly or disrespectfully, please talk with me about it. It is never my intention to cause this to happen to my clients, but sometimes misunderstandings can inadvertently result in hurt feelings. I want to address any issues that might get in the way of the therapy as soon as possible. This includes administrative or financial issues as well.

Financial. Payment is expected at the beginning of each session unless other arrangements have been made. By signing this document, you are agreeing to pay for the services rendered and any additional expenses that may be accrued in collecting said fees.

*Regular Therapy Services:* Currently, the fee for a 45-50 minute individual counseling session is \$125.00, and the fee for a 45-50 minute couples session is \$150.00. Sessions that are extended by more than ten minutes will be charged on a prorated basis. Please note that some insurance companies will not pay for an appointment outside of the traditional 45-50 minutes.

*Telephone consultations:* I have a strong preference for face-to-face contact. However, telephone consultations may be necessary at certain times in our therapy. If these last longer than ten minutes, you will be charged at the prorated hourly rate. If I need to have long telephone conferences with other professionals as part of your treatment, you will be billed for these at the same rate. If you are concerned about this, please be sure to let me know in advance so we can set a policy that is comfortable for both of us. Of course, there is no charge for calls about appointments or other business.

*Other services:* Charges for other services, such as hospital visits, consultations with other therapists, home visits, or court-related services (such as consultations with lawyers, depositions, or attendance at courtroom proceedings) will be based on the time involved in providing the service using my regular fee schedule.

I reserve the right to change my fees with 30 days notice and to use the services of a third-party collections service, when necessary. Refunds are not made after the services have been rendered. You have the right to be informed of all fees that you are required to pay. Please discuss these with me if you have a concern.

Insurance. I am not a preferred provider for health plans. If you are using one of these plans to pay for your treatment it would be your responsibility to call your insurance company to find out your mental health benefits. If you are using an insurance program, I will supply you with a superbill that you can turn into your insurance company so they can reimburse you. Your insurance company or managed care company may limit the number of sessions based on their assessment of medical necessity or other factors. Their determination may or may not match what you want or need in treatment. In the event that they will not authorize additional sessions or you exhaust the sessions that your insurance will provide, you understand that you will have to pay for the additional services rendered. In all cases however, payment for services is the responsibility of the client, not the insurance company. Once again, please discuss this with me if you have any questions.

Using a third party to reimburse you for the counseling implies that some information will be released in order to obtain payment for the services.

Availability of services. My practice does not have the capability to respond immediately to counseling emergencies. True emergencies should be directed to the community emergency services (911) or to the local hotlines (Empact – 480-784-1500, Banner Help line - 602-254-4357, ValueOptions – 602-222-9444). Established clients with an urgent need to make contact may contact me via cellular phone, but an immediate response is not guaranteed. A quick or immediate response in one situation does not constitute a commitment of rapid response in another situation. I attempt to return phone calls within the same day if left during office hours or within a 24/48 hour period. Also, I do *not* communicate via email or fax.

Appointments. Regular attendance at your scheduled appointments is one of the keys to a successful outcome in counseling. I reserve a 45-50 minutes for each appointment with a client. If I am ever unable to start on time, I can usually extend your session beyond the allotted hour. If you are late, we will probably be unable to meet for the full time, because it is likely that I will have another appointment after yours. Appointments canceled at the last minute are very detrimental to my practice. Therefore, I ask that you notify me a minimum of one full business day (24 hours, Monday through Friday) prior to your appointment if you need to cancel. Appointments for Mondays must be canceled by the prior Friday at 5:00 P.M. I do not initiate reminder phone calls. ***You will be billed the full rate for appointments you fail to cancel in accordance with this policy. Again, late cancellations or missed appointments will be billed at the full fee of \$125.00 or \$150.00 depending on the session booked. In addition, if you arrive more than 15 minutes late to an appointment I can not supply a superbill for you to issue to the insurance company for a full session. However, you will be responsible for the fee of a full session. Please note***

***that these are personal financial obligations that you are responsible for; not the obligations of your insurance company.***

Appointment availability varies with the client load at the time. High demand appointments (off hours, late afternoons, etc.) are likely to be sporadic in their availability. I reserve the right to limit my commitments of high demand appointment times to any particular client in order to meet the needs of all my clients and balance my workload.

## **HIPPA Privacy Notice**

THIS NOTICE DESCRIBES HOW YOUR MEDICAL INFORMATION MAY BE USED AND DISCLOSED AND HOW TO GET ACCESS TO THIS INFORMATION. PLEASE READ IT CAREFULLY.

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This practice is dedicated to maintaining the privacy of your personal health information as part of providing professional care. I am also required by law to keep this information private. These laws are complicated, but I am required to give you this important information. This statement is a shorter version of the full, legally required Notice of Privacy Practices (NPP) that is available in my office. Refer to the longer version for more information. Since it is impossible to cover all possibilities, please talk to me if you have further questions.

I will receive information about your health from you and possibly from others. This will be used primarily to provide you with treatment, to arrange payment for services, and for some other health care operations. After you have read this notice I will ask you to sign a Consent Form to let me use and share your information. If you do not consent and sign this form, I cannot treat you.

If I or you want to use or disclose (send, share, release) your information for any other purposes I will discuss this with you and ask you to sign a special Authorization form.

Of course I will keep your health information private but there are times when the laws require us to use or share it. For example:

1. When there is a serious threat to your health and safety or the health and safety of another individual or the public. I will only share information with a person or organization that can help prevent or reduce the threat.
2. Certain lawsuits and legal or court proceedings.
3. If a law enforcement official requires me to do so.
4. For Workers Compensation and similar benefit programs.

There are other situations like these that happen rarely. They are described in the longer version of the Notice.

### Your rights regarding your health information

1. You can ask me to communicate with you about your health and related issues in a particular way or at a certain place which is more private for you. For example, you can ask me to call you at home, and not at work to schedule or cancel an appointment. I will try my best to do as you ask.
2. You have the right to ask me to limit what I tell people involved in your care or the payment for your care, such as family members and friends. I will honor your request except in an emergency, when the information is necessary to treat you or when it is against the law to do so.
3. You have the right to look at the health information I have about you such as your medical and billing records. You can even get a copy of these records but I may charge you. Contact me to

arrange for these copies. (The only records I will not be sharing with you are detailed psychotherapy notes made during or after your sessions. These notes are for therapist use only, and can only be shared if subpoenaed.)

4. If you believe the information in your records is incorrect or missing important information, you can ask me to make an amendment to your health information. You have to make this request in writing and send it to me. You must tell me the reasons you want to make the changes.
5. You have the right to a copy of this notice. If I change this Notice I will place the new version in my office and you can always get a copy if you wish.
6. You have the right to file a complaint if you believe your privacy rights have been violated. You can file a complaint with myself and with the Secretary of the Department of Health and Human Services. All complaints must be in writing. Filing a complaint will not change the health care I provide to you in any way.

If you have any questions regarding this Notice or our health information privacy policies, please contact me.

The effective date of this notice is August 14, 2007.