

# 8 Broad Street Plattsburgh, NY 12901 Phone: (518) 825-1555 Fax: (518) 825-1550

### **INTAKE FORM**

The treatment and counseling work we do is unique to you, just as it is to each one of our patients. Before we get started we need to collect some general information from you.

#### **GENERAL INFORMATION**

First Name	Last Name	Gender
Date of Birth (MM/DD/YYYY)		Social Security Number
Address		
City	State	Zip Code
Main Phone		Other Phone
Email		
EMERGENCY CONTACT		
First Name		Last Name
Phone		Relationship
Do you authorize this person to disc	uss care or treatme	ent with the office in the case of an emergency?
$\square$ YES $\square$ NO		
INSURANCE INFORMATION	ON	
PRIMARY INSURANCE		Policy Holder
Policy Holder D.O.B. (MM/DD/YYYY)		Relationship
Policy Holder Address		
City	State	Zip Code
Policy Number		Group Number



SECONDARY INSURANCE	Policy Holder		
Policy Holder D.O.B. (mm/dd/yyyy)	Relationship		
Policy Holder Address			
City State	Zip Code		
Policy Number	Group Number		
PARENT/GUARDIAN INFORMATION (If	applicable)		
•	Last Name		
Phone	Relationship		
First Name	Last Name		
Phone	Relationship		
CURRENT MENTAL HEALTH TREATMEN  Are you currently receiving mental health services?  If yes, where are you receiving services?		□YES	□NO
If changing services, why are you making this change?			
Is someone (other than a parent for a minor child) help		□YES	□NO
PAST MENTAL HEALTH TREATMENT			
Have you ever been hospitalized for psychiatric reasons  If yes, when and where?		□YES	□NO
Have you ever had outpatient treatment by a psychiatri  If yes, when and by whom?		□YES	□NO
Have you ever received counseling or psychotherapy in		□YES	□NO



Name:	
Date:	Date of Birth:

DIRECTIONS: Please place a check mark in the box that describes your experience with any of the							
medications listed belo	W.						
Generic Name	Trade Name	Helpful	Not Helpful	Current Use	History of Use	Adverse Reaction	Patient, Parent, Guardian or Physician/NPP Comments
ANTIDEPRESSANTS							
Amitriptyline	Elavil						
Bupropion	Wellbutrin, Wellbutrin SR, Wellbutrin XL						
Citalopram	Celexa						
Clomipramine	Anafranil						
Desipramine	Norpramin						
Desvenlafaxine	Pristiq						
Doxepin	Sinequan, Silenor						
Duloxetine	Cymbalta						
Escitalopram	Lexapro						
Fluoxetine	Prozac, Sarafem						
Fluvoxamine	Luvox, Luvox CR						
Imipramine	Tofranil						
Isocarboxazid	Marplan						
Levomilnacipran	Fetzima						
Milnacipran	Savella						
Mirtazapine	Remeron, Remeron SolTab						
Nefazodone	Serzone						
Nortriptyline	Pamelor						
Paroxetine	Paxil, Paxil CR						
Phenelzine	Nardil						
Selegiline Transdermal	Emsam						
Sertraline	Zoloft						
Tranylcypromine	Parnate						
Trazodone	Desyrel, Oleptro						
Venlafaxine	Effexor, Effexor XR						
Vilazodone	Viibryd						
Vortioxetine	Trintellix, Brintellix						
ANTIPSYCHOTICS "major tranquilizers"							
Aripiprazole	Abilify						
Asenapine	Saphris						
Brexpiprazole	Rexulti						
Cariprazine	Vraylar						
Chlorpromazine	Thorazine						
Clozapine	Clozaril, FazaClo, Versacloz						
Fluphenazine	Prolixin, Prolixin Decanoate						
Haloperidol	Haldol, Haldol Decanoate						
Iloperidone	Fanapt						
110 Periaone	- mmp+						



Name:			

Date: Date of Birth:

Generic Name	Trade Name	Helpful	Not Helpful	Current Use	History of Use	Adverse Reaction	Patient, Parent, Guardian or Physician/NPP Comments
Loxapine	Loxitane						
Lurasidone	Latuda						
Molindone	Moban						
Olanzapine	Zyprexa, Zyprexa Zydis, Zyprexa Relprevv						
Paliperidone	Invega, Invega Sustenna, Inrega Trinza						
Perphenazine	Trilafon						
Pimavanserin	Nuplazid						
Quetiapine	Seroquel, Seroquel XR						
Risperidone	Risperdal, Risperdal Consta, Risperdal M-Tab						
Thioridazine	Mellaril						
Thiothixene	Navane						
Trifluoperazine	Stelazine						
Ziprasidone	Geodon						
ANXIOLYTICS "anti-a	nnxiety" "minor tranquilizers"	·I					
Alprazolam	Xanax, Xanax XR						
Buspirone	BuSpar						
Chlordiazepoxide	Librium						
Clonazepam	Klonopin, Klonopin Wafers						
Clorazepate	Tranxene						
Diazepam	Valium						
Hydroxyzine	Vistaril, Atarax						
Lorazepam	Ativan						
Oxazepam	Serax						
ANTICHOLINESTERA	ASE/ALZHEIMER'S AGENTS			ı			
Donepezil	Aricept						
Galantamine	Razadyne						
Memantine	Namenda, Namenda XR						
Rivastigmine	Exelon						
Selegiline	Eldepryl						
Tacrine	Cognex						
ALCOHOL/DRUG/SM	OKING CESSATION AGENTS	E.	1	ī			
Acamprosate	Campral						
Buprenorphine/ Naloxone	Suboxone, Bunavail, Zubsolv						
Bupropion	Zyban						
Disulfiram	Antabuse						
Methadone	Dolophine						
Naltrexone	ReVia, Vivitrol						



Name:	

Date: Date of Birth:

Generic Name	Trade Name	Helpful	Not Helpful	Current Use	History of Use	Adverse Reaction	Patient, Parent, Guardian or Physician/NPP Comments
Varenicline	Chantix						
MOOD STABILIZING	AGENTS/AED's		•				
Carbamazepine	Tegretol, Tegretol XR						
Fluoxetine/Olanzapine	Symbyax						
Gabapentin	Neurontin						
Lamotrigine	Lamictal, Lamictal XR, Lamictal ODT						
Levetiracetam	Keppra, Keppra XR						
Lithium	Eskalith, Eskalith CR, Lithobid						
Oxcarbazepine	Trileptal						
Tiagabine	Gabitril						
Topiramate	Topamax						
Valproate	Depakene, Depakote, Depakote ER, Valproic Acid						
PSYCHOSTIMULANT	S						
Amphetamine Salts	Adderall, Adderall XR						
Armodafinil, Pemoline	Nuvigil, Cylert						
Atomoxetine	Strattera						
Dexmethylphenidate	Focalin, Focalin XR						
Dextroamphetamine	Dexedrine, Dextrostat						
Lisdexamfetamine	Vyvanse						
Methylphenidate	Ritalin, Ritalin SR, Ritalin LA, Concerta, Metadate ER/CD, Methylin, QuilliChew ER, Quillivant XR						
Methylphenidate	Daytrana						
Transdermal							
Modafinil	Provigil						
SEDATIVE/HYPNOTION		1		1			
Chloral Hydrate	Noctec						
Eszopiclone	Lunesta						
Flurazepam	Dalmane						
Ramelteon	Rozerem						
Suvorexant	Belsomra						
Temazepam Triazolam	Restoril Halcion						
Zaleplon Zolpidem	Sonata Ambien, Ambien CR,						
Zorpidein	Intermezzo, Edluar						
OTHER	morniozzo, Laiutti	1	<u> </u>	<u> </u>			
Benztropine	Cogentin						



Name:	
Date:	Date of Birth:

Generic Name	Trade Name	Helpful	Not Helpful	Current Use	History of Use	Adverse Reaction	Patient, Parent, Guardian or Physician/NPP Comments
Clonidine	Catapres, Kapvay						
Cyproheptadine	Periactin						
Diphenhydramine	Benadryl						
Guanfacine	Tenex, Intuniv						
Prazosin	Minipress						
Propranolol	Inderal						
Trihexyphenidyl	Artane						
HERBAL PREPARATION	ONS						
☐ I am unable or unwilling	ng to complete this form.	I ha	ve con	npleted	this fo	orm to	the best of my ability.
Signature of Patient/Parent/Guardian:						Date:	
Reviewed in person with the patient.							
Reviewed over the phone with the parent/guardian of the patient.							
Reviewed in person with the patient and / or parent/guardian of the patient.							
Signature of Psychiatrist/NPP:						Date/Time:	



### **GENERAL MEDICAL HISTORY**

Primary Care Physician:
Please list any medical problems you may have below:
Please list any serious medical procedures you have had in the past:
Are you on any medications for any general medical problems you may have?   YES   NO
If yes, which ones?
Do you have any allergies to medications?
If yes, which ones?



Alcohol, Drug, and Tobacco Use	
Describe your use of alcohol:	
Describe your use of recreational drugs:	
Describe your use of tobacco:	
Family Medical History	anne abuse among blood veletives
List any history of illness (mental or other) and substa	ance abuse among blood relatives.
Mother's side	<u>Father's side</u>
SOCIAL HISTORY	
Birth place:	Where did you grow up?
Did your parents get divorced as a child?   YES	
Did your parents get divorced as a clinia:	
If so, how old were you when they separated?	
Father's occupation growing up:	
Mother's occupation growing up:	
How many siblings do you have?	



Did you have any early development problems as a child?			
Are you/were you a victim of any form of physical/sexual/emotional abuse?			
Highest Level of Education:			
- Ingliest Level of Education.			
Please list the last three jobs you have had below:			
Current employment:			
Are you currently in a romantic relationship?   YES   Duration:			
Describe your relationship:			
Spouse or partner's current occupation:			



Do you have any children?    YES    NO How many?
What are your children's names and ages?
What activities do you enjoy doing?
Have you ever been convicted of any crimes, served time, or been on probation? $\Box$ YES $\Box$ NO
Details:
Please list any additional notes that you think would be helpful for treatment below:



# **CONSENT TO TREATMENT**

Last Name:

First Name:

You are about to take a very important step in your mental health treatment, and you are seeing a mental health professional. As your mental health provider, we will be entering into a protected relationship. Treatment might involve a multidimensional family approach. Due to this consent is needed for all those attending sessions.
We are treating you and we will do our best to accurately diagnose you and design a comprehensive treatment plan that will enable you to continue with a normal emotional development. This may include recommendations of therapy, or medications. This is all part of the service of a mental health professional. We will also work with your primary care physician to assure coordination of care.
You are our patient and have confidentially rights. Confidentiality does not apply under certain situations: We are obligated by law to report any suspicion of child abuse. This includes physical or sexual abuse. Also, we have a duty to protect if we suspect anyone is in danger of killing themselves or has made threats to hurt someone else. Except in these rare situations, your child has the right to keep particular topics confidential from even his/her guardian. Please respect this confidentiality. Again, if there is any concern of harm, suicide or other dangerous behavior, we will inform you.
If I require or think it is in your best interest to communicate with an outside source, I will request a release of information. To assure good therapeutic care, frequent appointments are required. Unless arranged otherwise, patients that have not been seen in 6 months may be considered inactive. A new evaluation will be required for any inactive patient to be seen.
I,



	o deal with other problems if I	nal at any time. I understand that I may stop treatment. (For example, if my
communication over the Internet, i	my information may not be compountry Behavioral Medicine is not	e, email, text, or any other form of pletely secure. In the event that my responsible for the breach of patient respond to if contacted:
Phone:	Email:	
(Initial)		
Patient Name (please print)	Patient Signature	 Date



# LIFETIME INSURANCE AUTHORIZATION AND RELEASE OF INFORMATION

Last Name:

First Name:

Insurance Company	
Patient/Guardian Signature	Date
Patient Name (please print)	
time not to exceed 90 days.	ince of third payer within a reasonable period of
others pay a percentage of the charge. I understand it's my insurance, or any other balance not paid for by my insura	
Please remember that insurance is considered a method doctor and is not a substitute for payment. Some companie	
This assignment will remain in effect until revoked by me w	riting.
I PERMIT A COPY OF THESE AUTHORIZATIONS AND ASSIGNMENT OF THE PHYSICIAN'S OFFICE.	IMENTS TO BE USED IN PLACE OF THE ORIGINAL
certify that the information given by me in applying for pa Act is correct. I authorize any holder of medical or other Security Administration/Division of Family Services or its into this of a related Medicare/Medicaid claim. I hereby certif assigned to the physician treating me.	yment under Title XVIII/XIX of the Social Security information about me to be released to Social ermediaries or carries any information needed for
Medicare/Medicaid – Patient's certification authorization	to release information and payment request. I
Physician Insurance Assignment: I, the below named subsciountry Behavioral Medicine PLLC for my treatment at this services as described.	
and any providers working under North Country Behavioral I any and all information pertaining to my treatment to any the a government agency) as needed to determine a claim for p	ird party payer (such as my insurance company or
Release of Information: I, the subscriber named below, au	•



# HIPPA NOTICE/PRIVACY PRACTICES

Last Name:

First Name:

This notice describes how medical information about you naccess to this information. Please review it carefully.	nay be used and disclosed and how you can get
North Country Behavioral Medicine PLLC, 8 Broad Street, Plat	tsburgh, NY 12901, (518) 825-1555
We understand the importance of privacy and are comminformation. We make a record of the medical care we prowide use these records to provide or enable other health care obtain payment for services provided to you as allowed by professional and legal obligations to operate this medical maintain the privacy of protected health information, to proviprivacy practices with respect to protected health information breach of unsecured protected health information. This not medical information. It also describes your rights and our information. If you have any questions about this notice, please front office for "HIPPA Detail" forms.	vide and may receive such records from others. It is providers to provide quality medical care, to your health plan and to enable us to meet our practice properly. We are required by law to vide individuals with notice of our legal duties and on, and to notify affected individuals following a lice describes how we may use and disclose your legal obligations with respect to your medical
See Hollt Office for Thera Detail Tollis.	
Patient Name (please print)	
Patient/Guardian Signature	Date



#### North Country Behavioral Medicine, PLLC 8 Broad Street Plattsburgh, NY 12901

MRN

Name

DOB

#### **AUTHORIZATION TO RELEASE PROTECTED HEALTH INFORMATION**

BY SIGNING THIS FORM, YOU AUTHORIZE THE NORTH COUNTRY BEHAVIORAL MEDICINE, PLLC TO RELEASE OR OBTAIN YOUR HEALTH INFORMATION TO THE PARTIES LISTED IN SECTION C BELOW. PLEASE COMPLETE ALL SECTIONS. INCOMPLETE FORMS CAN PREVENT OR **DELAY RELEASE.** Section A: Patient Name: Date of Birth: City: \_\_\_\_ Patient Address: \_\_\_\_\_Phone Number: \_\_\_ State & Zip Code:\_\_\_ Section B: Reason for Release of Information: ☐ Medical Care □ Personal ☐ Insurance/ ☐ Workers' ☐ School: Records Payment Compensation ☐ Attorney/Legal □ Provider □ Disability □ Other: Proceedings Transfer Section C: Party to Receive or Obtain Information From: Release a copy of my protected health information (PHI) to: Obtain a copy of my PHI from: I decline to have PHI shared to or from North Country Behavioral Medicine, PLLC (except as allowed by HIPAA regulation) Name: Address: Phone Number: Fax Number: Delivery Method : 

Mail □ Fax □ E-mail address: \_\_\_\_ \_\_\_\_\_(only for patients, patient guardian(s), or next of kin for deceased patients).  $\square$  Other: Please note that if the request is for an unencrypted electronic delivery method, it may not be secure. The requester acknowledges and accepts risk associated with unencrypted electronic transmission. It is the recipient's responsibility to protect the information once received. Section D: Description of the Information to be released/obtained: The date of service and type(s) of information to be released or obtained are as follows: The records to be released will cover the time period from \_\_\_\_\_ Records from a specific Provider/Clinic: \_ ☐ Discharge Summary ☐ Emergency Dept. Notes ☐ Cardiology Testing Reports ☐ Billing ☐ Inpatient Notes ☐ Laboratory/Pathology Reports ☐ Radiology Reports ☐ Immunizations ☐ Office or Clinic Notes ☐ Operative Reports ☐ Radiology Images ☐ History and Physical ☐ Consults

☐ Other: \_\_



#### North Country Behavioral Medicine, PLLC 8 Broad Street Plattsburgh, NY 12901

MRN

Name

DOB

#### AUTHORIZATION TO RELEASE PROTECTED HEALTH INFORMATION

nitials in the space provided:	A Medical Center to release the following types of information, <b>ONLY IF</b> you place you
Mental Health Records (including Psychotherapy)	Confidential HIV/AIDS Information
	· · · · · · · · · · · · · · · · · · ·
Sexually Transmitted disease (STI) records	Genetic Testing Results
Substance, Drug, Alcohol Use Disorder Records fro	om a 42 CFR Part 2 program
	rt 2 Program" must be accompanied by the required statement regarding prohil
when required by law. Information from certain mental $% \left( 1\right) =\left( 1\right) \left( 1\right)$	must be accompanied by the required statements regarding prohibition of discl I health clinical records may be released pursuant to this authorization to the pably be expected to be detrimental to the patient or another person.
understand and agree that:	
=	nce with state and federal law. The fee schedule is available by
<ul> <li>I can revoke (cancel) this authorization at ar submitted this authorization form. My revoc</li> </ul>	nt by <b>Phone: (518) 825-1555 or Fax: (518) 825-1550.</b> In time by submitting my request in writing to the entity to whom I becation will not apply to information that has already been released in
<ul><li>reliance upon this authorization.</li><li>Information used or disclosed pursuant to the</li></ul>	this authorization may be re-disclosed by the recipient and may no
	e law, unless specific re-disclosure laws apply. to sign this form to receive health care services from North Country
	to sign this form to receive health care services from North Country
Behavioral Medicine, PLLC.	
This authorization will expire on authorization will expire one (1) year from	If I do not specify an expiration date, this the date signed.
This authorization will expire on     authorization will expire one (1) year from en the patient is a minor or is not competent to pal representative is required. If the patient is between	
This authorization will expire on     authorization will expire one (1) year from en the patient is a minor or is not competent to pal representative is required. If the patient is betwords for some services. Documentation of a legal	n the date signed.  provide authorization, the signature of a parent, legal guardian or otloween the ages of 12-17, the patient will need to authorize the release I representative's authority may be required to process this form.
This authorization will expire on     authorization will expire one (1) year from en the patient is a minor or is not competent to pal representative is required. If the patient is betwords for some services. Documentation of a legal	n the date signed.  provide authorization, the signature of a parent, legal guardian or otloween the ages of 12-17, the patient will need to authorize the release I representative's authority may be required to process this form.

**Employee Signature** 

**Date Completed** 

**Date Received** 



# **CLINIC POLICY AGREEMENT**

First Name:	Last Name:
ACKNOWLEDGEMENT OF CLINIC ATTENDAM	NCE POLICY:
	y Behavioral Medicine requires that all appointments be pefore the appointment is scheduled (Monday through nys).
INITIAL I understand that <i>if I no-show</i> than 24 business hours' notice, my file will I	or cancel an initial evaluation with our clinic with less be closed.
INITIAL I understand that I will be allow this number is exceeded, <i>I understand that</i>	ved 3 (three) late cancellations in a 12 month period. If my file will be closed.
INITIAL I understand that I will be allowed number is exceeded, I understand that my j	owed 2 (two) no-shows in a 12 month period. <i>If this file will be closed</i> .
<del></del>	nderstand that I will be allowed a <u>combined total</u> of 1 ons in a 12 month period. <i>If this number is exceeded, I</i>
INITIAL I understand that <i>if I have commappointment</i> .	nercial insurance I will be charged \$75 for any no-show
INITIAL I understand that it is <i>my respo</i> appointment reminder system, to cancel an	nsibility to call the office at (518) 825-1555, or via our by appointment.
By signing below I acknowledge that I have and that if I do not, my file with North Count	e read, understand and will abide by the above policies try Behavioral Medicine will be closed.
Printed Name	
Signature	Date
bill my insurance, however <i>if my insurance</i>	North Country Behavioral Medicine PLLC will attempt to does not pay, for whatever reason, I am responsible for eductibles, copays, or out of pocket expenses.
My signature acknowledges:	
• In the case of a Psychiatric Emergency I	will call 911 or go to the nearest hospital
• 72 business hours is required for any pre	escription renewals.
• I will adhere to the guidelines above to t	he best of my ability.
Patient Name (please print)	
Patient/Guardian Signature	Date



### STATEMENT OF NON-DISCRIMINATION

This Practice does not differentiate or discriminate in the treatment of Persons on the basis of, to include, but not limited to: veteran status, race, ethnicity, mental or physical disability or medical condition, sexual orientation, gender, claims experience, evidence of insurability (including conditions arising out of acts of domestic violence), genetic information, color, sex, age, religion, national origin, place of residence, health history, health status, handicap, source of payment or status as a Person.

Signature	Printed Name	Date

# North Country Behavioral Medicine, PLLC

Patient Review of Systems Questionnaire

NAME:	DATE	::
Please check if you've had any of the	se symptoms within the last three w	reeks:
Constitutional	Genitourinary	Neurological
☐ Coldness	Women:	☐ Confusion
☐ Sweating	□ Vaginal discharge	☐ Dizziness
☐ Dry mouth	☐ Menstrual cramps/pain	☐ Headaches
☐ Fatigue	☐ Irregular periods	☐ Head injury
☐ Fever	□ STD	☐ Memory problems
	Men:	☐ Migraines
Eye, Ear, Nose, Mouth/Throat	☐ STD	☐ Numbness
☐ Blurred vision	☐ Penile discharge	☐ Seizures
☐ Corrective lenses:	☐ Testicular swelling	☐ Fainting
☐ Double vision	☐ Testicular tenderness	☐ Tingling
☐ Ringing in ears		☐ Tremors
☐ Hearing loss	Urinary	
☐ Frequent colds	☐ Frequency	Endocrine
☐ Frequent sore throats	□ Incontinence	☐ Cold intolerance
☐ Difficulty swallowing	☐ Recurrent infections	☐ Excessive hunger
	☐ Urgency	☐ Excessive thirst
Cardiovascular	☐ Urethral discharge	☐ Excess urination
☐ Chest pain	= oretinal discharge	☐ Heat intolerance
☐ Leg/Arm swelling	Musculoskeletal	☐ Weight gain
☐ High blood pressure	Use of assistive device:	<u> </u>
☐ Low blood pressure	☐ Back pain	Weight loss
☐ Palpitations/skipped beats	•	Homotological
☐ Fast heart beat	☐ Joint pain	Hematological
- Fast fleart beat	☐ Stiffness	☐ Bruising
Baratania i	☐ Swelling	☐ Excessive bleeding
Respiratory	☐ Weakness	☐ Lumps/swelling
☐ Coughing		
☐ Shortness of breath	Skin/Hair/Nails	Allergies
☐ Wheezing	Dry skin	☐ Drug
	☐ Hair loss	☐ Environment
GI System	☐ Lacerations (cuts)	☐ Seasonal
Abdominal pain	☐ Rashes	☐ Food
Anal problems	☐ Scars	
☐ Blood in stools/black stools		OTHER:
☐ Constipation/hard stools	Breast/Chest	
☐ Diarrhea/unformed stools	□ Breast feeding	
☐ Heartburn	☐ Nipple discharge	
☐ Nausea	☐ Pain	
□ Vomiting	☐ Swelling	
atient Signature:	Vital Sign	ns (provider to enter):
	BP:	(Sitting)
		RR:
		Temp:
		 Weight: