

**THE BEHAVIORAL WELLNESS GROUP**

8224 Mentor Ave. #208, Mentor OH 44060

Phone: 440-392-2222 Fax: 440-565-2349

[www.behavioralwellnessgroup.com](http://www.behavioralwellnessgroup.com)**PATIENT INFORMATION**

Date \_\_\_\_\_

DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Age \_\_\_\_  Male  Female  Other \_\_\_\_\_

Name \_\_\_\_\_ Preferred Pronouns \_\_\_\_\_

Email \_\_\_\_\_ May we leave message on voicemail?  Yes  NoPhone \_\_\_\_\_  
(Home) (Cell) (Work)Address \_\_\_\_\_  
(Street)

(City)

(State)

(Zip Code)

Emergency Contact \_\_\_\_\_  
(Name) (Phone Number) (Relationship to Patient)

If You Found Us Online, What Did You Search: \_\_\_\_\_

Who Referred You \_\_\_\_\_

May we contact your referral source?  Yes  No Phone \_\_\_\_\_ Fax \_\_\_\_\_May we contact your primary care physician?  Yes  No

Physician Name \_\_\_\_\_ Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

Marital Status \_\_\_\_\_ Student?  Yes  NoParent /Guardian \_\_\_\_\_ Phone \_\_\_\_\_  
(If Applicable)

Primary Insurance Company \_\_\_\_\_ Phone \_\_\_\_\_

Mental Health Carrier \_\_\_\_\_ Phone \_\_\_\_\_  
(If Different from Primary Insurance Company)

Name of Policy Holder \_\_\_\_\_ Policy Holder DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Address of Policy Holder \_\_\_\_\_

Phone number of Policy Holder \_\_\_\_\_

Relationship to Patient \_\_\_\_\_

Member I.D./Subscriber # \_\_\_\_\_ Group # \_\_\_\_\_ Employer \_\_\_\_\_

Authorization # \_\_\_\_\_ Co-Pay \$ \_\_\_\_\_ Deductible \$ \_\_\_\_\_

Pharmacy Name \_\_\_\_\_ Phone \_\_\_\_\_

Physician Address \_\_\_\_\_

**PLEASE COMPLETE REVERSE SIDE**

## PROFESSIONAL SERVICES AGREEMENT

I understand that the effectiveness of mental health services depends on efforts of the patient as well as those of the practitioner (Clinician) and I promise to make my best effort to comply with these procedures. These best efforts will include open and honest discussion of my thoughts and feelings, as well as an effort to perform any exercises or homework assignments that may be recommended. I also agree to return, undamaged, any materials that have been loaned to me as part of the procedures and understand that I am liable for the cost of these materials. I understand that the effectiveness of the procedures cannot be guaranteed and that the Clinician has sole professional responsibility for all services provided.

I understand that regular attendance will produce the maximum benefits but that I am free to discontinue treatment at any time. If I decide to do so, I will notify the Clinician at least two weeks in advance so that effective planning for continued care can be implemented. I also agree to notify the Clinician at least 24 business hours in advance if I will be unable to attend any session. I understand that if I fail to make such notification, I may be charged for the full cost of the session, which will not be reimbursable by my insurance company. I agree to be responsible for these charges.

I understand that conversations with the Clinician will be of a confidential nature. I authorize my Clinician to discuss my treatment with other treatment providers to coordinate my care. I further understand that the Clinician, by law, must report actual or suspected child or elder abuse to the appropriate authorities. In addition, the Clinician has a legal responsibility to protect anyone that the patient may threaten with violence, harmful or dangerous actions (including those to myself) and may break the confidentiality of our communications if such a situation arises. I understand that the Clinician will make reasonable efforts to resolve these situations before breaking confidentiality. I also understand that in order to ensure patient confidentiality and privacy, electronic recording is strictly prohibited within any of The Behavioral Wellness Group's offices.

I understand that prescribed medication can only be provided in coordination with regular office visits, in order to provide me with safe and appropriate medical care, and that any urgent requests by me for medication refills without an office visit will incur a \$25 administrative fee, non-reimbursable by insurance.

My signature below indicates that I have agreed to these terms and have read and understand a "Notice of Privacy Practices" and a "Welcome to our Practice" informational flyer describing my rights and responsibilities as a patient or guardian.

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(Signature of Patient or Guardian)

(Date)

### FINANCIAL AGREEMENT

Patients are responsible for providing accurate information about their insurance benefits. Failure to complete this section or inaccurate information will make patients fully responsible for all charges. Patients are responsible for notifying The Behavioral Wellness Group of any changes in insurance within 30 days; otherwise, you will be responsible for payment in full. In most cases, patients are responsible for making the initial phone call to their insurance companies. The Behavioral Wellness Group does not bill secondary insurance, including Medicaid and its subsidiaries.

I request that The Behavioral Wellness Group, as the agent for the Clinician, submit bills to the insurance company that I have listed above on this form, and I grant permission to the Clinician and The Behavioral Wellness Group to release such confidential information as is necessary to obtain payment from the insurance company. In the event that my insurance company fails to observe Ohio prompt pay standards or otherwise fails to adhere to relevant rules and standards, I grant permission to The Behavioral Wellness Group to share information related to my insurance claim with the Ohio Department of Insurance.

I understand that I am financially responsible for the cost of the mental health services to me (my child) and for any portion of the fees not reimbursed or covered by my health insurance. I understand that my copay is due at time of service, otherwise a \$10 billing fee will be charged each time for any bill that is sent if I have an outstanding patient balance. If my mental health care is provided under the terms and conditions of a managed mental health care program to which the Clinician is contracted, my financial responsibilities may be limited by the terms of that contract. I understand that my failure to pay these bills may result in collection procedures (including court proceedings) being taken against me by the Clinician or a collection agency contracted by the Clinician to collect these bills. I also understand that if my account is placed in collection procedures, neither I nor any other patient of The Behavioral Wellness Group for whom I am the guarantor will be able to schedule appointments with any other Behavioral Wellness Group clinician.

**I understand that professional services will be rendered to me by \_\_\_\_\_ (Clinician) and that the fee for a 30-50 minute initial consultation session will be \$\_\_\_\_\_ and the fee for follow-up appointments will be \$\_\_\_\_\_ along with fees for any testing materials. I authorize the release of any medical information necessary to process my claim. Fees may be different for additional services such as psychological testing, legal consultation/testimony, report preparation, consultations with others on my behalf, phone/e-sessions etc. and will be explained to me if these services are necessary.**

My signature below indicates that I have agreed to the above terms.

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(Signature of Patient or Guardian)

(Date)

### FINANCIAL RESPONSIBILITY (if other than patient)

Name \_\_\_\_\_  Male  Female  Other \_\_\_\_\_

Address (If Different from Patient) \_\_\_\_\_ Date of Birth \_\_\_\_\_

Phone \_\_\_\_\_

Signature of Financially Responsible Party \_\_\_\_\_ Date \_\_\_\_\_

ID Verified \_\_\_\_\_ (Staff Use Only)



## **BWG MEDICAL SERVICES POLICIES AND PROCEDURES**

### **PATIENT STATEMENT OF UNDERSTANDING**

The choice to begin treatment is an important decision. Thank you for placing your confidence in BWG and your provider. In order to facilitate the process, we have created some guidelines below. Please note that in our commitment to assisting you with your treatment goals, we welcome open discussion about your treatment and progress throughout this process.

#### **POLICY:**

It is the policy of The Behavioral Wellness Group (BWG) to provide access to medications that support the maximum functioning of the persons served while reducing specific symptoms and minimizing the impact of side effects, as well as to monitor the use of controlled substances.

The Ohio Automated Rx Reporting System (OARRS), a tool to track the dispensing and personal furnishing of controlled prescription drugs to patients, will be used by BWG. To ensure this policy is fully realized, The Behavioral Wellness Group will enhance services through detailed and comprehensive Pharmacotherapy policies and procedures.

#### **PROCEDURES:**

**INITIAL APPOINTMENTS:** Initial appointments range from 60 to 120 minutes depending on the provider.

**FOLLOW-UP APPOINTMENTS:** Follow-up appointments range from 15 to 45 minutes.

**MEDICATION MANAGEMENT:** Medication may be prescribed as part of the treatment. Emotional and physical effects to be expected will be explained. Please call Medical Services if you experience any unexpected changes. Services are occasionally provided in addition to the regularly scheduled medication appointments. These might include consulting with other physicians or therapists, telephone consultations, providing reports, or completing forms for referral sources, insurance companies, and attorneys. The fees for these professional services range from \$25 to \$310.00 (please speak directly with your provider), depending on the service code.

- New patient (including Self pay) \$310.00 - \$450.00
- Follow-up (including Self pay) \$200.00 - \$330.00
- No Show/Late Cancel Fee \$40.00 - \$85.00
- Prescription Fee \$25.00 - \$30.00
- Paperwork Fee (depending on length/time) \$25.00 - \$50.00

All persons receiving medications will be required to have a regularly scheduled visit with their prescriber, as determined by the prescriber. If you have any questions regarding the fees listed above, please speak with your prescriber.

The Behavioral Wellness Group will ensure that all persons served receive optimal pharmacotherapy services and monitoring of **controlled substances**.

You will always be provided with prescriptions for enough medication to last until your next appointment. If an error appears to have been made, please contact the office **directly** as electronic prescription requests from pharmacies and refill requests called in/faxed by a pharmacy will not be honored.

If those regularly scheduled visits are not kept and a medication refill is called in to BWG Medical Services:

- that medication will be refilled for a fee of \$25 - \$30
- a follow-up appointment will be scheduled
- only sufficient medication to last until that follow-up appointment will be provided
- please note that refills include any/all medications **EXCEPT** controlled substance, as these will **NOT** be refilled between office visits

#### **NO SHOWS/LATE CANCELLATIONS:**

**\*A full 24 business hours' notice is required for cancellations\***

Payments for late cancels/no-shows will be expected at or before the next scheduled appointment. If you have an emergency and must cancel, please speak with your prescriber directly about the possibility of negating the charge prior to the cancellation. **THE PATIENT, NOT THE INSURANCE COMPANY, WILL BE RESPONSIBLE FOR PAYING FOR APPOINTMENTS CANCELED WITH LESS THAN 24 BUSINESS HOURS NOTICE.** By signing this Patient Statement of Understanding, you agree to pay for any missed appointments via check or credit card.

**TELEPHONE HOURS:** Medical Services office hours are 9:00am to 4:00pm, Monday through Thursday and 9:00am to 3:30pm Fridays. Voice mail messages will be returned as soon as possible, generally within **72 business hours**.

**EMERGENCIES:** For extreme emergencies such as: self-destructive intent, alcohol or drug intoxication, severe medication reactions or loss of contact with reality, **call 911 or go to the nearest emergency room immediately.**

**URGENT ISSUES:** For after-hours urgent issues such as medication side effects, please leave a message for Medical Services. **Medication refills are not emergency or urgent issues.**

**TESTS AND PRESCRIPTIONS:** Special tests are sometimes necessary to help diagnose psychological or medical disorders or to help determine whether an emotional problem has physical elements or a physical cause. The use of certain medications will require periodic blood tests. Most medication issues require a face-to-face evaluation. Refills of prescriptions will be issued at the time of your follow-up visit

**“PRIVATE PAY” PATIENTS:** Fees are generally based upon the length of time of a session. While some insurance companies reimburse the patient for psychiatric care, the payment of the bill is the patient's responsibility. **Please make full payment at the time of each appointment.** If you have insurance that will reimburse you, submit a copy of your receipt and bill to the insurance company for reimbursement.

**PAYMENTS / “CONTRACTED” INSURANCE:** If we are a contracted provider with your insurance carrier, BWG staff will submit the charges for services and accept payment by that company. Any self-pay, contracted deductible, co-payment, coinsurance or partial payment that is the insured's responsibility will be collected at the time of service.

**BILLING:** For billing issues, contact Kathy Long at 330-523-7231.

**CONFIDENTIALITY:** Your accumulated medical records are confidential except under special legal circumstances. Information contained in them will not be released to anyone without written consent from you, the patient. Please ask me if you have any questions.

**TERMINATION OF CARE:** Termination of care may occur by mutual consent, completion of treatment, or for your failure to keep your appointments or pay for services. If you do not contact your prescriber for more than three months and make no follow-up appointments, your care will be terminated unless you have made verbal arrangements for continuation of your treatment with your BWG prescriber.

**CONFIDENTIALITY:** To protect your confidentiality, if our paths cross outside of this office, I will not initiate contact with you.

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I have read and understand the above policy

Date

Revised 8.13.19  
Revised 8.17.20  
Revised 9.09.20  
Revised 10.31.22  
Revised 12.14.22  
Revised 10.29.24



## THE BEHAVIORAL WELLNESS GROUP

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## **PSYCHIATRIC AND MEDICAL HISTORY**

Patient's Name: \_\_\_\_\_ Date: \_\_\_\_\_

### **SOCIAL HISTORY/CLIENT INFORMATION**

In what city do you live? \_\_\_\_\_

Do you live with anyone? \_\_\_\_\_ YES \_\_\_\_\_ NO

If yes, with whom? \_\_\_\_\_

Please list occupation inside/outside of home. \_\_\_\_\_

If employed, current employment and length of time on job. \_\_\_\_\_

Please state the last grade you completed or last degree earned. \_\_\_\_\_

Please state, if any, military service. \_\_\_\_\_

Dates: \_\_\_\_\_

Are you currently working with an attorney on any legal matters? \_\_\_\_\_ YES \_\_\_\_\_ NO

If yes, explain. \_\_\_\_\_

Please list previous felonies/misdemeanors/legal issues: \_\_\_\_\_

Please rate the importance of religion/faith in your life on a scale of 10.

0-not important; 10-very important \_\_\_\_\_

Religious Affiliation: Present \_\_\_\_\_ Past \_\_\_\_\_

Please list your hobbies/interests. \_\_\_\_\_

Are you: (Check one):     Married     Separated     Divorced     Widowed     Single

Please answer the following:

Have you ever felt like you should cut down on your alcohol or drug use (including prescription drugs)? \_\_\_\_\_ YES \_\_\_\_\_ NO

Has a friend or relative discussed concerns about your use?  YES  NO

Have you ever felt guilty about your drinking or drug use? \_\_\_\_\_ YES \_\_\_\_\_ NO

Have you ever had to take a drink or use a drug the next day  
to steady your nerves? YES  NO

Are you a recovering alcoholic or recovering drug addict?  YES  NO

Have there been problems with alcohol or drug use in your family?  YES  NO

Have there been problems with alcohol or drug use, your family? \_\_\_\_\_ YES \_\_\_\_\_ NO

## **MEDICAL HISTORY**

Have you experienced either currently or in the past any of the following:

Please list current medications and dose, if known.

List all allergies to medication and reaction (rash, breathing problem, hives, etc.)

Medication	Reaction

Do you smoke cigarettes    YES    NO If so how much: \_\_\_\_\_

**PSYCHIATRIC HISTORY**

Please list the names of past/present psychiatric counselors, therapists, psychiatrists, and duration of treatment.

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Please list previous psychiatric diagnosis, if known: \_\_\_\_\_

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Please list all previous psychiatric medications you have tried:


Please list any previous suicide attempts (method and date):


Have you ever been hospitalized for a psychiatric conditions?    YES    NO

If yes, please explain: \_\_\_\_\_

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## **FAMILY HISTORY**

Do you have any family members with a psychiatric history?  YES  NO

If yes please explain: \_\_\_\_\_

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Have any family members committed suicide?  YES  NO

If yes, please explain: \_\_\_\_\_

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Growing up did you experience verbal, physical or sexual abuse?  YES  NO

If yes, please explain: \_\_\_\_\_

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## **CURRENT ISSUES**

Check the items that describe or relate to your concerns:

Family Violence	Bereavement	Anger Management
Depression	Anxiety/Nervous	Guilt
Religious Doubts or Fears	Marriage Problems	Sexual Concerns
Affairs	Relationship with Parents	Relationship with Children
Suicidal Thoughts/Feelings	Loneliness	Fears/Phobias
Drug/Alcohol Abuse	Financial Difficulties	Legal Problems
Attention/Concentration	Loss of Love or Hope	Lack of Confidence
Irritability or Impatience	Mood Swings	Disturbing Thoughts
Eating/Sleeping Problems	Employment/School Problems	Tension/Pressure of Stress

What brings you to counseling at this time? \_\_\_\_\_

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## **MARITAL HISTORY**

	Name	Date Married	Date Separated	Date Divorced	Date Widowed
1st					
2nd					
3rd					

If not married, have you or are you living intimately with another person?  YES  NO

Names and ages of children in order of birth:

Name	Sex	Age	Date of Birth	Deceased/Date

## **FAMILY BACKGROUND**

	Name	Living	Age	Deceased/Date
Father				
Mother				
Stepfather				
Stepmother				

Brothers and sisters. From oldest to the youngest (including yourself).

Name	Age	Male/Female	Self	Deceased/Date

## **FOR OFFICE USE ONLY**

Axis I:		
Axis II:		
Axis III:		
Axis IV:		
Axis V:	Current	Highest



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## **AUTHORIZATION FOR ELECTRONIC COMMUNICATION**

\_\_\_\_\_ consent to engage in telehealth with  
**(Name of Client)**

\_\_\_\_\_ I understand that "telehealth" includes  
**(Name of Clinician)**

consultation, treatment, transfer of medical data, emails, and telephone conversations using HIPAA compliant, interactive audio, video, and/or data communications. I understand that telehealth also involves the communication of my medical and/or mental health information, both orally and visually.

I understand that I have the following rights with respect to telehealth:

1. I have the right to withhold or withdraw consent at any time without affecting my right to future care or treatment.
2. The laws that protect the confidentiality of my medical information also apply to telehealth. As such, I understand that the information disclosed by me during the course of treatment is generally confidential. However, there are mandatory and permissive exceptions to confidentiality which include:
  - a. Disclosure of child abuse, neglect or endangerment
  - b. Disclosure of elder abuse, neglect or endangerment
  - c. Disclosure of imminent danger to myself or toward others
3. I understand that there are risks and consequences from telehealth, including, but not limited to, the possibility that the transmission of my information could be disrupted or distorted by technical failures. Other unlikely events may include interruptions by unauthorized persons—despite reasonable efforts taken by The Behavioral Wellness Group. Should this occur, The Behavioral Wellness Group has an emergency plan in place to abruptly end the session to protect the therapeutic relationship. I may then choose to have telephonic communication if the session was by audiovisual means.
4. I will make every effort to be as timely as possible for my telehealth appointment. I understand that my provider will make every effort to start as timely as possible and that at times, delays will be inevitable especially given unexpected emergent situations. In the event that my provider is not present within 15 minutes of my telehealth appointment, they will make every effort to get a message to me that they are running late if at all possible. In the event that I am not present within 15 minutes of my telehealth appointment, I will make every effort to get a message to my provider that I am running late if at all possible.
5. Should services be disrupted, The Behavioral Wellness Group will attempt to contact you at the earliest possible convenience. Also, further appropriateness of telehealth sessions will be discussed.

6. My Clinician will respond to communications within 48 business hours.
7. For other communication, it is requested that treatment services and related issues be limited to face-to-face visits, telehealth and video chatting only and that sessions are scheduled in advance. Emails, faxes, texts, etc. may be used for Administrative purposes and simple questions only.
8. I understand that if The Behavioral Wellness Group believes I would be better served by another form of treatment services (e.g. face-to-face), I will be referred to a professional in my practice or in the geographical area that can provide such services. I understand that an appointment may not be immediately available. Also, I understand that there are potential risks and benefits associated with any form of treatment services and that my condition may or may not improve. Thus, results cannot be guaranteed/assured.
9. Insurance coverage for telehealth varies. **It is important to ask your insurance company ahead of time** about whether they would cover telehealth services in your case. Our billing specialist can help with this. If you are paying for telehealth sessions “out-of-pocket,” The Behavioral Wellness Group’s policy is that out-of-pocket services be paid either before or at the time of service.
10. My Provider may utilize alternative means of communication in the following circumstances: Billing and Administrative issues which will be handled by Provider along with other BWG Staff such as Office and Medical Assistants and Billing Specialist using means of communication most appropriate at the time.
11. I accept that telehealth does not provide emergency services. During the evaluation, an emergency response plan will be discussed. If I am experiencing an emergency situation, including but not limited to a self-harming circumstance, I agree to call 911, 440-953-TALK / text NAMI to 741-741 or proceed to my nearest emergency room for immediate help. This may be done for me involuntarily if my Provider believes I am of imminent harm to myself or others.
12. I understand that I am responsible for:
  - a. Providing necessary telecommunications equipment and internet access for my telehealth sessions
  - b. The information security on my computer
  - c. Arranging a location with sufficient lighting and privacy free from distractions or intrusions
13. I understand that I have a right to access my medical information and copies of medical records in accordance with HIPAA privacy rules and applicable state laws.
14. I will take precautions to ensure that my communications are directed only to my Provider or other appropriate individuals.
15. I understand that I will be informed of the identities of all people who are present during the telehealth session and informed of their purpose for attending the session.
16. I understand that my Provider may abruptly end the session if I am acting inappropriately.
17. I understand that BWG uses a HIPAA compliant “non-public facing” communications platform. BWG and my provider will make every effort to protect my privacy, and I understand that they will be held harmless should my information be compromised as a result of something out of their control.
18. I understand that Audio/Visual telehealth sessions will be provided via HIPAA compliant connections through our HIPAA compliant EMR, or via the HIPAA compliant version of the platform itself.
19. My communications exchanged with my Provider will be stored using TherapyAppointment, a HIPAA compliant software program.
20. I understand that this Telehealth Informed Consent is an addendum to our Standard Informed Consent and does not replace it in any manner. All aspects of that Standard Informed Consent shall remain in effect.
21. I understand that my Provider will reinforce the importance of compliance with all of the above by me, my Provider, BWG.

22. I understand that my telehealth provider will ask where I am located for the telehealth session and that the location will be documented in the session note.
23. In the event of an emergency, the name and number of my local hospital is listed below:

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**Name of Hospital**

**Phone Number of Hospital**

24. If I am not in my local area, the nearest hospital/phone number will be shared with my provider, and it will be documented in my session note.

I have read, understand, and agree to the information provided above.

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**Client/Guardian's Signature**

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**Date**

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**Printed Name**

**Revised:** 9.28.2020  
5.09.2022  
01.09.2024  
**10.29.2024**