

**NEW PATIENT INFORMATION**

Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Sex: \_\_\_ M \_\_\_ F  
 Marital Status: \_\_\_ Single \_\_\_ Married \_\_\_ Separated \_\_\_ Divorced \_\_\_ Widowed  
 Spouse Name: \_\_\_\_\_ Spouse DOB: \_\_\_\_\_ Spouse Phone: \_\_\_\_\_  
 Parents Names (if minor patient): \_\_\_\_\_

**FINANCIALLY RESPONSIBLE (OR INSURED) PARTY**

Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Relation to Patient: \_\_\_\_\_ Sex: \_\_\_ M \_\_\_ F  
 Employer: \_\_\_\_\_ City \_\_\_\_\_  
 Supervisor/Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

**INSURANCE INFORMATION**

Primary Insurance: \_\_\_\_\_  
 Policy Holder Employer: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Group: \_\_\_\_\_ Group Number: \_\_\_\_\_ ID Number: \_\_\_\_\_  
 Policy Holder Name: \_\_\_\_\_ DOB: \_\_\_\_\_  
 Patient's Relationship to Policy Holder: \_\_\_ Self \_\_\_ Spouse \_\_\_ Child \_\_\_ Other  
 Secondary Insurance: \_\_\_\_\_  
 Policy Holder Employer: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Group: \_\_\_\_\_ Group Number: \_\_\_\_\_ ID Number: \_\_\_\_\_  
 Policy Holder Name: \_\_\_\_\_ DOB: \_\_\_\_\_  
 Patient's Relationship to Policy Holder: \_\_\_ Self \_\_\_ Spouse \_\_\_ Child \_\_\_ Other

**EMERGENCY CONTACT INFORMATION**

Contact Person: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
 Additional Contact Person (not living in your home): \_\_\_\_\_  
 Address: \_\_\_\_\_ Home: \_\_\_\_\_

SYMPTOM CHECKLIST

Please mark all of the following symptoms you are now experiencing with a N. Please mark all of the follow symptoms that you have experienced in the past, but are no longer currently experiencing with a P.

- |   |  |  |  |
|---|--|--|--|
| <input type="checkbox"/> Sadness                            | <input type="checkbox"/> Fatigue/exhaustion                | <input type="checkbox"/> Restless sleep                | <input type="checkbox"/> Loss or reduction of energy     |
| <input type="checkbox"/> Feeling empty                      | <input type="checkbox"/> Restlessness                      | <input type="checkbox"/> Not sleeping enough           | <input type="checkbox"/> Weight loss (_____ lbs.)        |
| <input type="checkbox"/> Tearfulness                        | <input type="checkbox"/> Social withdrawal                 | <input type="checkbox"/> Waking too early              | <input type="checkbox"/> Weight gain (_____ lbs.)        |
| <input type="checkbox"/> Irritability                       | <input type="checkbox"/> Indecisiveness                    | <input type="checkbox"/> Sleeping too much             | <input type="checkbox"/> General aches/pains             |
| <input type="checkbox"/> Guilt                              | <input type="checkbox"/> Low self-esteem                   | <input type="checkbox"/> Suicidal thoughts             | <input type="checkbox"/> Things aren't fun anymore       |
| <input type="checkbox"/> Headaches                          | <input type="checkbox"/> Feeling worthless                 | <input type="checkbox"/> Difficulty thinking           | <input type="checkbox"/> Loss of interest in things/life |
| <input type="checkbox"/> Stomach aches                      | <input type="checkbox"/> Self-blame                        | <input type="checkbox"/> I wish I didn't exist         | <input type="checkbox"/> Difficulty concentrating        |
|   |  |  |  |
| <input type="checkbox"/> Worrying/brooding                  | <input type="checkbox"/> Restless/on edge                  | <input type="checkbox"/> Easily fatigued               | <input type="checkbox"/> Fear of leaving home            |
| <input type="checkbox"/> Avoid social situations            | <input type="checkbox"/> Mind goes blank                   | <input type="checkbox"/> Irritability                  | <input type="checkbox"/> Intense or irrational fears     |
| <input type="checkbox"/> Compulsions                        | <input type="checkbox"/> Muscle tension                    | <input type="checkbox"/> Obsessive thoughts            | <input type="checkbox"/> Decreased concentration         |
| <input type="checkbox"/> Feeling stressed out               | <input type="checkbox"/> Unresolved trauma                 |  | <input type="checkbox"/> Decreased concentration         |
|   |  |  |  |
| <input type="checkbox"/> Panic                              | <input type="checkbox"/> Palpitations                      | <input type="checkbox"/> Sweating                      | <input type="checkbox"/> Trembling                       |
| <input type="checkbox"/> Shortened breath                   | <input type="checkbox"/> Hyperventilating                  | <input type="checkbox"/> Choking                       | <input type="checkbox"/> Chest pain                      |
| <input type="checkbox"/> Nausea                             | <input type="checkbox"/> Dizziness                         | <input type="checkbox"/> Things seem unreal            | <input type="checkbox"/> Fear of losing control          |
| <input type="checkbox"/> Fear of dying                      | <input type="checkbox"/> Tingling sensations               | <input type="checkbox"/> Chills/hot flashes            | <input type="checkbox"/> other                           |
|   |  |  |  |
| <input type="checkbox"/> Poor attention to detail           | <input type="checkbox"/> Frequent, careless mistakes       | <input type="checkbox"/> Difficulty paying attention   |  |
| <input type="checkbox"/> Difficulty listening               | <input type="checkbox"/> Difficulty following instructions | <input type="checkbox"/> Difficulty finishing tasks    |  |
| <input type="checkbox"/> Difficulty organizing things       | <input type="checkbox"/> Hyperactive                       | <input type="checkbox"/> Impulsive                     |  |
| <input type="checkbox"/> Excessively fidgety                | <input type="checkbox"/> Talks excessively                 | <input type="checkbox"/> Forgetful                     |  |
|   |  |  |  |
| <input type="checkbox"/> Lose temper easily                 | <input type="checkbox"/> Argumentative                     | <input type="checkbox"/> Defiant/noncompliant          | <input type="checkbox"/> Blames others                   |
| <input type="checkbox"/> Deliberately annoying              | <input type="checkbox"/> Easily annoyed                    | <input type="checkbox"/> Excessively "touchy"          | <input type="checkbox"/> Aggressive                      |
| <input type="checkbox"/> Angry                              | <input type="checkbox"/> Spiteful/vindictive               | <input type="checkbox"/> Cruel to animals              | <input type="checkbox"/> Cruel to others                 |
| <input type="checkbox"/> Bullies others                     | <input type="checkbox"/> Initiates physical fights         | <input type="checkbox"/> Destroys property             | <input type="checkbox"/> Theft/stealing                  |
| <input type="checkbox"/> Legal problems                     | <input type="checkbox"/> Starts fires                      | <input type="checkbox"/> Robbery                       |  |
|   |  |  |  |
| <input type="checkbox"/> Grossly inflated self-esteem       | <input type="checkbox"/> Decreased need for sleep          | <input type="checkbox"/> Far more talkative than usual |  |
| <input type="checkbox"/> Very rapid, "pressured" talking    | <input type="checkbox"/> Ideas racing through mind         | <input type="checkbox"/> Excessively distractible      |  |
| <input type="checkbox"/> Excessive increase in productivity | <input type="checkbox"/> High risk or hypersexual          | <input type="checkbox"/> Running away from home        |  |
| <input type="checkbox"/> Reckless decision making           | <input type="checkbox"/> Excessive energy                  | <input type="checkbox"/> Spending far too much         |  |
|   |  |  |  |
| <input type="checkbox"/> Sig. reduction of calories         | <input type="checkbox"/> Excessive exercise                | <input type="checkbox"/> Laxative abuse                | <input type="checkbox"/> Intense fear of weight          |
| <input type="checkbox"/> Dissatisfaction with body          | <input type="checkbox"/> Loss of menses                    | <input type="checkbox"/> Binging                       | <input type="checkbox"/> Purging                         |
| <input type="checkbox"/> Sig. weight loss                   | <input type="checkbox"/> Obsession with food               |  |  |

**ADOLESCENT DBT CONTRACT**

I have read and reviewed the above and have discussed with Dr. Hancock those items which were unclear or of concern to me. I understand and agree to the above as written as verified by initials and signature (as indicated). My signature also verifies that I have been provided a printed and/or electronic copy of the information and agreement.

My mobile phone number is: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_. I authorize the use of my mobile phone number (listed above) to receive scheduling and billing messages. I agree to update this office if my mobile number changes. \_\_\_\_\_ (Please initial)

I specifically elect to follow the billing practices identified below (initial one):

\_\_\_\_\_ I will pay \$50 for each individual group, due at the beginning of each group.  
(initial)

\_\_\_\_\_ I would like my insurance to be billed for both the child and parent/caregiver who attends each group. I understand that I will be responsible for deductible charges for both my child and myself. I understand that co-pay and co-insurance charges are separate from deductible charges.  
(initial)

\_\_\_\_\_ I would like my insurance to be billed for my child only; I understand that co-pay and co-insurance charges are separate from deductible charges. I will pay cash for the parent/caregiver who attends group. The cash payment for the parent/caregiver will be \$50 – insurance payment for the child.  
(initial)

\_\_\_\_\_  
Patient's Name (printed)

\_\_\_\_\_  
Parent/Guardian Name (if patient is a minor)

\_\_\_\_\_  
Signature of Patient (or Parent/Guardian if minor)

\_\_\_\_\_  
Today's Date

\_\_\_\_\_  
Signature of Financially Responsible Person

\_\_\_\_\_  
Name of Financial Guarantor

### AUTHORIZATION TO RELEASE PROTECTED HEALTH INFORMATION

I, the undersigned, hereby authorize Kyle Max Hancock, PhD, PC and its affiliates the release of medical/health/psychological information of:

<b>Name (print):</b> _____	<b>Birthdate:</b> _____
<b>Address:</b> _____	<b>City, State, Zip:</b> _____
<b>Home Phone:</b> _____	

Initial One:	Professional/Clinic/Person: _____
___ To release information to:	Address: _____
___ To receive information from:	City, State Zip: _____
___ To exchange information with:	Phone: _____
	Fax: _____

Please provide any information available whether written or verbal with respect to any psychological testing, reports, academic information, medical history, physical examinations/evaluations, consultation reports, and any treatment or programs prescribed.

With the following limitations or exclusions:

**Important:**

- You may revoke this authorization at any time by written request. Obviously, the revocation can't apply to information already released.
- There may be charges associated with services rendered to fulfill this release of information request.
- Your treatment is not conditional on signing this authorization.
- You are entitled to a copy of this authorization upon request.
- This authorization will expire one year from the date of your signature below.

**Person Authorized to Consent:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature of Authorized Person:** \_\_\_\_\_ **Date:** \_\_\_\_\_





## INFORMATION & AGREEMENT

This document contains important information about the professional services and business policies of Kyle Max Hancock, PhD, PC, and its affiliates. Please read it carefully and note any questions you might have so we can discuss them. Your signature verifies this document as a legal and binding agreement between us.

### SKILLS TRAINING CLASS

As a group member, I have rights and benefits as well as duties, and I understand that some of them are described in this agreement.

This class will be called the DBT Class for Adolescents and will meet on Tuesdays from 5:00 – 6:00. I agree to pay the full fee if I do not show up for group or if I cancel without 24 hours notice, except in the case of emergency or illness. Payment is due in full at each group session. The total cost of this group is \$50 per class, if clients pay for the class without billing their insurance company. If you prefer to bill your insurance company, Dr. Hancock has agreements with various insurance companies and additional information can be provided upon request. Please note that the insurance company will be billed for both the adolescent and parent who attend the class unless specific accommodations or agreements are made in writing between the participants and Dr. Hancock.

### PURPOSE OF DBT CLASS

The primary aim of this program is to provide training using standardized assessments and therapies with demonstrated effectiveness. In order to be able to determine whether a treatment we are providing is effective, we measure our clients' improvement over time. For this reason, we make use of various assessments approaches (e.g., self report and clinical interviews) in our practice.

To make DBT skills and therapy groups successful experiences, it is essential that the client be under the care of a primary mental health treatment provider (a primary therapist who sees you at least once per week) while participating in the program. DBT skills/therapy groups and phone coaching are not a substitute for the treatment provider for each client's primary provider. It is also very important that each treatment provider for each client understands and agrees to the client's participation in the DBT skills training and therapy groups. Each client has responsibilities, described below, that must be met if DBT is to be successful.

### TREATMENT AGREEMENT

The treatment consists of weekly class skills training and weekly individual therapy to help with applying new skills to everyday life. Five sets of skills will be covered: how to stay in the moment, how to regulate intense emotions, interact effectively with others, tolerate distress, and walk the middle path in ways that are not harmful to oneself or others; classes are taught in five separate modules. Mindfulness skills involve effective awareness and learning to control attention. Thus, it takes four months to complete the full set of skills modules one time.

I am voluntarily requesting to participate in the Dialectical Behavior Therapy Program. The guidelines of the program and its foundation are contained in Marsha Linehan's Cognitive Behavioral Treatment for Borderline Personality Disorder (Guilford Press, 1993). I understand that this program includes identifying patterns of reinforcement for behaviors that I want to change and that I do not need to have borderline personality disorder in order to benefit from this treatment. I also recognize that I must also take responsibility for my actions. There will

be times when I will not get the response from therapists that I might have expected in the past and this might increase my distress temporarily or put greater burden on others concerned about me.

I am agreeing to complete the program. I give the staff of the Dialectical Behavior Therapy Program permission to contract my treatment team member(s) (including my therapist, psychiatrist, family members, and therapist involved in my treatment), but I understand that I am personally responsible for conveying any essential information.

I will not assume that professionals involved in my treatment will pass important information along to others, but I understand that they may do so when they feel it is necessary for their own supervision/consultation or my treatment.

I understand that if I miss 2 out of 5 sessions of DBT skills training class for any reason, I will have voluntarily dropped out of DBT. I also understand that I must maintain individual therapy with a primary therapist and if I do not, I will no longer be able to participate in the DBT program.

I understand that I can request further clarification when I have a question regarding specific application of any parts of this authorization. I understand that I may speak with Dr. Hancock if I have any concerns.

I understand that payment for services is due at the time of service. Each class costs \$50. This totals \$800 to complete the entire course; I also understand that a discount of 10% is available if I pay for the entire course in advance. Finally, I acknowledge that there will be no refunds for missed classes (with the exception of illness, emergency, etc.).

By my signature, I agree to the following:

1. To attend the skills class on a regular basis.
2. To work in this group. This means openly talking about my thoughts and feelings, honestly reporting my behaviors, keeping my promises, and exchanging helpful feedback with other members of the group when appropriate.
3. To attend all meetings of the group from start to finish, even if I do not always feel like it. If I cannot attend, I will tell the group a week in advance (at the beginning of that meeting), or, if it is an emergency, call one of the leaders as soon as I know I cannot attend.
4. I understand that the leaders are required by law to report any suspected child or elder abuse, or serious threats of harm to myself or another person, to the proper authorities.
5. To avoid coming to group under the influence of drugs or alcohol.
6. To not discuss past (even if immediate) suicidal, self-harm behaviors, drug use, or other impulsive behaviors with other clients in or outside of group.
7. To keep information obtained during sessions, as well as the names of clients, strictly confidential.
8. To call the group leaders ahead of time if I will arrive late.
9. To provide 24 hours notice prior to missing any group.
10. To maintain appropriate relationships with other group members.
11. To pay my bill on time and in full.
12. Not to come to sessions under the influence (or appearing to be) of alcohol or illicit drugs.

**CLASS RULES**

1. Clients who drop out of DBT are out of DBT. “Dropping out” means missing 2 sessions out of 5 consecutive Skills Groups.
2. Each client must be in ongoing psychotherapy and have authorized communication between therapists.
3. Clients are not to discuss past (even if immediate) parasuicidal behaviors with other clients outside the group.
4. Clients who call one another for help when feeling suicidal must be willing to accept help from the person called.
5. Information obtained during sessions, as well as the names of clients, must remain confidential.
6. Clients who are going to be late or miss a session must call ahead of time.
7. Clients may not form “private” (that is “secret”) relationships with one another outside of groups. If it cannot be discussed in the group, don’t say or do it.
8. Sexual partners may not be in DBT groups together.
9. Physical violence, intimidation, or destructive comments are unacceptable.
10. Skills training group or therapy group therapists may be telephoned when there is need for “coaching” to use DBT skills and the primary therapist is unavailable. Skills coaching is not a crisis call and is limited to 5 minutes. Clients are expected to have tried practicing skills before calling for skills coaching. Skill coaching availability is based on the therapist’s limits, which may vary between therapists.

**CONFIDENTIALITY**

In general, law protects the privacy of all communications between a patient and a psychologist; we can only release information about our work to others with your permission, but there are a few exceptions, outlined below:

1. The nature of the skills training class is such that we cannot control the release of information from any group member outside of the group; consequently, although we will remind all group members of the requirements and regulations of the need for confidentiality on a regular basis, we cannot guarantee the maintenance of confidentiality of any individual member of the group by another group member. However, we will consistently maintain the confidentiality of each individual group member at all times—including during individual therapy. This means that we will not discuss any individual group member’s group participation with any other member of the group during individual therapy.
2. There are some situations in which we are legally obligated to take action to protect others from harm (such as reporting to appropriate agencies when someone has threatened serious bodily harm, a life is at risk, or when abuse or neglect is suspected). These actions may include notifying the potential victim, contacting family members or others that can help provide protection, contacting the police or seeking hospitalization for the patient. Such situations often require that we reveal some information about a patient’s treatment.
3. When a child’s welfare is involved or where a patient’s emotional condition is a critically important issue, a judge may order our testimony if he/she determines that the issues demand it. Such an order has been exceptionally rare in our experience.
4. We associate with and collaborate with four other behavioral health providers, all of whom are members of Mt. Logan Clinic, LLC. We are each independent of one another, yet we

share office space, certain expenses, and administrative functions. It is important that you understand that we are completely independent in providing you with clinical services and we alone are fully responsible for those services. My professional records are separately maintained and no member of the group can have access to them without your specific, written permission.

5. My support staff may have access to your medical chart and may occasionally send or receive privileged information such as psychotherapy notes, evaluations, and other written and/or verbal communications. All persons affiliated with Kyle Max Hancock, PhD, PC abide by the same limits and laws of confidentiality.

We are willing to discuss any questions you may have about confidentiality. You may also want to obtain formal legal advice because the laws governing confidentiality are quite complex and we are not attorneys.

### **BILLING & PAYMENT**

1. Class fees and/or insurance copays must be paid for at the beginning of each class, unless the course is paid for in advance. There is a \$10 service fee charged if patients choose to not pay the class fee at the time of service.
2. No-Show Fees: when patients fail to present for group without calling to cancel a minimum of 24 hours prior to their scheduled appointment (unless in cases of sudden illness or emergency), they will be charged a fee of \$50. Patients may speak with me if they feel circumstances warrant a discount or waiving of the fee. Number and frequency of no-shows, ratio of no-shows to shows, as well as unique circumstances may be taken into consideration.
3. Outstanding balances: interest is charged on outstanding balances at a rate of 1.5% per month, 18% per year. Patients will be informed of their total balance at each scheduled session; each person will also have the opportunity make payments toward their balance. Patients owing a balance will also be sent monthly statements reflecting the portion they owe for services provided. Statements can be confusing to read (e.g., our billing software system automatically applies payments to the oldest outstanding charge in order to reduce patients' interest charges; it may therefore appear that a co-pay paid wasn't credited to the account when it was, but it was applied to an older charge). If patients have questions about their statement or amount owed, they are encouraged to contact Carolyn or speak with Dr. Hancock. *Patients whose balances (patient portion) exceed \$300 will be given one month from the statement date indicating an outstanding payment balance exceeding \$300 to return their balances under \$300. If that does not occur, patients will be contacted to make a payment or payment arrangements. Payment arrangements must be made (and followed) in order to schedule further appointments and/or to retain existing appointments.* Patients will be sent a letter indicating the amount of their outstanding bills. Patients will be sent a second letter of outstanding balance with an appraisal that payments are necessary to avoid having the balance sent to collections. Although we will make every effort to work with patients on payment plans in cases of financial hardship, patients who refuse to make payment arrangements or adhere to them will be sent to collections. Thus, when reasonable efforts to collect an outstanding balance have failed, the account will be turned over to a collections agency or a claim will be made in small claims court. Should your account be submitted to a collections agency, the undersigned agrees to pay all costs to collect the debt, including, but not limited to, interest in the amount of 18% per annum, all associated attorney's fees, all associated court fees, and

all associated collection fees in the amount of 40% of the initial balance. The obligation to pay all collection fees shall be imposed at the time of the assignment of the debt to a third party debt collection agency. State law requires us to inform you that a negative credit report is submitted to a credit-reporting agency if you fail to fulfill your financial obligations.

4. Monthly statements will be sent to you showing charges and your payments. If there is an error on your statement, please bring it to our attention so we can promptly resolve the problem. Payment is due within ten days of receipt of your statement. A finance charge of 1.5% per month (18% per annum, \$5.00 minimum charge) is assessed on any unpaid balance over 60 days old. Returned checks result in a \$20 service charge in addition to any bank service charges.
5. When reasonable efforts to collect an amount owed fail, the account is turned over to a collection agency or a claim is made in small claims court. If such action is necessary, 40% of the outstanding amount is added to the bill as a "collection fee". This charge is included in the claim. In most collection situations, the only information we release is the name of the patient and responsible party, the dates and nature of services provided, and the amounts due. State law requires me to inform you that a negative credit report is submitted to a credit reporting agency when a person fails to fulfill contracted financial obligations.
6. Any and all agreed-upon changes to the above billing policy must be made and maintained in writing.
7. With your signature, you are authorizing payment of medical benefits to Kyle Max Hancock, PhD, PC. Additionally, you are authorizing Kyle Max Hancock, PhD, PC and/or its affiliated office and billing personnel to contact you for billing purposes.

#### **APPOINTMENTS**

Skills training classes are approximately 60 minutes long. This time is reserved specifically for the class meeting. Because your class is a substantial portion of our day's schedule, it is important that you keep track of your appointments. Reminder calls are a courtesy only, are not guaranteed, and should not be relied upon as a way of keeping track of your appointments. Do not leave appointment cancellations on Dr. Hancock's voicemail.

Effective skills training commonly requires full attention. As such, please make arrangements for childcare because we cannot provide it. Children should not be left in the waiting room unsupervised. Should a problem arise due to inadequate supervision, your therapy session would be cut short that day.

#### **PROFESSIONAL RECORDS**

The laws and standards of our profession require that we keep treatment records. As required by the Health Insurance Portability and Accountability Act of 1996 (HIPAA), we keep two sets of records—the medical record and our psychotherapy notes. The medical record includes the dates and times of sessions, the type of therapy provided, the results of any psychological testing, and any summaries of symptoms, diagnosis, treatment plan, and treatment progress.

**The medical record is available for your review.** Psychotherapy notes and personal notes, on the other hand, are protected by HIPAA law and state law and are considered the property of the health care provider who created them.