



## **FIRST APPOINTMENT ORIENTATION**

Thank you for choosing the Brief Therapy Institute of Denver, Inc for your behavioral healthcare services. We recognize you have many choices and we appreciate your trust in us.

We appreciate your downloading and completing the paperwork prior to your first session. Completing the paperwork allows your therapist the opportunity to spend a greater amount of time on clinical rather than administrative issues.

Some things to keep in mind:

- ✓ Remember, you can download and print, review, or ask for a complete set of Brief Therapy Institute of Denver, Inc. Privacy Policies.
- ✓ Your therapist will review and answer any questions about this paperwork or other matters.
- ✓ Please bring your authorization number, if given to you by your insurance company.
- ✓ Please bring your insurance card.
- ✓ We will need information about your copayment and/or deductible. If you do not know this information, please contact your insurance company and ask for an explanation of benefit coverage for mental/behavioral health issues.
- ✓ We will need your primary care physician's telephone number.
- ✓ If you have seen a counselor or psychiatrist within the last two years, we will need a telephone number to contact them.
- ✓ It is very helpful for the therapy process if you bring a list of goals for therapy. This will help you and your therapist make better use of the first session.

## **GOALS FOR THERAPY, PLEASE LIST.**

Office use only:

Name: \_\_\_\_\_

Chart #: \_\_\_\_\_

# Brief Therapy Institute of Denver, Inc.

All Information is kept in strict confidence

## CLIENT INFORMATION

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

STREET CITY STATE ZIP

BIRTH DATE: \_\_\_\_\_ AGE: \_\_\_\_\_ GENDER: \_\_\_\_\_ MALE \_\_\_\_\_ FEMALE

SOCIAL SECURITY #: \_\_\_\_\_

RELATIONSHIP STATUS: \_\_\_\_\_ MARRIED \_\_\_\_\_ SEPARATED \_\_\_\_\_ SINGLE \_\_\_\_\_ PARTNERED  
\_\_\_\_\_ DIVORCED \_\_\_\_\_ COHAB. \_\_\_\_\_ CHILD

I AGREE TO PAY MY CO-PAY OF \_\_\_\_\_ AT THE END OF EACH SESSION

IF I AM SELF PAYING, I WILL PAY \_\_\_\_\_ AT THE END OF EACH SESSION

WHOM SHOULD WE THANK FOR THE REFERRAL? \_\_\_\_\_

## CONTACT INFORMATION

HOME/CELL PHONE: \_\_\_\_\_ BEST TIME TO CALL: \_\_\_\_\_

Can we leave a message? \_\_\_\_\_

WORK PHONE: \_\_\_\_\_ MAY WE CALL YOU IN CONFIDENCE AT WORK: \_\_\_\_\_

Can we leave a message? \_\_\_\_\_

PARENT TO CONTACT IF PATIENT IS CHILD: \_\_\_\_\_

## INSURANCE INFORMATION

NAME OF INSURED (if different than patient) : \_\_\_\_\_

ADDRESS OF INSURED (if different than patient): \_\_\_\_\_

GENDER: \_\_\_\_\_ MALE \_\_\_\_\_ FEMALE BIRTHDATE: \_\_\_\_\_ SS#: \_\_\_\_\_

INSURANCE COMPANY: \_\_\_\_\_ PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

MEMBER ID# \_\_\_\_\_ GROUP NUMBER: \_\_\_\_\_

INSURED'S EMPLOYER: \_\_\_\_\_ STATUS: EMPLOYED TERMINATED LOA

AUTHORIZATION # \_\_\_\_\_ INSURANCE TYPE: HMO PPO OTHER DEDUCTIBLE: \_\_\_\_\_

## WHO WOULD YOU LIKE NOTIFIED IN CASE OF EMERGENCY?

NAME: \_\_\_\_\_ RELATIONSHIP TO YOU: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

HOME/CELL PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_

Office use only:

Name: \_\_\_\_\_

Chart #: \_\_\_\_\_

## AGREEMENTS AND DISCLOSURES

(for all participants over 18 years of age)

### AGREEMENTS

1. I authorize the Brief Therapy Institute of Denver, Inc. to contact the referral source for treatment, payment, or health care operations, **understanding that personal information will need to be released to my insurance company or the company that manages my benefits.**  
 yes  no
2. I authorize the Brief Therapy Institute of Denver, Inc. to bill my insurance/managed care company for the psychotherapy. The Brief Therapy Institute of Denver may need to disclose clinical information necessary to process all claims.  
 yes  no
3. I authorize \_\_\_\_\_ to make payment directly to  
 (insurance/managed care company)  
 the Brief Therapy Institute of Denver, Inc. for the benefit specified and otherwise payable to me, but not to exceed the usual and customary charges for the services.  
 yes  no
4. I authorize the Brief Therapy Institute to mail any correspondence regarding my treatment, satisfaction with treatment, updates about my treatment and educational programs during and after the completion of my treatment to my home mailing address.  
 yes  no
5. I want my primary care physician to be notified of my treatment at the Brief Therapy Institute of Denver?  
 yes  no

### DISCLOSURES

1. I realize that the Brief Therapy Institute of Denver, Inc conducts research and I understand that all research is calculated, reported, and described in a manner that maintains my confidentiality and total anonymity.  
 yes  no
2. I understand the Brief Therapy Institute of Denver, Inc cannot be held responsible for being unable to access me due to telephone devices that may block their calls, my use of a pager system in which I cannot be directly reached, any form of caller identification, **or any type of device that does not allow my therapist to make direct telephone contact with me.**  
 yes  no

### FINANCIALS (Please review this section with your therapist at the first session)

1. My usual and customary rate for providing direct face-to-face psychotherapy services is \$\_\_\_\_ per hour, \$\_\_\_\_ per 45 minutes.
2. You will be billed \$ **for not giving a minimum of 24 hours notification** of cancellation. This outstanding balance must be paid prior to additional psychotherapy services being delivered.
3. You will be billed for non covered and non routine services such as extended telephone consultation, crisis intervention, report writing, extended care coordination with other providers at a rate of \$\_\_\_\_ per minute. You will be informed of events involving additional billing prior to the event.
4. Any legal reporting, consultation, or coordination will be billed at a rate of \$\_\_\_\_ per minute.

Additional comments/special conditions:

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

Office use only:

Name: \_\_\_\_\_

Chart #: \_\_\_\_\_

# Privacy Notice

To comply with federal health insurance portability and accountability act guidelines the Brief Therapy Institute of Denver, Inc. has implemented the following policy regarding patient privacy and confidentiality. You may request a copy of our complete set of guidelines, you can review the guidelines posted in the waiting room, or you may review and download the policies from our web site. Our office holds patient record information confidential and we will only use your information for the following reasons: **treatment, payment and health care operations**. The following is a partial list of whom your information can be disclosed, if needed, to:

- Primary care physicians
- Psychiatrists
- Medical specialists
- Diagnostic facilities
- Hospitals, including psychiatric
- Labs
- Insurance companies
- Billing and collection services
- School officials: administrators, counselors, teachers

## Disclosing Record Information

Release of information to any other entity not listed above will require a signed authorization from you or your guardian. This request must be dated, show who the information is to be released to or requested from, the specific information to be released or acquired. These authorizations will have an end date. Additional requests beyond the end date will require a new authorization. We will keep a record of all disclosures in your file. This information will be available for you to review.

## You Have a Right to Access Your Records

You can review and obtain copies of your records. Our office requires a written request, and we will make the records available within 10 days of your request.

## Record Storage

The Brief Therapy Institute of Denver, Inc stores paper copies of **administrative** records for the appropriate length of time per clinician regulations. **Clinical records** are stored **electronically** for the appropriate length of time per clinician regulations.

## Miscellaneous

If we need to contact you by telephone and leave a message we will only leave our name and our phone number. We will not leave any information on an answering machine or with anyone other than the patient or guardian unless we have your consent. It will be your responsibility to return the call.

## Acknowledgment

I acknowledge that I have reviewed this privacy notice and that I may request or download the Brief Therapy Institute of Denver's full privacy policy.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Office use only:

Name: \_\_\_\_\_

Chart #: \_\_\_\_\_

**Medical Information – Please complete for all participants in therapy**

Name	Last 2 years Major medical events	Current medications Prescribed and over the counter	Dosage	Allergies? To what?

Family Physician: \_\_\_\_\_ Phone: \_\_\_\_\_

Psychiatrist: \_\_\_\_\_ Phone: \_\_\_\_\_

Pediatrician Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Tobacco Use: Cigarettes \_\_\_\_\_ Chewing \_\_\_\_\_ Other \_\_\_\_\_ How much \_\_\_\_\_

Who \_\_\_\_\_

Alcohol and Drug Use:

Who?                      Type?                      Amount?                      Frequency?

Family history of alcohol/drug use, mental health, physical conditions:

Member:    History:

Office use only:

Name: \_\_\_\_\_

Chart #: \_\_\_\_\_

If you use herbal supplements or vitamins, please list: