

Date _____

PATIENT INFORMATION

Patient's Last Name _____	Patient's First Name _____	Patient's Middle Name _____	Suffix _____	Preferred name _____
Date of Birth _____	<input type="checkbox"/> Male Pronouns: <input type="checkbox"/> He/Him <input type="checkbox"/> She/Her <input type="checkbox"/> They/Them <input type="checkbox"/> Another _____ <input type="checkbox"/> Female			
Race: <input type="checkbox"/> Caucasian (White) <input type="checkbox"/> American Indian <input type="checkbox"/> African American (Black) <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian <input type="checkbox"/> Multiracial <input type="checkbox"/> Other				
Ethnicity: <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> Non-Hispanic/Non-Latino <input type="checkbox"/> Refused/Declined Primary Language: _____				
Home address: _____		City: _____	State: _____	Zip: _____
Mail to address: _____ <small>(If different from home address)</small>		City: _____	State: _____	Zip: _____
Home Phone: () _____		<input type="checkbox"/> This is the primary number for patient.	Cellphone: () _____	
			<input type="checkbox"/> This is the primary number for patient.	
Primary Email Address: _____				

EMERGENCY CONTACT (Pediatric Patients, please list someone other than parents/guardians)

Name: _____ Home Phone: () _____ Relation to Patient: _____

PARENT/GUARDIAN INFORMATION (Pediatric patients only)

Parent/Guardian 1 (If the address and/or phone numbers are the same as patient, please indicate same.)

Name: _____
Last First Middle Nickname

Date of birth: _____ Home Phone: () _____ Cell Phone: () _____
Month/Day/Year

Home address: _____ City: _____ State: _____ Zip: _____
(If different from the patient)

Employer: _____ Work Phone: () _____ Ext. _____

Parent/Guardian 2 (If the address and/or phone numbers are the same as patient, please indicate same.)

Name: _____
Last First Middle Nickname

Date of birth: _____ Home Phone: () _____ Cell Phone: () _____
Month/Day/Year

Home address: _____ City: _____ State: _____ Zip: _____
(If different from the patient)

Employer: _____ Work Phone: () _____ Ext. _____

RESPONSIBLE PARTY

The Responsible Party is the person who is financially responsible for the patient's account and who will receive all account statements to their address.

Last Name _____ First Name _____ Middle Name _____ Relation to Patient _____

Home Phone: () _____ Cell Phone: () _____
(If different from the patient) (If different from the patient)

Mail to address: _____ City: _____ State: _____ Zip: _____
(If different from the patient)

Social Security Number: _____

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

Check here if no insurance. Skip to authorizations (below).

PRIMARY INSURANCE INFORMATION (Please present insurance card and ID to Business Office)

Subscriber: This is the person who carries the insurance. If the subscriber is the patient, skip to insurance co. name field.

Subscriber's name on card: _____ Subscriber's date of birth: _____
Month/Day/Year

Patient relationship to subscriber: _____

If address and phone number is same as patient, please indicate same.

Address: _____ City, State, ZIP: _____ Home Phone: () _____

Insurance co. name: _____ Phone: _____

Policy/Cert #: _____ Group no.: _____ Effective Date: _____

SECONDARY INSURANCE INFORMATION (Please present insurance card and ID to Business Office)

Subscriber: This is the person who carries the insurance. If the subscriber is the patient, skip to insurance co. name field.

Subscriber's name on card: _____ Subscriber's date of birth: _____
Month/Day/Year

Patient relationship to subscriber: _____

If address and phone number is same as patient, please indicate same.

Address: _____ City, State, ZIP: _____ Home Phone: () _____

Insurance co. name: _____ Phone: _____

Policy/Cert #: _____ Group no.: _____ Effective Date: _____

AUTHORIZATIONS

I authorize evaluation and treatment and I authorize release of information for insurance/medical purposes concerning evaluation and/or treatment services provided to me by Clarity, Inc. I hereby also authorize payment from my insurance company to Clarity, Inc. for services rendered. In addition, I authorize audio recording for the purpose of accurate scoring during the provision of evaluation services.

Signature _____ Relation to Patient _____ Date _____

ACCEPTANCE OF PAYMENT POLICIES AND FINANCIAL RESPONSIBILITY

I understand that some services provided by Clarity, Inc. may not be covered by my insurance and that I will be responsible for any amount not covered by my insurance at the time of service. I understand that it is my responsibility to notify Clarity, Inc. if my insurance coverage changes and that I will be financially responsible for any noncovered services. I understand that Clarity, Inc. will collect all applicable copays, deductibles, coinsurance, and fees for services not covered by my insurance at the time services are rendered.

If a deposit is required for scheduled services I understand that if I cancel the appointment(s) within (2) weeks of the appointment(s) and choose not to reschedule the appointment(s), the deposit will be forfeited. This policy does not apply to appointments that must be rescheduled due to illness or family emergency. I further acknowledge that only one reschedule will be allowed before my deposit is forfeited (this does not apply if Clarity, Inc. has to reschedule the appointment).

Signature _____ Relation to Patient _____ Date _____

LATE CANCELLATION AND NO-SHOW POLICY

I understand that if for any reason I am unable to keep a scheduled appointment, I must contact Clarity at least 24 hours in advance at (864) 331-1400 to cancel or reschedule. If two appointments (in any six-month period) are missed or cancelled with less than 24 hours' notice, Clarity will reschedule the appointment after a six-month waiting period from the time of the missed appointment.

Signature _____ Relation to Patient _____ Date _____



Privacy Practices and Authorization for Disclosure of Medical Information

The privacy of your medical information is important. We will only share information about the services you receive at Clarity, Inc. with person(s) you designate and via the mean(s) you specify. This authorization shall be in enforce for six years, until the patient reaches the age of majority (18 years of age) or until this authorization is revoked by the patient or the patient's personal representative.

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

PATIENT'S VERIFICATION CODE

Clarity, Inc. will verify the identity of a person requesting protected health information. Please provide a word/phrase that Clarity, Inc. can ask for to verify identity: _____

SHARING INFORMATION WITH OTHERS

Please **CHECK** the information below that you authorize Clarity, Inc. to give out for the above patient, and list who has permission to receive this information other than the patient's parents/legal guardians.

- Results of Evaluations Appointment Information Billing Information Treatment Information

Name of person that has permission to receive the above patient information Relationship to Patient

Name of person that has permission to receive the above patient information Relationship to Patient

COMMUNICATION BY PHONE

I authorize Clarity, Inc. to leave a voice message on the phone number below regarding: Check **ONLY ONE**

- All Information including appointments, general information, updates, billing etc.
 Appointment information **ONLY**

() _____
Phone Number Relationship to Patient

COMMUNICATION BY EMAIL

Please be aware that email communications can be intercepted during transmission or misdirected. Your use of and authorization for the use of email to communicate Protected Health Information or other information of a confidential nature with Clarity, Inc. indicates that you acknowledge and accept the possible risks associated with such communication. **Please CHECK the information below that you authorize Clarity, Inc. to release about above patient via email and the email address(es) you authorize Clarity, Inc. to send Protected Health Information.**

- Results of Evaluations Appointment Information Billing Information Treatment Information

Email Address Name of the account owner for this email address Relationship to Patient

Email Address Name of the account owner for this email address Relationship to Patient

RIGHTS OF THE PATIENT

I understand that I have the right to refuse to sign this Authorization and that my treatment will not be conditioned on signing. I understand that I have the right to revoke this authorization at any time by sending a written notification to the address listed below. I understand that a revocation is not effective in cases where the information has already been used or disclosed but will be effective going forward. I understand that information used or disclosed as a result of this authorization may be subject to redisclosure by the recipient and may no longer be protected by federal or state law. Information received by this office is for our own use and will continue to be protected by our Privacy Policy. I understand that I have the right to inspect or obtain a copy of the protected health information disclosed as described in this document. I can do this by written notification to the address below.

I authorize disclosure of the information listed above by the means specified and I have read and received a copy of the Notice of Privacy Practices for Clarity, Inc.

Signature Relation to Patient Date



HIPAA Notice of Privacy Practices

Effective as of April 14, 2003
Revised November 16, 2018
Contact: (864) 331-1400

THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

This Notice of Privacy Practices is not an authorization. The Notice of Privacy Practices describes, how we our Business Associates and their subcontractors, may use and disclose protected health information (PHI) to carry out treatment, payment, or healthcare operations (TPO) and for other purposes that are permitted or required by law. It also describes your rights to access and control your protected health information. "Protected Health Information" (also referred to as PHI) is health information is information about you, including demographic information, that may identify you and that relates to your past present, or future physical or mental health care condition and related health care needs.

USES AND DISCLOSURES OF PROTECTED HEALTH INFORMATION

Your protected health information may be used and disclosed by your provider, our office staff and others outside of our office that are involved in your care and treatment for the purpose of providing health care services to you, to pay your healthcare bills, to support the operation of Clarity, Inc., and any other use required by law.

Treatment- We may use or disclose your protected health information in consultation between health care providers relating to your treatment or for your referral to another health care provider for your treatment.

Payment- We may use or disclose your protected health information for billing, claims management, collection activities, or obtaining payment.

Health Care Operations- We may use or disclose your protected health information for reviewing the competence or qualifications of health care professionals, or for conducting training programs in which students, trainees, or practitioners participate. We may use or disclose your protected health information for accreditation, certification, licensing, or credentialing activities. We may use or disclosure your protected health information to our business associates who participate in our healthcare operations. These disclosures will only be made after we have satisfactory assurances in the form of a Business Associates Agreement from the business associate. These assurances will include their agreement to comply with the HIPAA rules and the compliance of any subcontractor with which they do business. We may use or disclose protected health information to remind you of your appointment, to give you information about treatment alternatives, or other health related benefits or services. If you do not wish to receive appointment reminders or the information about treatment alternatives, other health related benefits, services, you may notify our office and you will receive no further information.

Fundraising- We may contact you for our **own** fundraising activities. If you do not want to receive fundraising communication, you may opt-out at any time. Each communication will contain methods to be used to opt-out of further communication. If you opt-out, you will receive no further fundraising communications. If at any time you wish to receive fundraising communication you wish to receive the communication again, you can contact our practice.

USES AND DISCLOSURE THAT REQUIRE YOUR AUTHORIZATION

The following uses or disclosures require a **valid** authorization as defined by the HIPAA standards.

Uses or Disclosures for Psychotherapy Notes- We will require written authorization for most uses and disclosures of psychotherapy notes, where applicable.

Uses or Disclosures for Marketing Purposes- We will require an authorization for uses and disclosures of protected health information used in marketing.

Disclosures for a Sale of Protected Health Information- We will require an authorization for any disclosures that would constitute a sale of protected health information.

For any other use or disclosure, you wish us to make, you can give us a written, valid authorization. Your authorization must have specific instructions for the use and disclosure you want us to make. You will have the right to revoke the authorization in writing at any time before the information is used or disclosed.

USES OR DISCLOSURES REQUIRING AN OPPORTUNITY FOR THE INDIVIDUAL TO AGREE OR OBJECT

For disclosures to others involved with your health care or payment, we will inform you in advance and give you the opportunity to agree or object. These disclosures will be limited to the information necessary to help with your health care or payment. These disclosures will only be made if you do not object.

USES AND DISCLOSURES FOR WHICH AN AUTHORIZATION OR OPPORTUNITY TO AGREE OR OBJECT IS NOT REQUIRED

The following uses or disclosures do not require an authorization or the opportunity for you to agree or object.

Uses and disclosures required by law- We may use or disclose protected health information to the extent required by law. The use or disclosure will comply with and be limited to the relevant requirements of such law.

Uses and disclosures for public health activities- We may use or disclose protected health information for the purpose of preventing or controlling disease, injury, or disability, including, but not limited to, the reporting of disease, injury, and vital events such as birth or death.

Disclosures about victims of abuse, neglect or domestic violence- We may disclose protected health information about an individual whom We reasonably believes to be a victim of abuse, neglect, or domestic violence.

HIPAA Notice of Privacy Practices

Uses and disclosures for health oversight activities- We may disclose protected health information to a health oversight agency for oversight activities authorized by law, including audits, civil, administrative, or criminal investigations, inspections, licensure, or disciplinary actions.

Disclosures for judicial and administrative proceedings- We may, in response to an order of a court or administrative tribunal, provide only the protected health information expressly authorized by such order or a subpoena.

Disclosures for law enforcement purposes- We may disclose protected health information as required by law including laws that require the reporting of certain types of wounds or other physical injuries.

Uses and disclosures about decedents- We may disclose protected health information 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. We may disclose protected health information to a funeral director, as authorized by law, to carry out their duties. This disclosure will be made in reasonable anticipation of death.

Uses and disclosures for cadaveric organ, eye or tissue donation purposes- We may use or disclose protected health information to organ procurement organizations or other entities engaged in the procurement, banking, or transplantation of cadaveric organs, eyes, or tissue for the purpose of facilitating organ, eye or tissue donation and transplantation.

Uses and disclosures for research purposes- We may use or disclose protected health information for research, when the research has been approved by an institutional review board or privacy board, to protect your protected health information.

Uses and disclosures to avert a serious threat to health or safety- We may, consistent with applicable law and standards of ethical conduct, use or disclose protected health information, in good faith, if we believe the use or disclosure is necessary to prevent or lessen a serious and imminent threat to the health or safety of a person or the public.

Uses and disclosures for specialized government- We may use and disclose the protected health information of individuals who are Armed Forces personnel for activities deemed necessary by appropriate military command authorities to assure the proper execution of the military mission, if the appropriate military authority has published by notice in the Federal Register.

Disclosures for workers' compensation- We may disclose protected health information as authorized by and to the extent necessary, to comply with laws relating to workers' compensation or other similar programs, established by law, that provide benefits for work-related injuries or illness without regard to fault.

PATIENT RIGHTS UNDER HIPAA

The following information describes your rights under the HIPAA Standards. We require that all requests for the various rights be made in writing and we will provide our decision on your request in writing. You should be aware that there may be some situations when there could be limitations placed on your rights. We are required to permit you to request these rights, but we are not required to agree to your request, **except as in the Right of Restriction section.**

Right of an individual to request a restriction of uses and disclosures- We will permit an individual to request that we restrict uses or disclosures of protected health information about the individual to carry out treatment, payment, or health care operations or to others involved in your care or in payment. We will consider these requests, but we are not required to agree to them, except as discussed in the next section. Under your right of restriction, you may restrict certain disclosures of protected health information to a health plan for payment or healthcare operation, where payment in full is made out of pocket for a healthcare item or service. We will agree to this restriction as long as your payment is honored. If payment is not honored, we are not obligated to continue to abide by the requested restriction.

Confidential communication requirements- We will permit an individual to request and will accommodate reasonable requests to receive communications of protected health information from our practice by alternative means or at an alternative location.

Access of individuals to protected health information- An individual has a right of access to inspect and obtain a copy of protected health information about the individual in a designated record set except as prohibited by state or federal law or certain other exemption. Your access may be provided in electronic form if producible at your request or in another form or format. As permitted by state and federal law, we may charge you a reasonable cost-based fee for a copy of your record. Questions about the fee should be addressed to our Privacy Officer at the phone number listed at the end of this document.

Amendment of protected health information- An individual has the right to ask to have We amend protected health information or a record about the individual in a designated record set for as long as the protected health information is maintained in the designated record set.

Accounting of disclosures of protected health information- An individual has a right to receive an accounting of disclosures of protected health information made by us in the past six years but not before April 14, 2003. The accounting will not include disclosures made for treatment, payment, or operations, as well as authorized disclosures or disclosures made for which you had an opportunity to agree or object. You may receive one free accounting in a 12-month period. There will be a reasonable cost-based fee for additional requests.

Right of Breach Notification- An individual has the right to and will receive a notification of any breach of their unsecured protected health information as defined by the Breach Notification Rule. We will fulfill our obligation to provide notice in accordance to HIPAA standards.

COPY OF THIS NOTICE

You have a right to a copy of this notice. Even if you agreed to receive an electronic copy, you may request and receive a paper copy.

OUR DUTIES

We are required by law to maintain the privacy of protected health information and to provide individuals with notice of our legal duties and privacy practices with respect to protected health information.

We are required to abide by the terms of the notice currently in effect.

We are required to notify you of any change in a privacy practice that is described in the notice to protected health information that we created or received prior to issuing a revised notice. We reserve the right to change the terms of our notice and to make the new notice provisions effective for all protected health information that we maintain. Revised Notices will be available and posted at our office(s) and posted on our web site, if applicable.

COMPLAINTS

If at any time you feel we have violated your HIPAA rights, please contact Clarity's Privacy Officer, 29 North Academy Street, Greenville, SC 29601 or (864) 331-1400, or with the Office of Civil Rights, US Department of Health and Human Services, 61 Forsyth St., SW, Suite 3B70, Atlanta, GA 30323. We will not retaliate against any individual for filing a complaint.



**INFORMED CONSENT
FOR EVALUATION
AND THERAPEUTIC SERVICES**

Client Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

Welcome to the Psychology and Counseling Department at Clarity. This agreement contains important information about our services and your rights and responsibilities as a client. It is important that you read this document carefully before participating in the evaluation and/or therapeutic services. After you have read this document, please sign your name to accept the terms of this document.

CONSENT FOR SERVICES

As a legally consenting individual, I agree to permit the clinicians of the Psychology and Counseling Department at Clarity to provide therapeutic services and/or to conduct a comprehensive psychological/psychoeducational evaluation on myself or my child (as applicable).

I understand that psychological and psychoeducational evaluations and therapeutic services are provided by a licensed psychologist, licensed psychoeducational specialist, licensed professional counselor, licensed professional counselor-supervisor, licensed independent social worker-clinical practice, post-doctoral fellow (under the direct supervision of a licensed psychologist), or a trainee (under the direct supervision of a licensed psychologist, licensed psychoeducational specialist, licensed professional counselor, licensed professional counselor-supervisor, or licensed independent social worker-clinical practice) with the requisite training and qualifications for the service they are providing. The services provided by non-licensed providers are provided under the direct supervision of licensed providers. More specifically, a post-doctoral fellow is an individual who has a doctoral degree in psychology and is in the process of completing the year-long supervisory period that is required prior to becoming a licensed psychologist. A trainee/practicum student is an individual who is enrolled in a graduate level program (master's degree or higher) in counseling, social work, clinical psychology or school psychology and is completing supervised field experience for the aforementioned program.

I understand that some psychoeducational services provided at Clarity are available at no cost through the local school district for the purposes of determining eligibility for special education services and that licensed psychoeducational specialists employed by Clarity may not function as an independent evaluator for evaluations paid for by a school district. I understand that participation in evaluation and/or therapeutic services is entirely voluntary, and I or my child can withdraw consent at any time without penalty. However, I understand that Clarity may be unable to provide feedback of the test results if testing is terminated and that I will still be responsible for payment of any testing, scoring, and evaluation time provided up until termination.

CONFIDENTIALITY

I understand that communication between a client and clinician is protected by both federal and state law. Records of services in the Psychology and Counseling Department are confidential and will not be released in an individually identifiable form without my prior consent unless required by law. I understand that in many situations, Clarity can only release information about services rendered in the Psychology and Counseling Department to others if I sign a written authorization form that meets certain legal requirements imposed by state and federal privacy regulations. Clarity will follow applicable state laws and professional standards in the storage, maintenance, retention, and destruction of clinical records. Please see the HIPAA Privacy Notice, which explains HIPAA and how it applies to your personal health information in greater detail.

I agree that for training purposes, evaluation and/or therapeutic sessions may be observed by supervisors or trainees (such as a post-doctoral fellow). I also authorize the use of clinical case discussion and review of records for the purpose of training or consultation with other providers within Clarity, who are also legally bound to keep the information confidential.

I understand that Clarity must comply with child abuse reporting laws and court mandated rulings regarding release of confidential information or any provision of psychological services. Situations in which Clarity is legally obligated to take action and may reveal confidential information without your written consent include, but are not limited to, the following: filing a report with the appropriate government agency when there is reasonable cause to suspect abuse, abandonment, or neglect of a child under 18 or a vulnerable adult; protective action if it is believed that a client represents a clear and immediate threat to another person or themselves; or receipt of a subpoena from a court proceeding.

AUTHORIZATION FOR INFORMED CONSENT FOR EVALUATION AND THERAPEUTIC SERVICES

I fully understand and accept the terms of this consent.

Signature of Client (representative or parent/guardian if a minor)

Date

Print Name (representative or parent/guardian if a minor)

Relationship to Client (if not client)



TELEHEALTH INFORMED CONSENT

Telehealth services are different experience from in-person sessions and the therapeutic process may be impacted. In clinic sessions remain available if you prefer to continue coming into the clinic to meet with one of our providers in person.

If you would like to participate in telehealth services at Clarity, please read the information below so that you are informed about the risks, limitations, and benefits.

- Confidentiality still applies for telehealth services. No one is permitted to record the session without consent from everyone involved in the telehealth session.
- There are limitations to confidentiality due to the nature of the session and use of technology. As such, we cannot *guarantee* confidentiality. However, Clarity has selected **ZOOM for Healthcare** for providing telehealth and our business associate agreement (BAA) with them allows for end to end encryption and is HIPAA compliant.
- You should confirm with your insurance provider that telehealth (that is, audio and video sessions) sessions are allowed under your plan. If the telehealth services are not a covered service, you will be responsible for the full payment for each session.
- The provider will make every effort to maintain privacy. You should only be within hearing distance of the people participating in the session in order to maintain your confidentiality in your household.
- Telehealth is not best suited for play therapy and/or art therapy. Guardians of a minor are expected to check in with the provider at the beginning of every telehealth session and are to remain available as needed throughout session.
- The provider may determine that due to certain circumstances, telehealth is no longer appropriate and that in-clinic sessions should be resumed.
- The parent or legal guardian will need to provide written consent for telehealth sessions with clients under the age of 18 years old.

The provider will provide you with instructions and/or explain how to use Zoom. You will need a device (such as a laptop, tablet or smartphone) with a camera, microphone and audio (speakers or headphones) during the session. There are ZOOM apps that can be downloaded onto to computer and/or smartphone.

- It is important to be in a quiet, private space that is free of distractions (for example, pets, siblings) during the session.
- It is important to use a secure internet connection rather than public/free Wi-Fi. In addition, to increase video quality, move your computer as close to your router as possible or use a direct connection (that is, ethernet cable) to you computer.
- It is important to be on time. If you need to cancel or change your tele-appointment, you must notify the provider in advance by phone or email.
- Recording of the sessions is prohibited.
- For pediatric clients, the parent/guardian should remain available during therapy sessions to assist as needed.
- If technical problems are experienced, we may need to either restart or reschedule your session. Please provide a number for your provider to reach you if you become disconnected: _____

In the event of a crisis, you and/or the provider will contact your emergency contact or instruct you to go to the closest emergency room.

Please provide the name of an emergency contact for the client:

Name: _____ Relationship: _____ Phone Number of Emergency Contact: _____

I have read and understood the risks, limitations, and benefits of telehealth. I understand and agree with the terms listed for telehealth and would like to participate in telehealth services as indicated by my signature below.

Signature of Client or Parent/Legal Guardian

Date

Client Name

Date of Birth

What email address should Clarity use to send ZOOM session information? (Please print clearly)



_____ Date

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

Questionnaire Completed by: _____ Relation to Patient: _____

REFERRAL INFORMATION

Primary Care Physician: _____

Referring provider (if different from primary care physician): _____

What are your reasons for seeking help for the child at this time?

When did you first become concerned about the child?

What are the most positive features about the child?

FAMILY INFORMATION

Name of Parent 1: _____ Name of Parent 2: _____

Occupation: _____ Occupation: _____

Highest Grade Completed: _____ Highest Grade Completed: _____

Who does the child live with (include siblings and ages)? _____

If any immediate family members (for example, parent, sibling, etc.) are living elsewhere, please list:

Age	Sex	Relationship to this Child	Frequency of contact
-----	-----	-------------------------------	----------------------

Language(s) spoken/heard in the home: _____

Is the child adopted? No Yes

If yes, list date of adoption: _____

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

PREGNANCY HISTORY

Was the child's mother under doctor's care during the pregnancy? No Yes

During the pregnancy, did the mother take any medications or drugs (other than vitamins/iron), drink alcohol, or smoke cigarettes? No Yes

If yes, please describe: _____

Any complications during the pregnancy or delivery? No Yes

If yes, please describe: _____

Any specialized treatment provided to baby during and/or following delivery? No Yes

If yes, please describe: _____

Was the child born prematurely? No Yes If yes, what was the gestational age at delivery? _____ weeks

Birth weight: _____ lbs _____ oz Length of hospital stay following delivery: _____ Mother _____ Baby

Did any of the following occur during your baby's first month of life?

- | | | | |
|---------------------------------------------|-------------------------------------------|---------------------------------------------|---------------------------------------------|
| <input type="checkbox"/> Breathing Problems | <input type="checkbox"/> Infection | <input type="checkbox"/> Birth Defect | <input type="checkbox"/> Excessive Vomiting |
| <input type="checkbox"/> Jaundice (yellow) | <input type="checkbox"/> Excessive Crying | <input type="checkbox"/> Feeding Difficulty | <input type="checkbox"/> Injury |

DEVELOPMENTAL HISTORY

Communication/Speech/Language: Seems/ed early Seems/ed on time Seems/ed late

If concerns, please describe: _____

Motor Skills: Seems/ed early Seems/ed on time Seems/ed late

If concerns, please describe: _____

Do you have concerns for the child's social development? No Yes

If yes, please describe: _____

Do you have concerns for the child's emotional development? No Yes

If yes, please describe: _____

Do you have concerns for the child's behavior? No Yes

If yes, please describe: _____

Do you have any additional concerns for the child's development? No Yes

If yes, please describe: _____

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

HEALTH HISTORY

Has the child had any of the following?

Convulsions, seizures, fainting spells? No Yes

If yes, please indicate when and describe: _____

Vision or eye problems? No Yes

If yes, when was the last time the child's vision has been screened or evaluated? _____

If yes, does the child wear glasses or contacts? No Yes (please specify) _____

Hearing problems? No Yes

If yes, when was the last time the child's hearing has been screened or evaluated? _____

If yes, does the child have hearing aid(s)? No Yes

Did the child pass their newborn hearing screening? No Yes

Recurrent ear infections? No Yes

If yes, please indicate when and describe: _____

Have PE tubes been inserted? No Yes

If yes, at what age(s) and how many times? _____

Allergies? No Yes

If yes, what is the child allergic to? _____

Any surgeries, serious illnesses, injuries (including head injuries), or accidents? No Yes

If yes, please indicate when and describe: _____

Has the child ever been hospitalized overnight? No Yes

If yes, when and why? _____

Has the child ever been given a diagnosis? No Yes

If yes, please indicate when and state diagnosis(es): _____

Please list any current health concerns: _____

Is the child taking any medications? No Yes

If yes, please list: _____

Does or has the child received any of the following services? If yes, please describe (when, how long, what for):

BabyNet / Early Intervention No Yes: _____

Speech/language therapy No Yes: _____

Occupational therapy No Yes: _____

Physical therapy No Yes: _____

Counseling No Yes: _____

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

EDUCATIONAL HISTORY

Current School: _____ Grade: _____ School District: _____

What other schools has the child attended? (please list in chronological order beginning with nursery/preschool)

Are you worried about the child's school progress? No Yes

If yes, please describe: _____

Does the child receive extra help at school? No Yes

If yes, please mark any supports the child has received:

Tutoring Small Group Intervention 504 Plan Special Education (IEP) Other
(at school or privately) (such as, Rtl or LLI) _____

Has the child ever had any testing done by the school system or elsewhere? No Yes

If yes, please describe: _____

FAMILY HISTORY

Is there a family history of the following? If yes, list who has/d these concerns

Learning Difficulties	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Reading	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Written Language	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Mathematics	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Attention Problems	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Hyperactivity/Impulsivity	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Anxiety	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Depression	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Autism Spectrum Disorder	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Intellectual Disability	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Bipolar Disorder	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Schizophrenia/Delusions/Hallucinations	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Language/Speech Delay	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Any Genetic Syndrome	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Conduct Problems	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Drug/Alcohol Problems	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Seizure Disorder	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Motor or Vocal Tics	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Hearing Loss	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Visual Problems	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Muscular Problems/Weakness	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____
Other (please specify)	<input type="checkbox"/> No	<input type="checkbox"/> Yes:	_____

Additional Comments: _____

Date

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

Questionnaire Completed by: _____ Relation to Patient: _____

FAMILY HISTORY

Have there been any recent changes or stresses in the family/home? No Yes
If yes, please describe: _____

Has there been any DSS involvement concerning the child? No Yes
If yes, please describe: _____

Please list any other adults in the child's life who provide support in caring for the child? (family friends, neighbors, school personnel, people in religious or community organizations, etc.): _____

MEDICAL HISTORY

Does the child have any difficulties with sleeping or eating? No Yes
If yes, please elaborate: _____

On school nights, what time does the child usually go to sleep, and what time do they usually wake to get ready for school? _____

On non-school nights, does the child's bedtime vary? If so, please describe: _____

How much screen time (for example: cell phone, tablet, computer, TV, video games) does the child usually have per day?

Are there any medications that the child is currently taking or has taken in the past that you felt were especially beneficial or that had negative effects? No Yes

If yes, please elaborate: _____

EDUCATIONAL HISTORY

What are the child's academic strengths?

- | | | | |
|---------------------------------------------------------|-----------------------------------------------------------|------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Reading phonics/decoding | <input type="checkbox"/> Reading Comprehension | <input type="checkbox"/> Reading Fluency | <input type="checkbox"/> Math Calculation |
| <input type="checkbox"/> Communicating through writing | <input type="checkbox"/> Punctuation/Capitalization | <input type="checkbox"/> Spelling | <input type="checkbox"/> Math Reasoning |
| <input type="checkbox"/> Communicating through speaking | <input type="checkbox"/> Listening / Following Directions | <input type="checkbox"/> Focus | <input type="checkbox"/> Memorizing |
| <input type="checkbox"/> Perseverance | <input type="checkbox"/> Completing assignments on time | <input type="checkbox"/> Organization | <input type="checkbox"/> Study Skills |
| <input type="checkbox"/> Handwriting | <input type="checkbox"/> Other: _____ | | |

In what areas does the child have more difficulty?

- | | | | |
|---------------------------------------------------------|-----------------------------------------------------------|------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Reading phonics/decoding | <input type="checkbox"/> Reading Comprehension | <input type="checkbox"/> Reading Fluency | <input type="checkbox"/> Math Calculation |
| <input type="checkbox"/> Communicating through writing | <input type="checkbox"/> Punctuation/Capitalization | <input type="checkbox"/> Spelling | <input type="checkbox"/> Math Reasoning |
| <input type="checkbox"/> Communicating through speaking | <input type="checkbox"/> Listening / Following Directions | <input type="checkbox"/> Focus | <input type="checkbox"/> Memorizing |
| <input type="checkbox"/> Perseverance | <input type="checkbox"/> Completing assignments on time | <input type="checkbox"/> Organization | <input type="checkbox"/> Study Skills |
| <input type="checkbox"/> Handwriting | <input type="checkbox"/> Other: _____ | | |

Patient Name: _____ Date of Birth: _____
Last First Middle Month/Day/Year

EDUCATIONAL HISTORY CONTINUED...

Is homework completion a concern? No Yes
If yes, please describe: _____

Has the child ever repeated a grade? No Yes
If yes, which and for what reason? _____

Does the child like to attend school? No Yes
If no, please describe: _____

If the child has/had an IEP for Special Education services (or support services if attending a private school):
Why were these services initiated (e.g., speech, reading difficulty)? _____
When did the child first begin receiving services? _____
What services does/did the child receive? _____
If any (or all) services been discontinued, which and when? _____

SOCIAL, EMOTIONAL, AND BEHAVIORAL HISTORY

What does the child enjoy doing in his/her free time? _____
Do you have concerns for how the child interacts with adults or other children? No Yes
If yes, please describe: _____

Do you have any concerns for the child's sensory processing? No Yes
If yes, please describe: _____

Do you have any concerns for the child's response to changes in routine? No Yes
If yes, please describe: _____

Has the child ever experienced any traumatic events? (physical abuse, sexual abuse, witnessed domestic violence, car accident, fire, natural disaster, etc.) No Yes
If yes, please describe: _____

Does the child have a history of using/abusing alcohol or other substances? No Yes
If yes, briefly describe (substance used, length of time, amount, outcome, etc.): _____

Has the child ever been hospitalized or admitted at a residential treatment facility for psychiatric reasons? If yes, please describe: No Yes

Has the child ever engaged in any self-harming behaviors (cutting, burning, carving, head banging, etc.)? No Yes
If yes, please describe: _____

Has the child ever made suicidal statements or attempts? No Yes
If yes, please describe: _____

Please share any additional comments or concerns you have (or attach additional relevant information such as, previous evaluations)

