



CONTRACT ~ OFFICE PROCEDURES ~ FINANCIAL AGREEMENT

Welcome to Pine Meadow Counseling, Inc. This document contains important information about Pine Meadow Counseling, Inc. professional services and business policies. We are governed by various laws and regulations and by the code of ethics of our profession. The ethics code requires that we make you aware of specific office policies and how these procedures may affect you. Therefore, we are providing this information in writing.

We encourage you to take the time to read through this carefully before your first appointment. Please jot down any questions you might have so that you and your therapist can discuss them at your initial meeting. When you sign this document, it will represent an agreement between you and Pine Meadow Counseling, Inc.

PINE MEADOW COUNSELING, INC. (PMC) is a not-for-profit, Independent Corporation that is educational, therapeutic, operating with a 501(c) 3 status.

PMC employs Counselors who are either:

- a) Licensed by the State of California, and are practicing Marriage and Family therapists;
- b) Licensed/Registered Social Worker, and are practicing therapists;
- c) 3 Principles Life Coach;
- d) Graduate interns who have a Master's degree and are working towards completing their hours for licensure; and
- e) Trainees who are working towards the completion of their Master's degree program in counseling or social work.

CONFIDENTIALITY: All information disclosed within sessions and the written records pertaining to those sessions are confidential and may not be revealed to anyone without your (client's) written permission, except where disclosure is required by law.

When Disclosure Is Required By Law: Some of the circumstances where disclosure is required by the law are: where there is a reasonable suspicion of child, dependent or elder abuse or neglect; where a patient presents a danger to self, to others, to property, or is gravely disabled.

Initial here: _____

When Disclosure May Be Required: Disclosure may be required pursuant to a legal proceeding. If you place your mental status at issue in litigation initiated by you, the defendant may have the right to obtain the records and/or testimony by PMC. In couple and family therapy, or when different family members are seen individually, confidentiality and privilege do not apply between the couple or among family members. PMC counselors will use their clinical judgment when revealing such information. PMC will not release records to any outside party unless they are authorized to do so by all adult family members who were part of the treatment.

Initial here: _____

Health Insurance & Confidentiality of Records: The Health Insurance Portability and Accountability Act of 1996 (HIPAA) is a federal law that is designed to protect the privacy of patient information, provide for the electronic and physical security of health and patient medical information, and simplify billing and other electronic transactions by standardizing codes and procedures. A piece of this law recently took effect and is known as the HIPAA Privacy Rule. The HIPAA Privacy Rule creates a minimum federal standard for the use and disclosure of Protected Health Information (PHI) by health care organizations. One of the requirements of the Privacy Rule is that we give to you a Notice of Privacy Practices (NPP) that describes your rights and protections regarding your health care records (PHI). The Notice explains your rights regarding your private healthcare information, including your right to:

- ☐ Inspect and copy your medical records;
- ☐ Request an amendment or addendum to your medical records;
- ☐ An accounting of disclosures of your private health information;
- ☐ Request restrictions to release your medical information; and
- ☐ Request restrictions of confidential communications with you.

This document is included as part of the website First Visit Forms Packet that you can review and/or print out as you wish prior to your initial appointment. Upon request, paper copies may also be obtained from the front office receptionist.

By signing this contract, you are consenting to a release of information about your case to your health plan for claims, certification and case management for the purposes of treatment and payment. PMC has no control or knowledge over what insurance companies do with the information that is submitted or who has access to this information. You must be aware that submitting a mental health invoice for reimbursement carries a certain amount of risk to confidentiality, privacy or to future capacity to obtain health or life insurance.

I have reviewed and understand PMC's HIPAA policies- Notice of Privacy Practices and have been made aware of how my records may be used and disclosed.

Signature of Client/Responsible Party

Print Name

Date

TELEPHONE & EMERGENCY PROCEDURES:

- ☐ The best phone number for the offices is (661) 834-7564 or toll free at 1 (855) 454-7628. If you receive the voice mail, please leave a message for your personal counselor at their designated extension. Your counselor may be on the phone, in session, or out of the office.
- ☐ In a crisis, if your counselor cannot be reached and you are in imminent danger, call the National Suicide Prevention Hotline (800) 273-8255, local police, (911), or go immediately to your local emergency hospital.
- ☐ If you need to contact PMC between sessions, for an emergency, please indicate it clearly in your message. Telephone calls are monitored during the day as time allows and therefore, we cannot guarantee immediate return calls. PMC counselors are not responsible for your behaviors or decisions occurring outside the consultation room, whether before or after a telephone call or consultation.

- ☒ If there is an emergency whereby a PMC counselor becomes concerned about your personal safety, the possibility of you injuring someone else, or about you receiving proper psychiatric care, the counselor will do whatever he/she can within the limits of the law, to prevent you from injuring yourself or others; and to ensure that you receive the proper medical care. For this purpose, the counselor may also contact the person whose name you have provided as an Emergency Contact on the Intake Form.

Initial here: _____

INFORMED CONSENT FOR TELEPHONE, ELECTRONIC, AND MAIL CONTACT: Ordinary privacy precautions such as voice scramblers, pin codes, voice mail boxes, and locked fax, mail, and computer rooms are by no means foolproof, so that your confidentiality is always compromised when communicating by electronic devices or mail. Nor is deletion or shredding of private material a totally safe means of disposal, so that you are always at risk of breaches in confidentiality when electronic or mail communication of any type is used for private information. Your use of such means of communication with PMC constitutes implied consent for reciprocal use of electronic and mail communication as well. By signing this contract, you agree to and understand the following:

1. Many people feel comfortable communicating via email, because they have installed programs designed to detect spy ware, viruses, or other dangerous software. However, there is no guarantee that such programs will work 100%.
2. Sent and received emails are stored on both PMC and your computer until deleted. PMC may or may not delete such emails. Any saved emails will be kept in a password-protected account that only PMC has access to.
3. In addition, whenever you send an email, it is stored in cyberspace. It is possible for authorities to locate and read such emails under various circumstances, this is not a policy of PMC, but is due to the nature in which email is transmitted using the Internet, and other services or networks. For more information on this, please contact your Internet Service Provider or email service.
4. By initialing below, I agree that I understand the disclosures listed above regarding communicating with PMC using email. I also agree that if I send an email to a PMC counselor and request a response via email, that I am willing to accept the above-stated risks. I also agree that I will not use email for emergencies.

Initial here: _____

Permission for PMC to initiate emails to you:

Initial below if you give your permission for PMC to initiate sending emails to you.

Initial here: _____

Print your email clearly:

CONSENT TO TREATMENT AND CONFIDENTIALITY STATEMENT:

I, (print name of responsible party)

_____ consent for treatment to be rendered by a counselor of Pine Meadow Counseling, Inc. I grant the counselor to perform those procedures and treatments, which may include professional consultation or emergency telephone responses, necessary for my condition that are generally used in this and similar settings. I understand that information or opinions will be given to others only with my written consent.

Signature of Client/Responsible Party

Print Name

Date

APPOINTMENTS: All office visits are by appointment and may be scheduled through the office manager or your counselor directly. Because consistency is an important part of the counseling process, the appointment time you schedule is reserved for you and is not available to anyone else. Please arrive on time, as you use up your own time when you arrive late for an appointment. The usual length of an appointment is 50 minutes. If you are unable to keep a scheduled appointment, you must notify PMC at least 24 hours in advance to avoid having to pay for the canceled or missed appointment. Please leave a message if you get the voice mail. If you miss or cancel your appointment, you will need to contact the office for a new appointment time.

Cancellation Policies: Since scheduling of an appointment involves the reservation of time specifically for you, a minimum of 24 hours notice is required for rescheduling or canceling an appointment. You will be charged a NO-SHOW fee of \$70 for all licensed staff, \$50 for interns and life coaches. Most insurance companies do not reimburse for missed sessions. Failure to keep 3 consecutive appointments constitutes your termination of counseling services as well as ability to be rescheduled.

Your compliance in keeping appointments and active participation in treatment is vital.

Initial here: _____

PAYMENT & INSURANCE REIMBURSEMENT:

- Clients paying on a cash basis, and not billing any insurance company are expected to pay in full at time of service unless other arrangements have been made.
- Except in the case of minors or when other arrangements are made, the person receiving the counseling service is financially liable.
- Our office will bill your insurance company for services provided. You will receive a statement reflecting any balance due on your account. This office cannot accept responsibility for collecting your insurance claims or for negotiating a settlement on a disputed claim. You are responsible for payment, deductible, and insurance claims on your account.
- Clients are personally responsible for all payment of fees, including those not paid by their insurance carrier within 30 days after the rendering of services.
- The client portion (co-pay) of fees is expected at the time of service. Co-pays are not negotiable. Failure to pay your part may jeopardize your benefits.

- ☐ Additional fees are charged for lengthy telephone communications, court attendance and report/letter writing. Insurance does not cover this.
- ☐ There is a \$30.00 service fee for checks returned for non-sufficient funds, and the client will be required to pay for future sessions in cash. Before any future visits occur, the client or responsible party must pay in cash the service charge PLUS the value of the check.
- ☐ At any time during treatment should the client become ineligible for insurance coverage, the client and/or responsible party agrees to notify the counselor and will be responsible for 100% of the bill.

Initial here: _____

Collection Policy: Our office retains a professional collection agency for pursuit of accounts that become delinquent. If it becomes necessary to transfer your account to our collection agency, your financial records will be released to them and your delinquent balance will be recorded with the three (3) major credit bureaus, i.e., Trans Union, Equifax, and Experian.

- ☐ Accounts become delinquent after thirty (30) days. Delinquent accounts may be turned over for collection.
- ☐ Unpaid charges are sent to collections and 40% fee will be added to any unpaid balance.
- ☐ If legal proceedings become necessary, the client hereby agrees to bear all financial responsibility for all attorney and court costs associated with collecting an unpaid debt. Please be aware that we take this action only as a last resort.

Initial here: _____

Appeals and Grievances: I acknowledge my right to request reconsideration (an Appeal) in the case that client care is not certified by Managed Care Company. I understand that I would request an Appeal directly through my Managed Care Organization.

I also understand that I may submit a Grievance to my practitioner at any time to register a complaint about my care or I may send the complaint directly to my insurance company. My practitioner has access to information to facilitate this.

I understand that the California Department of Managed Health Care (DMHC) is responsible for regulating health care services. The California DMHC has a toll-free telephone number (800-400-0815) to receive complaints regarding health care plans. If I have a grievance about an appeal that has not been satisfactorily resolved by the plan I can contact the Managed Care Company of the DMHC.

Initial here: _____

Consent to Treatment and Fee: By signing this contract, you agree that if you have not obtained any necessary authorizations from your insurance, or are not eligible at the time services are rendered, you are responsible for payment even if the determination is made after the services are rendered. Clients who carry insurance should remember that professional services are rendered and charged to the client and not to the insurance company.

I hereby agree to full responsibility for all expenses incurred by or because of this client and hereby assign Pine Meadow Counseling, Inc. and all insurance benefits due to me to the full extent of my financial obligation to PMC. I understand my insurance coverage is a relationship between my insurance

company and me and I agree to accept financial responsibility for payment of charges incurred. I understand that a re-billing fee/financial charge complying with California State Law will be applied to any overdue balance, and in the event of non-payment, I will bear the cost of collection and/or court costs and reasonable legal fees should this be required. If conjoint (couple or family), all adults need to sign this contract because of confidentiality and your rights... even though one person is the identified client (and paying).

Signature of Client/Responsible Party

Print Name

Date

THE PROCESS OF THERAPY/EVALUATION: By signing this agreement you are authorizing and requesting that PMC carry out counseling treatment and/or diagnostic procedures that now or during the course of your care as a client are advisable. Participation in therapy can result in a number of benefits, including improved interpersonal relationships and resolution of the specific concerns that led you to seek therapy.

Working toward these benefits, however, requires effort on your part. Counseling requires your very active involvement, honesty, and openness in order to change your thoughts, feelings and/or behavior. PMC will ask for your feedback and views on your therapy, its progress and other aspects of the therapy and will expect you to respond openly and honestly. Sometimes more than one approach can be helpful in dealing with a certain situation. During evaluation or therapy, remembering or talking about unpleasant events, feelings, or thoughts can result in you experiencing considerable discomfort or strong feelings of anger, sadness, worry, fear, etc. or experiencing anxiety, depression, insomnia, etc. PMC may challenge some of your assumptions or perceptions or propose different ways of looking at, thinking about, or handling situations, which can cause you to feel very upset, angry, depressed, challenged or disappointed. Attempting to resolve issues that brought you to therapy in the first place, such as personal or interpersonal relationships may result in changes that were not originally intended. Psychotherapy may result in decisions about changing behaviors, employment, substance use, schooling, housing or relationships. Sometimes another family member views a decision that is positive for one family member quite negatively. There is no guarantee that counseling will yield positive or intended results. During the course of counseling, PMC will draw on to the best of their ability the Principles of Mind, Thought and Consciousness the framework of all mental wellbeing.

- I understand that if I am concerned about slow progress or lack of progress I have the right to speak about my concerns.
- I understand that our paths may cross in social situations, but that our counseling relationship comes first, along with protection of my confidentiality.
- I understand that there are some occasions when confidentiality can/must be breached. These are:
 - a) I sign a Release of Information Form or I verbally direct my counselor to tell someone else,
 - b) My counselor determines that his/her client poses a threat to self or others,
 - c) My counselor is ordered by a court to disclose information,
 - d) My counselor suspects child abuse has taken place and will notify Child Protective Services, or

- e) My counselor suspects elder or dependent adult abuse has taken place and will notify Adult Protective Services,
- ☒ I understand that counseling can improve as well as upset the equilibrium in any person or family.
- ☒ I understand that PMC counselors are not psychiatrists, and as such cannot recommend or prescribe medications but can encourage clients to see an M.D. for a medical evaluation.

Initial here: _____

CLIENT BILL OF RIGHTS:

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| <ul style="list-style-type: none"> <input type="checkbox"/> Request and receive information about the counselors professional capabilities, including license status, education, training, experience, professional association membership, specialization, and specific areas of competence. <input type="checkbox"/> Have a discussion with the counselor about fees, billing arrangements, and the nature and anticipated course of sessions. <input type="checkbox"/> Be provided a safe environment, free from sexual, physical or emotional abuse. <input type="checkbox"/> Report immoral and illegal behavior by a counselor. <input type="checkbox"/> Ask questions about your counseling. Refuse to answer any question or disclose any information you choose not to reveal. <input type="checkbox"/> Ask that the counselor inform you of your progress. | <ul style="list-style-type: none"> <input type="checkbox"/> Know if there are supervisors, consultants, students, registered assistants, or others with whom your counselor will discuss your case. <input type="checkbox"/> Refuse a particular type of treatment or end treatment at any time without obligation or harassment. <input type="checkbox"/> Refuse or request electronic recording of your sessions. <input type="checkbox"/> Request and (in most cases) receive a copy of your records, including the diagnosis, treatment plan, your progress, and type of treatment. <input type="checkbox"/> Receive referral names, addresses and telephone numbers in the event that your therapy needs to be transferred to someone else and to request that a copy or a summary of your records be sent to any therapist or agency you choose |
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Initial here: _____

PROFESSIONAL RECORDS: The laws and standards of the profession require that PMC keep treatment records. You are entitled to receive a copy of your records, or your therapist can prepare a summary for you instead. Because these are professional records, they can be misinterpreted and/or upsetting to untrained readers. If you wish to see your records, we recommend that you review them in the presence of your counselor so that she/he can discuss the contents. Clients will be charged an appropriate fee for any professional time spent in responding to information requests.

Initial here: _____

TERMINATION:

- ☒ An orderly end of counseling has positive effects for clients. It is suggested that you discuss openly with your counselor your wish to end counseling at least three (3) sessions before your last session. A final closure session has proved to be very important for clients. Closure sessions help you acknowledge and summarize what you have accomplished and discuss any unfinished

concerns you may have. While not required they are strongly recommended; you have the right to terminate counseling at any time. If you choose to do so, PMC will offer to provide you with names of other qualified professionals whose services you might prefer.

- ☐ If at any point during counseling, a PMC counselor assesses that she/he is not effective in helping you reach your goals, they are obligated to discuss it with you and, if appropriate, to terminate treatment. In such a case, the counselor would give you a number of referrals that may be of help to you. If you request it and authorize it in writing, the PMC counselor will talk to the counselor of your choice in order to help with the transition.
- ☐ If at any time you want another professional's opinion or wish to consult with another therapist, PMC will assist you in finding someone qualified, and with your written consent, will provide her or him with the essential information needed.
- ☐ If you don't show-up for three consecutive scheduled appointments, your treatment will be canceled and terminated and you will be financially responsible for the fees of the missed sessions. A letter will be sent to you acknowledging the termination along with a closing bill for any unpaid balance.

Initial here: _____

I have read the above Agreement and Office Policies and General Information carefully; I understand them and agree to comply with them:

I have been given the right to discuss these policies with a Pine Meadow Counseling, Inc. staff person if desired and at this time feel that all questions have been answered to my satisfaction. I have been offered a copy of these policies to take with me if I desire.

Signature of Client/Legal Representative	Print Name	Date
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Additional Client Signature (Spouse, /Partner, Family Member)	Print Name	Date
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