

UPLANDS COUNSELING ASSOCIATES - INFORMATION FORM

Date: _____ New Client Returning Client (if more than 3 months since your last visit)

CLIENT INFORMATION

Legal Name: (L, F, MI) _____

Preferred Name: _____

Date of Birth: _____ Age: _____ Sex: Female Male SSN: _____ - _____ - _____

Primary Address: _____

(City) _____ (State) _____ (Zip) _____

Primary Phone: _____ Home Work Cell for _____ Do NOT leave message

Additional Phone Numbers: *Mark all that apply*

_____ Home Work Cell for _____ Do NOT leave message Emergency Only

_____ Home Work Cell for _____ Do NOT leave message Emergency Only

E-Mail: _____ Auto Reminders: E-mail Text Msg Voice Msg.

DO YOU HAVE MEDICARE? Yes No **DO YOU HAVE M.A./MEDICAID?** Yes No

Is condition for which you are seeking treatment related to: Employment Auto Accident Other Accident

RESPONSIBLE PARTY – Complete if client is under eighteen and you must also sign consent form.

Name: (L, F, MI.) _____ Date of Birth: _____

Address: (if different than client) _____

Preferred Phone Number: _____ Do NOT leave message Emergency Only

Additional Phone Number: _____ Do NOT leave message Emergency Only

Sex: Female Male Relationship to Client: _____ SSN: _____ - _____ - _____

Employer: _____ Occupation: _____

INSURANCE INFORMATION – We need a copy of all insurance cards

****PRIMARY INSURANCE COMPANY:** _____

Insurance Address: _____

Subscriber or ID #: _____ - _____ Group/File #: _____

Full Name of Policy Holder: _____ Date of Birth: _____

Employer: _____ Relationship to Client: _____

Home address if different than client: _____

Deductible: _____ Co-Payment: _____ Mental Health Coverage Limits: _____

****SECONDARY INSURANCE COMPANY:** _____

Insurance Address: _____

Subscriber or ID #: _____ - _____ Group/File #: _____

Full Name of Policy Holder: _____ Date of Birth: _____

Employer: _____ Relationship to Client: _____

Home address if different than client: _____

Deductible: _____ Co-Payment: _____ Mental Health Coverage Limits: _____

For Staff Use Only

Clinician: _____ Madison Dodgeville Diagnosis Code: _____

Additional Client Information

| Other Persons in Primary Household: Name | Sex (M/F) | Birth date (mo/day/yr) | Relationship to Client |
|---|--------------|---------------------------|---------------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Address of Secondary Household: _____

Phone for Secondary Household: _____ Home Cell for _____ Do NOT leave message

| Other Persons in Secondary Household: Name | Sex (M/F) | Birth date (mo/day/yr) | Relationship to Client |
|---|--------------|---------------------------|---------------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Insurance and Billing Policies

Please be aware that **you are ultimately responsible for your entire bill**. However, as a courtesy to you, we will submit claims to your insurance company. Before your first appointment, please be sure you understand your plan's mental health benefits, including co-payments (the portion of the charge you must pay), deductibles (the amount you must pay before your insurance begins paying) and plan benefit limits. If you need assistance in verifying benefits, please ask us. Please **bring your insurance information and ID card to your first appointment**.

Many insurance plans require **preauthorization for mental health services**. Some plans limit the types of services covered, or the number of appointments covered. Please obtain any necessary preauthorization prior to your first appointment, and inform us of benefit limits.

Co-payments and deductibles are payable at the time of service. We reserve the right to charge interest on unpaid balances over 60 days old at 1.5% OR 18% annually.

Late Cancels/Missed Appointments: If you miss or cancel a **therapy appointment** with less than 24 hours notice, you will be charged a fee of \$60. **These fees are not payable by insurance.**

MD Late Cancels/Missed Appointments will be billed as follows and are not payable by insurance:

Initial appointment: \$137 20 minute follow-up med check: \$80 Extensive follow-up med check: \$130

Bank fee for returned checks: This \$40 bank fee, along with the original amount of the bad check, is payable only in cash, money order, or cashier's check. Any future payments must also be made by these methods.

Responsible Party: If the primary client is a child, the parent or guardian bringing the child in for services is responsible for paying for these services. If you have a financial agreement regarding the child's medical expenses (such as a divorce decree) with the other parent, you are still expected to pay for your child's services, and arrange for your own reimbursement with the other party. If requested, we will provide billing information to the other party.

My signature below indicates that I have read and understood the above information about billing and payment.

CLIENT NAME (PLEASE PRINT): _____

Signed: _____

Client Signature

Date: _____

Responsible Party Signature (if needed)

Date: _____

Witness Signature

Date: _____