

BIOPSYCHOSOCIAL INTAKE ASSESSMENT & CLIENT INFORMATION - ADULT

Demographic Information

****Please include a picture of your Driver's License****

Name: _____ Date: _____

DOB: _____ Age: _____ Gender: _____ Birthplace: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number(s): _____

Is it ok to leave a voicemail? YES NO

Email: _____

Would you like to receive email communication? YES NO

Is it ok to send something in the mail? YES NO

How were you introduced to us? _____

** Please complete below for additional client*

Name: _____

DOB: _____ Age: _____ Gender: _____ Birthplace: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number(s): _____

Is it ok to leave a voicemail? YES NO

Email: _____

Would you like to receive email communication? YES NO

How Have We Come to Meet?

MRTherapy, LLC*Michele Ramey, LMFT*256-801-3139

admin@mrtherapy.net

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What are the 3 biggest concerns you have right now? How long have each been going on? Put them in order of importance:

1. _____
2. _____
3. _____

What do you think those that care about you would say their concern(s) is/are in regards to you?

What solutions (helpful or unhelpful) have you tried to resolve your concerns?

Have you had therapy in the past? If so, with whom and when? What reasons did you attend therapy for? Please share with us about your experience. What was helpful? unhelpful?

Change is Coming...

What are your expectations from therapy? What are your expectations of the therapist?

Looking into the future, how will you know that our work and time together has been worth it? List concrete changes you will see:

What other things would you like to see change in your life (family, career, health, relationships, etc.)?

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Do you foresee any obstacles to achieving your goals or the desired changes?

How long do you think therapy will need to last to achieve your goals? Write down a target date:

List 5 strengths about yourself or that others say about you, give examples of each:

1. _____
2. _____
3. _____
4. _____
5. _____

Is there anyone that you would like to be a part of your sessions or think may be helpful to be part of sessions either now or in the future?

Medical & Wellness Information

What do you do for wellness (i.e. healthy food choices, exercise, limits on TV/electronics/work, managing stress, family time, leisure, etc.)? Give examples:

How do you achieve balance in your life?

Have you ever received psychiatric services before? YES NO

If yes, how long ago, with whom, for what, medications prescribed and results:

Do you have any allergies (food, environmental, medicinal, animal, etc.)

Do you have any current or past medical issues, hospitalizations, accidents, injuries or surgeries? If yes, what?

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Is there a family history of the above medical issues/concerns?

Are you presently under a physician's/psychiatrist's care? If so, for what reason?

Is there anyone in your life that is currently dealing with a medical issue that you are concerned about? If so, whom, for what?

In the past year, have there been any changes in your life? (i.e.: moves, appetite, sleep, health, family, overall functioning)?

List any medications (over-the-counter & prescribed), nutritional or herbal supplements, or alternative treatments (acupuncture, chiropractic, etc.) you are taking/doing and the reasons:

Important Questions We Must Ask

Have you ever had thoughts of killing yourself? YES NO
If yes, please explain:

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Have you ever planned on killing yourself? YES NO
If yes, please explain:

Have you ever attempted to kill yourself? YES NO
If yes, please explain:

Has anyone in your family or close to you died by suicide? YES NO
If yes, please explain:

Have you ever felt you wanted to seriously harm or kill someone else? YES NO
If yes, please explain:

Do you have weapons in your home or access to weapons? YES NO
If yes, who has access to them and what are the safety protocols around them?

Is there any history or presence of abuse or violence? YES NO
If so, please explain:

Are you currently using any illegal drugs or prescription medications in a way other than was prescribed, or is the reason you are seeking therapy services substance related?

Have you ever witnessed or experienced a trauma? Do you have recurring nightmares, flashbacks, or do you avoid anything that is uncomfortable or painful? If so, please explain:

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Do you have currently legal issues or is the reason you are seeking therapy related to a court order? If so, please explain?

Career/Job, Recreation and Leisure

What is your current occupation? How would you describe your fulfillment of your job/career?

What is your highest level of education completed and field of study?

What do you enjoy doing during your free/leisure time?

Intimate Relationships

If you are currently in a relationship, describe your relationship:

How would you describe your communication?

How would you describe intimacy and/or sex in your relationship?

* If you are in a relationship answer the following regarding your relationship:

1. Like _____
2. Dislike _____

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- 3. Not enough of _____
- 4. Too much of _____
- 5. Ideal relationship _____

Understanding Your Family & Influences

** Space left for therapist to draw family tree (genogram)*

Parent's marital status:

Married Divorced Never Married Separated Domestic Partners Widowed

Please describe your relationship with your parents:

How would you describe your upbringing?

Who lives with you currently?

Do you have any pets? If yes, names, types and relationship to each pet:

Describe your relationship with the following:

Mother:

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Father:

Mother's Significant Other:

Father's Significant Other:

Siblings: Age, Name and Sex:

1. Sibling 1

2. Sibling 2

3. Sibling 3

Children:

1. Child 1

2. Child 2

3. Child 3

Significant Other/Spouse:

Relationships

Describe your relationship with your friends:

Who would you say your support system is (people, organizations, or affiliations)?

Do you belong to any religious or spiritual groups?

YES

NO

If yes, what is your level of involvement?

How do your religious or spiritual beliefs/practices influence your life?

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Please list anything else that is important for us to know about you that would assist us in working with you to achieve your desired results:

TERAPY CONSENT, POLICIES, & AGREEMENT

PART I: THERAPEUTIC PROCESS

BENEFITS/OUTCOMES: The therapeutic process seeks to meet goals established by all persons involved, usually revolving around a specific complaint(s). Participating in therapy may include benefits such as the resolution of presenting problems as well as improved intrapersonal and interpersonal relationships. The therapeutic process may reduce distress, enhance stress management, and increase one's ability to cope with problems related to work, family, personal, relational, etc. Participating in therapy can lead to greater understanding of personal and relational goals and values. This can increase relational harmony and lead to greater happiness. Progress will be assessed on a regular basis and feedback from clients will be elicited to ensure the most effective therapeutic services are provided. There can be no guarantees made regarding the ultimate outcome of therapy.

EXPECTATIONS: In order for clients to reach their therapeutic goals, it is essential they complete tasks assigned between sessions. Therapy is not a quick fix. It takes time and effort, and therefore, may move slower than your expectations. During the therapy process, we identify goals, review progress, and modify the treatment plan as needed. According to the parenting plan, biological parents who have decision making for non-medical services are expected for the intake session prior to scheduling any minors. Parents are also required to engage in Parenting sessions every 3-4 sessions during treatment.

RISKS: In working to achieve therapeutic benefits, clients must take action to achieve desired results. Although change is inevitable, it can be uncomfortable at times. Resolving unpleasant events and making changes in relationship patterns may arouse unexpected emotional reactions. Seeking to resolve problems can similarly lead to discomfort as well as relational changes that may not be originally intended. We will work collaboratively toward a desirable outcome; however, it is possible that the goals of therapy may not be reached.

STRUCTURE OF THERAPY:

- **Intake Phase** – During the first session, therapeutic process, structure, policies and procedures will be discussed. We will also explore your experiences surrounding the presenting problem(s).
- **Assessment Phase** – The initial evaluation may last 2-4 sessions. During this assessment phase, I will be getting to know you. I will ask questions to gain an understanding of your worldview, strengths, concerns, needs, relationship dynamics, etc. During this relationship building process, I will be gathering a lot of information to aid in the therapeutic approach best suited for you

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needs and goals. If it is determined that I am not the best fit for your therapeutic needs, I will provide referrals for more appropriate treatment.

- **Goal Development/Treatment Planning** – After gathering background information, we will collaborate to identify your therapeutic goals. If therapy is court ordered, goals will encompass your goals and court ordered treatment goals, based on documentation from the court (please provide any court documents). Once each goal is reached, we will sign off on each goal and you will receive a copy.
- **Intervention Phase** – This phase occurs anywhere from session two until graduation/discharge/termination. Each client must actively participate in therapy sessions, utilize solutions discussed, and complete assignments between sessions. Progress will be reviewed, and goals adjusted as needed.
- **Graduation/Discharge/Termination** – As you progress and get closer to completing goals, we will collaboratively discuss a transition plan for graduation/discharge/termination.

LENGTH OF THERAPY: Therapy sessions are typically weekly or biweekly for 50 minutes depending upon the nature of the presenting challenges. The 60–90-minute sessions are available upon request at an increased rate. Brainspotting therapy sessions are weekly or biweekly for 60+ minutes. Intensives are 1.5-3 hours of therapy weekly or bi-monthly. If you arrive late or do not have the paperwork completed, in person or via telehealth, the session will be shorter as we do end at the scheduled time. It is difficult to initially predict how many sessions will be needed. We will collaboratively discuss from session to session what the next steps are and how often therapy sessions will occur.

APPOINTMENTS AND POLICIES:

Consistency Policy:

Engaging in mental health therapeutic services is an investment in your total well-being and is most effective and life-changing with consistency and commitment. Your therapeutic hour is held exclusively for them, and to maintain therapeutic consistency sessions can be rescheduled per this office's same week reschedule policy. You may reschedule your session within the same 4-day business week (Sunday through Wednesday). For example, if the session is on Tuesday you can reschedule between Wednesday of the same week. A reschedule request must be made 24 hours in advance within the Sunday-Wednesday time frame. Reschedule requests must be in writing by either text or email. This office is closed Thursday-Saturday, voicemails, emails, and text messages may not be checked until the following Sunday. Thus, reschedule requests must be made between Sunday- Wednesday. For example, a Sunday's session reschedule request must be made on or before the previous Wednesday. There will be every attempt to find an appointment time to accommodate your reschedule request, but it cannot guarantee that space is available for your requested reschedule. Without the 24 hours in advance written reschedule request and new appointment time you will be responsible for the full session fee. Your card on file will be charged on the same business day of your missed session. Failure to arrive on time to a session means you will still be charged for the full session fee regardless of your arrival time to the session. Keep in mind this office is not responsible to remind the client of the consistency policy before charging for missed sessions or no-shows. _____ Initial

Session Cancellation Waiver:

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You will receive two waiver cancellations per year free of charge of no show or cancelation no reschedule fees. You may use these at any time. If the clinician has to cancel a session with you: you will not be charged. If you find you are in need of an extended break from therapy due to unplanned circumstances or other situations that arise it will be discussed on an individual basis at the clinician's discretion. If your break is longer than 2 weeks, they will have the option to be removed from the schedule and reschedule the week of your return. _____ Initial

Psychotherapy is a uniquely personal service; therefore, consultations may be briefly interrupted. I may periodically take time off for vacation, seminars, and/or become ill. Attempts will be made to give adequate notice of these events. If I am unable to contact you directly, a colleague may contact you to cancel or reschedule an appointment. _____ Initial

FEES: The fee for each 50-minute therapy session is \$150-200. Intensives start at \$250. Payment is due at the time of service. Acceptable forms of payment are credit/debit card, which has a \$6-10 processing fee. Exact-amount cash or check (insufficient-funds checks will be returned upon full payment of the original amount plus \$25 for any returned check) are permitted if mailed and received prior to the appointment. Some HSA credit cards are accepted. If your card is denied be prepared to have alternative payment available otherwise you will be charged for the full session as it will be accounted for a late cancellation appointment within 24 hours due to insufficient payment. In the event that a scheduled appointment time is missed or cancelled less than 24 hours, please refer to the "Appointments and Policies" policy above. _____ Initial

The clinician reserves the right to terminate the counseling relationship if more than 3 sessions are missed without proper notification. _____ Initial

In the case we need to collect unpaid payments, a collection agency may be utilized. _____ Initial

The clinician charges her hourly rate in quarter hours for phone calls over 10 minutes in length, email correspondence, reading assessments or evaluations, writing assessments or letters, and collaborating with necessary professionals (with your permission) for continuity of care. All costs for services outside of session will be billed. ***I understand that each time I schedule an appointment with Michele Ramey Therapy, I am entering into a contract for professional time and services with my therapist. A credit card on file for payment is required. Credit card information is stored in a triple encrypted merchant services system for my protection. Payment is requested at the beginning of the session. All major credit cards are accepted. Checks should be made out to *Michele Ramey*. If payment is not made at the time of the session, I give permission for Michele Ramey of MRTherapy, LLC to charge my credit card on file for counseling session fees. I give permission for the credit card on file to be charged for missed session fees, phone consultations and additional counseling services. _____ **Initial** ***

In-home/on-site, and telehealth therapy services offer people comfort and flexibility. They are offered at a two-hour rate (i.e. your session fee times two). For on-site therapy, cost for travel is based on the regular hourly rate and is determined by the time it takes to travel from the office to the client's home or requested place of session and return trip. Time is configured by tracking and logging actual time via

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internet sites such as Google, Bing, Mapquest, etc. to determine travel time. If the location is takes longer than 30minutes to and 30 minutes from location, an additional fee may be required.

TRIAL, COURT ORDERED APPEARANCES, LITIGATION: Michele Ramey, LMFT is not a custody evaluator and cannot make any recommendations on custody. Due to the sensitive nature of divorce and all potential issues that may rise I have specific policies in place. Rarely, but on occasion, a court will order a therapist to testify, be deposed, or appear in court for a matter relating to your treatment or case. In order to protect your confidentiality, I strongly suggest not being involved in the court. If I get called into court by you or your attorney, or as a subpoena, I will testify as a fact witness only, you will be charged a fee of \$2500 prior to any work being done. Court related professional time, including but not limited to court letters, depositions, or communication to lawyers, is billable at \$300 billable at 15-minute increments to include travel time, court time, preparing documents, etc. Checks, cash, and all major credit cards are acceptable to pay for hourly fees as well.

COPIES OF MEDICAL RECORDS: Should you request a copy of your medical records; the cost is \$2.50 per page. Court medical records do not apply, please see Financial Fee Agreement for information on court fees. Payment for your medical records will be due prior or upon receipt and can be picked up at the office. Please allow at least 1 week to prepare medical records.

TELE-HEALTH AND YOUR CONFIDENTIALITY: In this age of electronic communication, we are required to be very clear with our clients as to the nature of the risks and benefits of “tele-health.” Any time you and we communicate in a way that cannot be guaranteed as secure in maintaining your confidentiality, there is a risk involved. There are limits to your confidentiality when participating in any form of “telehealth.” You are required to disclose the to the therapist your location. At each session, we will also ensure the safety of the scene by doing a “spin around” which means that you will take the computer and show me the room allowing for plausible deniability and I will do the same. Tele-health is defined by the U.S. Department of Health and Human Services as: The use of electronic information and telecommunications technologies to support distance clinical health care, patient and professional health-related education, public health, and health administration. Technologies include videoconferencing, the internet, store-and-forward imaging, streaming media, and terrestrial and wireless communications. In order to make every effort to keep secure the confidentiality of your Private Health Information please note the following specific policies:

PHONE CONTACTS AND EMERGENCIES: Cell phone communications cannot be guaranteed as a confidential form of communication. We make every effort to ensure our phone conversations are held confidential within our ability to do so. When we have a conversation via cell phone you are acknowledging and accepting the risk and limits of your confidentiality. If you don’t wish to take this risk, we advise you only use phone communication to schedule an appointment in person to discuss sensitive information as part of your Private Health Information. Phone therapy sessions are available with some of our therapists depending on individual needs.

Office hours are from Sun. - Wed. 9a-5p CST. If you need to contact the clinician for any reason, please call 256-801-3139, please leave a voicemail, and a return call will be made as soon as possible.

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MRTherapy, LLC is not an emergency services agency. In case of an emergency, you can access emergency assistance by calling the National Suicide Prevention Lifeline at 1-800-273-8255. The Crisis Line is staffed with mental health professionals trained to provide free phone counseling and support to anyone experiencing a crisis. If either you or someone else is in danger of being harmed, dial 911 or go to the nearest Emergency Room. Please visit <https://www.alabamapublichealth.gov/suicide/crisis-numbers.html> if you live in Alabama. Mobile Crisis Birmingham, AL 205-323-7777; Mobile Crisis Montgomery, AL 1-855-634-HOPE (4673); Mobile Crisis Huntsville, AL 256-716-1000

PART II: CONFIDENTIALITY:

Anything said in therapy is confidential and may not be revealed to a third party without written authorization, *except* for the following limitations:

- **Child Abuse:** Child abuse and/or neglect, which include but are not limited to domestic violence in the presence of a child, child on child sexual acting out/abuse, physical abuse, etc. If you reveal information about child abuse or child neglect, I am required by law to report this to the appropriate authority.
- **Vulnerable Adult Abuse:** Vulnerable adult abuse or neglect. If information is revealed about vulnerable adult or elder abuse, I am required by law to report this to the appropriate authority.
- **Self-Harm:** Threats, plans or attempts to harm oneself. I am permitted to take steps to protect the client's safety, which may include disclosure of confidential information.
- **Harm to Others:** Threats regarding harm to another person. If you threaten bodily harm or death to another person, I am required by law to report this to the appropriate authority.
- **Court Orders & Legal Issued Subpoenas:** If I receive a subpoena for your records, I will contact you so you may take whatever steps you deem necessary to prevent the release of your confidential information. I will contact you twice by phone. If I cannot get in touch with you by phone, I will send you written correspondence. If a court of law issues a legitimate court order, I am required by law to provide the information specifically described in the order. Despite any attempts to contact you and keep your records confidential, I am required to comply with a court order.
- **Law Enforcement and Public health:** A public health authority that is authorized by law to collect or receive such information for the purpose of preventing or controlling disease, injury, or disability; to a health oversight agency for oversight activities authorized by law, including audits; civil, administrative, or criminal investigations; inspections; licensure or disciplinary actions; civil, administrative, or criminal proceedings or action; limited information (such as name, address DOB, dates of treatment, etc.) to a law enforcement official for the purpose of identifying or locating a suspect, fugitive, material witness, or missing person; and information that your clinician believes in good faith establishes that a crime has been committed on the premises.
- **Governmental Oversight Activities:** To an appropriate agency information directly relating to the receipt of health care, claim for public benefits related to mental health, or qualification for, or receipt of, public benefits or services when your mental health is integral to the claim for benefits or services, or for specialized government functions such as fitness for military duties, eligibility for VA benefits, and national security and intelligence.

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- **Upon Your Death**: To a law enforcement official for the purpose of alerting of your death if there is a suspicion that such death may have resulted from criminal conduct; to a coroner or medical examiner for the purpose of identifying a deceased person, determining a cause of death, or other duties as authorized by law.
- **Victim of a Crime**: Limited information, in response to a law enforcement official's request for information about an you if you are suspected to be a victim of a crime; however, except in limited circumstances, we will attempt to get your permission to release information first.
- **Court Ordered Therapy**: If therapy is court ordered, the court may request records or documentation of participation in services. I will discuss the information and/or documentation with you in session prior to sending it to the court.
- **Written Request**: Clients must sign a release of information form before any information may be sent to a third party. A summary of visits may be given in lieu of actual “psychotherapy/process notes”, except if the third party is part of the medical team. If therapy sessions involve more than one person, each person over the age of 18 MUST sign the release of information before information is released.
- **Fee Disputes**: In the case of a credit card dispute, I reserve the right to provide the necessary documentation (i.e., your signature on the “Therapy Consent & Agreement” that covers the cancellation policy to your bank or credit card company should a dispute of a charge occur. If there is a financial balance on account, a bill will be sent to the home address on the intake form unless otherwise noted.
- **Couples Counseling & “No Secret” Policy**: When working with couples, all laws of confidentiality exist. I request that neither partner attempt to triangulate me into keeping a “secret” that is detrimental to the couple's therapy goal. If one partner requests that I keep a “secret” in confidence, I may choose to end the therapeutic relationship and give referrals for other therapists as our work and your goals then become counter-productive. However, if one party requests a copy of couples or family therapy records in which they participated, an authorization from each participant (or their representatives and/or guardians) in the sessions before the records can be released.
- **Dual Relationships & Public**: Our relationship is strictly professional. In order to preserve this relationship, it is imperative that there is no relationship outside of the counseling relationship (i.e.: social, business, or friendship). If we run into each other in a public setting, I will not acknowledge you as this would jeopardize confidentiality. If you were to acknowledge me, your confidentiality could be at risk.
- **Social Media**: No friend requests on our personal social media outlets (Facebook, LinkedIn, Pinterest, Instagram, Twitter, etc.) will be accepted from current or former clients. If you choose to comment on our professional social media pages or posts, you do so at your own risk and may breach confidentiality. I cannot be held liable if someone identifies you as a client. Posts and information on social media are meant to be educational and should not replace therapy. Please do not contact me through any social media site or platform. They are not confidential, nor are they monitored, and may become part of medical record.
- **Policy on Confidentiality for Child Clients**: In working with child clients, though legally the parent(s) or legal guardian(s) of child clients age-appropriate privacy is essential relationship and setting for a child’s therapy, we do honor what the child does or says in our sessions as

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confidential while providing parents and/or legal guardians summaries of treatment goals, plan and progress as well as recommendations. _____ Initial

- **Treatment of Minors in Counseling:** Individuals (under age 18) in therapy are seen only with permission from his or her parents or guardian. A child will be seen only with written permission and/or acknowledgement of both parents. Children of divorce must have signed permission from BOTH parents to attend counseling. Participation from both parents, regardless of the custodial arrangement, is the preferred practice of this office. **A COPY OF THE PARENTING PLAN MUST BE INCLUDED IN THE CLIENT FILE INDICATING THE CUSTODIAL ARRANGEMENT PRIOR TO THE FIRST SESSION WITH THE MINOR CHILD.** In any custodial arrangement, both parents have the right to contact the therapist and inquire regarding their child's treatment progress (unless otherwise indicated by the courts). _____ Initial
- **Age of Majority:**
 - 1) Once a client turns 18, they are no longer considered a minor for purposes of mental health treatment. At that time, they will be required to sign all new consent to treatment forms and will be solely responsible for their treatment. _____ Initial
 - 2) In the state of Alabama, Section 22-8-4 states as follows: Any minor who is 14 years of age or older, or has graduated from high school, or is married, or having been married is divorced or is pregnant may give effective consent to any legally authorized medical, dental, health or mental health services for himself or herself, and the consent of no other person shall be necessary. _____ Initial
- **Electronic Communication:** If you need to contact me outside of our sessions, please do so via phone.
 - **Clients often use text or email as a convenient way to communicate in their personal lives. However, texting introduces unique challenges into the therapist–client relationship.** Texting is not a substitute for sessions. **Texting is not confidential.** Phones can be lost or stolen. DO NOT communicate sensitive information over text. The identity of the person texting is unknown as someone else may have possession of the client's phone.
 - **Do not use email for emergencies.** In the case of an emergency call 911, your local emergency hotline or go to the nearest emergency room. Additionally, e-mail is not a substitute for sessions. If you need to be seen, please call to book an appointment.
 - **E-mail is not confidential.** Do not communicate sensitive medical or mental health information via email. Furthermore, if you send email from a work computer, your employer has the legal right to read it. E-mail is a part of your medical record.
- **Sessions Outside the Office:** From time to time, clients like to meet in an alternate location (i.e., their home, in public, or somewhere more conducive for them). We may be able to accommodate this request, however, this can put your confidentiality at risk.

PART III: REASONS I DO NOT ACCEPT INSURANCE

- **Reduced Ability to Choose:** Most health care plans today (insurance, PPO, HMO, etc.) offer little coverage and/or reimbursement for mental health services. Most HMOs and PPOs require “preauthorization” before you can receive services. This means you must

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call the company and justify why you are seeking therapeutic services in order for you to receive reimbursement. The insurance representative, who may or may not be a mental health professional, will decide whether services will be allowed. If authorization is given, you are often restricted to seeing the providers on the insurance company's list. Reimbursement is reduced if you choose someone who is not on the contracted list; consequently, your choice of providers is often significantly restricted.

- **Pre-Authorization and Reduced Confidentiality:** Insurance typically authorizes several therapy sessions at a time. When these sessions are finished, your therapist must justify the need for continued services. Sometimes additional sessions are not authorized, leading to an end of the therapeutic relationship even if therapeutic goals are not completely met. Your insurance company may require additional clinical information that is confidential in order to approve or justify a continuation of services. Confidentiality cannot be assured or guaranteed when an insurance company requires information to approve continued services. Even if the therapist justifies the need for ongoing services, your insurance company may decline services. Your insurance company dictates if treatment will or will not be covered. Note: Personal information might be added to national medical information data banks regarding treatment.
- **Negative Impacts of a Psychiatric Diagnosis:** Insurance companies require clinicians to give a mental health diagnosis (i.e., “major depression” or “obsessive-compulsive disorder”) for reimbursement. Psychiatric diagnoses may negatively impact you in the following ways:
 1. Denial of insurance when applying for disability or life insurance;
 2. Company (mis)control of information when claims are processed;
 3. Loss of confidentiality due to the increased number of persons handling claims;
 4. Loss of employment and/or repercussions of a diagnosis in situations where you may be required to reveal a mental health disorder diagnosis on your record. This includes but is not limited to: applying for a job, financial aid, and/or concealed weapons permits.
 5. A psychiatric diagnosis can be brought into a court case (ie: divorce court, family law, criminal, etc.).

It is also important to note that some psychiatric diagnoses are not eligible for reimbursement. This is often true for marriage/couple's therapy.

Why Clinicians Do Not Take Insurance: These involve enhanced quality of care and other advantages:

1. You are in control of your care, including choosing your therapist, length of treatment, etc.
2. Increased privacy and confidentiality (except for limits of confidentiality).
3. Not having a mental health disorder diagnosis on your medical record.
4. Consulting with me on non-psychiatric issues that are important to you that aren't billable by insurance, such as learning how to cope with life changes, gaining more effective

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communication techniques for your relationships, increasing personal insight, and developing healthy new skills.

After reading my position on why I don't accept health insurance, you still may decide to use your health insurance. If you provide me with a list of therapists on your insurance provider list, I will do my best to recommend a therapist for you.

EMERGENCY CONTACT:

It is necessary that **Michele Ramey, LMFT** of **MRTherapy, LLC** has someone to contact on your behalf. In case of an emergency who should we contact?

Full Name	Relationship	Phone Number(s)
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Please check here that you agree and sign below. Thank you.

I agree to allow **MRTherapy, LLC** to contact my emergency contact on my behalf in the case of emergency

Signature

Date

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PART IV: CONSENT

1. I have read and understand the information contained in the Therapy Agreement, Policies and Consent. I have discussed any questions that I have regarding this information with **Michele Ramey, LMFT**. My signature below indicates that I am voluntarily giving my informed consent to receive counseling services and agree to abide by the agreement and policies listed in this consent. I authorize **Michele Ramey, LMFT** to provide counseling services that are considered necessary and advisable.

2. I authorize the **release of treatment and diagnosis information** (as described in Part III, above) necessary to process bills for services **to my insurance company**, and request payment of benefits to **Michele Ramey, LMFT, of MRTherapy, LLC**. I acknowledge that I am financially responsible for payment whether or not covered by insurance. I understand, in the event that fees are not covered by insurance, **Michele Ramey, LMFT, of MRTherapy, LLC** may utilize payment recovery procedures after reasonable notice to me, including a collection company or collection attorney.

3. **Consent to Treatment of Minor Child(ren): I hereby certify that I have the legal right to seek counseling treatment for minor(s) in my custody and give permission to Michele Ramey, LMFT to provide treatment to my minor child(ren).** If I have unilateral decision-making capacity to obtain counseling services for my minor, I will provide the appropriate court documentation to **Michele Ramey, LMFT** prior to or at the initial session. Otherwise, I will have the other legal parent/guardian sign this consent for treatment prior to the initial session.

Printed Name	Signature	Date

Your signature signifies that you have received a copy of the “Therapy Agreement, Policies and Consent” for your records.

Printed Name of Minor Child	DOB	Date

Clinician Signature: _____ Date: _____
 Michele Ramey, LMFT

PART IV: CONSENT (CLIENT’S COPY)

1. I have read and understand the information contained in the Therapy Agreement, Policies and Consent. I have discussed any questions that I have regarding this information with **Michele Ramey, LMFT**. My signature below indicates that I am voluntarily giving my informed consent to receive counseling services and agree to abide by the agreement and policies listed in this consent. I authorize **Michele Ramey, LMFT** to provide counseling services that are considered necessary and advisable.

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3. **Consent to Treatment of Minor Child(ren): I hereby certify that I have the legal right to seek counseling treatment for minor(s) in my custody and give permission to Michele Ramey, LMFT to provide treatment to my minor child(ren).** If I have unilateral decision-making capacity to obtain counseling services for my minor, I will provide the appropriate court documentation to **Michele Ramey, LMFT** prior to or at the initial session. Otherwise, I will have the other legal parent/guardian sign this consent for treatment prior to the initial session.

Printed Name	Signature	Date

Your signature signifies that you have received a copy of the “Therapy Agreement, Policies and Consent” for your records.

Printed Name of Minor Child	DOB	Date

Clinician Signature: _____ Date: _____
 Michele Ramey, LMFT

TECHNOLOGY ASSISTED COUNSELING (TAC) CONSENT, POLICIES, & AGREEMENT

This form is in **addition** to the regular Therapy, Policies, Agreement and Consent Form and Notice of Privacy Practices for Protected Health Information commonly known as HIPAA. You must sign both in order to participate in Technology Assisted Counseling (TAC) sessions. TAC incorporates email, phone and video counseling. Prior to engaging in TAC an assessment/consultation will be done to assure that TAC is an appropriate form of counseling. This is to inform you about what you can expect regarding your participation in TAC counseling.

Benefits:

The benefits to TAC counseling are:

1. The ability to expand your choice of service provider.
2. More convenient counseling options including location, time, no driving, etc.
3. Reduces the overall cost and time of therapy due to not having to drive to and from an office.
4. Ability to have real time monitoring and reduces the wait time for scheduling office appointments.
5. Increased availability of services to homebound clients. clients with limited mobility, and clients without convenient transportation options.

Limitations:

It is important to note that there are limitations to TAC counseling that can affect the quality of the session(s). These limitations include but are not limited to the following:

1. I cannot see you, your body language, or your non-verbal reactions to what we are discussing.
2. Due to technology limitations I may not hear all of what you are saying and may need to ask you to repeat things.
3. Technology might fail before or during the TAC counseling session.
4. Although every effort is made to reduce confidentiality breaches, breaches may occur for various reasons.
5. To reduce the effect of these limitations, I may ask you to describe how you are feeling, thinking, and/or acting in more detail than I would during a face-to-face session. You may also feel that you need to describe your feelings, thoughts, and/or actions in more detail than you would during a face-to-face session.

Logistics:

When I provide phone/video-counseling sessions, I will call you at our scheduled time or send you a link for our secure and HIPAA compliant video session. I expect that you are available at our scheduled time and are prepared, focused and engaged in the session. I am calling you from

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a private location where I am the only person in the room. You also need to be in a private location where you can speak openly without being overheard or interrupted by others to protect your own confidentiality. If you choose to be in a place where there are people or others can hear you, I cannot be responsible for protecting your confidentiality. Every effort MUST be made on your part to protect your own confidentiality. I suggest you wear a headset to increase confidentiality and also increase the sound quality of our sessions. Please know that I cannot guarantee the privacy or confidentiality of conversations held via phone, as phone conversations can be intercepted either accidentally or intentionally. Please assure you reduce all possibilities of interruptions for the duration of our scheduled appointment.

Please know that per best practices and ethical guidelines I can only practice in the state(s) I am licensed in. That means wherever you reside I must be licensed. You agree to inform me if your therapy location has changed or if you have relocated your domicile to a different jurisdiction.

Connection Loss During Phone Sessions: If we lose our phone connection during our session, I will call you back immediately. Please also attempt to call me at 256-801-3139 if I cannot reach you. If we are unable to reach each other due to technological issues, I will attempt to call you 2 times. If I cannot reach you, I will remain available to you during the entire course of our scheduled session. Should you contact me back and there is time left in your session we will continue. If the reason for a connection loss i.e. technology, your phone battery dying, bad reception, etc. occurs on your part, you will still be charged for the entire session. If the loss for connection is a result of something on my end, I will call you from an alternate number. The number may show up as restricted or blocked please be sure to pick it up.

Connection Loss During Video Sessions: If we lose our connection during a video session, I will call you to troubleshoot the reason we lost connection. If I cannot reach you, I will remain available to you during the entire course of our scheduled session. Should you contact me back and there is time left in your session we will continue. If the reason for a connection loss i.e. technology, battery dying, bad reception, etc. occurs on your part, you will still be charged for the entire session. If the loss for connection is a result of something on my end, we can either complete our session via. phone or plan an alternate time to complete the remaining minutes of our session.

Please list your main number and an alternate number below.

Number(s)

Recording of Sessions:

Please note that recording, screenshots, etc. of any kind of any session is not permitted and are grounds for termination of the client-therapist relationship.

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Payment for Services:

Payments for services must be made **prior** to each session. I will charge your card on file or send you an invoice. Payment is to be completed prior to our session.

Cancellation Policy:

If you must cancel or reschedule an appointment, 24-hour advance notice is required, otherwise you will be held financially responsible. Should you cancel or miss an appointment with notification less than 24 hours this will result in being charged the **full fee** for your missed appointment. Cancellations must be communicated by phone; NOT email or text. If clients have more than 2 cancellations during the course of treatment/therapy the therapist and client will address the need for ongoing therapy. Should a client express and wish and/or desire to continue a client may be asked to pre-pay for sessions when they are scheduled. If the client cancels or misses the session with less than 24 hours' notice and the session is pre-paid, this follows the cancellation guidelines, and the payment will not be reimbursed for the missed or canceled session less than 24 hours. Phone/video sessions should be treated as regular in office sessions. If you are late getting on the phone, are unable to talk at our scheduled time, your battery has died and you are unable to access another confidential place to talk, or any other variable that would have you not be able to attend our session please know that you will be charged for the session. Please make the necessary arrangements you need to be available and present for your session.

Emergencies and Confidentiality:

I request an emergency contact for you. Please list the person's first and last name, relationship, and phone number(s) of your emergency contact:

Full Name	Relationship	Number(s)
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I also request the address from which you are calling and the number to your local police department including area code in the area in which you are located during the time of our call.

Street Address

City	State	Zip Code
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City and State of Local Police Department	Phone Number
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If a situation occurs where we are talking and get disconnected and you are in crisis, you agree to call 911, go to your local emergency room immediately or contact the National Suicide Hotline at 800-784-2433.

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If I have concerns about your safety at **any** time during a phone session, I will need to break confidentiality and call 911 (if located in the same county or emergency services in the area you are located at the time of the call) and/or your emergency contact immediately. Please note that everything in our informed consent that you signed, including all the confidentiality exceptions, still applies during phone/video sessions.

Consent to Participate in TAC Sessions:

By signing below you agree that you have read and understand all of the above sections of TAC informed consent. You agree that you also understand the limitations associated with participating in TAC counseling sessions and consent to attend sessions under the terms described in this document.

Client's Name: _____ Date: _____

Client's Signature: _____ Date: _____

Client's Name: _____ Date: _____

Client's Signature: _____ Date: _____

Signature: _____ Date: _____

Michele Ramey, LMFT

Health Insurance Portability Accountability Act (HIPAA)
Client Rights & Therapist Duties

This document contains important information about federal law, the Health Insurance Portability and Accountability Act (HIPAA), that provides privacy protections and patient rights with regard to the use and disclosure of your Protected Health Information (PHI) used for the purpose of treatment, payment, and health care operations.

HIPAA requires that I provide you with a Notice of Privacy Practices (the Notice) for use and disclosure of PHI for treatment, payment, and health care operations. The Notice explains HIPAA and its application to your PHI in greater detail.

The law requires that I obtain your signature acknowledging that I have provided you with this. If you have any questions, it is your right and obligation to ask so I can have a further discussion prior to signing this document. When you sign this document, it will also represent an agreement between us. You may revoke this Agreement in writing at any time. That revocation will be binding unless I have taken action in reliance on it.

LIMITS ON CONFIDENTIALITY

The law protects the privacy of all communication between a patient and a therapist. In most situations, I can only release information about your treatment to others if you sign a written authorization form that meets certain legal requirements imposed by HIPAA. There are some situations where I am permitted or required to disclose information without either your consent or authorization. If such a situation arises, I will limit my disclosure to what is necessary. Reasons I may have to release your information without authorization:

- If you are involved in a court proceeding and a request is made for information concerning your diagnosis and treatment, such information is protected by the psychologist-patient privilege law. I cannot provide any information without your (or your legal representative's) written authorization, or a court order, or if I receive a subpoena of which you have been properly notified and you have failed to inform me that you oppose the subpoena. If you are involved in or contemplating litigation, you should consult with an attorney to determine whether a court would be likely to order me to disclose information.
- If a government agency is requesting the information for health oversight activities, within its appropriate legal authority, I may be required to provide it for them.
- If a patient files a complaint or lawsuit against me, I may disclose relevant information regarding that patient in order to defend myself.
- If a patient files a worker's compensation claim, and I am providing necessary treatment related to that claim, I must, upon appropriate request, submit treatment reports to the appropriate parties, including the patient's employer, the insurance carrier or an authorized qualified rehabilitation provider.

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- I may disclose the minimum necessary health information to my business associates that perform functions on our behalf or provide us with services if the information is necessary for such functions or services. My business associates sign agreements to protect the privacy of your information and are not allowed to use or disclose any information other than as specified in our contract.

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

- If I know, or have reason to suspect, that a child under 18 has been abused, abandoned, or neglected by a parent, legal custodian, caregiver, or any other person responsible for the child's welfare, the law requires that I file a report with the AL Abuse Hotline. Once such a report is filed, I may be required to provide additional information.
- If I know or have reasonable cause to suspect that a vulnerable adult has been abused, neglected, or exploited, the law requires that I file a report with the AL Abuse Hotline. Once such a report is filed, I may be required to provide additional information.
- If I believe that there is a clear and immediate probability of physical harm to the patient, to other individuals, or to society, I may be required to disclose information to take protective action, including communicating the information to the potential victim, and/or appropriate family member, and/or the police or to seek hospitalization of the patient.

CLIENT RIGHTS AND THERAPIST DUTIES

Use and Disclosure of Protected Health Information:

- **For Treatment** – I use and disclose your health information internally in the course of your treatment. If I wish to provide information outside of our practice for your treatment by another health care provider, I will have you sign an authorization for release of information. Furthermore, an authorization is required for most uses and disclosures of psychotherapy notes.
- **For Payment** – I may use and disclose your health information to obtain payment for services provided to you as delineated in the Therapy Agreement.
- **For Operations** – I may use and disclose your health information as part of our internal operations. For example, this could mean a review of records to assure quality. I may also use your information to tell you about services, educational activities, and programs that I feel might be of interest to you.

Patient's Rights:

- **Right to Treatment** – You have the right to ethical treatment without discrimination regarding race, ethnicity, gender identity, sexual orientation, religion, disability status, age, or any other protected category.

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- ***Right to Confidentiality*** – You have the right to have your health care information protected. If you pay for a service or health care item out-of-pocket in full, you can ask us not to share that information for the purpose of payment or our operations with your health insurer. I will agree to such unless a law requires us to share that information.
- ***Right to Request Restrictions*** – You have the right to request restrictions on certain uses and disclosures of protected health information about you. However, I am not required to agree to a restriction you request.
- ***Right to Receive Confidential Communications by Alternative Means and at Alternative Locations*** – You have the right to request and receive confidential communications of PHI by alternative means and at alternative locations.
- ***Right to Inspect and Copy*** – You have the right to inspect or obtain a copy (or both) of PHI. Records must be requested in writing and release of information must be completed. Furthermore, there is a copying fee charge of \$1.50 per page. Please make your request well in advance and allow 2 weeks to receive the copies. If I refuse your request for access to your records, you have a right of review, which I will discuss with you upon request.
- ***Right to Amend*** – If you believe the information in your records is incorrect and/or missing important information, you can ask us to make certain changes, also known as amending, to your health information. You have to make this request in writing. You must tell us the reasons you want to make these changes, and I will decide if it is and if I refuse to do so, I will tell you why within 60 days.
- ***Right to a Copy of This Notice*** – If you received the paperwork electronically, you have a copy in your email. If you completed this paperwork in the office at your first session a copy will be provided to you per your request or at any time.
- ***Right to an Accounting*** – You generally have the right to receive an accounting of disclosures of PHI regarding you. On your request, I will discuss with you the details of the accounting process.
- ***Right to Choose Someone to Act for You*** – If someone is your legal guardian, that person can exercise your rights and make choices about your health information; I will make sure the person has this authority and can act for you before I take any action.
- ***Right to Choose*** – You have the right to decide not to receive services with me. If you wish, I will provide you with names of other qualified professionals.
- ***Right to Terminate*** – You have the right to terminate therapeutic services with me at any time without any legal or financial obligations other than those already accrued. I ask that you discuss your decision with me in session before terminating or at least contact me by phone letting me know you are terminating services.
- ***Right to Release Information with Written Consent*** – With your written consent, any part of your record can be released to any person or agency you designate. Together, we will discuss whether or not I think releasing the information in question to that person or agency might be harmful to you.

Therapist's Duties:

- I am required by law to maintain the privacy of PHI and to provide you with a notice of my legal duties and privacy practices with respect to PHI. I reserve the right to change the privacy policies and practices described in this notice. Unless I notify you of such changes, however, I am

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required to abide by the terms currently in effect. If I revise my policies and procedures, I will provide you with a revised notice in office during our session.

COMPLAINTS

If you are concerned that I have violated your privacy rights, or you disagree with a decision I made about access to your records, you may contact me, the State of AL Department of Health, or the Secretary of the U.S. Department of Health and Human Services.

YOUR SIGNATURE BELOW INDICATES THAT YOU HAVE READ THIS AGREEMENT AND AGREE TO ITS TERMS AND ALSO SERVES AS AN ACKNOWLEDGEMENT THAT YOU HAVE RECEIVED THE HIPAA NOTICE FORM DESCRIBED ABOVE.

Client/Legal Guardian Signature : _____ Date: _____

Printed Name: _____ Date: _____

Client/Legal Guardian Signature : _____ Date: _____

Printed Name: _____ Date: _____

Signature: _____ Date: _____

Michele Ramey, LMFT

AUTHORIZATION FOR RELEASE/REQUEST OF INFORMATION/RECORDS

I, (Client’s Name) _____ **DOB:** _____

hereby give my permission to **MRTherapy, LLC**, to release or request from a third party information contained in my medical record. I understand that my medical record may contain information concerning my psychiatric, psychological, drug or alcohol abuse, sexual abuse treatment, HIV/Acquired Immune Deficiency Syndrome (AIDS) and/or related conditions, and that under law these records are classified as privileged and confidential and cannot be released to me or those designated by me or my legal guardian without an expressed and informed consent. In addition, I understand that those records will not be released to entities other than those designated by myself or my personal representative or otherwise provided in federal law.

This information will be released/requested upon request to the following:

To/From:

First and last name, phone, and address of person(s)

The type of information to be disclosed/requested is as follows:

To Be Released * from MRTherapy, LLC

To Be Requested * from third parties

___ Treatment Plans

___ Treatment Plans

___ Process Notes

___ Process Notes

___ Health/Medical Records (if applicable)

___ Health/Medical/Academic Records

___ Letter(s) of Progress

___ Psychological/Psychiatric Evaluations

___ Bio Psychosocial Evaluation/Assessment (if applicable)

___ Court Documents

___ Verbal Communication

___ Verbal Communication

___ Other (Specify): _____

___ Other (Specify): _____

** In the case of notes documenting or analyzing the contents of conversation during a private counseling session (“process notes”), such records may be protected from disclosure under the HIPAA Privacy Rule.*

___ (initial) I understand that I have the right to withdraw my authorization at any time except to the extent that action has already been taken pursuant to the authorization. I understand that if I revoke this authorization, I must do so in writing and present my written revocation to **MRTherapy, LLC**.

___ (initial) I understand that authorizing the disclosure of this health information is voluntary, I can refuse to sign, and **MRTherapy, LLC** will not base my treatment or payment whether or not I provide authorization for the requested use or disclosure. I understand that I may inspect or copy the information to be disclosed, as provided in CFR164.524 (with reasonable charge).

___ (initial) I understand that information used or disclosed pursuant to this authorization may be subject to re-disclosure by the recipient of the information and is no longer protected by federal confidentiality laws or **MRTherapy, LLC** will not be held liable for information disclosed to another party per the client’s request.

___ (initial) I understand that **MRTherapy, LLC** will release only the minimum amount of information necessary to fulfill a request.

This authorization shall expire when the client is discharged from the current episode of care (treatment has been completed, the client rejects/declines/drops out of treatment, is referred elsewhere, moves, or in the case of the client's death.) This agreement is subject to revocation in writing at any time.

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Release:

Request:

Signature Client/Next of Kin/Guardian Date

Signature Client/Next of Kin/Guardian Date

Signature: _____
Michele Ramey, LMFT

Date: _____

INFORMED CONSENT TO VIDEO RECORD COUNSELING SESSIONS

Video recording are commonly used for consultation, training and research in individual and couple therapy. Videos are used for the purposes of professional training, consultation and/or improving service in individual supervision (between the counselor and their supervisor) and/or group supervision (between the counselor, the supervisor, and other registered therapists). The recording of sessions will likely enhance the effectiveness and quality of treatment, but is not required. You may decline to have sessions recorded. Your signature below indicates that you give Michele Ramey, LMFT at MRTherapy, LLC permission to videotape your counseling sessions for training and supervision purposes and that you understand that: 1. You can request that the video recorder be turned off at any time and may request that the video or any portion thereof be erased. You may terminate this permission to record at any time. 2. The purpose of recording is for use in training and supervision. This will allow the above referenced counselor to consult with his or her assigned supervisor(s) in an individual or group supervision format, who may watch the recording alone or in the presence of other counselors involved in direct supervision. 3. The strictest confidentiality will be maintained, and there will be no sharing of the recorded material beyond the limits of training and supervision. Except for your first name and your voice and/or image on the recording, there will be no information that could identify you. The recording will never knowingly be shared with anyone who knows you. Mental health professionals who may view or hear recorded material of your session are also bound by law and by code of ethics to the same obligation to protect your confidentiality. Except in the context of training and supervision, the existence of this recording will not be discussed with anyone at any time. 4. The recordings will be stored in a secure location and will not be used for any other purpose without your explicit written permission.

Client Name (Please Print)

Date

Client Signature

Parent / Guardian Signature

Date

Client Decline Signature

Date

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