

Summit Wellness Centers, PLLC

PO Box
211 Arden, NC 28704

Client Information Survey (Completed by Client)

Date: _____

In order to better serve you, we would appreciate the following information. Please complete this questionnaire as fully and accurately as you can.

Please Print:

Client Name: _____

Sex: _____ M _____ F

Home Address: _____

Date of Birth: _____ Age: _____

Marital Status: _____

Years Married: _____

E-mail Address: _____

(Completing this is an "opt-in" and signifies your comfort with electronic communications from our office regarding appointments or newsletters).

Phone Number (H): _____

(cell): _____

(Cell phones are not as secure as land-lines, but often our clients prefer this method of contact. Completing this signifies your comfort with cell phone communications with our office).

May we leave you a message at any of these phone numbers? Yes No
If no, please specify how you would like us to contact you. _____

If the client is a child/adolescent, who has legal custody? (*If joint custody, a signed agreement must be completed by both guardians. Please speak with office for this agreement prior to first appointment).

School Information: School: _____

Grade Level: _____

Special Educational Placements: _____

List other family members/significant others living in the home:

Name	Age	Relationship to Client
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

List other children not living in the home:

_____	_____	_____
_____	_____	_____
_____	_____	_____

Work/School

Current Employer/School _____ Location _____
If in school or college, Current Grade/Year _____ Highest grade ever completed _____

Please explain any problems/concerns with Work/School (change of jobs/schools, firing, suspensions, grades, etc...)

HEALTH

Client Physician/Pediatrician: _____ Phone Number: _____

Date of last appointment with any doctor: _____

Date of last complete physical exam: _____

Current Health: ___ good ___ fair ___ poor

Explain:

Have you ever experienced/been diagnosed with any of the following and if so when?

Arthritis _____	Cancer _____	Diabetes _____	Hearing/Vision Pr. _____
Heart Disease _____	Brain Injury _____	High/Low Blood Pressure _____	Kidney Disease _____
Stroke _____	Seizures _____	Fainting Spells _____	Lung Problems _____
Cirrhosis _____	Infertility _____	Low Blood Sugar _____	STD's _____
Thyroid _____	Pancreatitis _____	Migraines _____	Eating Disorder _____
Weight gain/loss _____		Alcohol/Drug Use _____	Other _____

Do you have other medical concerns not mentioned? (Please list other health problems, surgeries, limitations, or disabilities): _____

Is client pregnant? ___ Y / N Due date: _____

Please note any important medical or mental health problems in your family: _____

If client is a child/adolescent, please note any concerns/abnormalities with pregnancy, birth or childhood development: _____

Medications:

If you are presently taking any medications, please complete graph below:

Names	Dosage	Frequency	Start Date -- End Date	Reason/Effectiveness	Prescribed By

Do you take your meds as prescribed? ___ Y ___ N If no, please explain: _____

Substance Abuse

Has anyone *in your family* had a history of alcohol/drug use? ____ Yes ____ No

If yes, explain: _____

Please describe *your* history or current abuse of the following substances:

(include age of first use, current frequency, date of last use, and average monthly cost)

Alcohol: _____

Drugs: _____

Prescription Meds: _____

Has drinking and/or drug use ever caused you problems in the following areas (please circle):

Family School Employment Legal Emotional Relational Health

Legal

Please tell us about any previous or current legal or court involvement (ie. Arrests or pending charges): _____

Previous Treatment

Have you ever received any type of *outpatient* mental health counseling in the past? _____

If so, where, and what was the outcome? _____

Have you ever seen another clinician in our center? _____

Please list any previous *inpatient* mental health or substance abuse treatment:

Facility Name/Location	Date	Reason	Response to Treatment
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Trauma History

Do you have a history of physical, emotional, or sexual abuse, domestic violence, or physical trauma?

If yes, please briefly explain (your counselor will discuss further): _____

Beliefs

What is your belief about God? _____

Do you currently attend a church? _____ If so, where? _____

Family History:

What words would you use to describe the family you grew up in? _____

Relationships

What concerns do you have regarding current relationships? _____

Today's Appointment

Explain in your own words why you have made this appointment today (your counselor will discuss this with you in more detail): _____

**On a scale of 1-10, how do you estimate the current severity of this problem/concern?
(1=Mildly upsetting, but tolerable 10= Incapacitating, not tolerable)**

What is your goal of treatment? _____

What action(s) have you already taken regarding this issue? _____

What do you perceive to be your strengths/abilities that will assist you in the process of achieving your goal? _____

What personal weaknesses or vulnerabilities may hinder your success? _____

How did you hear about our counseling center or the specific counselor that you are seeing today? _____

*Other information you feel is important that wasn't asked about: _____

Summit Wellness Centers, PLLC

REGISTRATION AND INSURANCE INFORMATION

Today's Date: _____
Client: _____ DOB: _____ Age: _____

Client Social Security Number (for insurance purposes only): _____
Social Security Number of the insured: _____ DOB of insured: _____
Spouse Name: _____ Parent/Guardian Name: _____
Address: _____

Telephone: (H): _____ (W): _____ (C): _____
Emergency Contact Person: _____ Phone: _____

Insurance Information

Are you covered by health insurance? (circle) Yes No

	<u>Primary Insurance</u>	<u>Secondary Insurance</u>
Name of insurance:	_____	_____
Insured's Name:	_____	_____
Insured's Social Security #:	_____	_____
Insured's Date of Birth:	_____	_____
Policy # / Group #:	_____	_____
Relationship to Client:	_____	_____

Note: We will file insurance claims for you. However, you are responsible for any deductible, non-covered charges, or co-payments which may apply. This responsibility, due at the time of service, is a result of your contract with your insurance company. Refusal to pay your contractual obligation is fraudulent. As a courtesy, we will verify your insurance benefits. However, we recommend that you also personally verify your behavioral or mental health benefits with your insurance company. In the event that insurance payments differ from the information we receive from your insurance company, you will be billed for any remaining balance owed. Being referred to our clinic by another physician does not guarantee that your insurance will cover our services.

I authorize any holder of medical or other information about me to release Social Security Administration, any Health Care Financing Administration or its intermediaries or carrier of any other commercial insurance company, any information needed for this claim. I permit a copy of this authorization to be used in place of the original, and request payment of medical insurance benefits to Summit Wellness Centers.

Client Signature Date

Summit Wellness Centers, PLLC

PO Box 211
Arden, NC 28704

Payment Policy:

It is the policy of Summit Wellness Centers, PLLC that payment is due at the time of service unless other financial arrangements are made in advance. In order to complete this process efficiently, Summit Wellness Centers, PLLC will maintain secure records of our clients' credit /debit card. Your card will be billed for the deductible, copay and/or coinsurance payment. Your card will also be charged for no-show appointments on the date of service you were scheduled.

By paying via credit/debit card, you acknowledge that this credit/debit card information will be automatically kept on file via PCI-compliant encrypted code with the following credit card processor: TSYS (CAYAN). Health Savings Account cards can be kept on file as the primary form of payment but there must be a back-up credit/debit card on file in case HSA funds are depleted.

I (we), the undersigned, authorize and request Summit Wellness Centers, PLLC to charge my credit/debit card, which I provide, for any balances due for services rendered that my insurance company identifies as my financial responsibility. If uninsured, or in the event of no-show appointments, I authorize Summit Wellness Centers, PLLC to charge my credit/debit card for my balance due. Please remember that you are 100 percent responsible for all charges incurred: your physician's referral and our verification of your insurance benefits are not a guarantee of payment. We highly recommend you also contact your insurance carrier and check into your coverage for behavioral health services. This authorization will remain in effect until I(we) cancel this authorization. To cancel, I(we) must give a 60 day notification to Summit Wellness Centers, PLLC in writing and the account must be in good standing.

Cancellation/No-Show Policy:

If for any reason you need to cancel an appointment, you must call at least 24 hours prior to the appointment to reschedule. Otherwise, you will be charged for the time that was reserved for you. If you repetitively cancel appointments, we reserve the right to discontinue services. Because of high demand for our services, we keep a waiting list of those who desire to have appointments and are waiting for an opening. This cancellation and no-show policy assures that we are being good stewards of the number of sessions our counselors can provide and allows us to best serve our clients. We appreciate your cooperation and partnership in this matter as we seek to serve our community.

Signed Agreement:

I understand and agree to the preceding information regarding the cancellation/no-show policy and the financial requirements/payment policy for services rendered.

Client Name _____ Date _____

Client Signature _____

Summit Wellness Centers, PLLC

**PO Box:
211 Arden, NC 28704**

Health Insurance Portability Accountability Act (HIPAA)

Client Rights & Therapist Duties

This document contains important information about federal law, the Health Insurance Portability and Accountability Act (HIPAA), that provides privacy protections and patient rights with regard to the use and disclosure of your Protected Health Information (PHI) used for the purpose of treatment, payment, and health care operations. HIPAA requires that I provide you with a Notice of Privacy Practices (the Notice) for use and disclosure of PHI for treatment, payment and health care operations. The Notice, which is attached to this Agreement, explains HIPAA and its application to your PHI in greater detail. The law requires that I obtain your signature acknowledging that I have provided you with this. If you have any questions, it is your right and obligation to ask so we can have a further discussion prior to signing this document. When you sign this document, it will also represent an agreement between us. You may revoke this Agreement in writing at any time. That revocation will be binding unless I have taken action in reliance on it.

LIMITS ON CONFIDENTIALITY

The law protects the privacy of all communication between a patient and a therapist. In most situations, I can only release information about your treatment to others if you sign a written authorization form that meets certain legal requirements imposed by HIPAA. There are some situations where I am permitted or required to disclose information without either your consent or authorization. If such a situation arises, I will limit my disclosure to what is necessary. Reasons I may have to release your information without authorization:

1. If you are involved in a court proceeding and a request is made for information concerning your diagnosis and treatment, such information is protected by the psychologist-patient privilege law. I cannot provide any information without your (or your legal representative's) written authorization, or a court order, or if I receive a subpoena of which you have been properly notified and you have failed to inform me that you oppose the subpoena. If you are involved in or contemplating litigation, you should consult with an attorney to determine whether a court would be likely to order me to disclose information.
2. If a government agency is requesting the information for health oversight activities, within its appropriate legal authority, I may be required to provide it for them.
3. If a patient files a complaint or lawsuit against me, I may disclose relevant information regarding that patient in order to defend myself.

4. If a patient files a worker's compensation claim, and I am providing necessary treatment related to that claim. I must, upon appropriate request, submit treatment reports to the appropriate parties, including the patient's employer, the insurance carrier or an authorized qualified rehabilitation provider.
5. I may disclose the minimum necessary health information to my business associates that perform functions on our behalf or provide us with services if the information is necessary for such functions or services. My business associates sign agreements to protect the privacy of your information and are not allowed to use or disclose any information other than as specified in our contract.

There are some situations in which I am legally obligated to take actions, which I believe are necessary to attempt to protect others from harm, and I may have to reveal some information about a patient's treatment:

1. If I know, or have reason to suspect, that a child under 18 has been abused, abandoned, or neglected by a parent, legal custodian, caregiver, or any other person responsible for the child's welfare, the law requires that I file a report with the North Carolina Abuse Hotline. Once such a report is filed, I may be required to provide additional information.
2. If I know or have reasonable cause to suspect, that a vulnerable adult has been abused, neglected, or exploited, the law requires that I file a report with the North Carolina Abuse Hotline. Once such a report is filed, I may be required to provide additional information.
3. If I believe that there is a clear and immediate probability of physical harm to the patient, to other individuals, or to society, I may be required to disclose information to take protective action, including communicating the information to the potential victim, and/or appropriate family member, and/or the police or to seek hospitalization of the patient.

CLIENT RIGHTS AND THERAPIST DUTIES

Use and Disclosure of Protected Health Information:

- ***For Treatment*** - We use and disclose your health information internally in the course of your treatment. If we wish to provide information outside of our practice for your treatment by another health care provider, we will have you sign an authorization for release of information. Furthermore, an authorization is required for most uses and disclosures of psychotherapy notes.
- ***For Payment*** - We may use and disclose your health information to obtain payment for services we provide to you as delineated in the Therapy Agreement.
- ***For Operations*** - We may use and disclose your health information within as part of our

internal operations. For example, this could mean a review of records to assure quality. We may also use your information to tell you about services, educational activities, and programs that we feel might be of interest to you.

Patient's Rights:

- **Right to Confidentiality** - You have the right to have your health care information protected. If you pay for a service or health care item out-of-pocket in full, you can ask us not to share that information for the purpose of payment or our operations with your health insurer. We will agree to such unless a law requires us to share that information.
- **Right to Request Restrictions** - You have the right to request restrictions on certain uses and disclosures of protected health information about you. However, I am not required to agree to a restriction you request.
- **Right to Receive Confidential Communications by Alternative Means and at Alternative Locations** - You have the right to request and receive confidential communications of PHI by alternative means and at alternative locations.
- **Right to Inspect and Copy** - You have the right to inspect or obtain a copy (or both) of PHI. Records must be requested in writing and release of information must be completed. Furthermore, there is a copying fee charge of \$1.00 per page. Please make your request well in advanced and allow 2 weeks to receive the copies. If I refuse your request for access to your records, you have a right of review, which I will discuss with you upon request.
- **Right to Amend** - If you believe the information in your records is incorrect and/or missing important information, you can ask us to make certain changes, also known as amending, to your health information. You have to make this request in writing. You must tell us the reasons you want to make these changes, and we will decide if it is and if we refuse to do so, we will tell you why within 60 days.
- **Right to a copy of this notice** - If you received the paperwork electronically, you have a copy in your email. If you completed this paperwork in the office at your first session a copy will be provided to you per your request or at any time.
- **Right to an Accounting** - You generally have the right to receive an accounting of disclosures of PHI regarding you. On your request, I will discuss with you the details of the accounting process.
- **Right to choose someone to act for you** - If someone is your legal guardian, that person can exercise your rights and make choices about your health information; we will make sure the person has this authority and can act for you before we take any action.
- **Right to Choose** - You have the right to decide not to receive services with me. If you wish, I will provide you with names of other qualified professionals.
- **Right to Terminate** - You have the right to terminate therapeutic services with me at any time without any legal or financial obligations other than those already accrued. I ask that you discuss your decision with me in session before terminating or at least contact me by phone letting me know you are terminating services.
- **Right to Release Information with Written Consent** - With your written consent, any

part of your record can be released to any person or agency you designate. We will discuss whether or not I think releasing the information in question to that person or agency might be harmful to you.

Therapist's Duties:

- I am required by law to maintain the privacy of PHI and to provide you with a notice of my legal duties and privacy practices with respect to PHI. I reserve the right to change the privacy policies and practices described in this notice. Unless I notify you of such changes, however, I am required to abide by the terms currently in effect. If I revise my policies and procedures, I will provide you with a revised notice in office during our session.

Disclosure to Health Information Exchanges: (For NC State Health Insurance Plans)

This facility participates in the North Carolina Health Information Exchange Network, called NC HealthConnex, which is operated by the North Carolina Health Information Exchange Authority (NC HIEA). We will share your protected health information, or PHI, with the NC HIEA and may use NC HealthConnex to access your PHI to assist us in providing health care to you. We are required by law to submit clinical and demographic data pertaining to services paid for with funds from North Carolina programs like Medicaid and State Health Plan. We may also share other patient data with NC HealthConnex not paid for with state funds. If you do not want NC HealthConnex to share your PHI with other health care providers who are participating in NC Health Connex, you must opt out by submitting a form directly to the NC HIEA. Forms and brochures about NC HealthConnex are available in our offices and online at NCHealthConnex.gov. You may also contact our Privacy Office at (828)-692-6383. Again, even if you opt out of NC HealthConnex, we will submit your PHI if your health care services are funded by State programs. Your patient data may also be exchanged or used by the NC HIEA for public health or research purposes as permitted or required by law. For more information on NC HealthConnex, please visit NCHealthConnex.gov/patients.

COMPLAINTS

If you are concerned that I have violated your privacy rights, or you disagree with a decision I made about access to your records, you may contact me, the State of North Carolina Department of Health, or the Secretary of the U.S. Department of Health and Human Services.

YOUR SIGNATURE BELOW INDICATES THAT YOU HAVE READ THIS AGREEMENT AND AGREE TO ITS TERMS AND ALSO SERVES AS AN ACKNOWLEDGEMENT THAT YOU HAVE RECEIVED THE HIPAA NOTICE FORM DESCRIBED ABOVE.

Client/Legal Guardian Signature

Date

Printed Name

Client/Legal Guardian Signature

Date

Printed Name

Kevin Wimbish, LMFT, HIPAA Compliance Officer

Pamela S. Nettles, MA, LCMHC Professional Disclosure Statement

I am pleased that you have chosen me for your counselor. This document is designed to inform you about my background, ensure that you understand our professional relationship, and document your understanding of and consent to treatment.

Background and Training

I received a master's of arts degree in professional counseling from Liberty University in December, 2010. I have an unrestricted license as a Licensed Clinical Mental Health Counselor (#8716) in the state of North Carolina. My counseling experience includes working with children, adolescents, individuals, families, couples, and groups struggling with a variety of emotional, psychological, spiritual, and behavioral concerns, including, but not limited to: depression, anxiety, marital difficulty, job stress, grief, sexual abuse, among other mental health conditions.

Counseling Services Offered

You can get the most out of our time together if you understand how counseling works and something about how I practice. This is an introduction only, and you may feel free to ask me questions at any time during our work together.

Counseling includes both the development of a trusting relationship between us and the development of goals for your situation and plans to accomplish them. Thus, counseling will include your active involvement and efforts to understand and change your thoughts, feelings and behaviors. You will have to work both in and out of the counseling sessions. Some steps may include homework assignments, exercises, writing in a journal, or observing yourself and practicing new behaviors.

Early in our times together, we will be focusing our efforts on understanding your situation and developing specific goals that will make a positive difference for you. These goals will be your goals, and will need to be realistic ones towards which you yourself can work. I will encourage you, support you, and help you devise appropriate steps that will help you move closer to your goals.

With respect to my theoretical basis for counseling, I am committed to an approach that includes an integration of my Christian faith with compatible psychological perspectives. I am an evangelical Christian, and believe that we are whole persons, with physical, psychological, social and spiritual aspects. Whether we include discussion of the spiritual dimension of life in our time together will be up to you, but I want you to understand that this informs who I am and how I understand others and the nature of and solutions for problems in living. This spiritual perspective is integrated with cognitive-behavioral, developmental, and family systems understandings of how people work. I often utilize the techniques that are consistent with cognitive-behavioral based approaches such as Rational Emotive Behavior Therapy, Cognitive Therapy, and Dialectical Behavior Therapy. I often utilize Emotionally Focused Therapy when working with couples. These are well-established and researched methods of therapy that are widely respected as being effective.

I will enter our relationship with hope and expectation for positive change. It is important, however, that you understand that there are possible risks as well as benefits of counseling. Risks might include uncomfortable levels of feelings like sadness, guilt, anxiety, anger or frustration, or having difficulties in relationships with other people. Sometimes, relationships with others can take unaccustomed directions that feel quite awkward at first. That initial awkwardness can occur no matter how you evaluate the balance between the long-term costs and benefits compared to the old ways of relating. Decisions you make regarding these areas of your life will remain your responsibility.

If we work together, we will specify the goals and methods we will use together, identify the risks and benefits of treatment, and make clear the approximate time commitment involved, costs, and other aspects of your particular situation. Before going further, I expect us to have a plan to which we will both agree. Periodically, we will evaluate our progress and, if necessary, change our goals, treatment plan and/or methods.

I work with individuals, couples and families. I also work with children and adolescents. Clients with whom I work are psychologically and emotionally "healthy" and seek counseling for difficulties due to common life events. This includes people experiencing depression, anxiety, grief and loss, adjustment difficulties, relationship issues and confusion about identity or life goals. I do not work with people whom, in my professional opinion, I

cannot help using the resources and skills I have available, and will in such cases offer referral to another therapist who may be better equipped to help.

Confidentiality

I regard the information you share with me with the greatest respect, so I want us to be as clear as possible about how it will be handled. All information that we share as well as my records of our conversations are confidential. There are several circumstances in which I cannot guarantee confidentiality, either legally or ethically:

- 1) If child abuse is suspected, the law requires I report it to the appropriate authorities.
- 2) If elder abuse or dependent/impaired adult abuse is suspected, the law requires I report it to the appropriate authorities.
- 3) If the therapist believes that the client is in a clear and imminent danger to self or others, I will contact the appropriate person/people to prevent harm to the client or others.
- 4) In rare circumstances, therapists can be ordered by a judge to release information.

In order to provide you with the best possible help, I may consult with other therapists who may have insights that will be of assistance, but only in such a way that your confidentiality is preserved. Otherwise, I will not tell anyone anything about your treatment, diagnosis, history, or even that you are a client, without your full knowledge and a signed "Release of Information Form."

Fees and Billing

My standard fee is \$130/session. Each session typically lasts 50- 60 minutes. Fees for extended sessions will be agreed upon in advance. Fees for counseling services are due in full at the end of each session. Cash, personal checks, or bank card are acceptable for payment. You will be provided with a receipt for all fees paid. If you choose to file with your insurance company, they may require information regarding diagnosis, symptoms, treatment goals and methods. Any diagnosis provided to your insurance company becomes a part of your permanent medical record.

Complaint Procedures

If you are dissatisfied with any aspect of our work, this is most effectively and productively dealt with in our sessions together. Please feel free to ask any questions or clarify any confusion you may have about our work. If you think that you have been treated unfairly or unethically by me and we cannot resolve this problem, you can contact the North Carolina Board of Licensed Clinical Mental Health Counselors at P.O. Box 77819, Greensboro NC, 27417, 844-622-3572, for clarification of clients' rights as I have explained them or even to lodge a complaint.

Please read carefully and complete the following section:

- * I have read these policies and understand and accept them as described.
- * I hereby give my permission and consent to Pamela S. Nettles to provide psychotherapeutic treatment to me and/or _____ who is (are) my spouse/child(ren).
- * I understand that I am responsible financially for services rendered and that payment is due in full each session.
- * I understand that I will be charged for appointments not canceled with 24 hours notice.
- * I will pay _____ per session, as agreed upon with the therapist.
- *

Client's Signature

Therapist's Signature

Date

Date

Summit Wellness Centers, PLLC
PO Box
211 Arden, NC 28704

Services and Policy Consent Form

Location – Based Tracking

If you have location tracking enabled on your mobile phone, it is possible that others may identify your location at our office. Please be aware of your risks of exposing your privacy should you continue utilizing this service on your personal technology.

Social Media Policy

Our Summit Facebook page is a passive page. Comments are intentionally disabled to protect privacy, and to ensure that a non-multiple relationship is maintained. (If you choose to comment, you will see the comment, but others will not). If you desire to follow the blog, or learn of upcoming events, we encourage you to follow the social media link without actually creating a visible public link to the page, as "fanning" could potentially compromise your privacy. You may use your own discretion in choosing whether to follow a professional page, or the Summit page, on these sites.

Though you may follow the *professional* author page of Donna Gibbs, or any other Summit contractor, or the Summit Wellness Centers page, Summit counselors will not accept requests from current or previous clients to friend on any *personal* social media sites. This constitutes a multiple relationship, and has the potential of compromising your confidentiality. For the same reason, we request that clients do not communicate with counselors via messaging on any interactive social networking sites. If you need to contact your counselor, please contact our office, or utilize our TherapyAppointment portal, which provides an encrypted, HIPAA compliant platform.

Search Engine

Though it is not a regular part of our practice to search for clients on search engines, at times we may conduct a web search on clients, before the beginning of therapy, or during therapy. If you have concerns or questions regarding this practice, please discuss it with your counselor.

Testimonials

Our primary concern is your privacy. Confidentiality means that we take great measures to protect your privacy. This is why we do not request testimonials. However, you are welcome to tell anyone you wish that you are receiving services from Summit, and how you feel about the services provided you, in any forum of your choosing.

We're glad you chose Summit Wellness Centers, and we look forward to the journey ahead!

Client Signature

Date

Appointment Reminders and Online Appointment Scheduling

You can receive appointment reminders to your email address, your cell phone (via a text message), or your home phone (via a voice message) before your scheduled appointments.

You can also enjoy the convenience of online scheduling at any time. Once your account is established, you simply visit www.schedule.care to schedule or reschedule your appointments. You may continue to schedule appointments in person or by telephone, but if you have Internet access, you are sure to enjoy the convenience of this online system.

Your name: _____

Email address: _____

Home phone number: _____ Cell phone number: _____

Where would you like to receive appointment reminders? (check one)

Via a text message on my cell phone (normal text message rates will apply)

Via an email message to the address listed above

Via an automated telephone message to my home phone

None of the above. I'll remember my appointments.
(Missed appointment fees will still apply)

I am choosing to **Opt In** to communications via the method specified above.

If you would like to **Opt Out** at any time of future communications from our office, please email lbeddingfield@summitwellnesscenters.com indicating the method of communication from which you would like to opt out.

Appointment information is considered to be "Protected Health Information" under HIPAA. I understand that email and standard SMS messages are not confidential methods of communication, and may be insecure. I further understand that, because of this, there is a risk that email and standard SMS messaging regarding my mental/ behavioral health care may be intercepted and read by a third party. Accordingly, by my signature, I am waiving my right to keep this information completely private, and requesting that it be handled as I have noted above.

Signature

Date

Summit Wellness Centers, PLLC

Authorization to Release/Exchange Confidential Records and Protected Health Information

Client: _____

Date: _____

I hereby authorize *Summit Wellness Centers* to disclose/obtain/exchange mental health treatment information and records obtained in the course of treatment of client, including, but not limited to, provider's diagnosis of client, to/from/with the person(s) below: (both parties have my permission to exchange information regarding my treatment).

(List individual/office/facility)

Name: _____

Relationship: _____

Address: _____

Phone Number: _____

This authorization may include the following exchange of information: (please circle individual items below only if you are limiting areas you want to identify for release. Otherwise, all below areas are included in this release and it is not necessary to circle. Summit only releases minimum amount necessary per request). Referral information, relevant history or diagnoses, treatment planning, evaluation results, continuity of care, insurance information, inpatient and/or outpatient treatment records for physical and/or psychological, psychiatric, or emotional illness or drug or alcohol abuse, treatment notes and summaries, treatment plans, social histories, assessments, recommendations, and similar documents, information about how the client's condition affects or has affected his or her ability to complete tasks, activities of daily living, or ability to work, and billing records. When requested of information, Summit only releases minimum information necessary to complete request; typically in the form of a brief letter with dates of treatment and summary of progress.

Circle below if this release is for billing/confirmation of attendance purposes only:

Billing/Confirmation of Attendance ONLY

Please explain below any additional limitations to this release (anything you do not want Summit to release):

Communicable diseases, HIV-related information and drug and alcohol information contained in these records will be released under this consent unless indicated by your initial here: _____ Do not release.

I understand that no services will be denied me/the client solely because I refuse to consent to this release of information, and that I am not in any way obligated to release information. I do sign this release because I believe that it is necessary to assist in the development of the best possible treatment plan for me/the client. The information disclosed may be used in connection with my/the client's treatment. The purpose of the release may include continuation of care, legal purposes, or insurance purposes.

In consideration of this consent, I hereby release Summit from any and all liability arising from the release. I understand that information used or disclosed pursuant to this authorization may be subject to redisclosure by the recipient and may no longer be protected by the HIPAA privacy rule.

I understand that I may void this request/authorization, except for action already taken, at any time by means of a written letter revoking the authorization and transfer of information, but that this revocation is not retroactive. If I do not void this request/authorization, it will automatically expire one year from the date below.

I agree that a photocopy of this form is acceptable, but it must be individually signed by me, the releaser, and a witness if necessary. I affirm that everything in this form that was not clear to me has been explained. I also understand that I have the right to receive a copy of this form upon my request.

Client / Parent / Guardian Signature

Date

Witness Signature

Date