



JILL K. BERSHAD, LHMC, CAP

Thank you for contacting me to address some of the issues that are concerning you.

Before or during our first session, it is necessary to read over and complete the initial paperwork. In this packet, you will find important information regarding the scope of services, as well as information about confidentiality and payment.

Please take the time to fill out this information and bring it with you to your first visit.

The following forms are enclosed:

- Client Information and History Form: This provides information about you, your current concerns, and history.
- Consent and Psychological Services Agreement: This form indicates that you are voluntarily seeking services and what therapy entails. Please review and initial each point and sign at the bottom.
- Payment Contract for Services: This form can be completed during our first session. It covers what the rate of each session will be.
- Credit Card Authorization Form
- Consent For The Release Or Disclosure Of Confidential Information And/or Records
- The Notice of Mental Health Practitioner's Policies & Privacy Practices to Protect the Privacy of Your Health Information (HIPAA): This form is standard for any healthcare provider and is required by HIPAA law. It discusses your protected health information (PHI).

Please provide your Driver's License at your first appointment so a copy can be made for your record.

I will be happy to discuss any questions that you may have during our first session.

Thank you,

Jill K. Bershada, LHMC, CAP

ADULT INTAKE PACKET REV. 04/21 (SP)



JILL K. BERSHAD, LHMC, CAP

Adult Information & History Form

Name: _____ Date of Birth: _____ Gender: _____
 Address: _____ Marital Status: _____
 _____ Preferred Phone Number: _____
 Email address: _____ Alternate Phone Number: _____
 Driver's License#: _____ Calls will be discreet however please indicate any
 restrictions: _____

Emergency Contact:

Name: _____ Relationship to you: _____
 Address: _____ Phone Number: _____

I consent and authorize Jill K. Bershada, LMHC, CAP to contact the above-designated person in the event of an emergency.
 Signature: _____ Date: _____

Reason that you are seeking treatment at this time:

List any recent stress/challenges/life event: _____

Have you experienced any of the following in the past year?

Anxiety/Panic _____	Irritability _____	Isolation/Loneliness _____
Depression _____	Sleep Disturbances _____	Loss of Interest _____
Mood Swings _____	Difficulty Concentrating _____	Sexual Difficulties _____
Fatigue _____	Weight Loss/Gain _____	Intrusive Thoughts _____
Low Self Esteem _____	Feelings of guilt/worthlessness _____	Other _____

Medical History

Primary Physician: _____ Phone Number: _____
 Current Medications & Dosages: _____
 Allergies or other significant medical information: _____

Mental Health History

Previous Therapy/Psychiatric Medications (date/reason/name) _____

History of Psychiatric hospitalization/ suicide attempt: No Yes If yes, please describe:

Employment/Education History

Education:

Occupation:

Any legal history: No Yes If yes, please describe:

Family History

Describe Relationship/Marital History:

Children (Names/ages):

Briefly describe relationship with your parents/siblings:

History of psychiatric/psychological disorders in family: No Yes If yes, please describe:

History of substance abuse in family: No Yes If yes, please describe:

History of suicide in family: No Yes If yes, please describe:

Recreation/Social Activities/Social Support

Hobbies/Interests:

Support System/Friendships:

Do you smoke? No Yes If yes, how much:

Do you drink? No Yes If yes, describe frequency:

Do you use drugs? No Yes If yes, please

describe:

Please describe any other relevant information:



JILL K. BERSHAD, LHMC, CAP

Payment Contract for Services

Name _____

Address _____

Person Responsible for Payment of Services Relationship to Client: _____

Name _____

Address _____

Federal Truth in Lending Disclosure Statement for Professional Services

Part One: - Fees For Professional Services / Self Pay Arrangements

I (we) agree to pay Jill K. Bershada, LMHC, CAP, a rate of \$225 per clinical session (defined as 50 minutes for assessment, testing, hypnosis, documentation, consultation, and individual or family counseling). **I (we) agree to pay full fee for any appointments canceled less than 24 hours prior to the appointment.**

Part Two: All Clients

Payment is due at the time of service.

I hereby certify that I have read and agree to the conditions.

Client Name Signature Date

Print Name Person Responsible for Payment Signature Date
(If different)



JILL K. BERSHAD, LHMC, CAP

Credit Card Authorization Form

Please complete this form even if you will not be charging your sessions on a regular basis. Missed appointments, late cancellations, and returned checks will automatically be charged to this credit account.

Client name: _____

Name as it appears on the card: _____

Billing address: _____

Card type: _____ AMEX _____ Visa _____ MC

Card number: _____

Expiration date: _____

CVV2: _____

I authorize Jill K. Bershad, LMHC, CAP to process my credit card for payment of services on a recurring basis for all scheduled appointments including missed appointments, late cancellations, and returned checks.

Signature

Date

Email _____

Phone _____



JILL K. BERSHAD, LHMC, CAP

**CONSENT FOR THE RELEASE OR DISCLOSURE OF
CONFIDENTIAL INFORMATION AND/OR RECORDS**

I, _____, hereby authorize Jill K. Bershada, LMHC, CAP to *release, request, and exchange* information and records obtained in the course of my diagnosis and treatment to: _____.

Signature of Client

Date

Signature of Parent/Guardian
Or Authorized Representative
If a Minor

Date



JILL K. BERSHAD, LHMC, CAP

Notice of Mental Health Practitioner's Policies & Privacy Practices to Protect the Privacy of Your Health Information

This Notice Describes How Health Information About You May Be Used And Disclosed And How You Can Get Access To This Information. Please Review This Notice Carefully. This Notice of Privacy Practices is provided to you as a requirement of the Health Insurance Portability and Accountability Act (HIPAA). Please retain these pages (inclusive of this one) for your records.

ACKNOWLEDGMENT OF RECEIPT OF THIS NOTICE

You will be asked to provide a signed acknowledgment of receipt of this notice. It is our intention to advise you of the permissible uses and disclosures. The services will not be conditioned upon your signed acknowledgment.

NOTICE OF PRIVACY PRACTICES

This Notice describes the types of uses and disclosures regarding your Protected Health Information (hereafter referred to as "PHI"); it explains how, when and why we use and disclose PHI about you; it notifies you that we may use and disclose your PHI as described in this Notice.

WHO WILL FOLLOW THIS NOTICE

This Notice describes the information privacy practices followed by our employees, staff and other office personnel. The practices described in this notice will also be followed by health care providers you consult with by telephone (when your regular health care provider from our office is not available) who may provide "on-call coverage" for your health care provider.

OUR DUTIES TO YOU REGARDING PROTECTED HEALTH INFORMATION

We are required to protect the privacy of your health information that can identify you. This information is called "PHI." We understand that mental health and other health information about you is personal. We are committed to protecting PHI about you. We must protect PHI information that we created or received about your past, present, or future health condition; the services, care and treatment provided to you; or payment for your health care.

HOW MAY WE USE AND DISCLOSE PHI ABOUT YOU

For Treatment: We may use and disclose PHI about you to provide you with medical and mental health care and other related services. We may use and disclose PHI about you to provide, coordinate or manage your medical and mental health care and other related services.

- We may disclose PHI about you to doctors, nurses, technicians, or other personnel who are involved with the delivery of services provided to you.
- We may communicate with other medical, mental and other health care providers regarding your treatment, the coordination, and management of your health care with others.
- Family members and other health care providers may be part of your medical care outside this office and may require information about you that we have.

For Health Care Operations: We may use and disclose your PHI in order to run the office and make sure that we provide quality care and reduce health care costs. Examples of the way we may use or disclose your PHI for “health care operations” include the following:

- To review and improve the quality, efficiency, treatment, services and cost of care provided to you and to evaluate the performance of staff providing services to you.
- To review and evaluate the skills, qualifications, and performance of health care providers taking care of you.

For Payment: We may use and disclose your PHI to others such as your insurance company and third party payers for purposes of receiving payment for the services rendered. We may also tell your health plan about a treatment you are going to receive to obtain prior approval or to determine whether your plan will cover the treatment. We may also share portions of your medical information with the following:

- Billing departments;
- Collection departments or agencies;
- Insurance companies, health plans and their agents which provide you coverage; – Consumer reporting agencies (e.g., credit bureaus).

Appointment Reminders: We may use and disclose your PHI to contact you regarding the scheduling of an appointment, to remind you of an appointment, and to send written notification of a scheduled appointment for treatment.

Treatment Alternatives: We may use and disclose your PHI to tell you about or recommend possible treatment options or alternatives that may be of interest to you.

Health Related Benefits and Services: We may use and disclose your PHI to tell you about health-related benefits or services that may be of interest to you. For example, if you are diagnosed with diabetes, we may tell you about nutritional and other counseling services that may be of interest to you.

To Avert Serious Threat To Health Or Safety: We may use and disclose your PHI consistent with applicable state and federal laws and standards of ethical conduct, if we in good faith believe that the disclosure is necessary to prevent or lessen a serious and imminent threat to your health and safety or that of a person or the public; if the disclosure is made to a person or person(s) reasonably able to prevent or lessen the threat, including the target of the threat or is necessary for law enforcement authorities to identify or apprehend an individual. Additionally, we may use and disclose your PHI when the disclosure relates to victims of abuse, neglect or domestic violence.

Child Abuse: If there is a reasonable cause to suspect, that a child is abused, abandoned, or neglected by a parent, legal custodian, caregiver or other person responsible for the child's welfare, the law requires that the practitioner report such knowledge or suspicion to the Florida Department of Child and Family Services.

Adult and Domestic Abuse: If there is a reasonable cause to suspect that a vulnerable adult (disabled or elderly) has been or is being abused, neglected, or exploited, the law requires the practitioner to report such suspicion to the Central Abuse Hotline.

Research: Under certain circumstances, we may use and disclose your PHI for research purposes, but only under contacting the Privacy Officer in writing.

Worker's Compensation: We may release your PHI for worker's compensation or similar programs as authorized by state worker's compensations laws and programs.

Public Health Activities: We may use and disclose your PHI for public health reasons in order to prevent or control disease, injury or disability; report births, deaths, suspected abuse or neglect, non-accidental physical injuries, reactions to medications or problems with products.

Health Oversight Activities: We may use and disclose your PHI to a state or federal health oversight agency which is authorized by law to oversee our operations. These activities include audits, investigations, inspections, and licensure. These activities are required by government programs to monitor the health care system, government programs and compliance with applicable laws, including civil rights law.

Judicial Administrative Proceedings, Lawsuits and Disputes: If you are involved in a lawsuit or dispute, we may disclose your PHI in response to a court or administrative order. We may also disclose your PHI in response to a subpoena, discovery request, or other lawful process by someone else involved in the dispute. Prior to this disclosure, we must make a good faith effort to inform you about the request or to obtain an order protecting the information requested and to follow applicable state laws.

As Required By Law: We will disclose your PHI when required to do so by federal, state or local law or other judicial or administrative proceeding.

Specialized Government Functions: If you are a member of the armed forces, we may disclose your PHI as required by military command authorities. We may use and disclose your PHI to authorized federal, foreign and other national security officials when the use and disclosure is for activities deemed necessary to assure the proper execution of the military mission or for other specialized government functions.

Inmates: If you are an inmate of a correctional institution or under the custody of a law enforcement official, we may disclose your PHI to the correctional institution or law enforcement official. This release would be necessary (1) for the institution to provide you with health care; (2) to protect your health and safety or the health and safety of others; or (3) for the safety and security of the correctional institution.

Examples of Other Permissible or Required Disclosures of Health Information about You Without Your Authorization:

Business Associates: Some activities are provided on our behalf through contracts with business associates. Examples of when we may use a business associate include coding and claims submission performed by a third party billing company, consulting and quality assurance activities provided by an outside consultant, billing and coding audits performed by an outside auditor, and other legal and consulting services provided in response to billing and reimbursement issues which may arise from time to time. When we enter into contracts to obtain these services, we may need to disclose your PHI to our business associate so that the associate may perform the job in which we have requested. To protect your PHI, however, we require our business associate to appropriately safeguard your information.

Communication with family members: If you are in an emergency situation involving you or another person (e.g. your minor child) and you cannot consent to your care because you are incapable of doing so or you cannot consent to the other person's care because, after a reasonable attempt, Jill K. Bershada, LMHC, CAP has been unable to locate you, Jill K. Bershada, LMHC, CAP may, based on professional judgment and the surrounding circumstances, determine that disclosure is in the best interests of you or the other person. In these emergencies, your PHI will be disclosed, but only as it pertains to the care being provided and you will be notified of the specific disclosures as soon as possible after the care is completed.

Federal law allows for the release of your PHI to appropriate health oversight agencies, public health authorities or attorneys, provided that a work force member or business associate believes in good faith that we have engaged in unlawful conduct or otherwise violated professional or clinical standards and are potentially endangering one or more patients, workers or the public. Any use or disclosure of your PHI that is not described in this notice will be made only with your written authorization.

YOUR RIGHTS REGARDING YOUR HEALTH INFORMATION

You Have The Following Rights With Respect To Your Protected Health Information:

Right to Inspect and Copy: You have the right to inspect and copy all or any part of your medical or health record, as provided by federal regulations. You may request and receive an electronic copy of your protected health information, or "PHI" if we maintain your PHI in an electronic health record. To inspect and copy your PHI, you must submit your request in writing to our Administrator at the address listed on the first page of this notice. The right of access to inspect and copy must be subject to and consistent with applicable laws as set forth in the Florida Statute. In addition to the Florida law requirements, the following exceptions apply: psychotherapy notes; information compiled in reasonable anticipation of or for use in a civil, criminal or administrative proceeding; or subject to the Clinical Laboratory Improvement Amendments of 1988. Instead of providing you with a full copy of your PHI, we may give you a summary or explanation of the PHI about you, if you agree in advance to the form and cost of the summary or explanation. If you request a copy of your PHI we may charge a reasonable, cost-based fee in accordance with state law for the costs associated with fulfilling your request. We may deny your request to inspect and copy your PHI in certain limited circumstances.

Right to Amend: You have the right to request that we amend your PHI, clinical or billing record about you if you feel that health information we have about you is incorrect or incomplete. You have the right to request an amendment for as long as we keep the information. Your request for amendment must be in writing and you must provide the basis for the requested amendment. If we accept your requested amendment, in whole or in part, we will respond in a timely manner and forward a copy of the amendments to relevant person(s), if necessary. If we deny your request for an amendment, we will respond to you in writing, stating the basis of the denial of your request.

Right to an Accounting of Disclosures: You have the right to request a list accounting for any disclosures of your PHI we have made, except for disclosures made for the purpose of treatment, payment, health care operations and certain other purposes if such disclosures were made through a paper record or other health record that is not electronic, as set forth in federal regulations. If you request an accounting of disclosures of your PHI, the accounting may include disclosures made for the purpose of treatment, payment and health care operations to the extent that disclosures are made through an electronic health record. To request an accounting of disclosures, you must submit your request in writing to our Administrator at the address listed on the first page of this notice. We will, to the extent possible, mail you a list of disclosures in paper form within 60 days of your request, or notify you if we are unable to supply the list within that time period and by what date we can supply the list; such date will not be later than a total of 90 days from the date you made the request.

Right to Request Restrictions: You have the right to request a restriction or limitation on the use and disclosure of your PHI. You also have the right to request a restriction or limitation on the disclosure of your PHI to someone who is involved in your care or the payment for your care, such as a family member or friend. We are not required to agree to your request for restrictions, except if you pay for a service entirely out-of-pocket. If you pay for a service entirely out-of-pocket, you may request that information regarding the service be withheld and not provided to a third party payer for purposes of payment or health care operations. We are obligated by law to abide by such restriction. To request a restriction on the use and disclosure of your PHI, you must make your request in writing to our Administrator at the address listed on the first page of this notice. In your request, you must tell us what information you want to limit and to whom you want the limitations to apply. We will notify you of our decision regarding the requested restriction. If we do agree to your requested restriction, we will comply with your request unless the information is needed to provide you emergency treatment, disclosures to the Secretary of the Department of Health and Human Services, and uses and disclosures as previously addressed in this Notice.

Right to Revoke Authorization: If you execute any authorization(s) for the use and disclosure of your PHI, you have the right to revoke such authorization(s), except to the extent that action has already been taken in reliance on such authorization.

Right to Receive Confidential PHI: It is our practice to contact clients at the home number and address provided to us by the client. This contact information is documented in the client records. You have the right to request

that we contact you in a different manner. This request is conditioned upon two requirements 1) you must provide us with the alternative phone and address or other method of contact 2) when appropriate, information as to how the method of payment, if any, will be handled. We must accommodate reasonable requests if you clearly state that the disclosure of all or part of the information that you are requesting could endanger you.

Right to A Copy of This Notice: You have the right to receive a paper copy of this Notice on the date you first receive service from us. In emergency situation, we will provide the Notice to you as soon as possible. We reserve the right to change the terms of this notice and will inform you of any changes. You then have the right to object or withdraw as provided in this notice.

COMPLAINTS

If you believe that your privacy rights have been violated, you may file a complaint with us or with the Secretary of Department of Health and Human Services at 200 Independence Avenue, S.W., Washington, D.C., 20201. You will not be penalized for filing a complaint. We will not take any action against you or change our treatment of you in any way.