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**ADULT INTAKE FORM**

Today's Date \_\_\_\_\_ Individual completing this form \_\_\_\_\_

Patient's Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Age \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_ St \_\_\_\_\_ Zip \_\_\_\_\_

Daytime Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Home Phone \_\_\_\_\_ Secure Email \_\_\_\_\_

Individual who referred you/Relationship \_\_\_\_\_ May we thank this person? Y / N

**Patient Information**

Highest Level of Education \_\_\_\_\_ School(s) Attended \_\_\_\_\_

Occupation \_\_\_\_\_ Currently Employed? \_\_\_\_\_

Your marital status:     Single                       Married                       Separated  
                                          Divorced                       Re-Married                       Widowed/Deceased

Spouse's Name \_\_\_\_\_ Age \_\_\_\_\_

Spouse's Education \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_

Spouse is Currently Employed? \_\_\_\_\_

Number of Children & Ages \_\_\_\_\_

(If Divorced) Who has custody? \_\_\_\_\_

Others Living with You \_\_\_\_\_

As a child, your parents were:     Biological     Adoptive (age at adoption: \_\_\_\_\_)     Foster (how long? \_\_\_\_\_)

Your parents are                       Single                       Married                       Separated  
(currently):                               Divorced                       Re-Married                       Deceased

Please list your siblings, if they are full- or half-siblings, and their ages: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **Referral Information**

Referral Reason (Briefly describe the main reason you are seeking evaluation): \_\_\_\_\_

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Describe some of your strengths/abilities: \_\_\_\_\_

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Describe some of your weaknesses: \_\_\_\_\_

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What have you tried to address the concern? \_\_\_\_\_

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What has worked best? \_\_\_\_\_

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What has not worked? \_\_\_\_\_

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What is/has been the result? \_\_\_\_\_

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What do you hope to learn as a result of the evaluation? \_\_\_\_\_

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## **Social/Emotional/Behavioral History**

(Please circle all of the following which apply to you)

Get along with peers	Get along with coworkers	Get along with family	Have a sense of humor
Initiate friendships	Understand others' feelings	Am "bossy"	Bully others
Initiate activities	Understand social cues	Initiate bad behavior	Am bullied by others
Keep friends	Have empathy for others	Struggle with peer pressure	Am teased by others

Please describe any pertinent issues regarding your social/emotional/behavioral functioning: \_\_\_\_\_

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What do you find most difficult about your social/emotional/behavioral functioning? \_\_\_\_\_

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Do you make and maintain friendships? Y / N      Do you have any close friendships? Y / N

Please explain: \_\_\_\_\_

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What do you love? \_\_\_\_\_

What do you dislike? \_\_\_\_\_

What are your current activities/interests? \_\_\_\_\_

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Have there been any events in your life that have been difficult for you to handle or get used to? Explain:

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## **Educational History**

Current/Past Schools: \_\_\_\_\_

Highest Level of Education: \_\_\_\_\_ Placement: Gifted Regular Resource Special Education

Any grades skipped? \_\_\_\_\_ Repeated? \_\_\_\_\_

Teachers reported problems in: \_\_\_\_\_

Reading Spelling Arithmetic Writing

Attention Behavior Social Adjustment Hyperactivity

Impulsivity Easily Distracted Motor Skills Other: \_\_\_\_\_

Organization Work Completion Other: \_\_\_\_\_ Other: \_\_\_\_\_

Please described the above-noted problems: \_\_\_\_\_

Grade: \_\_\_\_\_ Academic Performance (Please describe) \_\_\_\_\_

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Specific problems noted: \_\_\_\_\_

Accommodations/Interventions: \_\_\_\_\_

## **Employment History**

Current Occupation: \_\_\_\_\_ Current Employer: \_\_\_\_\_

Length of current employment: \_\_\_\_\_

Current employment difficulties (e.g., problems with coworkers, etc.): \_\_\_\_\_

Prior employments: \_\_\_\_\_

Have you ever been fired or let go from a job? If so, please explain: \_\_\_\_\_

## **Legal History**

Have you ever been arrested? \_\_\_\_\_ If yes, how many times? \_\_\_\_\_

If yes, please explain reason for arrest(s): \_\_\_\_\_

Have you ever been incarcerated? \_\_\_\_\_ If yes, how many times? \_\_\_\_\_

If yes, please explain reason for incarceration(s): \_\_\_\_\_

If yes, how long were each of your incarcerations? \_\_\_\_\_

Are you currently on probation? \_\_\_\_\_

If yes, please explain: \_\_\_\_\_

## Pregnancy and Birth History

Age of mother at **your** delivery: \_\_\_\_\_ Age of father at **your** delivery: \_\_\_\_\_

Number of mother's prior pregnancies: \_\_\_\_\_

Number of mother's prior miscarriages: \_\_\_\_\_ Was a fertility specialist consulted? \_\_\_\_\_

Were your parents married when you were born? \_\_\_\_\_

Mother's living circumstances during pregnancy: \_\_\_\_\_

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Known health problems of **your mother** during your pregnancy (check all that apply):

- |                                                              |                                       |                                               |                                          |
|--------------------------------------------------------------|---------------------------------------|-----------------------------------------------|------------------------------------------|
| <input type="checkbox"/> Toxemia                             | <input type="checkbox"/> Hypertension | <input type="checkbox"/> Gestational Diabetes | <input type="checkbox"/> Trauma          |
| <input type="checkbox"/> Fever                               | <input type="checkbox"/> Allergies    | <input type="checkbox"/> Smoking              | <input type="checkbox"/> Alcohol Use     |
| <input type="checkbox"/> Drug Use                            | <input type="checkbox"/> Antibiotics  | <input type="checkbox"/> Depression           | <input type="checkbox"/> Anxiety         |
| <input type="checkbox"/> Blood Incompatibility               | <input type="checkbox"/> Injury       | <input type="checkbox"/> Accidents            | <input type="checkbox"/> Mental Illness  |
| <input type="checkbox"/> Physical Abuse                      | <input type="checkbox"/> Sexual Abuse | <input type="checkbox"/> Spousal Abuse        | <input type="checkbox"/> Emotional Abuse |
| <input type="checkbox"/> Sexually Transmitted Disease: _____ | <input type="checkbox"/> Other: _____ |                                               |                                          |

List any medications, tobacco use, alcohol use, or drugs taken by your mother during your pregnancy:

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Pregnancy:  Vaginal  Cesarean If Cesarean, reason: \_\_\_\_\_

Induced  Full-Term  Premature Gestational age at birth (weeks): \_\_\_\_\_

Birth Weight: \_\_\_\_\_ lbs \_\_\_\_\_ oz Time spent in labor: \_\_\_\_\_ hours

Check any birth complications that apply:

- |                                   |                                           |                                            |                                         |
|-----------------------------------|-------------------------------------------|--------------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Breech   | <input type="checkbox"/> Cord around neck | <input type="checkbox"/> Meconium staining | <input type="checkbox"/> Lacking oxygen |
| <input type="checkbox"/> Jaundice | <input type="checkbox"/> Fetal distress   | <input type="checkbox"/> Forceps/Vacuum    | Other: _____                            |

Apgar scores: \_\_\_\_\_ How old were you at discharge from the hospital after birth? \_\_\_\_\_

Please explain any other medical problems or other difficulties after delivery or in the first year of your life and interventions required: \_\_\_\_\_

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Did your mother experience post-partum depression? Y / N Duration/severity? \_\_\_\_\_

Additional information: \_\_\_\_\_

## Developmental History

### Motor Developmental Milestones:

Age sat alone \_\_\_\_\_ Crawled \_\_\_\_\_ Stood alone \_\_\_\_\_ Walked alone \_\_\_\_\_

Were you slow to develop motor skills or awkward compared to siblings/friends? (e.g., running, skipping, climbing, biking, playing ball) Y / N Explain: \_\_\_\_\_

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Handedness:  Right  Left  Ambidextrous (both)

Family history of left-handedness? (list relatives) \_\_\_\_\_

Please list any physical or occupational therapy services you received as a child, reason, and duration:

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### Speech/Language Developmental Milestones:

Your first language: \_\_\_\_\_ Language spoken in childhood home: \_\_\_\_\_

Age of first words \_\_\_\_\_ Put 2-3 words together \_\_\_\_\_ Full sentences \_\_\_\_\_

Check all that apply:

- |                                        |                                                |                                                 |                                                  |
|----------------------------------------|------------------------------------------------|-------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Poor sucking  | <input type="checkbox"/> Speech delays         | <input type="checkbox"/> Slow to learn alphabet | <input type="checkbox"/> Stuttering              |
| <input type="checkbox"/> Late drooling | <input type="checkbox"/> Hard to understand    | <input type="checkbox"/> Slow to learn colors   | <input type="checkbox"/> Frequent ear infections |
| <input type="checkbox"/> Poor chewing  | <input type="checkbox"/> Articulation problems | <input type="checkbox"/> Slow to learn numbers  | Other: _____                                     |

Please list any speech therapy services you received as a child, reason, and duration: \_\_\_\_\_

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### Toileting:

Age when toilet trained \_\_\_\_\_ Childhood problems with:  Bedwetting  Urinating  Soiling

Current/ongoing problems (e.g., incontinence, constipation): \_\_\_\_\_

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## Medical History

Primary Physician & Address: \_\_\_\_\_

Last Vision Exam: \_\_\_\_\_ Any Problems: \_\_\_\_\_

Last Hearing Exam: \_\_\_\_\_ Any Problems: \_\_\_\_\_

Allergies or Asthma? Y / N Please describe: \_\_\_\_\_

Do you take medications and/or supplements on a regular (daily) basis? Y / N

Current Medications/Supplements (Please include Dose, Reason, and Prescribing Physician):

Any history of:            Head Injury            Seizure            Loss of Consciousness

Please Explain: \_\_\_\_\_

CT or MRI Obtained? Y / N Date Obtained: \_\_\_\_\_ Results: \_\_\_\_\_

EEG Obtained? Y / N Date Obtained: \_\_\_\_\_ Results: \_\_\_\_\_

Please list any serious injuries, illnesses, surgeries, and hospitalizations:

Incident/Treatment: \_\_\_\_\_ Date: \_\_\_\_\_

Incident/Treatment: \_\_\_\_\_ Date: \_\_\_\_\_

Incident/Treatment: \_\_\_\_\_ Date: \_\_\_\_\_

Incident/Treatment: \_\_\_\_\_ Date: \_\_\_\_\_

Please check all that apply and note date (or age) of occurrence if not current:

- |                                                     |                                                               |                                                  |                                                   |
|-----------------------------------------------------|---------------------------------------------------------------|--------------------------------------------------|---------------------------------------------------|
| <input type="checkbox"/> Failure-to-thrive          | <input type="checkbox"/> Allergies                            | <input type="checkbox"/> Meningitis              | <input type="checkbox"/> Sleep difficulties       |
| <input type="checkbox"/> Febrile seizures           | <input type="checkbox"/> Asthma                               | <input type="checkbox"/> Encephalitis            | <input type="checkbox"/> Sleep walking or talking |
| <input type="checkbox"/> Epilepsy                   | <input type="checkbox"/> Headaches                            | <input type="checkbox"/> Loss of Consciousness   | <input type="checkbox"/> Clumsiness               |
| <input type="checkbox"/> Staring spells             | <input type="checkbox"/> Abdominal pains                      | <input type="checkbox"/> Head injuries           | <input type="checkbox"/> Physical injuries        |
| <input type="checkbox"/> Repetitive movements       | <input type="checkbox"/> Eating difficulties                  | <input type="checkbox"/> Head banging            | <input type="checkbox"/> Impulsivity              |
| <input type="checkbox"/> Facial or other Tics       | <input type="checkbox"/> Vomiting                             | <input type="checkbox"/> Temper tantrums         | <input type="checkbox"/> Ear infections           |
| <input type="checkbox"/> Nail biting                | <input type="checkbox"/> Eating disorder                      | <input type="checkbox"/> Self-injurious behavior | <input type="checkbox"/> Lead poisoning           |
| <input type="checkbox"/> Diabetes                   | <input type="checkbox"/> Toxic ingestion                      | <input type="checkbox"/> Tobacco Use             | <input type="checkbox"/> Other _____              |
| <input type="checkbox"/> Drug Use (present or past) | <input type="checkbox"/> Alcohol Use & Drinks per week: _____ | <input type="checkbox"/> Other _____             |                                                   |

Please explain age of occurrence, relevant information, and interventions for checked conditions:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## **Psychological and Treatment History**

Family History: (Please check all that apply; include parents, siblings, aunts, uncles, maternal & paternal)

- |                                                    |                                               |                                                |                                         |
|----------------------------------------------------|-----------------------------------------------|------------------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Depression                | <input type="checkbox"/> Bipolar Disorder     | <input type="checkbox"/> Neurological Illness  | <input type="checkbox"/> Alcoholism     |
| <input type="checkbox"/> Anxiety                   | <input type="checkbox"/> Schizophrenia        | <input type="checkbox"/> Seizures              | <input type="checkbox"/> Drug Abuse     |
| <input type="checkbox"/> Suicide                   | <input type="checkbox"/> Personality Disorder | <input type="checkbox"/> Attention Problems    | <input type="checkbox"/> Legal Problems |
| <input type="checkbox"/> Obsessive-Compulsive Dis. | <input type="checkbox"/> Psychiatric Disorder | <input type="checkbox"/> Learning Difficulties | <input type="checkbox"/> Incarceration  |
| <input type="checkbox"/> Other: _____              | <input type="checkbox"/> Other: _____         |                                                |                                         |

Please explain: \_\_\_\_\_

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Does anyone else in your family have difficulties or problems similar to your reason for referral? Y / N

Please explain: \_\_\_\_\_

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Personal History: (Please check all prior and current diagnoses/problems)

- |                                                    |                                               |                                                |                                         |
|----------------------------------------------------|-----------------------------------------------|------------------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Depression                | <input type="checkbox"/> Bipolar Disorder     | <input type="checkbox"/> Neurological Illness  | <input type="checkbox"/> Alcoholism     |
| <input type="checkbox"/> Anxiety                   | <input type="checkbox"/> Schizophrenia        | <input type="checkbox"/> Seizures              | <input type="checkbox"/> Drug Abuse     |
| <input type="checkbox"/> Suicide                   | <input type="checkbox"/> Personality Disorder | <input type="checkbox"/> Attention Problems    | <input type="checkbox"/> Legal Problems |
| <input type="checkbox"/> Obsessive-Compulsive Dis. | <input type="checkbox"/> Psychiatric Disorder | <input type="checkbox"/> Learning Difficulties | <input type="checkbox"/> Incarceration  |
| <input type="checkbox"/> Other: _____              | <input type="checkbox"/> Other: _____         |                                                |                                         |

Please explain: \_\_\_\_\_

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Have you ever engaged in psychotherapy or counseling? Y / N

If Yes, please list current and past psychologists, counselors, social workers, psychiatrists, and therapy.

<u>Name &amp; Occupation of Therapist</u>	<u>Dates Seen</u>	<u>Reason for Treatment</u>	<u>Describe Progress</u>
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Have you ever undergone psychological, psychoeducational, or neuropsychological evaluation? Y / N

If Yes, please describe below:

<u>Name &amp; Occupation of Evaluator</u>	<u>Dates of Eval.</u>	<u>Reason for Eval.</u>	<u>Results/Diagnoses</u>
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## **Additional Information**

Please add any additional information you would like us to know: \_\_\_\_\_

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*Thank you for completing this form. Please bring it with you to your first appointment. Please let us know if you have any questions about this form prior to or at your first appointment.*

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## PSYCHOLOGIST-PATIENT SERVICES AGREEMENT

This document contains important information about our professional services and business policies. It also contains summary information about the Health Insurance Portability and Accountability Act (HIPAA), a federal law that provides privacy protection 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 we 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 personal health information in greater detail. The law requires that we obtain your signature acknowledging that we provided you with this information at the end of this session. Although these documents are long and sometimes complex, it is very important that you read them carefully before our next session. We can discuss any questions you have about procedures at that time. When you sign this document, it will represent an agreement between us. You may revoke this Agreement in writing at anytime. That revocation will be binding on us unless we have taken action in reliance on it; if there are obligations imposed on us by your health insurer in order to process or substantiate claims under your policy; or if you have not satisfied any financial obligations you have incurred.

### **PSYCHOLOGICAL SERVICES AND FEES**            **(initial, if applicable)**

Our practice offers neuropsychological assessment, psychoeducational and gifted intellect assessment, psycho-diagnostic sessions, psychological assessments, and psychotherapy. Neuropsychological evaluations typically require 6 to 10 hours from diagnostic interview through the feedback session. The flat rate fee for our full neuropsychological assessment is between \$2,500.00- \$3,400.00.

Psychoeducational and gifted intellect assessments usually take between 3 to 6 hours. The fee for psychoeducational assessment is \$240.00 per hour. Our gifted assessment is \$700.00. For a diagnostic interview we charge \$240.00 per hour. If it is decided to proceed with a full neuropsychological evaluation the cost from the diagnostic interview will be applied to the flat fee cost. We are available to attend school meetings for \$195.00 per hour door to door. Consultation meetings for advocacy are \$195.00 per hour, this fee will include standard records review. In the event that significant time is warranted for records review we will inform you of the associated fees. For consultations we charge \$240.00 per hour. While report writing is included in the assessment fee, letter writing is an additional 100.00 per hour. Psychotherapy session rates are available upon request. Record review is \$240.00 per hour and does not apply to the flat fee for neuropsychological evaluations. Forensic fees are available upon request.

A 'no-show' is defined as failure to cancel a scheduled appointment 24 hours prior to the appointment or completely failing to show for a scheduled appointment. Our no-show fee is \$150.00 per incident.

Additionally, we require a non-refundable \$300.00 retainer before we will schedule another appointment if a client cancelled/no-showed two consecutive appointments. By signing this Agreement, you agree to comply with this policy.

Late policy: It is our priority to spend quality time with each patient. We cannot accommodate a patient who is more than 15 minutes late for a psychotherapy session, as this will affect other patients. If you are 15 minutes late, we will not be able to see you, and you will be responsible for payment in full.

I understand that the professional is providing clinical, not forensic services. I further understand that as there is as at least a potential and more likely an actual conflict of interest in a psychologist or psychotherapist providing clinical and forensic services in the same case the professional will not provide any forensic services to or for client. If called to testify in a legal setting, and subject either to a written authorization or a court order to release confidential information, the professional will report as a witness to the extent asked about the facts involved in the clinical services provided, including if asked the opinions reached in the course of the clinical work. The professional will not perform any analysis or provide any opinions for the express purpose of addressing issues arising in the legal setting.

### **PSYCHOTHERAPY SERVICES AND FEES [REDACTED] (initial, if applicable)**

Our practice offers initial psychotherapy assessments and psychotherapy services for individuals, couples and families. Initial appointments typically require a minimum of 1 hour and up to 2 hours. The ongoing sessions are typically 50 to 60 minutes. Longer sessions will be discussed and determined by the client and the clinician. The fee service from a student is \$125.00 per hour. For a master's level clinician and above rates range from \$100.00-\$225.00 per hour. Some clinicians are available to attend school meetings at the predetermined session rate. Additional contact, letter writing and evaluations fees are previously discussed between the client and the clinician, as they may vary based upon the clinician. Specific modalities of treatment are based upon the clinician's training and licensing.

A 'no-show' is defined as failure to cancel a scheduled appointment 24 hours prior to the appointment or completely failing to show for a scheduled appointment. Our no-show fee is \$150.00 per incident. Additionally, we require a non-refundable \$300.00 retainer before we will schedule another appointment if a client cancelled/no-showed two consecutive appointments. By signing this Agreement, you agree to comply with this policy.

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### **CONTACTING BPS**

Our office hours are 9 AM to 5 PM, Monday thru Friday. Although our phone lines are only open from

9AM to 4PM. If no one answers leave a message with detailed information and we will return your call at least by the next business day. If you are difficult to reach, please include in your message the most favorable times we can contact you. The clinical staff also finds it efficient to set phone appointments to insure timely contact. If you are unable to reach us and feel that you cannot wait you can call the **Maricopa Crisis Line @ 1-800-631-1314** or contact your family physician or the nearest emergency room and ask for the psychologist or psychiatrist on call.

### **LIMITS ON CONFIDENTIALITY**                      **(initial)**

The law protects the privacy of all communications between a patient and a psychologist or psychotherapist. In most situations, we 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 other situations that require you provide written advance consent. Your signature on this agreement provides consent for those activities, as follows:

- We may find it helpful to consult other medical and mental health professionals about a case. During a consultation we do not reveal the identity of the patient. The other professionals are also legally bound to keep the patient information confidential. If you do not object, we will not tell you about these consultations unless we feel it is important to our work together. We will note all consultations in your Clinical Record (which is called "PHI" in our Notice of Psychologist's Policies and Practices to Protect the Privacy of Your Health Information).
- You should be aware that we practice with other mental health and allied health professionals and that we employ administrative staff. In most cases, we need to share protected information with these individuals for both clinical and administrative purposes, such as scheduling, billing and quality assurance. All of the mental health professionals are bound by the same rules of confidentiality. All staff members have been given training about protecting your privacy and have agreed not to release any information outside of the practice without the permission of a professional staff member who has prior written authorization. Disclosures required by health insurers or to collect overdue fees are discussed elsewhere in this Agreement. If a patient threatens to harm himself/herself, we may be obligated to seek hospitalization for him/her, or to contact family members or others who can help provide protection.

Situations occur where we are permitted or required to disclose information without either your consent or Authorization:

- If you are involved in a court proceeding and request is made for information concerning the professional services we provided you, such information is protected by the psychologist/ psychotherapist -patient privilege law. We cannot provide any information without you or your legal representative's written authorization, or a court order. If you are involved in or contemplating litigation, you should consult with your attorney to determine whether a court would be likely to order us to disclose information.
- If a government agency is requesting the information for health oversight activities, we may be required to provide it for them.
- If a patient files a complaint or lawsuit against us, we may disclose relevant

information regarding that patient in order to defend ourselves.

- If a patient files a worker's compensation claim, and we are providing services related to that claim, we must, upon appropriate request, provide appropriate reports to the Workers Compensation Commission or the insurer.

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

- If we have reason to believe that a minor who we have examined is or has been the victim of injury, sexual abuse, neglect or deprivation of necessary medical treatment, the law requires us to file a report with the appropriate government agency, usually the Office of Child Protective Services. Once such a report is filed, we may be required to provide additional information.
- If we have reason to believe that any adult patient who is either vulnerable and/or incapacitated and who has been the victim of abuse, neglect or financial exploitation, the law requires us to file a report with the appropriate state official, usually a protective services worker. Once such a report is filed, we may be required to provide additional information.
- If a patient communicates an explicit threat of imminent serious physical harm to a clearly identified or identifiable victim including themselves, and we believe that the patient has the intent and ability to carry out such threat, we must take protective actions that may include notifying the potential victim, contacting the police, or seeking hospitalization for the patient.

In the event of the death or incapacitation of your clinician:

- Each clinician has a professional will and in the event of their death or incapacitation, their professional executor has access to your records for the sole purpose of securing them, providing any needed notifications, and arranging for their storage/access for the statutory period.

If such a situation arises, we will make every effort to fully discuss it with you before taking any action and we will limit disclosure to only what is necessary.

While this written summary of exceptions to confidentiality should prove helpful in informing you about potential problems, it is important that we discuss any questions or concerns that you may have now or in the future. The laws governing confidentiality can be quite complex, and we are not attorneys. In situations where specific advice is required, formal legal advice may be needed.

Due to HIPPA, confidentiality, and the ethical duty to protect testing materials, BPS does not allow audio or visual recordings done in any way or using any format of the testing, assessment, feedback, or psychotherapy sessions. The term "audio recordings" includes, but is not limited to, recording an individual's voice using video recording (e.g., video cameras, cellular telephones), tape recorders, or other technologies capable of capturing audio. The term "visual recording" includes, but is not limited to, recording an individual's likeness (e.g., image, picture) using photography (e.g., cameras, cellular

telephones), video recording (e.g., video cameras, cellular telephones), digital imaging (e.g., digital cameras, web cameras), or other technologies capable of capturing an image (e.g., Skype, Facetime). Considering the development and growth of technology other means may exist or come into existence for recording in some other way testing, assessment, feedback, or psychotherapy sessions; this notice prohibiting recording is intended to extend to any and all such means, without exception. If you have any question about whether this notice applies to anything you have done, are doing or are considering doing then you must immediately notify the person conducting the testing, assessment, feedback, or psychotherapy sessions so the matter of recording can be addressed.

**MARITAL OR FAMILY COUNSELING**  (initial)

By initialing above, you are agreeing to be a participant in marital or family counseling. There are meaningful differences between couple, family and individual psychotherapy. Couples and family psychotherapy includes the participating members as the “client. Individual psychotherapy involves only the identified client and the clinician,. First, in any session, the clinician is working to improve the relationship and interactions among the participants and, accordingly, will not have a duty to act for the benefit of any one participant over the interests of any other participant. Do not expect your clinician to take sides; it will be your responsibility to work through issues with your clinician’s help. Second, matters discussed in session by one member cannot be kept confidential from the other members. While your clinician and our practice will maintain the confidentiality of information disclosed in session from outside persons as provided in HIPAA (subject to the Limits on Confidentiality described above), and will encourage all members to agree that what is said in session is not to be discussed outside of group or disclosed to others, neither your clinician nor our practice can control the use or disclosure of such information by other members and we have no responsibility or liability to you if such disclosure occurs.

**PROFESSIONAL RECORDS**

The laws and standards of our profession require that we keep Protected Health Information about you in your Clinical Record. It includes information about your reasons for seeking services, a description of the ways in which your problem impacts your life, your diagnosis, the goals that we set for treatment, your progress towards those goals, your medical and social history, your treatment history, any past treatment records that we receive from other providers, reports of any professional consultations, your billing records, and any reports that have been sent to anyone, including reports to your insurance carrier. Except in unusual circumstances that involve danger to yourself and/or others or where information has been supplied to us confidentially by others, you may examine and/or receive a copy of your Clinical Record if you request it in writing. This accessibility does not extend to testing protocols, because of test security issues. Because these are professional records, they can be misinterpreted and/or upsetting to untrained readers. For this reason, we recommend that you initially review them in our presence, or have them forwarded to another mental health professional so you can discuss the contents. In most situations, we are allowed to charge a copying, postage, and administrative fee.

**PATIENT RIGHTS**

The Health Insurance Portability and Accountability Act (HIPAA) provides you with several new or expanded rights with regard to your Clinical Record and disclosures of protected health information. These rights include requesting that we amend your record; requesting restrictions on what information from your Clinical Record is disclosed to others; requesting an accounting of most disclosures of protected health information that you have neither consented to nor authorized; determining the location to which protected information disclosures are sent; having any complaints you make about our policies and procedures recorded in your records; and the right to a paper copy of this Agreement, the attached Notice form, and our privacy policies and procedures. We are happy to discuss any of these rights with

you.

**MINORS & PARENTS**

Patients under 18 years of age (minors) who are not emancipated from their parents should be aware that the law may allow parents to examine their treatment records. Because privacy in psychotherapy is often crucial to successful progress, particularly with teenagers, it is sometimes our policy to request an agreement from parents that they consent to give up their access to their child's records. If they agree, during treatment, we will provide them only with general information about the progress of the child's treatment, and his/her attendance at scheduled sessions. We will also provide parents with a summary of their child's treatment when it is complete. Any other communication will require the child's Authorization, unless we feel that the child is in danger or is a danger to someone else; in which case, we will notify the parents of our concern. Before giving parents any information, we will discuss the matter with the child if possible, and do our best to handle any objections he/she may have.

**BILLING AND PAYMENTS**            (initial)

You will be expected to pay for each session at the time it is held, unless we agree otherwise. If your account has not been paid for more than 60 days and arrangements for payment have not been agreed upon, we have the option of using legal means to secure the payment. This may involve hiring a collection agency or going through small claims court which will require us to disclose otherwise confidential information. In most collection situations, the only information we release regarding a patient's treatment is his/her name, the nature of services provided, and the amount due. If such legal action is necessary, all costs will be included in the claim and be the responsibility of the patient.

**INSURANCE REIMBURSEMENT**            (initial)

This is a fee for service practice. We do not accept insurance. If you wish to submit a claim to your insurance company, we will provide you with a diagnosis code, if one is available and CPT codes. All insurance companies claim to keep such information confidential; we have no control over the use of the information once it has been submitted to the insurance company by our clients..

**PREFERRED & ACCEPTABLE CONTACT**

Please specify your preferred form of contact:

Telephone: \_\_\_\_\_ Type: \_\_\_\_\_

Is Okay to Leave Voicemail: \_\_\_\_\_

Email: \_\_\_\_\_

Mail: \_\_\_\_\_

Our standard practice is to provide patients with appointment reminders via telephone or email contact. These reminders include: the patient's name, the name of our practice (Beljan Psychological Services) and/or the name of the professional with whom you have an appointment, the date and time of your appointment, and our telephone number. We will not disclose PHI in voicemail messages left on your cellular, home, or office phones unless you specifically authorize us to do so.

If you would like us to leave appointment reminders via voicemail, please specify the telephone number at which appointment reminders may be left. \_\_\_\_\_



**APPROVAL GIVEN**

By signing this agreement you give us the permission to treat you or your child in accordance with the information stated in this document. This treatment includes but is not limited to neuropsychological assessment, psychoeducational/intellectual assessment, psychotherapy, and other treatments previously discussed and agreed upon with the patient and/or guardian.

**SIGNATURE**

Your signature below indicates that you have read the information in this document and agree to abide by its terms during our professional relationship. In cases of joint custody, we will need to have signatures from both parents and/or legal guardians before we can proceed with testing your child. In cases of divorce, we also need a copy of the custody agreement before we can work with the child.

\_\_\_\_\_  
Client or Guardian's Name

\_\_\_\_\_  
Client or Guardian's Signature

\_\_\_\_\_  
Client or Guardian's Name

\_\_\_\_\_  
Client or Guardian's Signature

\_\_\_\_\_  
Administrator/Clinician's Name

\_\_\_\_\_  
Administrator/Clinician's Signature

Paul Beljan, PsyD, ABPdN, ABN  
Vanessa Berens, PhD  
Casey Blandford, MAS, LAMFT  
Sarah Bald, PsyD  
Steve Quagliano, Autism Spclst  
D. Wechsler, PsyD, Post-Doctoral Fellow



9835 E. Bell Rd., Ste. 140  
Scottsdale, AZ 85260  
(602) 957-7600  
[www.beljanpsych.com](http://www.beljanpsych.com)

I have received a copy of:

Notice of Psychologist's Policies and Practices to  
Protect the Privacy of Your Health Information

\_\_\_\_\_  
Patient's Name

\_\_\_\_\_  
Guardian's Name (if patient is a minor)

\_\_\_\_\_  
Patient or Guardian Signature

\_\_\_\_\_  
Date

Paul Beljan, PsyD, ABPdN, ABN  
Vanessa Berens, PhD  
Casey Blandford, MAS, LAMFT  
Sarah Bald, PsyD  
Steve Quagliano, Autism Spclst  
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I understand that **Steven Quagliano, BA** is a Psychometrician and Autism Specialist under the supervision of licensed psychologist Paul Beljan, PsyD at Beljan Psychological Services.

I understand **Ross Davids, MA** is a Psychology Doctoral Practicum Student under the supervision of licensed psychologist Vanessa Berens, PsyD at Beljan Psychological Services.

I understand that **Justin Gardener, MA.** is a Psychology Doctoral Practicum Student under the supervision of licensed psychologist Paul Beljan, PsyD, at Beljan Psychological Services.

I understand that **Daniel Wechsler, PsyD** is a Postdoctoral Fellow under the supervision of licensed psychologist Paul Beljan at Beljan Psychological Services.

By signing this form I am agreeing to allow any of the aforementioned Post-Doctoral Fellow, students, and/or psychometricians to administer assessment measures under the supervision of the aforementioned psychologists to my child or myself (whichever is applicable) as a part of my child's or my evaluation (whichever is applicable).

I understand that I may contact at Beljan Psychological Services (602) 957-7600 with any questions or concerns at any time.

\_\_\_\_\_  
Patient's Name

\_\_\_\_\_  
Guardian's Name if patient is a minor

\_\_\_\_\_  
Patient/ Guardian Signature

\_\_\_\_\_  
Date