



Necessary Information

Name: _____ Date of Birth: _____

Address: _____

City/State/Zip: _____

Home Phone/VP: _____ Work: _____

May I contact you at home? (Check one) Yes No At work? Yes No

E-mail or Pager: _____

Age: _____ Gender: _____ Social Security Number*: _____

Emergency Contact: _____

Brief Health History

Physician's Name: _____

Physician's phone: _____ Date of Most Recent Exam: _____

Are you being treated for a medical illness? Yes No If yes, please list illness below:

Are you currently taking any medications? Yes No If yes, please list them below:

Do you have any allergies? Yes No If yes, please list below:

Have you been in therapy before? Yes No

If yes, was the experience helpful? Yes No

How were you referred to my service? _____

If you are under the age of 18, please fill out the reverse side of this form.

**SSN is necessary for billing purposes only*

If you are a minor under 14 years of age or if a parent is responsible for your bill:

Parent's Name: _____

Parent's Address: _____

City/State/Zip: _____

Telephone #'s _____

I have reviewed this document for my child and I attest, if applicable, that I am the custodial parent. I have reviewed and signed a *Consent to Treatment* form for my child or have provided consent by the signature of the other parent.

Signature of Parent

Printed Name of Parent

____/____/____
Date

Parent's Name: _____

Parent's Address: _____

City/State/Zip: _____

Telephone #'s _____

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Signature of Parent

Printed Name of Parent

____/____/____
Date



Using Insurance

What You Need to Know

Please know that my office submits insurance claims electronically through a professional practice management billing service known as Secure Connect. This will include the information you submit below as well as additional information required for billing purposes such as, but not limited to, date of service, applicable diagnosis code(s), and billing codes for the service rendered. I must have your express permission to bill your insurance company for any service provided and to participate in any quality or utilization review that they might require. You should be aware that your insurance company may review your file at any time.

If you do not wish my office to bill your insurance for you, please do not complete this form.

Please be aware that unless otherwise explicitly stated, you remain responsible for charges incurred.

The undersigned hereby authorizes the release of information relating to all claims for benefits submitted on behalf of myself and/or my dependents. I further expressly agree and acknowledge that my signature on this document authorizes Mr. O'Dell to submit claims for benefits, for services rendered or for services to be rendered, without obtaining my signature on each and every claim to be submitted for me and/or my dependents. This signature will bind me as though I have personally signed the particular claim.

Name of Insured: _____ Insured date of birth: ____/____/____

Address of Insured: _____ City, State & Zip _____

Relationship of client to insured: _____ Employer of insured: _____

Insurance Company: _____ Insurance Phone Number: _____

Insurance Company Address: _____ City, State, Zip _____

Insurance ID Number: _____ Group Number: _____

<Signature>

_____/_____/_____
<Date>

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Informed Consent for Treatment

Why Informed Consent?

Psychotherapy is not an exact science. It is important for you to know something about the kind of treatment you will experience, expectations about fees, confidentiality and the process for dealing with any concerns about your treatment.

What Is Psychotherapy?

Psychotherapy is often thought of as a process in which uncomfortable areas of your life are identified and explored. During this process, various options for change will be discussed, exercises or activities will be suggested, and you may come to a greater understanding of how to live as you wish. In order to be successful, psychotherapy requires an investment of your time and energy and the process has both benefits and risks. Occasionally, individuals go through periods during treatment that result in emotional discomfort, changes in relationships, or temporary worsening of particular symptoms. These should subside as the work progresses and as you become clearer on how to promote your own emotional well-being.

My particular style of psychotherapy is based on the understanding that our beliefs shape our experience. Talking about your experiences and feelings is one of many ways to explore patterns which arise and which may be interfering with your current life satisfaction. Psychotherapy is often an experience of re-learning, one in which old beliefs, values and attitudes can be examined to see if they are truly helping you live as you wish.

You may be asked to do exercises or activities to help you be in touch with how your feelings and beliefs are working. Please remember that you have the right to refuse any particular therapeutic technique or to request a change in your treatment; however, we must be able to talk about your current experience, thoughts and feelings.

Therapy has no specific beginning or ending and it is not useful to estimate how long it will last as it will depend on the work you do outside the therapeutic hour. As one particular issue resolves, another may arise. These other issues may need attention, or they may not. We will continually review your desire for change, devise techniques of healing specific to you, and discuss your level of comfort with how therapy is going.

Confidentiality

Any information discussed in the course of treatment and/or evaluation will be held in strict confidence and will not be communicated to any person or agency without your written permission. Additionally, it is my policy to respect your right to privacy; therefore, I will *not* acknowledge you outside the therapeutic setting without express consent to do so.

There are, however, limitations and exclusions to confidentiality. These include (1) statements that you might make of intention to commit suicide, (2) statements that you might make of intention to commit homicide with respect to named or readily identifiable persons, (3) statements indicating that you have committed or intend to commit acts of child abuse, (4) statements indicating that you have committed or intend to commit acts of abuse against the elderly, and (5) information that would facilitate your treatment in a life threatening, medical emergency.

Should our therapy be terminated prematurely due to the unlikely event of my death, your file will be open to Kay Gage, MS, RN, or another associated clinician who would work with you to arrange continuation of treatment.

SIGNATURE REQUIRED ON REVERSE OF FORM

Concerns About Therapy

If you have questions or concerns about the conduct of your therapy, please talk with me as soon as the question arises or the concern is experienced. If discussion does not resolve the concern or if you feel that civil or criminal damages have occurred, please contact the Oregon State Board of Clinical Social Workers at 3218 Pringle Road SE Suite 40, Salem, Oregon 97302-6310. My Oregon license number is 2226. My board certification is through the American Board of Examiners in Clinical Social Work, 27 Congress St., Suite 211, Salem, Massachusetts, 01970.

My Diplomate number is 27765.

Availability

I am generally available by phone Monday through Friday from 10:00 am until 6:00 p.m. Voice mail is paged to my attention and calls are generally returned within 24 hours. If you have an urgent need after my general office hours, please follow the voice mail instructions for paging. **However, if you feel you cannot wait for a return call**, please call your local crisis center. In Salem, the telephone number is (503) 585-4949; in the Portland metropolitan area, the telephone number is (503) 988-4888. Each center is staffed 24 hours a day, 7 days a week.

Fees

My usual and customary fee is \$150.00 for an evaluative session, \$110.00 for individual psychotherapy, and \$125.00 for family or “conjoint” therapy. If you are using insurance to assist in the cost of treatment*, it is your responsibility to check with your insurance company or managed health care organization to determine your coverage for mental health services. I will bill applicable insurance, employee assistance and managed health care organizations as a courtesy; however, you are ultimately responsible for the cost of services. You will be charged for missed appointments not cancelled 24 hours in advance and, for these appointments, insurance will not be billed

Should you have questions or concerns about fees please discuss them with me as soon as they occur.

Payment is expected at the time services are rendered unless prior arrangements are made. There is a \$7.50 monthly charge for any account outstanding. Accounts more than 90 days in arrears are subject to collections with Western Credit and Collection Services, Inc or Portland, Oregon.

Request and Consent for Treatment

I hereby request and agree to engage in a course of psychotherapy with Steven “Bo” O’Dell, LCSW. I understand that I will jointly decide about the goals and the nature of my treatment. I understand that I can revoke this consent at any time. I have read on-line, requested a copy, or have otherwise reviewed and understood the office policy on privacy and confidentiality.

By my signature I indicate that I have read and understood the above material.

Signature: _____

Printed Name: _____ Date: ____/____/____

* please see additional printed information about *Using Insurance; What You Need to Know*



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Intake and Assessment Client Form

Getting to know more about the problem or problems that have brought you (or your child) here is an important step in starting therapy. Please take a few minutes to complete the questions below and the pre-therapy testing on the pages that follow.

Please briefly describe how you perceive yourself:

How do you think other people perceive you?

If you are having any of the following symptoms, please check:

- | | | | |
|-------------------------------------------|--------------------------------------------|------------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> Depression | <input type="checkbox"/> Extreme Sadness | <input type="checkbox"/> Trouble Concentrating | <input type="checkbox"/> Lack of Energy |
| <input type="checkbox"/> Memory Problems | <input type="checkbox"/> Change in Eating | <input type="checkbox"/> Perfectionism | <input type="checkbox"/> Feeling of Extreme Happiness |
| <input type="checkbox"/> Low Self-esteem | <input type="checkbox"/> Lack of Enjoyment | <input type="checkbox"/> Feeling Fearful | <input type="checkbox"/> Trouble Performing Your Job |
| <input type="checkbox"/> Physical Pain | <input type="checkbox"/> Feeling Tearful | <input type="checkbox"/> Problems with Anger | <input type="checkbox"/> Obsessions or Compulsions |
| <input type="checkbox"/> Feeling Hopeless | <input type="checkbox"/> Change in Sleep | <input type="checkbox"/> Weight Change | <input type="checkbox"/> Thoughts About Suicide |
| <input type="checkbox"/> Feeling Stressed | <input type="checkbox"/> Feeling Irritable | <input type="checkbox"/> Feeling Nervous | <input type="checkbox"/> Change in Sexual Interest/Desire |
| <input type="checkbox"/> Sudden Panic | <input type="checkbox"/> Fatigue | <input type="checkbox"/> Feeling Violent | <input type="checkbox"/> Thoughts of Homicide |

Was there any event or activity that happened just before you noticed these things?

- Do you use tobacco in any form? Yes No About how much? _____
- Do you use alcohol (include social use)? Yes No About how much? _____
- Do you use caffeine (including cola drinks) Yes No About how much? _____
- How much sleep do you get on average? _____ Is that enough? No Yes
- Do you dream? Yes No

<Your Name>

THERAPY GOALS

What are your reasons for seeking help at this time? Please be specific.

How is this affecting your life on a day-to-day basis?

Are there any specific situations where this shows up for you?

What is your desired outcome for therapy? Include a list of therapy goals.

Please list 3 experiences that made you feel alive.



Pre-Therapy Testing*

Instructions: This packet contains three self-assessment tests which measure depression, anxiety, and satisfaction in personal relationships, respectively. Please complete each one and bring them to your therapist at the initial evaluation. They will only require a few minutes.

Your therapist may ask you to take these tests once a week throughout the therapy. If so, you will be given a fresh set of tests along with answer sheets and scoring keys at your first session. The tests are easy to complete and can help you and your therapist accurately track your progress.

Your therapist may also ask you to complete a fourth test called the Empathy Scale between sessions. This will give you a chance to indicate what you liked and disliked about your most recent session. This information can be invaluable, and will often make the therapy much more meaningful and rewarding.



Burns Depression Checklist *

Instructions:

Place a check in the box to the right of each of the 15 symptoms to indicate how much of this type of feeling has been bothering you in the past several days.

| | 0 – NOT AT ALL | 1 – SOMEWHAT | 2 – MODERATELY | 3 – A LOT |
|--------------------------------------------------------------------------------------------------|----------------|--------------|----------------|-----------|
| 1. Sadness: Have you been feeling sad or down in the dumps? | | | | |
| 2. Discouragement: Does the future look bleak or hopeless? | | | | |
| 3. Low self-esteem: Do you feel worthless or think of yourself as a loser? | | | | |
| 4. Inferiority: Do you feel inadequate or inferior to others? | | | | |
| 5. Guilt: Do you get self-critical and blame yourself? | | | | |
| 6. Indecisiveness: Is it hard to make decisions? | | | | |
| 7. Irritability and Frustration: Have you been feeling angry or resentful? | | | | |
| 8. Loss of interest in life: Have you lost interest in your career, hobbies, family, or friends? | | | | |
| 9. Loss of motivation: Do you feel overwhelmed and have to push yourself hard to do things? | | | | |
| 10. Poor self-image: Do you think you're looking old or unattractive? | | | | |
| 11. Appetite changes: have you lost your appetite? Or, do you overeat compulsively? | | | | |
| 12. Sleep changes: Is it hard to get a good night's sleep? Are you tired and sleeping too much? | | | | |
| 13. Loss of libido: Have you lost your interest in sex? | | | | |
| 14. Hypochondriasis: Do you worry a lot about your health? | | | | |
| 15. Suicidal impulses: Do you think life is not worth living or think you'd be better off dead? | | | | |
| Total Score on items #1 - #15 → | | | | |

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with permission by the author, David Burns, MD



*Burns Anxiety Inventory **

Instructions: Place a check in the box to the right of each of the 33 symptoms to indicate how much of this type of feeling has been bothering you in the past several days.

CATEGORY 1: ANXIOUS FEELINGS

1. Anxiety, nervousness, worry or fear
2. Feeling things around you are strange or foggy
3. Feeling detached from all or part of your body
4. Sudden, unexpected panic spells
5. Apprehension or a sense of impending doom
6. Feeling tense, stress, "uptight", or on edge

CATEGORY II: ANXIOUS THOUGHTS

7. Difficulty concentrating
8. Racing thoughts
9. Frightening fantasies or dreams
10. Feeling on the verge of losing control
11. Fears of cracking up or going crazy
12. Fears of fainting or passing out
13. Fears of illnesses, heart attacks, or dying
14. Fears of looking foolish in front of others
15. Fears of being alone, isolated, or abandoned
16. Fears of criticism or disapproval
17. Fears that something terrible will happen

| | 0 – NOT AT ALL | 1 – SOMEWHAT | 2 – MODERATELY | 3 – A LOT |
|--|----------------|--------------|----------------|-----------|
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Burns Anxiety Inventory *

Instructions: Place a check in the box to the right of each of the 33 symptoms to indicate how much of this type of feeling has been bothering you in the past several days.

CATEGORY II: PHYSICAL SYMPTOMS

| | 0 – NOT AT ALL | 1 – SOMEWHAT | 2 – MODERATELY | 3 – A LOT |
|-------------------------------------------------|----------------|--------------|----------------|-----------|
| 18. Skipping, racing, or pounding of the heart | | | | |
| 19. Pain, pressure or tightness in the chest | | | | |
| 20. Tingling or numbness in the toes or fingers | | | | |
| 21. Butterflies or discomfort in the stomach | | | | |
| 22. Constipation or diarrhea | | | | |
| 23. Restlessness or jumpiness | | | | |
| 24. Tight, tense muscles | | | | |
| 25. Sweating not brought on by heat | | | | |
| 26. A lump in the throat | | | | |
| 27. Trembling or shaking | | | | |
| 28. Rubbery or “jelly” legs | | | | |
| 29. Feeling dizzy, lightheaded or off balance | | | | |
| 30. Choking or smothering sensations | | | | |
| 31. Headaches or pains in the neck or back | | | | |
| 32. Hot flashes or cold chills | | | | |
| 33. Feeling tired, weak, or easily exhausted | | | | |
| Total Score on items #1 - #33 → | | | | |

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Relationship Satisfaction Scale *

Instructions: Place a check in the box to the right of each category that best describes the amount of satisfaction you feel in your closest relationship.

| | 0 – VERY DISSATISFIED | 1 – MODERATLY DISSATISFIED | 2 – SLIGHTLY DISSATISFIED | 3 – NEUTRAL | 4 – SLIGHTLY SATISFIED | 5 – MODERATLY SATISFIED | 6 – VERY SATISFIED |
|------------------------------------------------------------------|-----------------------|----------------------------|---------------------------|-------------|------------------------|-------------------------|--------------------|
| 1. Communication and openness | | | | | | | |
| 2. Resolving conflicts and arguments | | | | | | | |
| 3. Degree of affection and caring | | | | | | | |
| 4. Intimacy and closeness | | | | | | | |
| 5. Satisfaction with your role in the relationship | | | | | | | |
| 6. Satisfaction with the other person’s role in the relationship | | | | | | | |
| 7. Overall satisfaction with your relationship | | | | | | | |
| Total Score on items #1 - #7 → | | | | | | | |

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