

Mandatory Disclosure Statement

Lawrence H. Nelson, II, MSW, LCSW

Licensed Clinical Social Worker

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You are hereby informed that I am a Licensed Clinical Social Worker (L.C.S.W.), licensed to practice in the State of Colorado under license number 982020. The practice of licensed or registered persons in the field of psychotherapy is regulated by the Mental Health Licensing Section of the Division of Registrations. The Board of Social Work Examiners can be reached at 1560 Broadway, Suite 1350, Denver, Colorado 80202; (303) 894-7800. To obtain standing as an L.C.S.W. in the State of Colorado, I am required to have received a Master of Social Work degree from an accredited institution, have two years of clinical supervision following my master's degree, and pass a licensing exam.

I received a degree Master of Social Work from Smith College School for Social Work in Northampton, Massachusetts in 1976. To meet the requirements for this degree I attended 6 semesters of graduate level education, completed two clinical internships (each of eight months duration) and completed a thesis. I received a Bachelor of Arts Degree in History in 1970 from Miami University in Oxford, Ohio.

The following rights as a client of a psychotherapist are mandated by the State of Colorado:

- 1) You are entitled to receive information from your therapist about the methods of therapy, the techniques used, and the duration of your therapy (if known), and the fee structure of your therapy.
- 2) You may seek a second opinion from another therapist, or may terminate therapy, at any time.
- 3) In a professional relationship sexual intimacy is never appropriate and should be reported to the Grievance Board of the Board of Social Work Examiners as listed above.
- 4) Generally speaking, the information provided by and to you during therapy sessions is legally confidential and cannot be released without your written consent. There are exceptions to your confidentiality, some of which are listed in section 12-43-218 of the Colorado Revised Statutes and the HIPAA Notice of Privacy Rights provided, as well as other exceptions in Colorado and Federal law. For example, mental health professionals are required to report suspected child abuse or abuse of at-risk adults to the proper authorities. If a legal exception arises during therapy, if feasible, you will be informed accordingly. The Mental Health Practice Act (CRS 12-43-101, et seq.) is available at: <http://www.dora.state.co.us/mental-health/Statute.pdf>.

In accordance with the 12-245-216, Colorado Revised Statute of the Mental Health Practice Act, you are to be informed of the levels of regulation applicable to mental health professionals and the differences between licensure, registration and certification, including the educational, experience and training requirements applicable to the particular level of regulation.

- A Registered Psychotherapist is a psychotherapist listed in the State's database and is authorized by law to practice psychotherapy in Colorado, but is not licensed by the state and is not required to satisfy any standardized educational or testing requirements to obtain a registration from the state.
- A Certified Addiction Counselor I (CAC I) must be a high school graduate or equivalent, complete required training hours and 1,000 hours of supervised experience.

- A Certified Addiction Counselor II (CAC II) must be a high school graduate or equivalent, complete CAC I requirements, and obtain additional required training hours, 2,000 additional hours of supervised experience, and pass a national exam.
- A Certified Addiction Counselor III (CAC III) must have a bachelor's degree in behavioral health, complete CAC II requirements, and complete additional required training hours, 2,000 additional hours of supervised experience, and pass a national exam.
- A Licensed Addiction Counselor must have a clinical master's degree, meet CAC III requirements, and pass a national exam.
- A Licensed Social Worker must hold a master's degree from a graduate school of social work and pass an examination in social work.
- A Licensed Clinical Social Worker must hold a master's or doctorate degree from a graduate school of social work, practiced as a social worker for at least two years, and pass an examination in social work.
- A Psychologist Candidate, a Marriage and Family Therapist Candidate, and a Licensed Professional Counselor Candidate must hold the necessary licensing degree and be in the process of completing the required supervision for licensure.
- A Licensed Marriage and Family Therapist must hold a master's or doctoral degree in marriage and family counseling, have at least two years post-master's or one-year postdoctoral practice, and pass an exam in marriage and family therapy.
- A Licensed Professional Counselor must hold a master's or doctoral degree in professional counseling, have at least two years post-master's or one-year postdoctoral practice, and pass an exam in professional counseling.
- A Licensed Psychologist must hold a doctorate degree in psychology, have one year of post-doctoral supervision, and pass an examination in psychology.

You are further informed that I am an independent contractor with the Brief Therapy Institute of Denver, Inc. (BTID), and therefore BTID cannot be held liable for my actions. In the practice of psychotherapy successful outcomes cannot be guaranteed. However, cooperation between client and therapist should help in identifying and achieving improvement. Please feel free to ask your therapist any questions you may have.

I have read the preceding information and received a copy of it. It has also been provided verbally to me, unless I have waived the right to have it so, and I understand my rights as a client or as the client's responsible party.

Print Client's Name

Client's or Responsible Party's Signature

Date



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

Member:	History:
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Office use only:

Name: _____

Chart #: _____

If you use herbal supplements or vitamins, please list:

Informed Consent for Telehealth Services

Therapist: _____

Definition of Telehealth

Telehealth involves the use of electronic communications to enable BTID's mental health professionals to connect with individuals using interactive video and audio communications.

Telehealth includes the practice of psychological health care delivery, diagnosis, consultation, treatment, referral to resources, education, and the transfer of medical and clinical data.

I understand that I have the rights with respect to telehealth:

1. The laws that protect the confidentiality of my personal information also apply to telehealth. As such, I understand that the information disclosed by me during the course of my sessions is generally confidential. However, there are both mandatory and permissive exceptions to confidentiality, including, but not limited to, reporting child, elder, and dependent adult abuse; expressed threats of violence toward an ascertainable victim; and where I make my mental or emotional state an issue in a legal proceeding. I also understand that the dissemination of any personally identifiable images or information from the telehealth interaction to other entities shall not occur without my written consent.
2. I understand that I have the right to withhold or withdraw my consent to the use of telehealth in the course of my care at any time, without affecting my right to future care or treatment.
3. I understand that there are risks and consequences from telehealth, including, but not limited to, the possibility, despite reasonable efforts on the part of the counselor, that: the transmission of my personal information could be disrupted or distorted by technical failures, the transmission of my personal information could be interrupted by unauthorized persons, and/or the electronic storage of my personal information could be unintentionally lost or accessed by unauthorized persons. BTID utilizes secure, encrypted audio/video transmission software to deliver telehealth.
4. I understand that if my counselor believes I would be better served by another form of intervention (e.g., face-to-face services), I will be referred to a mental health professional associated with any form of psychotherapy, and that despite my efforts and the efforts of my counselor, my condition may not improve, and in some cases may even get worse.
5. I understand the alternatives to counseling through telehealth as they have been explained to me, and in choosing to participate in telehealth, I am agreeing to participate using video conferencing technology. I also understand that at my request or at the direction of my counselor, I may be directed to "face-to-face" psychotherapy.

6. I understand that I may expect the anticipated benefits such as improved access to care and more efficient evaluation and management from the use of telehealth in my care, but that no results can be guaranteed or assured.

7. I understand that my healthcare information may be shared with other individuals for scheduling and billing purposes. Others may also be present during the consultation other than my counselor in order to operate the video equipment. The above-mentioned people will all maintain confidentiality of the information obtained. I further understand that I will be informed of their presence in the consultation and thus will have the right to request the following: (1) omit specific details of my medical history that are personally sensitive to me, (2) ask non-clinical personnel to leave the telehealth room, and/or (3) terminate the consultation at any time.

8. I understand that my express consent is required to forward my personally identifiable information to a third party.

9. I understand that I have a right to access my medical information and copies of my medical records in accordance with the laws pertaining to the state in which I reside.

10. By signing this document, I agree that certain situations, including emergencies and crises, are inappropriate for audio-/video-/computer-based psychotherapy services. If I am in crisis or in an emergency, I should immediately call 9-1-1 or seek help from a hospital or crisis-oriented health care facility in my immediate area.

Payment for Telehealth Services

BTID will bill insurance for telehealth services when these services have been determined to be covered by an individual’s insurance plan. In the event that insurance does not cover telehealth, the individual wishes to pay out-of-pocket, or when there is no insurance coverage, we will provide you with a statement of service to submit to your insurance company if you wish.

Patient Consent to the Use of Telehealth I have read and understand the information provided above regarding telehealth, have discussed it with my counselor, and all of my questions have been answered to my satisfaction. I have read this document carefully and understand the risks and benefits related to the use of telehealth services and have had my questions regarding the procedure explained. I hereby give my informed consent to participate in the use of telehealth services for treatment under the terms described herein. By my signature below, I hereby state that I have read, understood, and agree to the terms of this document.

Print Name

Client’s Signature

Date

Parent or Guardian Signature

Date