



Heartline Mental Health Practitioners, LLP

255 W Stewart Ave, Suite 101 Medford, OR 97501
Ph: 541-772-5992 Fax: 541-772-5996

REGISTRATION INFORMATION

Patient Name _____ Today's Date _____
Phone No. _____ Cell Phone _____ Other _____ Msg OK? _____
Mailing Address _____ City _____ State _____ ZIP _____
Social Security Number _____ Age _____ Date of Birth _____
Occupation _____ Employer _____ Work Phone _____
Marital Status: S ___ M ___ Sep ___ Div ___ W ___ Education _____
Spouse/Significant Other _____ Date of Birth _____
Spouse/Significant Other Employer _____ Work Phone _____
Emergency contact person _____ Relationship _____ Phone _____

MEDICAL HISTORY

Severe Illnesses _____
Surgeries _____
Accidents _____ Allergies _____
Current Medications _____
Previous Mental Health Care _____
Personal Physician _____ How were you referred to this office _____
Reason for visit today _____

OFFICE POLICIES

Please initial to show that you have read and understand the Office Policy Information provided _____

ASSIGNMENT AND RELEASE

I assign directly to Heartline Mental Health Practitioners all medical benefits, if any, otherwise payable to me for services rendered. I hereby authorize Heartline Mental Health Practitioners to release all information necessary to secure the payment of benefits. I authorize the use of my signature on all my insurance submissions.

I understand that I am financially responsible for all charges whether or not paid by insurance. I certify that the above information is true and accurate to the best of my knowledge.

Signature of Insured

Date

FOR UPDATE USE ONLY:

I have reviewed the above information. To the best of my knowledge, the above information is current and updated with changes.

Signature of Insured

Date

CONSENT TO USE OR DISCLOSE CLINICAL INFORMATION

I authorize Linda Stead, LCSW to use and disclose the health and clinical information of

_____ for the purpose of **Treatment, Payment and Health Care Operations**.
(Name of client)

- ❖ **Treatment** (includes activities performed by a practitioner, facility, program, nurse, office staff, and other types of health care professionals providing care to you, coordinating or managing your care with third parties, and consultations with and between other health care providers. This consent includes treatment provided by any practitioner who covers my/our practice by telephone as the on-call practitioner).
- ❖ **Payment** (includes activities involved in determining your eligibility for health plan coverage, billing and receiving payment for your health benefit claims, and utilization management activities which may include review of health care services for clinical necessity, justification of charges, precertification and preauthorization).
- ❖ **Health Care Operations** (includes the necessary administrative and business functions of our office).

You may review Linda Stead, LCSW “*Notice of Privacy Practices*” for additional information about the uses and disclosures of information describe in the CONSENT prior to signing this CONSENT. Please verify that you have received a copy of our *Notice* by placing your initials here: _____.

Because we have reserved the right to change our privacy practices in accordance with the law, the terms contained in the *Notice* may change also. A summary of the *Notice* will be posted in the lobby of our office indicating the effective date of the *Notice* in the upper right hand corner. We will offer you a copy of the *Notice* on your first visit to us after the effective date of the then current *Notice*. We will also provide you with a copy of the *Notice* upon your request.

As more fully explained in the *Notice*, you have the right to request restrictions on how we use and disclose your protected health information for treatment, payment, and health care operations purposes. ***We are not required to agree to your request.*** If we do agree, we are required to comply with your request unless the information is needed to provide you emergency treatment. Other practitioner/providers who provide call coverage for our office are required to use and disclose your protected health information consistent with the *Notice*.

I understand that I have the right to revoke this CONSENT provided that I do so in writing, except to the extent that [name of practitioner/provider/practitioner/provider group] has already used or disclosed the information in reliance on this CONSENT.

_____ (or)
(Date) (Signature of client)

(Date) (Signature of person authorized by law)



Heartline Mental Health Practitioners, LLP

255 W Stewart Ave, Suite 101 Medford, OR 97501
Ph: 541-772-5992 Fax: 541-772-5996

ETHICAL STANDARDS AND PRACTICES

The following answers some important and frequently asked questions concerning this practice. Please read the following information carefully and let us know if there is any part you do not understand.

I Treatment Philosophy

Psychotherapy has both benefits and risks. It also requires an investment of your time and energy in order to make the process of therapy most successful. It will begin with an evaluation of your needs. Next, we will develop and discuss a treatment plan in accordance with your goals and aims. Occasionally individuals may go through periods in therapy which may result in emotional discomfort, changes in their relationships, or temporary worsening of their symptoms. This should subside as the work progresses. Remember, you always retain the right to request changes in treatment or to refuse treatment at any time.

II Health Insurance

If you are using a health insurance benefit as payment for these services, you need to be aware of what this means. Your health plan requires cooperation between client, provider and insurance company to provide services as efficiently as possible.

Health insurance companies usually limit mental health coverage to:

1. Services that are determined “medically necessary”. Medically necessary may be defined as presentation of a covered DSM IV Axis I diagnosis (these are acute symptoms).
2. Conditions that are able to be treated by short-term, problem-focused, goal-oriented approaches whenever possible.

This means your insurance company will cover a limited number of office sessions to work on your problem as intensely as possible with the focus of eliminating acute symptoms. We are contracted with insurance companies to provide these services within these conditions.

Many insurance companies review cases for quality assurance and preauthorization purposes. Your case may be reviewed by a utilization review/ quality assurance group set up by the insurance company. We will maintain, to the best of our ability, your confidentiality in this process.

III Office Policies

Please see separate page containing our office policies in detail.

IV Confidentiality

We abide by the laws and ethical principles that govern privilege and confidentiality. We will not disclose any information about you or your treatment without your written consent by way of signed release. There are some exceptions to this standard:

- It is legally required of us that we act so as to prevent physical harm to yourself or to others when there is “clear and imminent” danger of that happening.
- We are legally required to report cases of ongoing child, elder and disabled abuse.
- We may have to release clinical information regarding you to insurance carriers as required for payment or review of your claim.
- We may have to release your records when ordered to do so by court subpoena. However, we will discuss this with you beforehand and request written release from you if we judge this to be in your best in your best interest.
- On occasion, clinicians consult with colleagues about their work. If your case were ever discussed it would be confidential and without your name or identifying information.

V Release of Information

Please sign below to show that you have read and understand this information.

Signature

Date

BRIEF MOOD & BEHAVIOR SURVEY

NAME:

DATE:

Instructions: Put a check (✓) after each item to indicate how strongly you have been feeling during the past week, including today. Please answer all the items and total each group.

Depression	0	1	2	3	4	Obsessive	0	1	2	3	4
Sad or down in dumps						Perfectionistic tendencies					
Discouraged or hopeless						Must keep things neat & clean					
Low self-esteem						Frequent worry about germs & contamination					
Worthless or inadequate						Checking & rechecking things					
Loss of pleasure/ satisfaction						Often wash hands or bathe					
TOTAL						TOTAL					
Panic	0	1	2	3	4	Odd Experiences	0	1	2	3	4
Feelings of terror or overwhelming fear						Things seem strange or unreal					
Terrifying panic attacks that come out of the blue						Someone else can control my thoughts					
Feeling you are going crazy or cracking up						I hear voices that others can't hear					
Feeling you'll suffocate or pass out						Others are watching or talking about me					
Feeling you'll have a stroke, heart attack or die						Others are aware of my private thoughts					
TOTAL						TOTAL					
Suicidal Feelings	0	1	2	3	4	Manic	0	1	2	3	4
Suicidal thoughts						Talking very fast or constantly					
I would like to end my life						Thoughts race & jump around					
Others would be better off without me						I do a lot but don't get much accomplished or turns out wrong					
I've worked out a plan to do it						I have cycles of ups & downs					
I've decided to kill myself						I don't need much sleep					
TOTAL						TOTAL					
Anxiety	0	1	2	3	4	Relationship Satisfaction	0	1	2	3	4
Anxious						Communication & openness					
Frightened						Resolving conflicts & arguments					
Worrying over & over						Degree of affection and caring					
Tense or on edge						Intimacy and closeness					
Nervous						Overall Satisfaction					
TOTAL						TOTAL					
Anger	0	1	2	3	4	Therapist Empathy	0	1	2	3	4
Frustrated						Accepting and supportive					
Annoyed						Interested in me and caring					
Resentful						Treats me with respect					
Angry						Paid attention to what I said					
Irritated						Seems to understand what I say					
TOTAL						TOTAL					

KEY: 0 = none or not at all, 4 = Extremely or Very True
Based on a Brief Mood Survey by Dr. David Burns



Heartline Mental Health Practitioners, LLP

255 W Stewart Ave, Suite 101 Medford, OR 97501
Ph: 541-772-5992 Fax: 541-772-5996

OFFICE POLICY INFORMATION

OFFICE HOURS: We currently do not have a receptionist. Each practitioner's hours vary. Please use our voicemail system to leave your practitioner messages as needed. Linda Stead is box #2 and Susan Wrona is box #3. Our answering service will also be available to you in case of emergency. **Please note that prescription refill requests must be received on business days in order to be tended to in a timely fashion.**

FINANCIAL POLICY: You will be asked to pay the portion of your visit that is not covered by your insurance. We bill primary and secondary insurances. If you do not have insurance, full payment is expected at the time of service; Susan accepts cash, check or credit/debit cards. Please be sure we have accurate and up-to-date information (current insurance and address).

INSURANCE: Your health insurance may or may not cover mental health care services. Our practitioners are members of several panels and networks. Please check with your insurance company to verify your outpatient mental health benefits; these may differ from your regular medical benefits. Check to see whether your practitioner is on your insurance company's mental health panel. Preauthorization is often required. Please familiarize yourself with your insurance requirements. Lack of pre-authorization may result in non-payment by your insurance company.

We bill insurance as a courtesy. However, we wish to stress that our contract for payment is with you, not the insurance company. Please understand that if there is a problem with payment from your insurance company you will still be required to pay your bill with us. We may be able to supply you with benefit information as quoted by your insurance company, but we still do not assume responsibility for the accuracy of this information. We do not guarantee payment from your insurance company. Please understand that we may not be able to calculate your portion of the bill correctly until your claim has been processed by your insurance company. We reserve the right to collect any unpaid amount from you.

APPOINTMENTS: All appointments are scheduled through your practitioner. You will always be seen as promptly as possible. When you arrive, please have a seat in the waiting room and your practitioner will escort you to her office. If you have any changes of address, phone, or insurance information please give her the update.

CANCELLATIONS AND MISSED APPOINTMENTS: If you must cancel or change an appointment, please give us 24 hours notice, except in the case of an emergency. If you cancel giving less than 24 hours notice or do not show up for an appointment, you may be charged for the time reserved. Insurance will not pay for this charge.

PRESCRIPTIONS AND REFILLS: Prescriptions and refills are issued during office hours only. Our nurse practitioners do not routinely write prescriptions or issue refill requests during the evening or weekends because your medical records are not available to them at that time. Please give our office 24 hours to process your request from the pharmacy.

EMERGENCY SERVICES: If an emergency occurs during hours when the office is closed, you may call our office number (772-5992) and then press 0 to access our 24-hour answering service. They will locate your practitioner or the person on call.



Heartline Mental Health Practitioners, LLP

255 W Stewart Ave, Suite 101 Medford, OR 97501
Ph: 541-772-5992 Fax: 541-772-5996

Effective Date: 12/01/2004

PATIENT PRIVACY NOTICE

We are committed to preserving the privacy of your personal health information. In fact, we are required by law to protect the privacy of your clinical information and to provide you with a notice describing:

HOW CLINICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN ACCESS THIS INFORMATION

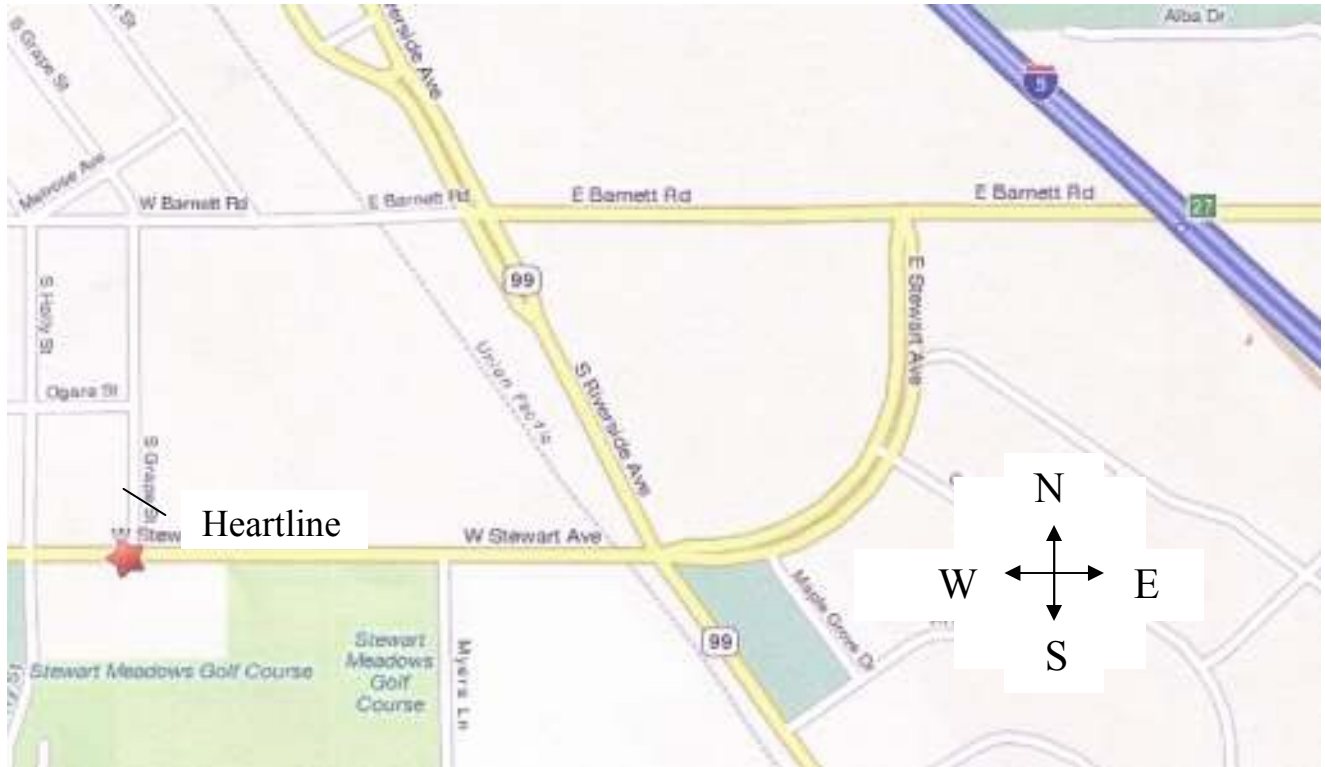
- We are required by law to have your written consent before we use or disclose to others clinical information for purposes of providing or arranging for you health care, the payment for or reimbursement of the care that we provide to you and the related administrative activities supporting your treatment.
- We may be required or permitted by certain laws to use and disclose your clinical information for other purposes without your consent or authorization.
- As our patient, you have important rights relating to inspecting and copying your clinical information that we maintain, amending or correcting that information, obtaining an accounting of our disclosures of your clinical information, requesting that we communicate with you confidentially, requesting that we restrict certain uses and disclosures of your health information, and complaining if you think your rights have been violated.
- We have available a detailed NOTICE OF PRIVACY PRACTICES which fully explains your rights and our obligations under the law. We may revise our NOTICE from time to time. The effective date at the top right hand of this page indicates the date of the most current NOTICE in effect.
- You have the right to receive a copy of our most current NOTICE in effect. If you have not yet received a copy of our current NOTICE, please ask your provider and we will provide you with a copy.
- If you have any questions, concerns or complaints about the NOTICE or your clinical information, please contact **Linda Stead, LCSW** at this office at **541-772-5992**.

**DIRECTIONS TO
HEARTLINE MENTAL HEALTH PRACTITIONERS, LLP**

Linda S. Stead, LCSW
Susan Wrona, PMHNP
Kevan Olson, PMHNP

255 W. Stewart Ave, Ste 101
Medford, OR 97501

Phone: (541)772-5992
Fax: (541)772-5996



From South Medford 1-5 exit: You may take either direction – Barnett Rd or City Center direction. Both the north bound and southbound traffic exits put you onto Garfield St.

If you take the Barnett Rd option, follow Garfield to Barnett Rd. and then turn left on Barnett and go over the freeway overpass. Turn left at the 2nd stop light onto Riverside/Hwy 99. Go 1 block and turn right on W. Stewart Ave. Continue on for approximately 2 blocks.

If you take the City Center option, follow along Garfield St. and at the first stop light turn right onto Center Dr. Follow Center Dr. until it ends at E. Stewart Ave. Turn left onto E. Stewart and proceed around the curve to Riverside/Hwy. 99.

Continue across Riverside and over the railroad tracks. You are now on W. Stewart Ave. Our office is about 2 blocks down on the left side just before the Human Bean coffee kiosk and the stop light at Holly Street. Turn left into the parking lot beside our office.