



# Koru Counseling

Jayme Koerselman, MA, LMHC, CSAT • 624 W Hastings Rd, Suite 4, Spokane, WA 99218 •  
Phone: 509 842 6757 • Email: jayme@korucounseling.org

To new clients:

First, let me thank you for your interest in including me on your journey. Choosing a therapist is an important step and one deserving careful consideration. This packet includes information about me and forms for you to fill out and bring with you to our first session. It is a lot of reading, but the information is important, so please review it in its entirety. If for some reason you are unable to complete the paperwork before our session I will have copies in my office and we will use your session time to complete the paperwork.

The *Disclosure Statement* outlines my policies regarding financial matters, confidentiality of information, and other administrative issues.

The *Communications Policy* describes appropriate methods of communication with me.

The *Communication by Email, Text Message, and Other Non-Secure Means* form allows you to give your consent for non-secure methods of communication if you desire.

The *Credit Card Authorization Form* provides me with a backup form of payment in the event of a missed appointment or absence of payment at the time of session.

The *Intake Form* provides me with your basic identifying and contact information.

The *Acknowledgement of Receipt of Notice of Privacy Practices (one page)* asserts that you have received the *Notice of Privacy Practices* (the last three pages of this document).

Please complete this paperwork prior to our initial meeting so that we can spend our time together focusing on your concerns. I look forward to meeting with you.

*Jayme Koerselman, MA, LMHC, CSAT*  
Licensed Counselor and Supervisor

## Checklist for completing paperwork:

- Please print your name in the space provided on this page.
- Read my **Disclosure Statement**. Sign and date.
- Read the **Communications Policy**.
- Read the **Communication by E-mail, Text Message, and Other Non-Secure Means** form and sign if you agree.
- Complete, sign, and date the **Credit Card Authorization Form**.
- Complete your **Intake Form**.
- Please sign the **Acknowledgement of Receipt of Notice of Privacy Practices**.
- Read through the **Notice of Privacy Practices** regarding your therapy.
- Initial all pages to indicate that you have read and understand the information provided.

Client name: \_\_\_\_\_ (please print)



## Disclosure Statement

### Contact Information:

Address: 624 W Hastings Rd. Suite 4 Spokane, WA 99218  
Phone: 509.842.6757  
Email: [jayme@korucounseling.org](mailto:jayme@korucounseling.org)

### Washington State Licensed Mental Health Counselor Number: LH00010905

**Training and Work Experience:** I received a Bachelor of Arts degree in Music Performance from Belmont University in Nashville, TN. Prior to my training as a therapist, I worked extensively as a professional musician and tour manager, as well as the web store and public relations manager for a record label. In 2002, I moved to Seattle, WA where I received my Master of Arts in Counseling from The Seattle School of Theology and Psychology ([www.theseattleschool.edu](http://www.theseattleschool.edu), previously Mars Hill Graduate School). My training at The Seattle School included individual, group, and couples training as well as an internship at Compass Health working with children and adolescents. My experience includes working in a mental health hospital, in-home family counselling, and working in a private practice from 2004-current. I also have trained extensively with Patrick Carnes in the issue of sex addiction and sexuality and am a Certified Sex Addiction Therapist ([www.iitap.com](http://www.iitap.com)). In February of 2010, I moved to Auckland, New Zealand and became a full-time faculty member in the Laidlaw College School of Counselling program. I continued to have a smaller private practice while lecturing. After five years of living in New Zealand, we decided to move back to Spokane, where I have set up a private practice.

**Counseling Orientation:** I view the counseling process as forming a collaborative relationship with you to explore the nature of the issues that bring you to counseling. Although we will spend much time dealing with these specific issues, we will also look at the nature of your relationships with the significant people in your life as well as any relational dynamics you and I experience. According to my theoretical orientation, many of the symptoms or problems you may be facing are rooted in these relational issues. I view our relationship not only as the environment where these things can change, but often the best vehicle in discovering how you connect with others.

In particular, the Biblical foundation underlying my counseling leads me to believe you are made to connect and relate in a satisfying and self-giving manner. Relational interactions are likely both the source of your greatest joy and your deepest pain and in many ways shape who you are and how you understand the world. Thus, we will explore these interactions and how *you shape and are shaped* by others.

It's important to recognize that progress in counseling is not linear. It can be a disruptive process as you purposely consider parts of your life. Your symptoms or concerns may actually increase for a time and this is often a normal part of the counseling journey. Don't give up The pain you feel is not superficial and the work of getting to the deeper issues can often be very difficult. However, if you are unsure of the direction of our work, I welcome your questions and feedback at any time.

The length of your therapy is difficult to project. It is dependent upon your goals, motivation, external support, personal work outside of sessions, and the chronicity of problems. In my experience, clients who are most successful in their work with me

- 1) appreciate honest discussion and investigation of their personal histories

- 2) value their counseling time, maintaining a consistent appointment schedule
- 3) build resourcefulness through outside assignments, (e.g., reading, journaling, or other creative outlets)

Finally, I believe that some issues can have a physical component; in such cases, medical consultation will be advised.

**Billing Information:** The American Medical Association has established standards for the length of psychotherapy sessions. I have tailored my fees to these standards.

	<b>Individual</b>	<b>Couple/Family</b>
<b>53+-minute session:</b>	<b>\$120</b>	<b>\$120</b>
<b>Initial Consultation:</b>	<b>\$180</b>	

My usual session length is between 53 and 60 minutes (for insurance billing purposes). Occasionally, you may wish to schedule longer or shorter sessions. Please discuss with me how payment is structured for these sessions.

Your regular fee will be charged, on a prorated basis, for any additional professional services rendered at your request, such as phone contacts over 5 minutes and consultations with other professionals. Court time and related preparation will be billed at the rate of \$160 per hour, including travel time. Fees may be adjusted annually on January 1 and will not increase more than \$10 per year. I accept cash, personal checks (**made out to Koru Counseling**), and credit cards (added fee - see below). Payments are to be made at the beginning of each session.

**Credit Card Authorization and Purpose:** This authorization applies in the event that you forget to bring cash, check or a credit card to your session OR you fail to give adequate notice by phone of missing an appointment. In such a case you are authorizing me to charge your credit card for any therapy related fees plus a 3% credit card processing fee (or 3.5% if card is keyed in). If you prefer not to provide a credit card number as a backup form of payment, and you do not have payment upon arrival, I will direct you to obtain payment before we begin. There are several automatic teller machines near my office. If for some reason you cannot pay for the session at our meeting time, we will not hold the session. However, you will still be responsible for payment for the session; it will be regarded as a missed appointment.

**Insurance and Third Party Payments:** Unless I am an in-network provider for your insurance company, I do not file insurance claims for you or receive direct insurance payments. If you wish to use your insurance, you must arrange for the provider to reimburse you directly. You are responsible for obtaining and filling out any appropriate paperwork and submitting it to your provider. I will be glad to provide information that the insurance company deems necessary. **Note: Insurance and other third party payers will not pay for missed appointments. Complete payment for services rendered and missed appointments is your responsibility.**

**Missed Appointments / Cancellations:** You may cancel an appointment up to 48 hours in advance of the scheduled time at no charge. *You will be charged for a missed or cancelled appointment if you have failed to provide this minimum notice of 48 hours.* To notify me, you may speak to me directly or leave me a voice mail. E-mail is not adequate notice, as there are times when I am away from my e-mail for more extended periods. Serious illness and emergencies are an exception to this rule. If you have a minor illness and do not want to go out, you may consider keeping your appointment by phone or secure video chat software.



**Inclement Weather:** I will make reasonable and safe efforts to make it to the office in case of inclement weather (e.g., snow). If I make it to the office, I will assume that our appointment will be held and payment is your responsibility. If you are unable to attend in person, you may consider keeping your appointment by phone or secure video chat software.

**Intake Process / Initial Consultation Services:** The initial consultation will begin with reviewing all the necessary paperwork and exploring together the nature of your concerns. A general inventory of what is currently happening in your life and relationships, and the goals you have for our time will also be discussed. I will determine if I can work with the problem as presented or a referral to another clinician would be more appropriate. If we both determine that we want to proceed, the regular fee will be charged for the consultative services I provide during the intake process. You understand that until a plan of treatment has been developed and agreed upon by both counselor and client, all services provided are consultative in nature, and I will assume no obligation to provide continuing services to you. In the event I recommend services elsewhere, I will provide you with referral assistance.

**Scheduling Appointments:** Appointments are generally made on a regular, weekly basis. In some cases I may suggest more frequent appointments. Appointment times are not automatically held open for you from week to week. If requested, I will make an effort to schedule an extra session between regular appointments should the need arise.

**Social Networking and Internet Searches:** At times I may conduct a web search on clients before the beginning of therapy or during therapy if there are suspected dual relationships (for example if I become aware I am already seeing a relative/close friend of yours). If you have concerns or questions regarding this practice, please discuss it with me. I do not accept friend requests from current or former clients on my psychotherapy related profiles on social networking sites due to the fact that these sites can compromise clients' confidentiality and privacy. For the same reason, I request that clients do not communicate with me via any interactive or social networking websites.

**Ending Therapy:** You may end therapy at any time without legal or financial obligation beyond payment for services already rendered and unpaid missed appointments. Please give a minimum of one week's notice. It is expected that we will discuss the prospect of ending therapy under the following conditions:

- When the mutually agreed upon therapy goals have been fulfilled and we develop a closure process for your therapy.
- When you or I determine the therapy process to be unproductive and/or if you would be better served by other health or mental health practitioners. I will provide 30 days notice of intent to terminate to allow you to make other treatment arrangements and will assist you in finding someone qualified. If I have written consent by you, I will provide that professional with information they request.
- When you have not paid for the last two sessions, unless special arrangements have been made with me.
- When you have failed to show up to your last two therapy sessions without a 48-hour notice or contact of any kind, it will be understood that you have ended therapy. I shall have no further obligation to you once treatment has been ended. Should you make contact with me at a later date requesting additional services, I may choose to see you on a consultative basis, or I may recommend that you seek services elsewhere.

**Confidentiality:** There is a legal privilege in the state of Washington protecting the confidentiality of the information that you share with me. Information cannot be released to other parties, including family members



and close friends, without the **client's written consent except as mandated by law** (see below). The law specifically states:

RCW 70.02.020 prohibits a health care provider from disclosing health care information about a patient to any other person without the patient's written authorization, except as authorized in RW70.02.050.

There are legal **exceptions** to confidentiality. In the following situations, the information you have shared with me may be shared with others (please see the enclosed HIPAA form for a more complete list):

**Exceptions to Confidentiality & Duty to Warn or Report.** The following situations are those in which the information you have shared with me may be shared with others:

- 1) The Uniform Health Care Information Act may provide for disclosure of information to another health care provider who is serving you.
- 2) The client gives permission to share confidential information through a signed Release of Information.
- 3) The law requires the release of information in the event of physical abuse, sexual abuse or neglect of a minor. A minor child is considered to be anyone under the age of 18 years. Those that would be contacted include:
  - Child Protective Services
  - Law Enforcement officials.
- 4) The law also requires that I report the physical, sexual, or fiscal abuse of a dependent adult, 18-64 years or older and of an elder, 65 years or older. Those that would be contacted include:
  - Adult Protective Services
  - Law Enforcement officials
- 5) If an individual intends to take harmful action against another specific individual, it is the therapist's responsibility to warn that individual or individuals of such intentions and to notify the police as well.
- 6) If you bring charges against me, or in order to recoup unpaid fees I must disclose sufficient information to support my case.
- 7) The law further allows for such release when, in my professional opinion, there is a probability of suicide to inform family members and/or close significant others that can provide necessary care
- 8) In the case of psychiatric disability, which is severe enough that the individual may not be capable of self-care or safety.
- 9) The law also requires that I release information if I have been so directed by the court by subpoena. Even with a subpoena you maintain some rights of confidentiality. Should this occur I would discuss the subpoena with you, and your attorney with your written permission, and, if necessary, with my attorney prior to releasing information.
- 10) As required under chapter 26.44 RCW

**Please note: When it is possible, we will discuss any exceptions to confidentiality before action is taken.**

**Note to marriage counseling clients: If you and your spouse are both seeing me for marriage counseling, I will not withhold information that one spouse may have revealed to me in private, from the other spouse.**

**Clinical Consultation:** I regularly consult with other professionals regarding clients with whom I am working. This allows me to gain other perspectives and ideas as to how to best help you reach your goals. These consultations are obtained in such a way that confidentiality is maintained.



**Choosing a Counselor:** You have the right to choose a counselor who best suits your needs and purposes. You may seek a second opinion from another mental health practitioner or may end therapy at any time. In the event that you elect to end our time together, I strongly recommend a minimum of one final meeting to discuss your progress and your goals for the future (see “Ending Therapy” above).

**State Information:** Counselors practicing counseling for a fee must be registered or licensed with the department of health for the protection of the public health and safety. Licensing of an individual with the department does not include recognition of any practice standards, nor does it necessarily imply the effectiveness of any treatment. The purpose of the Counselor Credentialing Act (Chapter 18.19 RCW) is a) to provide protection for public health and safety and b) to empower the citizens of the State of Washington by providing a complaint process against counselors who would commit acts of unprofessional conduct. If you believe that I have been unethical in our work and still believe so after discussing your concern with me, you may contact the state:

**Department of Health—Counselor Programs**  
**P.O. Box 47869**  
**Olympia, WA 98504-7869**  
**360.664.9098**

**Thank you** for taking the time to read this document and your interest in therapy with me.

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## TREATMENT AGREEMENT

I have read and understand the information in this form. Further, I have read the written statement entitled “Notice of Privacy Practices Regarding Protected Health Information.” If there is anything I do not understand, I can ask my counselor. I continue my consent to treatment according to the policies presented in this form. *A signed copy of this form is available on request.*

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Second Client Signature (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Responsible Party’s Signature (for clients under 18)

\_\_\_\_\_  
Relationship to Client

\_\_\_\_\_  
Date

\_\_\_\_\_  
Therapist Signature

\_\_\_\_\_  
Date



## Communications Policy

### CONTACTING ME

When you need to contact Jayme Koerselman for any reason, these are the most effective ways to get in touch in a reasonable amount of time:

**By phone (509.842.6757):** You may leave messages on voicemail, which is confidential. I will check these messages on a regular basis. Please limit your phone contacts to appointment scheduling and emergencies; barring prior arrangement, our work will take place face-to-face. There may be circumstances in which it is appropriate to conduct one or more scheduled sessions by phone. Unscheduled telephone conversations initiated by a client will result in a fee being charged on a prorated basis according to the client's established fee schedule.

**By e-mail ([jayme@korucounseling.org](mailto:jayme@korucounseling.org)):** If you wish to communicate with me by normal email or normal text message, please read and complete the Communication by Email, Text Message, and Other Non- Secure Means form included with these office policies. My e-mail address is available to simplify contacts from new clients, to facilitate scheduling of appointments, and to send files such as PDFs or other digital documents. However, e-mail is not a viable means of communicating other information to me. Please note that e-mails, other than simple scheduling changes, will be printed and placed in your file. I do not respond in depth to e-mails from clients. If you require urgent contact, you may choose to schedule a session sooner than your previously scheduled appointment time, if available.

I subscribe to **VSee**—secure online video chat software—that can allow us to communicate more privately through the use of encryption and other privacy technologies. It will not cost you money, but it does require setup before use. Please ask if you would like to use this service.

Please refrain from making contact with me using social media messaging systems such as Facebook, Twitter, or LinkedIn. These methods have very poor security and I am not prepared to watch them closely for important messages from clients. It is important that we be able to communicate and also keep the confidential space that is vital to therapy. Please speak with me about any concerns you have regarding my preferred communication methods.

### RESPONSE TIME

I may not be able to respond to your messages and calls immediately. For voicemails and other messages, you can expect a response within 48 hours (weekends excluded). I may occasionally reply more quickly than that on weekends, but please be aware that this will not always be possible.

Be aware that there may be times when I am unable to receive or respond to messages, such as when out of cellular range or out of town.



## EMERGENCY CONTACT

If you are ever experiencing an emergency, including a mental health crisis, please call:

- General Emergencies – 911
- Crisis Line (First Call for Help) – 509.838.4428 or 1.800.SUICIDE

If you need to contact me about an emergency, the best method is:

- By phone (509.842.6757)
- If you cannot reach me by phone, please leave a voicemail.

Please note that SMS (normal phone text messages) are not designed for emergency contact. SMS text messages occasionally get delayed and on rare occasions may be lost. So, please refrain from using SMS as your sole method of communicating with me in emergencies.

## Communication by Email, Text Message, and Other Non-Secure Means

It may become useful during the course of treatment to communicate by email, text message (e.g. “SMS”) or other electronic methods of communication. Be informed that these methods, in their typical form, are not confidential means of communication\*. If you use these methods to communicate with Jayme Koerselman, there is a reasonable chance that a third party may be able to intercept and eavesdrop on those messages. The kinds of parties that may intercept these messages include, but are not limited to:

- People in your home or other environments who can access your phone, computer, or other devices that you use to read and write messages
- Your employer, if you use your work email to communicate with Jayme Koerselman
- Third parties on the Internet such as server administrators and others who monitor Internet traffic

If there are people in your life that you don’t want accessing these communications, please talk with Jayme Koerselman about ways to keep your communications safe and confidential.

### CONSENT FOR TRANSMISSION OF PROTECTED HEALTH INFORMATION BY NON-SECURE MEANS

I consent to allow Jayme Koerselman to use unsecured email and mobile phone text messaging to transmit to me the following protected health information:

- Information related to the scheduling of meetings or other appointments
- Information related to billing and payment

I have been informed of the risks, including but not limited to my confidentiality in treatment, of transmitting my protected health information by unsecured means. I understand that I am not required to sign this agreement in order to receive treatment. I also understand that I may terminate this consent at any time.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Second Client Signature (if applicable)

\_\_\_\_\_  
Date

\* Note that I do subscribe to Google Apps for Business which supports HIPAA compliance with my email. I have a signed Business Associate Agreement (BAA) which is standard for any company handling your Personal Health Information (PHI) in partnership with me. For more information see <https://support.google.com/a/answer/3407054?hl=en>



## Credit Card Payment Authorization Form

Sign and complete this form to authorize Jayme Koerselman to debit your credit card as listed below.

By signing this form you give me permission to debit your account for the amount indicated on or after the specified date. This is permission for therapeutic treatment fees accrued while in treatment with Jayme Koerselman, and does not provide authorization for any additional unrelated debits or credits to your account. Credit cards may be run in the event that you forget to bring cash, check or a valid credit card to your session. Credit cards will also be debited in the event that you fail to give adequate notice by phone of missing an appointment. A receipt of credit card processing will be sent to the email provided below or, if you choose, by text to your mobile device.

### Please complete the information below:

I, \_\_\_\_\_, authorize Jayme Koerselman to charge my credit card account  
(full name; please print)

indicated below. Fees accrued for missed appointments or failure to provide payment at the time of service will be processed via credit card at the agreed upon counseling fee and charged 3.5% for keying in a credit card number. This is to cover the fee charged by my credit card processing company. Using your credit card at time of service (via swipe) will incur a charge of 3%.

Billing Address \_\_\_\_\_ Phone # \_\_\_\_\_

City, State, Zip \_\_\_\_\_ Email \_\_\_\_\_

Account Type:       Visa       MasterCard       AMEX       Discover

Cardholder Name \_\_\_\_\_

Account Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

CVV2 (3 digit number on back of Visa/MC/Discover, 4 digits on front of AMEX) \_\_\_\_\_

I authorize Jayme Koerselman to charge the credit card indicated in this authorization form according to the terms outlined above. This payment authorization is for the goods/services described above, for the amounts indicated above only. I certify that I am an authorized user of this credit card and that I will not dispute the payment with my credit card company; so long as the transaction corresponds to the terms indicated in this form.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_



## Intake Form

Date \_\_\_\_\_ Last Name \_\_\_\_\_ First Name(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Do I have permission to send mail to this address? Y / N

E-mail Address: \_\_\_\_\_

Telephone: Home \_\_\_\_\_ Cell \_\_\_\_\_ Work \_\_\_\_\_

Male  Female  Couple Date of Birth \_\_\_/\_\_\_/\_\_\_ (Partner DOB \_\_\_/\_\_\_/\_\_\_)

Denominational or religious affiliation \_\_\_\_\_

Is it acceptable to contact you at home by phone? Y / N By cell phone? Y / N

If none of the above options is acceptable, how may I contact you? \_\_\_\_\_

How did you hear of me? If you found me on the web, through what site?

Who may I thank for referring you? \_\_\_\_\_

*Please check any current general issues or past issues that still affect you.*

- |   |  |
|---|--|
| <input type="checkbox"/> Anxiety                        | <input type="checkbox"/> Depression            |
| <input type="checkbox"/> Fears/phobias (type: _____)    | <input type="checkbox"/> Eating disorders      |
| <input type="checkbox"/> Sexual problems                | <input type="checkbox"/> Suicidal thoughts     |
| <input type="checkbox"/> Separation/divorce             | <input type="checkbox"/> Finances              |
| <input type="checkbox"/> Drug/alcohol use               | <input type="checkbox"/> Career Choices        |
| <input type="checkbox"/> Anger                          | <input type="checkbox"/> Self-Control          |
| <input type="checkbox"/> Addiction                      | <input type="checkbox"/> Insomnia              |
| <input type="checkbox"/> Religious matters              | <input type="checkbox"/> Work/Stress           |
| <input type="checkbox"/> Health problems                | <input type="checkbox"/> Cutting/Self-harm     |
| <input type="checkbox"/> Thought patterns (type: _____) | <input type="checkbox"/> Pregnancy Issues      |
| <input type="checkbox"/> Death of someone close         | <input type="checkbox"/> Relationship Concerns |
| <input type="checkbox"/> recently (when: _____)         | <input type="checkbox"/> family                |
| <input type="checkbox"/> in the past                    | <input type="checkbox"/> friend                |
| <input type="checkbox"/> Sexual assault/rape            | <input type="checkbox"/> parent                |
| <input type="checkbox"/> recently (when: _____)         | <input type="checkbox"/> significant other     |
| <input type="checkbox"/> in the past                    | <input type="checkbox"/> roommate              |
| <input type="checkbox"/> Childhood abuse                | <input type="checkbox"/> other: _____          |
| <input type="checkbox"/> Sexual identity issues         | <input type="checkbox"/> Academic Issues       |
| <input type="checkbox"/> Pornography                    | <input type="checkbox"/> Conduct problems      |
| <input type="checkbox"/> Other _____                    |  |



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## **Your Current Functioning**

**Please describe the particular issue(s) that have brought you to counseling. Briefly include any relevant information on when these problems began, how often they occur, and/or the severity of these issues.**

**Who provides you with social and emotional support? How do you describe your network of friends?**

**What do you do to relax and enjoy yourself?**

## **Work and Education**

**Please provide a brief history of your employment, including your current position if you are employed. Are you happy with your work now?**

**Describe your educational experience (last grade completed, grades, problems).**



## Family of Origin

Who was present in your family during your childhood?

	Present entire childhood	Present part of childhood	Not present at all
mother	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
father	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
stepmother	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
stepfather	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
brother(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sister(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Describe your parents:

Father

Mother

Name \_\_\_\_\_  
Occupation \_\_\_\_\_  
Education \_\_\_\_\_  
General health \_\_\_\_\_

**Parents' current marital status:**

- married to each other
- separated for \_\_\_\_\_ years
- divorced for \_\_\_\_\_ years
- mother remarried \_\_\_\_\_ times
- father remarried \_\_\_\_\_ times
- mother involved with someone
- father involved with someone
- mother deceased for \_\_\_\_\_ years  
your age at mother's death \_\_\_\_\_
- father deceased for \_\_\_\_\_ years  
your age at father's death \_\_\_\_\_

**Describe your childhood family experience:**

- outstanding home environment
- normal home environment
- chaotic home environment
- witnessed phys./verbal/sexual abuse toward others
- experienced physical/verbal/sexual abuse from others

Age you left home: \_\_\_\_\_ Circumstances:

Special circumstances in childhood?



## **Immediate and Extended Family**

What is your current family structure (marital status, children, others living in home)? Also, describe any history of previous marriages, children, stepchildren, or other significant relationships.

Please mark any issues that are present in your family, including extended family:

<b>Issue</b>	<b>Family member(s)</b>
<input type="checkbox"/> Mental illness (incl. depression and anxiety)	_____
<input type="checkbox"/> Birth defects	_____
<input type="checkbox"/> Chronic illness	_____
<input type="checkbox"/> Hereditary illness	_____
<input type="checkbox"/> Alcoholism	_____
<input type="checkbox"/> Drug abuse	_____
<input type="checkbox"/> Physical abuse	_____
<input type="checkbox"/> Sexual abuse	_____
<input type="checkbox"/> Behavior problems	_____

## **Medical Health / History**

Are you currently under medical care? If yes, please explain/describe:

Do you have health concerns that are untreated at this time? If yes, please describe:

Name of primary physician: \_\_\_\_\_ Phone number: \_\_\_\_\_



**Medical Health / History (cont.)**

Are you currently taking prescribed medications? **Y / N** Please explain/describe, including dosage:

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List psychiatric/mental health medications you have taken in the past, including herbal substances:

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Please list any time(s) in which you received care from a psychiatrist, psychologist, or counselor:

<u>Clinician</u>	<u>Location</u>	<u>Date</u>	<u>Nature of problem/ Diagnosis</u>
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Are you or have you ever been suicidal? Briefly note dates and whether you have attempted suicide.

How often do you drink alcohol? \_\_\_\_\_ times per \_\_\_\_\_ (week, month, etc.)

How many drinks do you have each time you drink? \_\_\_\_\_

Has anyone (you or others) expressed concern about your use of alcohol?

Do you use other drugs/substances? \_\_\_\_\_ How often? \_\_\_\_\_ times per \_\_\_\_\_

Has anyone (you or others) expressed concern about your use of other drugs/substances?

Are you in a relationship in which you have been hit or threatened or forced to have sex? Is there anyone you're afraid of?



## Specific Symptoms

*Please rate your experience of the following specific symptoms using the key below. It is a lengthy list, but it can help you and your therapist to identify specific problems.*

*Never = 0; Seldom = 1; Often = 2; Always = 3*

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Difficulty concentrating   | <input type="checkbox"/> Memory loss/blackout   | <input type="checkbox"/> Seizures               |
| <input type="checkbox"/> Vision or hearing problems | <input type="checkbox"/> Crying                 | <input type="checkbox"/> Missing classes        |
| <input type="checkbox"/> Stealing                   | <input type="checkbox"/> Weight gain/loss       | <input type="checkbox"/> Lack of energy         |
| <input type="checkbox"/> Feeling helpless           | <input type="checkbox"/> Anger                  | <input type="checkbox"/> Feeling uptight        |
| <input type="checkbox"/> Eating binges              | <input type="checkbox"/> Worrying               | <input type="checkbox"/> Lack of interest       |
| <input type="checkbox"/> Feeling hopeless           | <input type="checkbox"/> Feeling afraid         | <input type="checkbox"/> Guilt feelings         |
| <input type="checkbox"/> Lying to others            | <input type="checkbox"/> Withdrawing socially   | <input type="checkbox"/> Feeling out of control |
| <input type="checkbox"/> Sexual preoccupation       | <input type="checkbox"/> Feelings of self-doubt | <input type="checkbox"/> Suicidal thoughts      |
| <input type="checkbox"/> Feelings of worthlessness  | <input type="checkbox"/> Nervous around others  |   |
| <input type="checkbox"/> Injuring self              |   |   |

*If so please list:* \_\_\_\_\_

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Irritability                                | <input type="checkbox"/> Decreased need for sleep      | <input type="checkbox"/> Difficulty sleeping     |
| <input type="checkbox"/> Racing thoughts                             | <input type="checkbox"/> Impulsivity                   |  |
| <input type="checkbox"/> Shortness of breath                         | <input type="checkbox"/> Dizziness/Faintness           | <input type="checkbox"/> Palpitations            |
| <input type="checkbox"/> Trembling/shaking                           | <input type="checkbox"/> Sweating                      | <input type="checkbox"/> Sensation of choking    |
| <input type="checkbox"/> Nausea                                      | <input type="checkbox"/> Numbness                      | <input type="checkbox"/> Hot flashes/chills      |
| <input type="checkbox"/> Chest pain                                  | <input type="checkbox"/> Fear of dying                 | <input type="checkbox"/> Fear of "going crazy"   |
| <input type="checkbox"/> Panic attacks                               |  |  |
| <input type="checkbox"/> Muscle tension/ache                         | <input type="checkbox"/> Restlessness                  | <input type="checkbox"/> Dry mouth               |
| <input type="checkbox"/> Frequent urination                          | <input type="checkbox"/> Trouble swallowing            | <input type="checkbox"/> Feeling "on edge"       |
| <input type="checkbox"/> Easily startled                             |  |  |
| <input type="checkbox"/> Recurrent dreams                            | <input type="checkbox"/> Intrusive recollections       | <input type="checkbox"/> Flashbacks              |
| <input type="checkbox"/> Hallucinations                              | <input type="checkbox"/> Difficulty feeling emotions   | <input type="checkbox"/> Lack of sense of future |
| <input type="checkbox"/> Physiological reaction to trauma reminders  | <input type="checkbox"/> Avoidance of certain memories |  |
| <input type="checkbox"/> Difficulty recalling aspects of past trauma | <input type="checkbox"/> Distress to trauma reminders  |  |

Physical symptoms (e.g., headaches, digestive) Have you seen a health care provider for these? \_\_\_\_\_

Sexual functioning problems Have you seen a health care provider for these? \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_



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## ACKNOWLEDGEMENT OF RECEIPT OF NOTICE OF PRIVACY PRACTICES

By my signature below I, \_\_\_\_\_, acknowledge that I received a copy of the Notice of Privacy Practices for Jayme Koerselman.

Signature of Client (or Legal Guardian): \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Client (or Legal Guardian): \_\_\_\_\_ Date: \_\_\_\_\_

**If a personal representative signs this acknowledgement on behalf of the client, please complete the following:**

Name of Personal Representative: \_\_\_\_\_

Relationship to Client: \_\_\_\_\_

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### FOR OFFICE USE ONLY

I attempted to obtain written acknowledgement of receipt of our Notice of Privacy Practices, but acknowledgement could not be obtained because:

Individual refused to sign

Communication barriers prohibited obtaining the acknowledgement

An emergency situation prevented us from obtaining acknowledgement

Other (Please specify)

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*This form does not constitute legal advice.*



## **NOTICE OF PRIVACY PRACTICES INTRODUCTION**

The privacy of your health information is important to me. I will not disclose your health information to others unless you tell me to do so, or unless the law authorizes or requires me to do so.

A federal law, the Health Insurance Portability and Accountability Act, commonly known as HIPAA, requires that I inform you about how I may use information that is gathered in order to provide health care services to you. As part of this process, I am required to provide you with the attached Notice of Privacy Practices and to request that you sign an acknowledgement that you received it. The Notice describes how I may use and disclose your protected health information to carry out treatment, payment, or health care operations, and for other purposes that are permitted or required by law. This Notice also describes your rights regarding the health information I maintain about you and a brief description of how you may exercise these rights.

### **NOTICE OF PRIVACY PRACTICES**

(effective January 30, 2013)

**THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED, AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.**

#### **I. IT IS MY LEGAL DUTY TO SAFEGUARD YOUR PROTECTED HEALTH INFORMATION (PHI).**

By law I am required to insure that your PHI is kept private. The PHI constitutes information created or noted by me that can be used to identify you. It contains data about your past, present, or future health or condition, the provision of health care services to you, or the payment for such health care. I am required to provide you with this Notice about my privacy procedures. This Notice must explain when, why, and how I would use and/or disclose your PHI. Use of PHI means when I share, apply, utilize, examine, or analyze information within my practice; PHI is disclosed when I release, transfer, give, or otherwise reveal it to a third party outside my practice. With some exceptions, I may not use or disclose more of your PHI than is necessary to accomplish the purpose for which the use or disclosure is made; however, I am always legally required to follow the privacy practices described in this Notice.

Please note that I reserve the right to change the terms of this Notice and my privacy policies at any time as permitted by law. Any changes will apply to PHI already on file with me. Before I make any important changes to my policies, I will immediately change this Notice and post a new copy of it in my office and on my website. You may also request a copy of this Notice from me, or you can view a copy of it in my office or on my website, which is located at [www.blueharborcounseling.com](http://www.blueharborcounseling.com).

#### **II. HOW I WILL USE AND DISCLOSE YOUR PHI.**

I will use and disclose your PHI for many different reasons. Some of the uses or disclosures will require your prior written authorization; others, however, will not. Below you will find the different categories of my uses and disclosures, with some examples.



**A. USES AND DISCLOSURES RELATED TO TREATMENT, PAYMENT, OR HEALTH CARE OPERATIONS DO NOT REQUIRE YOUR PRIOR WRITTEN CONSENT. I may use and disclose your PHI without your consent for the following reasons:**

1. **For treatment.** I can use your PHI within my practice to provide you with mental health treatment, including discussing or sharing your PHI with my trainees and interns. I may disclose your PHI to physicians, psychiatrists, psychologists, and other licensed health care providers who provide you with health care services or are otherwise involved in your care. Example: If a psychiatrist is treating you, I may disclose your PHI to her/him in order to coordinate your care.
2. **For health care operations.** I may disclose your PHI to facilitate the efficient and correct operation of my practice. Examples: Quality control - I might use your PHI in the evaluation of the quality of health care services that you have received or to evaluate the performance of the health care professionals who provided you with these services. I may also provide your PHI to my attorneys, accountants, consultants, and others to make sure that I am in compliance with applicable laws.
3. **To obtain payment for treatment.** I may use and disclose your PHI to bill and collect payment for the treatment and services I provided you. Example: I might send your PHI to your insurance company or health plan in order to get payment for the health care services that I have provided to you. I could also provide your PHI to business associates, such as billing companies, claims processing companies, and others that process health care claims for my office.
4. **Other disclosures.** Examples: Your consent isn't required if you need emergency treatment provided that I attempt to get your consent after treatment is rendered. In the event that I try to get your consent but you are unable to communicate with me (for example, if you are unconscious or in severe pain) but I think that you would consent to such treatment if you could, I may disclose your PHI.

**B. CERTAIN OTHER USES AND DISCLOSURES DO NOT REQUIRE YOUR CONSENT. I may use and/or disclose your PHI without your consent or authorization for the following reasons:**

1. When disclosure is required by federal, state, or local law; judicial, board, or administrative proceedings; or, law enforcement. Example: I may make a disclosure to the appropriate officials when a law requires me to report information to government agencies, law enforcement personnel and/or in an administrative proceeding.
2. If disclosure is compelled by a party to a proceeding before a court of an administrative agency pursuant to its lawful authority.
3. If disclosure is required by a search warrant lawfully issued to a governmental law enforcement agency.
4. If disclosure is compelled by the patient or the patient's representative pursuant to Washington health and safety codes or to corresponding federal statutes of regulations, such as the Privacy Rule that requires this Notice.
5. To avoid harm. I may provide PHI to law enforcement personnel or persons able to prevent or mitigate a serious threat to the health or safety of a person or the public (i.e., adverse reaction to meds).



6. If disclosure is compelled or permitted by the fact that you are in such mental or emotional condition as to be dangerous to yourself or the person or property of others, and if I determine that disclosure is necessary to prevent the threatened danger.
7. If disclosure is mandated by Washington child abuse and neglect reporting laws. For example, if I have a reasonable suspicion of child abuse or neglect.
8. If disclosure is mandated by Washington elder/dependent adult abuse reporting laws. For example, if I have a reasonable suspicion of elder abuse or dependent adult abuse.
9. If disclosure is compelled or permitted by the fact that you tell me of a serious/imminent threat of physical violence by you against a reasonably identifiable victim or victims.
10. For public health activities. Example: In the event of your death, if a disclosure is permitted or compelled, I may need to give the county coroner information about you.
11. For health oversight activities. Example: I may be required to provide information to assist the government in the course of an investigation or inspection of a health care organization or provider.
12. For specific government functions. Examples: I may disclose PHI of military personnel and veterans under certain circumstances. Also, I may disclose PHI in the interests of national security, such as protecting the President of the United States or assisting with intelligence operations.
13. For research purposes. In certain circumstances, I may provide PHI in order to conduct medical research.
14. For Workers' Compensation purposes. I may provide PHI in order to comply with Workers' Compensation laws.
15. Appointment reminders and health related benefits or services. Examples: I may use PHI to provide appointment reminders. I may use PHI to give you information about alternative treatment options, or other health care services or benefits I offer.
16. If an arbitrator or arbitration panel compels disclosure, when arbitration is lawfully requested by either party, pursuant to subpoena duces tectum (e.g., a subpoena for mental health records) or any other provision authorizing disclosure in a proceeding before an arbitrator or arbitration panel.
17. If disclosure is required or permitted to a health oversight agency for oversight activities authorized by law. Example: When compelled by U.S. Secretary of Health and Human Services to investigate or assess my compliance with HIPAA regulations.
18. If disclosure is otherwise specifically required by law.

### **C. CERTAIN USES AND DISCLOSURES REQUIRE YOU TO HAVE THE OPPORTUNITY TO OBJECT.**

**Disclosures to family, friends, or others.** I may provide your PHI to a family member, friend, or other individual who you indicate is involved in your care or responsible for the payment for your health care, unless you object in whole or in part. Retroactive consent may be obtained in emergency situations.

### **D. OTHER USES AND DISCLOSURES REQUIRE YOUR PRIOR WRITTEN AUTHORIZATION.**

In any other situation not described in Sections IIA, IIB, and IIC above, I will request your written authorization before using or disclosing any of your PHI. Even if you have signed an authorization to disclose your PHI, you may later revoke that authorization, in writing, to stop any future uses and



disclosures (assuming that I haven't taken any action subsequent to the original authorization) of your PHI by me.

### **III. WHAT RIGHTS YOU HAVE REGARDING YOUR PHI**

These are your rights with respect to your PHI:

#### **A. THE RIGHT TO SEE AND GET COPIES OF YOUR PHI.**

In general, you have the right to see your PHI that is in my possession, or to get copies of it; however, you must request it in writing. If I do not have your PHI, but I know who does, I will advise you how you can get it. You will receive a response from me within 30 days of my receiving your written request. Under certain circumstances, I may feel I must deny your request, but if I do, I will give you, in writing, the reasons for the denial. I will also explain your right to have my denial reviewed.

If you ask for copies of your PHI, I will charge you not more than \$.25 per page. I may see fit to provide you with a summary or explanation of the PHI, but only if you agree to it, as well as to the cost, in advance.

#### **B. THE RIGHT TO REQUEST LIMITS ON USES AND DISCLOSURES OF YOUR PHI.**

You have the right to ask that I limit how I use and disclose your PHI. While I will consider your request, I am not legally bound to agree. If I do agree to your request, I will put those limits in writing and abide by them except in emergency situations. You do not have the right to limit the uses and disclosures that I am legally required or permitted to make.

#### **C. THE RIGHT TO CHOOSE HOW I SEND YOUR PHI TO YOU.**

It is your right to ask that your PHI be sent to you at an alternate address (for example, sending information to your work address rather than your home address) or by an alternate method (for example, via email instead of by regular mail). I am obliged to agree to your request providing that I can give you the PHI, in the format you requested, without undue inconvenience. I may not require an explanation from you as to the basis of your request as a condition of providing communications on a confidential basis.

#### **D. THE RIGHT TO GET A LIST OF THE DISCLOSURES I HAVE MADE.**

You are entitled to a list of disclosures of your PHI that I have made. The list will not include uses or disclosures to which you have already consented, i.e., those for treatment, payment, or health care operations, sent directly to you, or to your family; neither will the list include disclosures made for national security purposes, to corrections or law enforcement personnel, or disclosures made before April 15, 2003. After April 15, 2003, disclosure records will be held for six years.

I will respond to your request for an accounting of disclosures within 60 days of receiving your request. The list I give you will include disclosures made in the previous six years unless you



indicate a shorter period. The list will include the date of the disclosure, to whom PHI was disclosed (including their address, if known), a description of the information disclosed, and the reason for the disclosure. I will provide the list to you at no cost, unless you make more than one request in the same year, in which case I will charge you a reasonable sum based on a set fee for each additional request.

#### **E. THE RIGHT TO AMEND YOUR PHI.**

If you believe that there is some error in your PHI or that important information has been omitted, it is your right to request that I correct the existing information or add the missing information. Your request and the reason for the request must be made in writing. You will receive a response within 60 days of my receipt of your request. I may deny your request, in writing, if I find that: the PHI is (a) correct and complete, (b) forbidden to be disclosed, (c) not part of my records, or (d) written by someone other than me. My denial must be in writing and must state the reasons for the denial. It must also explain your right to file a written statement objecting to the denial. If you do not file a written objection, you still have the right to ask that your request and my denial be attached to any future disclosures of your PHI. If I approve your request, I will make the change(s) to your PHI. Additionally, I will tell you that the changes have been made, and I will advise all others who need to know about the change(s) to your PHI.

#### **F. THE RIGHT TO GET THIS NOTICE BY EMAIL.**

You have the right to get this notice by email. You have the right to request a paper copy of it, as well.

### **IV. HOW TO COMPLAIN ABOUT MY PRIVACY PRACTICES**

If, in your opinion, I may have violated your privacy rights, or if you object to a decision I made about access to your PHI, you are entitled to file a complaint with the person listed in Section V below. You may also send a written complaint to the Secretary of the Department of Health and Human Services at 200 Independence Avenue S.W. Washington, D.C. 20201. If you file a complaint about my privacy practices, I will take no retaliatory action against you.

### **V. PERSON TO CONTACT FOR INFORMATION ABOUT THIS NOTICE OR TO COMPLAIN ABOUT MY PRIVACY PRACTICES**

If you have any questions about this notice or any complaints about my privacy practices, or would like to know how to file a complaint with the Secretary of the Department of Health and Human Services, please contact me at: Jayme Koerselman, 624 W Hastings Rd. Suite 4 Spokane, WA 99218 / 509.842.6757 / jayme@korucounseling.com.

### **VI. NOTIFICATIONS OF BREACHES**

In the case of a breach, Jayme Koerselman is required to notify each affected individual whose unsecured PHI has been compromised. Even if such a breach was caused by a business associate, Jayme Koerselman is ultimately responsible for providing the notification directly or via the business associate. If the breach involves more than 500 persons, OCR must be notified in accordance with instructions posted on its website. Jayme Koerselman bears the ultimate burden of proof to demonstrate that all notifications were given or that the impermissible use or disclosure of PHI did not constitute a breach and must maintain supporting documentation, including documentation pertaining to the risk assessment.



## **VII. PHI AFTER DEATH**

Generally, PHI excludes any health information of a person who has been deceased for more than 50 years after the date of death. Jayme Koerselman may disclose deceased individuals' PHI to non-family members, as well as family members, who were involved in the care or payment for healthcare of the decedent prior to death; however, the disclosure must be limited to PHI relevant to such care or payment and cannot be inconsistent with any prior expressed preference of the deceased individual.

## **VIII. INDIVIDUALS' RIGHT TO RESTRICT DISCLOSURES; RIGHT OF ACCESS**

To implement the 2013 HITECH Act, the Privacy Rule is amended such that Jayme Koerselman is required to restrict the disclosure of PHI about you, the patient, to a health plan, upon request, if the disclosure is for the purpose of carrying out payment or healthcare operations and is not otherwise required by law. The PHI must pertain solely to a healthcare item or service for which you have paid the covered entity in full. (OCR clarifies that the adopted provisions do not require that covered healthcare providers create separate medical records or otherwise segregate PHI subject to a restrict healthcare item or service; rather, providers need to employ a method to flag or note restrictions of PHI to ensure that such PHI is not inadvertently sent or made accessible to a health plan.)

The 2013 Amendments also adopt the proposal in the interim rule requiring Jayme Koerselman to provide you, the patient, a copy of PHI to any individual patient requesting it in electronic form. The electronic format must be provided to you if it is readily producible. OCR clarifies that Jayme Koerselman must provide you only with an electronic copy of their PHI, not direct access to their electronic health record systems. The 2013 Amendments also give you the right to direct Jayme Koerselman to transmit an electronic copy of PHI to an entity or person designated by you. Furthermore, the amendments restrict the fees that Jayme Koerselman may charge you for handling and reproduction of PHI, which must be reasonable, cost-based and identify separately the labor for copying PHI (if any). Finally, the 2013 Amendments modify the timeliness requirement for right of access, from up to 90 days currently permitted to 30 days, with a one-time extension of 30 additional days.

## **IX. NOTICE OF PRIVACY PRACTICES**

Jayme Koerselman's Notice of Privacy Practices must contain a statement indicating that most uses and disclosures of psychotherapy notes, marketing disclosures and sale of PHI do require prior authorization by you, and you have the right to be notified in case of a breach of unsecured PHI.

## **X. EFFECTIVE DATE OF THIS NOTICE**

This notice went into effect on January 30, 2013.