

**Lisa Montalvo, MFT, CEAP, SAP**  
**1395 San Carlos Avenue, Suite C#4**  
**San Carlos, California 94070**  
**(650) 631-0909**  
**www.BayAreaCounselingService.com**

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

**Patient Information:**

Name\_\_\_\_\_

Address\_\_\_\_\_

City\_\_\_\_\_State\_\_\_\_Zip\_\_\_\_\_

Home Phone\_\_\_\_/\_\_\_\_/\_\_\_\_ Work Phone\_\_\_\_/\_\_\_\_/\_\_\_\_ ext\_\_\_\_\_

Cell Phone \_\_\_\_/\_\_\_\_/\_\_\_\_ Email Address\_\_\_\_\_

\*Please indicate your preferred telephone contact number.

Birth Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Age\_\_\_\_\_

Social Security: \_\_\_\_/\_\_\_\_/\_\_\_\_ Marital Status \_\_\_\_\_

Employer\_\_\_\_\_Occupation\_\_\_\_\_

Spouse's Employer\_\_\_\_\_Occupation\_\_\_\_\_

Name of those living in household	Relation to you	Age
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Health Insurance Information:**

Company\_\_\_\_\_Plan Name\_\_\_\_\_

Group or Policy Number \_\_\_\_\_

Address\_\_\_\_\_City\_\_\_\_\_State\_\_\_\_Zip\_\_\_\_\_

Phone\_\_\_\_/\_\_\_\_/\_\_\_\_

Name of Insured\_\_\_\_\_

Social Security No of Insured\_\_\_\_\_

How were you referred? \_\_\_\_\_

Have you had previous counseling?\_\_\_\_ With Whom?\_\_\_\_\_ When\_\_\_\_\_

Briefly describe the difficulties for which you are seeking help:

## Medical History Questionnaire

Current Health- On a scale of 1 (very poor) to 10 (excellent) how would you rate your present health?

(Circle one) 1 2 3 4 5 6 7 8 9 10

Who is your Primary Care Physician:

\_\_\_\_\_

What prescription medications are you currently taking and why?

\_\_\_\_\_

What non-prescription medications are you currently taking and why?

\_\_\_\_\_

Describe your alcohol consumption: What kind \_\_\_\_\_

How frequently \_\_\_\_\_

How much \_\_\_\_\_

Has it changed recently? \_\_\_\_\_

## Mental Health Questionnaire

Please answer each of the questions below by circling the appropriate number or response appearing at the right side of the page. Each of the items should be answered according to how you currently feel.

- |   | Poor(ly) |          | Good         |             | Very well |
|---|----------|----------|--------------|-------------|-----------|
| How well are you sleeping                       | 1        | 2        | 3            | 4           | 5         |
| Has your sleep pattern changed recently?        |          |          | Yes          |             | No        |
| How would you describe your energy level        |          |          | 1            | 2           | 3 4 5     |
| How high is your current level of stress        |          |          | 1            | 2           | 3 4 5     |
| How does your future look to you?               |          | Hopeless |              | Very bright |           |
|   |          | 1        | 2            | 3           | 4 5       |
| How would you describe your recent mood?        |          |          | Sad          |             | Happy     |
|   |          |          | 1            | 2           | 3 4 5     |
| How do you generally feel about yourself?       |          |          | Disappointed |             | Satisfied |
|   |          |          | 1            | 2           | 3 4 5     |
| Do you worry a great deal?                      | Yes      |          | No           |             |           |
| Have you been very nervous or anxious recently? |          |          | Yes          |             | No        |
| How would you describe your relationship with:  |          |          | Poor         |             | Excellent |
| Your spouse (or significant other)              |          |          | 1            | 2           | 3 4 5     |
| Your family                                     |          |          | 1            | 2           | 3 4 5     |
| Your friends                                    |          |          | 1            | 2           | 3 4 5     |
| Do you have any trouble concentrating           |          | Yes      |              | No          |           |
| Do you have any trouble making decisions?       |          | Yes      |              | No          |           |
| Do you have any trouble remembering things?     |          | Yes      |              | No          |           |

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**Client Agreement Form**

**Fee Payment** My fee is \$180.00 per session, per agreement, and appointments are 50 minutes in length. Payment is requested at the beginning or end of each session.

**Cancellations** I will make every effort to accommodate your scheduling needs. In return I ask that you help out by keeping your scheduled appointment, and by notifying me in advance if you are unable to do so. With advance notice, I am often able to accommodate other clients that are waiting to get an appointment.

**ALL APPOINTMENTS THAT ARE CANCELLED WITH LESS THAN 48 HOURS ADVANCE NOTICE ARE SUBJECT TO A MISSED APPOINTMENT FEE. 48 hour cancellation policy is Monday – Friday during business hours. Please note that this is NOT covered by insurance/ EAP companies. It is the client’s responsibility.**

If you fail to arrive for your appointment without 48 hour advance notification, you will be charged the full hourly rate which is \$180.00. This fee is due and payable at your next appointment.

**Insurance** For clients who participate in a qualified insurance or EAP plan, applicable co-payments and deductibles will be collected during the scheduled appointment. I understand that I am financially responsible for all charges whether or not they are covered by insurance. In the event my insurance plan fails to reimburse, I agree to pay all costs accrued.

**Assignment of benefits** I hereby authorize Lisa Montalvo, MFT, CEAP, SAP to release any information required to process my mental health claims, and I also give authorization for direct payment of mental health claims reimbursement to Lisa Montalvo, MFT, CEAP, SAP.

**Acknowledgement of receipt of Notice of Privacy Practices** I hereby acknowledge that I have received a copy Notice of Privacy Practices. I further acknowledge that a copy of the current notice will be available upon request, and that I will be offered a copy of any amended Notice of Privacy Practices at each appointment.

**Confidentiality** All communications between the therapist and client in the therapeutic sessions are privileged and confidential with the following exceptions mandated by law:

- If there is reasonable cause to believe there is a clear and imminent danger to another person or persons.
- If there is a reasonable cause to believe that the client is in danger to himself/herself.
- If there is reasonable cause to believe there is child, elder or dependent adult abuse.

**Consent to Treatment** Most people who participate in behavioral or mental health treatment benefit from it. Like most kinds of healthcare, this kind of treatment requires a very active effort on the individual’s part. In addition, there may be certain kinds of risks involved. For example, the counseling process can be challenging and sometimes may involve experiencing some uncomfortable feelings, or engaging in difficult interactions, or facing difficult aspects of your life. Nevertheless, most people find the benefits outweigh any such risks.

It is important that the individual participates in this treatment willingly. If you have any questions or concerns about this document, about the services being provided, or about the treatment options, please feel free to ask questions.

**Termination of Therapy**

Therapist reserves the right to terminate therapy at his/her discretion. Reasons for termination include, but are not limited to, untimely payment of fees, failure to comply with treatment recommendations, conflicts of interest, failure to participate in therapy, Patient needs are outside the Therapist’s scope of practice or competence, or Patient is not making adequate progress in therapy. Patient has the right to terminate therapy at his/her discretion. Upon either party’s decision to terminate therapy, Therapist will generally recommend that Patient participate in one or more termination sessions. These sessions are intended to facilitate a positive termination experience and give both parties an opportunity to reflect on the work that has been done. Therapist will also attempt to ensure a smooth transition to another therapist by offering referrals when appropriate.

By signing this agreement, I acknowledge that I have read this agreement, understood its terms, agree to be subject to its provisions, and voluntarily agree to the participation in the treatment.

**Signature**

**Date**

\_\_\_\_\_

