

## 2023 ADULT CLIENT RENEWAL

We are asking for your help in updating the following pages. To help us continue to bring effective counseling services to you and your family please provide the following information to your therapist or to the front desk at your next session:

- ✓ Changes to your Name, Address, or Contact information
- ✓ Copy of your current 2022 insurance card. (Even if your insurance/carrier remains the same.)
- ✓ Renewal of any releases for individuals you would like us to contact about your treatment including doctors, schools, family members, etc.
- ✓ Signatures on the following pages including any custody or guardianship requirements.
  - Informed Consent and Disclosure
  - Financial Release and information
  - Telehealth release in case of emergency contact
  - Acknowledgement of Privacy Policy being offered and/or received.

### PLEASE NOTE:

#### **Cancellations and Missed Appointments**

If you are unable to attend a scheduled session, it is your responsibility to let Engage Services know your intent to cancel your scheduled appointment. We reserve the right to charge a **\$25 cancellation fee** if the scheduled session is not cancelled prior to 24 hours before the session or is without appropriate emergency exceptions. Any missed appointments will be assessed with a \$75 missed appointment fee. A complete fee schedule will be provided by request. Emergency exceptions will be considered on a per-needed basis.

I want to take a moment and thank you for your support and trust in helping us serve you and your family this past year. It is our goal at Engage Counseling services to provide thoughtful, effective, and sustainable support for life's challenges and changes. Blessings to you and your family this coming year!

Jonathan Busch NCC, LPC-MH

Engage Services Owner/Director



**ADULT CLIENT RENEWAL INFORMATION**

All information provided to Engage Counseling Services on this form or during the initial intake session will be used for counseling purposes only and is considered confidential regardless of subsequent contract for therapy services. If you have any questions about our privacy policy, please ask us at any time.

**PERSONAL INFORMATION**

Today's Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Client's Name: \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Age: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

SSN: \_\_\_\_\_ Gender:  Male  Female Ethnicity: \_\_\_\_\_

Religious Affiliation \_\_\_\_\_ Employed?  No  Yes Where? \_\_\_\_\_

Student?  Yes  No School Name: \_\_\_\_\_

Education Level Completed:  Grade \_\_\_\_\_  GED  High School  College  Other \_\_\_\_\_

Relationship Status: \_\_\_\_\_ If married, # of years: \_\_\_\_\_

List in the following area any persons that are in your household or of significance to you:

Name	Relationship	Age	Occupation

Referred to Counseling by: \_\_\_\_\_

**CONTACT INFORMATION**

Home Phone: (\_\_\_\_) \_\_\_\_\_ Leave Message?  Yes  No

Work Phone: (\_\_\_\_) \_\_\_\_\_ Leave Message?  Yes  No

Cell Phone: (\_\_\_\_) \_\_\_\_\_ Leave Message?  Yes  No

Text?  Yes  No

Email: \_\_\_\_\_ Send Message?  Yes  No

Which of the above do you prefer as the primary source of contact? \_\_\_\_\_

Emergency Contact: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

**(By filling in the above contact I give permission to Engage to make contact in case of an emergency)**

## STRENGTHS, NEEDS, ABILITIES, PREFERENCES (SNAP) INVENTORY

**SNAP Questionnaire Instructions:** Put a checkmark next to the strengths/needs/abilities/preferences that you believe you have.

Client name: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

### STRENGTHS

- |  |   |   |   |
|--|---|---|---|
| <input type="checkbox"/> Ability to ask for help | <input type="checkbox"/> Determined           | <input type="checkbox"/> Good social support system | <input type="checkbox"/> Organized                |
| <input type="checkbox"/> Honest                  | <input type="checkbox"/> Articulate           | <input type="checkbox"/> Dependable                 | <input type="checkbox"/> Good Family Relationship |
| <input type="checkbox"/> Physically Strong       | <input type="checkbox"/> Athletic             | <input type="checkbox"/> Dynamic                    | <input type="checkbox"/> Has Charisma             |
| <input type="checkbox"/> Levelheaded             | <input type="checkbox"/> Well-liked by others | <input type="checkbox"/> Goal oriented              | <input type="checkbox"/> Has integrity            |
| <input type="checkbox"/> Resilient               | <input type="checkbox"/> Business like        | <input type="checkbox"/> Energetic                  | <input type="checkbox"/> Enthusiastic             |
| <input type="checkbox"/> Responsible             | <input type="checkbox"/> Cares about others   | <input type="checkbox"/> Motivated                  | <input type="checkbox"/> Exercises regularly      |
| <input type="checkbox"/> Self-reliant            | <input type="checkbox"/> Centered             | <input type="checkbox"/> Humble                     | <input type="checkbox"/> Financially stable       |
| <input type="checkbox"/> Sincere                 | <input type="checkbox"/> Confident            | <input type="checkbox"/> Flexible                   | <input type="checkbox"/> Creative                 |
| <input type="checkbox"/> Humorous                | <input type="checkbox"/> Considerate          | <input type="checkbox"/> Spiritual/religious        | <input type="checkbox"/> Generous                 |
| <input type="checkbox"/> Intelligent             | <input type="checkbox"/> Very patient         | <input type="checkbox"/> Courageous                 |   |
| <input type="checkbox"/> Other _____             |   |   |   |

### NEEDS

- |   |   |  |  |
|---|---|--|--|
| <input type="checkbox"/> Advanced Directives          | <input type="checkbox"/> Grief Counseling         | <input type="checkbox"/> Increase Motivation         | <input type="checkbox"/> Relapse Prevention      |
| <input type="checkbox"/> Social Supports              | <input type="checkbox"/> Abuse/Trauma Counseling  | <input type="checkbox"/> Help with negatives in life | <input type="checkbox"/> Increase self-esteem    |
| <input type="checkbox"/> Public assistance            | <input type="checkbox"/> Values clarification     | <input type="checkbox"/> Transportation help         | <input type="checkbox"/> Insomnia relief         |
| <input type="checkbox"/> Relaxation skills            | <input type="checkbox"/> Anger Management         | <input type="checkbox"/> Help with bipolar highs/low | <input type="checkbox"/> Spiritual Support       |
| <input type="checkbox"/> Boundary Setting             | <input type="checkbox"/> Employment               | <input type="checkbox"/> Learn to have fun           | <input type="checkbox"/> Learn to read           |
| <input type="checkbox"/> Domestic Violence Counseling | <input type="checkbox"/> HIV/AIDS Counseling      | <input type="checkbox"/> Housing/Shelter             | <input type="checkbox"/> Learn to say "no"       |
| <input type="checkbox"/> Stress reduction             | <input type="checkbox"/> Education Assistance     | <input type="checkbox"/> Improved honesty            | <input type="checkbox"/> Legal assistance        |
| <input type="checkbox"/> Time Management              | <input type="checkbox"/> Eliminate Hallucinations | <input type="checkbox"/> Improved relationships      | <input type="checkbox"/> To understand diagnosis |
| <input type="checkbox"/> To improve trust             | <input type="checkbox"/> Improved social skills   | <input type="checkbox"/> Medical Consultation        |  |
| <input type="checkbox"/> Impulse Control              | <input type="checkbox"/> Financial Counseling     | <input type="checkbox"/> Medication education        |  |
| <input type="checkbox"/> Other _____                  |   |  |  |

### ABILITIES

- |  |  |  |  |
|--|--|--|--|
| <input type="checkbox"/> Time management             | <input type="checkbox"/> Computer literate       | <input type="checkbox"/> Good with people      | <input type="checkbox"/> Manages money well        |
| <input type="checkbox"/> Artistic                    | <input type="checkbox"/> Creative                | <input type="checkbox"/> Has GED/Diploma       | <input type="checkbox"/> Organized                 |
| <input type="checkbox"/> Assertive in a positive way | <input type="checkbox"/> Employable/always works | <input type="checkbox"/> Athletic              | <input type="checkbox"/> Has empathy toward others |
| <input type="checkbox"/> Problem solving skills      | <input type="checkbox"/> Follows directions      | <input type="checkbox"/> Homemaking skills     | <input type="checkbox"/> Keeps appointments        |
| <input type="checkbox"/> Public Speaking             | <input type="checkbox"/> Auto mechanic           | <input type="checkbox"/> Good driver           | <input type="checkbox"/> Makes friends easily      |
| <input type="checkbox"/> Successful at school        | <input type="checkbox"/> Can read well           | <input type="checkbox"/> Good parenting skills |  |
| <input type="checkbox"/> Takes all medications       | <input type="checkbox"/> Volunteer work          | <input type="checkbox"/> Other _____           |  |



**PREFERANCES**

- |  |   |  |  |
|--|---|--|--|
| <input type="checkbox"/> AM Appointments           | <input type="checkbox"/> PM Appointments                | <input type="checkbox"/> Female Therapist        | <input type="checkbox"/> Male Therapist            |
| <input type="checkbox"/> Specific age of therapist | <input type="checkbox"/> Spiritual Guidance             | <input type="checkbox"/> Therapy in home         | <input type="checkbox"/> Therapy in office         |
| <input type="checkbox"/> Therapy in school         | <input type="checkbox"/> Independently                  | <input type="checkbox"/> Group therapy           | <input type="checkbox"/> Family therapy            |
| <input type="checkbox"/> Individual Therapy        | <input type="checkbox"/> Hearing-impaired services      | <input type="checkbox"/> Sight-impaired services | <input type="checkbox"/> Spanish Speaking services |
| <input type="checkbox"/> Atypical antipsychotics   | <input type="checkbox"/> No written/reading assignments |  |  |
| <input type="checkbox"/> Other _____               |   |  |  |

Client signature: \_\_\_\_\_

Date: \_\_\_/\_\_\_/\_\_\_

Legal Guardian signature: \_\_\_\_\_

Date: \_\_\_/\_\_\_/\_\_\_

Please describe any alcohol or substance use/misuse over the past 6 months including frequency and amounts, legal consequences, and any other negative impacts. \_\_\_\_\_

**UPDATED MEDICAL INFORMATION**

Primary Care Physician: \_\_\_\_\_ Clinic: \_\_\_\_\_

Primary Care Phone Number: ( ) \_\_\_\_\_ - \_\_\_\_\_

Most Recent Medical Exam: \_\_\_\_\_ History of Serious Illness  Yes  No

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

Do you give consent for Engage Services to contact your primary care physician if needed:  Yes  No

Signature: \_\_\_\_\_

Date: \_\_\_/\_\_\_/\_\_\_

Please update all current medication you are taking:

Medication	Reason	Dose	Frequency

## **INFORMED CONSENT AND DISCLOSURE**

### **Counseling Approach & Philosophy**

The role of a counselor is to provide an environment of safety, trust, and mutual respect from which he/she and the client can cooperatively explore their world together. He/she will help the client to discover new perspectives and options from which they may choose to change their life situation according to the goals they establish. People become healthy and hopeful when they learn to balance their need for personal growth alongside fulfilling their responsibility to others. Our counselors are motivated by a very simple philosophy: Everyone is a person of value, everyone has an issue they struggle with, and every problem has a solution.

### **Benefits & Risks of Therapy**

While the effects of counseling therapy have generally proven to be beneficial, there are some risks to consider. For example, some clients will experience uncomfortable feelings, and may, for a time, feel worse as they begin to work on sensitive areas of their lives or recall unpleasant memories. These feelings could possibly affect the client's life outside the counseling office. Others in the client's life may have a negative view of counseling which might create distance in their relationship. Any doubts or concerns the client has should be discussed prior to therapy, and if possible, should be alleviated to minimize the potential risks and maximize the benefits of therapy. Additionally, there may be options to counseling, such as support groups and/or self-help books, which may help to provide the results the client is seeking. Feel free to discuss any of these with the therapist.

### **Confidentiality**

All counseling therapy is confidential within the exceptions provided by law. The therapist is otherwise unwilling and unavailable to offer support or testimony in court or legal situations of any kind unless compelled by law. The therapist may consult with other professionals or supervisors on client issues, however, identifying details are kept strictly confidential, unless you sign a specific written release. While wireless telephone communication is reasonably private, it is not guaranteed to be secure. Because our business phone is cellular, you should be aware of this while discussing therapy related issues in detail on the phone. Any correspondence via e-mail or text is likewise not guaranteed to be private, so reasonable precautions are advised. Unavoidable dual relationships will be discussed in therapy to decide on a mutually satisfactory approach.

While the therapist strives to be confidential as much as possible, there are certain situations in which confidentiality will not be able to be maintained. (1.) When necessary, the therapist will share information with parents regarding a child's individual therapy sessions in order to help parents to meet the child's needs, promote positive behavior, and increase optimal benefit. (2.) The therapist will not keep secrets in therapy when more than one person is involved in treatment. When treating a couple or family in therapy, the therapist views the entire family unit as the client in therapy. (3.) The Client or authorized person for the client has signed Releases of Information to important individuals in the client's life that will allow the therapist to talk with others regarding the client. (4.) If the therapist has reason to believe that a child client, or another child whose identifying information has been given, has experienced or is at risk of experiencing physical abuse, sexual abuse, emotional abuse, neglect, exploitation, the therapist is required by law to report this information to Child Protection Services. (5.) The therapist is required by law to protect those who are the anticipated victims of physical harm or death. If anyone makes a claim that he or she plans to harm him/herself or another person, the therapist is required by law to take every step possible to protect these individuals from potential harm.



**Discontinuation of Therapy**

While most therapy experiences are positive and beneficial to both the client and the therapist, there are times when the therapy process is not proving to be beneficial for the client, and possibly harmful to the therapist. The therapist reserves the right to ask any client or family to leave therapy if they believe that the continuation of therapy services with this therapist is not beneficial to the client. A client as well can request termination of services or consideration of changing to another available therapist. A client automatically is terminated from therapeutic care if not seen in a six-week time period.

**Risks of Withdrawing from Therapy**

Therapy is a process. If the client chooses to leave therapy during the process and has not learned necessary coping skills, there is a risk of harm. It is best to discuss these feelings with the therapist so that so that together the therapist and client can decide what is in the best interests of the client at that time.

**Consent for Treatment of a Minor**

If I am not the client, but I am signing as the authorized person for the client (guardian or parent), I hereby authorize the therapist and whomever they designate as their assistants to administer treatment of my child as necessary. An additional consent for treatment of a minor child will also be required.

**Emergencies**

If you, or the client you are authorized to sign for, needs emergency psychological help at a time when a therapist is not available, it is your responsibility to call 911 or another support service.

**If you have any questions about this, please do not hesitate to ask.**

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**Client name**

My Signature below signifies that I have read and understand all the above. I have been given a copy of this Informed Consent as well as an understanding of the policy can be found at [www.EngageServices.Net](http://www.EngageServices.Net).

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**Client or Authorized Person on Behalf of the Client**

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**Date**



**FINANCIAL AGREEMENT**

**Payments**

We are committed to providing you with the best possible care. Co-pays/Co-insurance/Cash Discounts are due at the time of service unless another agreement has been reached between you and Engage Services. We accept cash, checks, and credit/debit cards. Any amount not paid by a third party is expected to be paid by you within 30 days of the invoice to avoid a finance charge. Any account balances outstanding after ninety days will be subject to administrative review and can be considered for submission to a collection agency. Please contact the business office to inquire about payment plans and discount rates.

**Other services**

There is no charge for brief phone calls. However, calls requiring more than 10 minutes may be charged to the closet quarter hour at the Crisis Psychotherapy rate at the discretion of the therapist. Any legal appearances or professional work outside of normal therapeutic commitments will also be billed at this rate.

**Cancellations and Missed Appointments**

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**Standard Fees**

The standard fee for the initial Psychotherapy Evaluation is \$300. For Subsequent Psychotherapy Sessions, the standard rate is \$250. We offer a discounted and sliding fee rate **for payment at time of service** for those who do not have insurance or have not met their insurance deductible. A discount cash price and sliding fee are available for approved clients upon request. All accounts will be required to have a credit/debit card on file which will be charged at check in prior to the session and per the missed/cancelled appointment agreement. The client is required to make sure debit/credit cards on file are current and funded. (Call for information on discounts and sliding fee.) **By signing this form, the client is giving permission to charge the card on file for the above agreed upon amounts. Discount pricing will not be allowed to carry a balance on the account.**

**Insurance**

Processing your insurance claims and tracking reimbursement is a benefit we provide to you. If you have medical insurance providing coverage for mental health counseling, we can assist in processing claims and tracking reimbursement. *Remember, you are ultimately responsible for any cost not covered by the insurance plan.*

**Insurance Information**      **Copy of Insurance Card provided:**       Yes       No

Insurance Company \_\_\_\_\_ Phone Number \_\_\_\_\_

ID Number \_\_\_\_\_ Group Number \_\_\_\_\_

Policy Holder \_\_\_\_\_ Policy Holder DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Policy Holder Employer \_\_\_\_\_ Policy Holder Phone \_\_\_\_\_

Client's relationship to Policy Holder \_\_\_\_\_

**Authorization for Health Insurance Claims**

Engage Services utilizes documentation software that allows for billing to take place electronically. Information is stored then shared electronically with a clearinghouse that forwards the claims to your health insurance company. During this process, identifying information of the client such as name, date of birth, diagnosis and type of session is visible to health insurance companies. These companies are required by law to maintain confidentiality. By signing below, the client or authorized person on behalf of the client, hereby authorizes the release of any information relating to all claims for benefits submitted on behalf of the client. It also serves as my signature authorizing Engage Services to process claims without obtaining my signature on each submission.

**My Signature below signifies that I have read and understand all the above. I have been given a copy of this agreement as well as understand the policy can be found at [www.EngageServices.Net](http://www.EngageServices.Net).**

\_\_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

**Client or Authorized Person on Behalf of the Client**      **Date**



**TELEMENTAL HEALTH INFORMED CONSENT**

I \_\_\_\_\_ [name of patient(s)] hereby consent to engaging in Telemental health with Engage Services LLC as part of my psychotherapy. I understand that "Telemental health" includes the practice of health care delivery, diagnosis, consultation, treatment, transfer of mental health data, and education using interactive audio, video, or data communications. I understand that Telemental health also involves the communication of my medical/mental information, both orally and visually, to health care practitioners located in South Dakota or outside of South Dakota. I understand that I have the following rights with respect to Telemental health:

- (1) I have the right to withhold or withdraw consent at any time without affecting my right to future care or treatment nor risking the loss or withdrawal of any program benefits to which I would otherwise be entitled.**
- (2) The laws that protect the confidentiality of my medical and mental health information also apply to Telemental Health.** As such, I understand that the information disclosed by me during my therapy is generally confidential. However, there are both mandatory and permissive exceptions to confidentiality, including, but not limited to reporting child, elder, and dependent adult abuse; expressed threats of violence towards self and/or an ascertainable victim; and where I make my mental or emotional state an issue in a legal proceeding.

In case of emergency my location is: \_\_\_\_\_  
and contact information for local emergency services is: \_\_\_\_\_

I understand the therapist may contact my emergency contact and/or appropriate authorities in case of emergency.

I also understand that the dissemination of any personally identifiable images or information from Telemental Health interaction to researchers or other entities shall not occur without my written consent.

- (3) I understand that there are risks and consequences from Telemental health.** These may include, but not limited to, the possibility, despite reasonable efforts on the part of my psychotherapist, that: the transmission of my medical or mental health information could be disrupted or distorted by technical failures; the transmission of my medical or mental health information could be interrupted by unauthorized persons; the electronic storage of my medical information could be accessed by unauthorized persons; and/or limited ability to respond to emergencies.

In addition, I understand that Telemental health-based services and care may not be as complete as face-to-face services. I also understand that if my psychotherapist believes I would be better served by another form of psychotherapeutic services (e.g., face-to-face services) I will be referred to a psychotherapist who can provide such services in my area. Finally, I understand that there are potential risks and benefits associated with any form of psychotherapy, and that despite my efforts and the efforts of my psychotherapist, my condition may not improve, and in some cases may even get worse.

- (4) I understand that I may benefit from Telemental health, but that results cannot be guaranteed or assured.**

**(5) I understand that I have a right to access my medical and mental health information and copies of medical records in accordance with South Dakota law.** I have read and understand the information provided above. I have discussed it with my psychotherapist, and all my questions have been answered to my satisfaction.

\_\_\_\_\_  
**Client Name**

\_\_\_\_\_  
**Signature of Client/Parent/Guardian**

\_\_\_\_/\_\_\_\_/\_\_\_\_  
**Date**





**HIPAA ACKNOWLEDGEMENT FORM**

We are required to provide you with a copy of our Notice of Privacy Practices, which states how we may use and/or disclose your health information. Please sign this form to acknowledge receipt of the Notice. You may refuse to sign this acknowledgement if you wish. Our current Privacy Policy can also be found at [www.engageservices.net](http://www.engageservices.net).

My signature below signifies that I have received a copy of the Engage Counseling Services' HIPAA Notice of Privacy Practices as well as understanding the policy can be found at [www.EngageServices.Net](http://www.EngageServices.Net).

SIGN HERE if you were offered a privacy policy.

\_\_\_\_\_  
**Client or Authorized Person on Behalf of the Client**

\_\_\_\_/\_\_\_\_/\_\_\_\_  
**Date**



Only sign below if you refuse to accept the privacy policy.



**Client Refusal to accept Privacy Policy (Counseling service cannot be provided without agreement.)**

\_\_\_\_\_  
**Signature**

\_\_\_\_/\_\_\_\_/\_\_\_\_  
**Date**

\_\_\_\_\_  
**Administrative Signature**

\_\_\_\_/\_\_\_\_/\_\_\_\_  
**Date**