Blue Mountain Psychology, PS
Dr. Jameson C. Lontz
1624 W. Dean Avenue, Spokane, WA 99201
Phone: (509) 939-6863; Fax: (509) 464-6463; Email: drlontz@bluemountainpsychology.com

Please complete all pages prior to your first appointment. Thank you.

CHILD/ADOLESCENT CLIENT/PATIENT/EXAMINEE INFORMATION

Today's date: ___/___/_____	**Patient Name:** _____ **First** **Last** **Middle**	**Date of birth (DOB):** ___/___/_____
Patient's address:		**Email:**
Preferred contact #: ( )	Patient's SSN: _____-_____-_____	Previous patient: ☐Yes Dates:_____ ☐No
Patient's race:	Patient's ethnicity:	☐Male ☐Female ☐_____
Reason for referral (reason and/or diagnosis required):		
School name:		
Father's name:	Father's SSN: _____-_____-_____	Father's DOB: ___/___/_____
Father's address (if different):		Father's employer:
Father's work phone: ( )	Father's cell phone: ( )	
Mother's name:	Mother's SSN: _____-_____-_____	Mother's DOB: ___/___/_____
Mother's address (if different):		Mother's employer:
Mother's work phone: ( )	Mother's cell phone: ( )	
Who has physical custody of the patient?:	If joint custody, please indicate schedule:	
Emergency contact name:	Emergency contact phone number: ( )	
Patient's Primary Care Physician (PCP):	PCP address:	PCP phone: ( )

Referral source:	Other physicians and other professionals involved in the patient's care for the current services:	
Allergies:	Current medications:	
Is referral auto related?:	If so, date of injury: ___/___/_____	
Is referral work related?:	If so, date of injury: ___/___/_____	

****Please bring your insurance card to the first appointment****

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INSURANCE INFORMATION

A copy of the patient's insurance card does not replace this page. Please complete as much information as possible including a phone number for the insurance company. Thank you.

Today's Date: __/__/____	**Patient Name:** _____ **First Last Middle**	**Patient Date of Birth: __/__/____**
Primary insurance carrier:	Insurance phone#: ( )	Claims mailing address:
Contract #:	Group#:	
Subscriber name: _____ First Last Middle	Subscriber's Date of Birth: ___/___/_____	Subscriber employer:
Date verified (**Staff only**): ___/___/_____	Contact person:	Call notes:
Secondary insurance:	Insurance phone#: ( )	Claims mailing address:
Contract #:	Group#:	
Subscriber name (if different): _____ First Last Middle	Subscriber's Date of Birth: ___/___/_____	Subscriber employer:
Date verified (**Staff only**): ___/___/_____	Contact person:	Call notes:
Other insurance (e.g., auto):	Insurance phone#: ( )	Claims mailing address:
Contract #:	Group#:	
Subscriber name (if different): _____ First Last Middle	Subscriber's Date of Birth: ___/___/_____	Subscriber employer:
Date verified (**Staff only**): __/__/____	Contact person:	Call notes:

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Client/Patient/Examinee Name: _____ Date: _____

This practice is located in a professional office building where noise must be kept to a minimum and unruly behavior is not allowed. Children must be accompanied by an adult at all times in this building.

Parents/Guardians are responsible for all children under their care. Please arrange for childcare of siblings and other children if needed, and take your child (children) out of the building if he or she becomes unruly or too noisy at any time (e.g., while in the waiting room).

We apologize for any inconvenience. Thank you for your understanding, and for helping us assure quality care of all individuals.

Please sign and date below to acknowledge receipt of this document

Signature of Client/Patient/Examinee: _____ Date: ___/___/_____
(if 13+ years old)

Signature of guardian (if applicable): _____ Date: ___/___/_____

Staff signature: _____ Date: ___/___/_____

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Client/Patient/Examinee Name: _____ Date: _____

Disclosures

Consent to treatment

1) You (the **Client/Patient/Examinee**) have a right to refuse treatment and all other services offered by **Blue Mountain Neuropsychological Associates, PS**, hereafter referred to as **BMNA (also known as Blue Mountain Psychology)**
2) The **Client/Patient/Examinee** has responsibility to choose the provider and treatment modality that best suits their needs
3) The theoretical orientation used by BMNA staff is an eclectic one
4) I hereby consent to receiving services from BMNA

Please sign and date below to acknowledge receipt of this document

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Client/Patient/Examinee Name: _____

Notice of Privacy Practices Acknowledgement
Health Insurance Portability and Accountability Act of 1996 (HIPAA)
PAGE ONE OF TWO

Confidentiality

1) Your (the patient's) confidential health care information cannot be disclosed to any other person without written authorization from you (the patient) or a legal representative
2) You have a right to receive an accounting of disclosures of health care information made by a health care provider or a health care facility in the six years before the date on which the accounting is requested, except for disclosures:
    a. To carry out treatment, payment, and health care operations;
    b. To the patient of health care information about him or her;
    c. Incident to a use or disclosure that is otherwise permitted or required;
    d. Pursuant to an authorization where the patient authorized the disclosure of health care information about himself or herself;
    e. Of directory information;
    f. To persons involved in the patient's care;
    g. For national security or intelligence purposes if an accounting of disclosures is not permitted by law;
    h. To correctional institutions or law enforcement officials if an accounting of disclosures is not permitted by law; and,
    i. Of a limited data set that excludes direct identifiers of the patient or of relatives, employers, or household members of the patient
3) In the case of suspected neglect or abuse of a child or elderly person, information may be disclosed without your consent
4) In the case of potential harm to self, others, or property, information may be disclosed to others without your consent
5) Please see RCW 70.02.050 for information about possible disclosure without patient authorization
6) I hereby authorize BMNA to release medical and financial information pertaining to services rendered to third party insurance carrier(s) for charges incurred during my receipt of BMNA services
7) I hereby authorize disclosure of any information that BMNA deems necessary to provide me with proper treatment or other services

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Notice of Privacy Practices Acknowledgement
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PAGE TWO OF TWO

NOTICE

We keep a record of the health care services we provide you. You may ask us to see and copy that record. You may also ask us to correct that record. We will not disclose your record to others unless you direct us to do so or unless the law authorizes or compels us to do so. You may see your record or get more information about it by contacting an authorized representative of Blue Mountain Neuropsychological Associates, PS (BMNA).

Records are maintained for at least eight years beyond the date of service. Records for minor children are maintained at least until the **Client/Patient/Examinee** becomes 24 years of age, or for eight years, whichever is longer.

Please sign and date below to acknowledge receipt of this document

Signature of Client/Patient/Examinee: _____ **Date:** ___/___/_____
(if 13+ years old)

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Staff signature: _____ **Date:** ___/___/_____

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Client/Patient/Examinee Name: _____

Financial Obligations
PAGE ONE OF TWO

Duplicating or searching for records

1) A charge of $1.12 per page will be charged for the first 30 pages; 84 cents per page will be charged for all other pages
2) There is a $25 clerical fee for searching and handling of records
3) Reviewing and/or Editing of records is assessed at a rate of approximately $225 for any portion of each hour

Charge for clinical services

1) The "hourly" rate for services received is approximately $225 for any portion of each hour
    a. "Hourly" is typically defined as a period of 45-50 minutes
2) Intake appointments are charged at a rate of $338
3) Consistent with standard fees, the following grid lists charges for BMNA products & services:

Psychological or Forensic Psychological evaluation	$1,100
Neuropsychological or Forensic Neuropsychological evaluation	$2,200
Consultation	$275 for any portion of each hour
Deposition or testimony	a) Deposition: a. $1,000 for any portion of the first hour i. $500 for any portion of each additional hour b) Live testimony: **Charges begin upon my arrival at the arranged location and start time, and last until my departure** a. $1,000 for any portion of the first hour i. $500 for any portion of each additional hour **ii. Minimum charge of $5,000** ***b. $5,000 is billed to the payer in cases of cancellation or no-show***

<u>*Insurance will not be billed for any Forensic Evaluations (this includes parenting competency evaluations)*</u>

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Financial Obligations
PAGE TWO OF TWO

4) If you have insurance that is accepted by BMNA, your insurance carrier will be billed for amounts due
    a. You are fully responsible for any amounts rejected or otherwise not covered by your insurance company
    b. If BMNA has not secured payment from your insurance company within 90 days of billing, you will be responsible for the bill
5) Reports may be withheld until balance is paid in full
6) I hereby authorize that the benefits payable be directly paid to BMNA by third party carrier(s)

Failure to show for scheduled appointments

1) Failure to show (*no*-show) for scheduled appointments, or cancelling a scheduled appointment less than 48 hours in advance, will result in a charge of $275 per occurrence
    a. **Clients/Patients/Examinees** who present greater than 15 minutes late for a scheduled appointment will be considered a *no-show* and billed accordingly
    b. This charge cannot be billed to your insurance provider
    c. All outstanding charges must be paid before additional appointments will be scheduled
2) Copayments are due at time of appointment unless other arrangements have been made
3) Cash, check, and credit cards (3% transaction fee applies) are acceptable forms of payment
    a. There is a $30 fee on each returned check
    b. If your account is delinquent for 90 or more days, services may be discontinued and your account may be forwarded to a collection agency
        i. An interest charge of 1.2% per month will be applied to all outstanding balances
        ii. You are responsible for all collection costs and attorney fees if applicable
4) You are responsible for notifying BMNA of any changes to your insurance carrier or coverage

Please sign and date below to acknowledge receipt of this document

Signature of Client/Patient/Examinee: _____ **Date:** ___/___/_____
(if 13+ years old)

Signature of guardian (if applicable): _____ **Date:** ___/___/_____

Staff signature: _____ **Date:** ___/___/_____

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Disclosure Authorization
Release of Information

(Complete this form if you know that BMNA staff will need to communicate with the client's/patient's/examinee's family physician, transportation services, family members, or others involved in their care)

Client/Patient/Examinee Name: _____ **Date:** _____

I authorize Blue Mountain Neuropsychological Associates, PS to exchange (i.e., **release and/or receive**) my confidential medical/health information with the following entity or entities:

_____
_____

The following types of information will be disclosed:

__All available records
__Diagnoses
__Treatment plans
__Other (please describe): _____

This disclosure authorization will expire on: ___/___/_____
Additional information regarding expiration of this authorization: _____

Signature of Client/Patient/Examinee: _____ **Date:** ___/___/_____
(if 13+ years old)

Signature of guardian (if applicable): _____ **Date:** ___/___/_____

Staff signature: _____ **Date:** ___/___/_____

Disclosures to financial institutions or employers for purposes other than payment shall expire after 90 days unless renewed by the patient. Disclosures to the department of corrections (DOC), while the patient is under supervision of DOC, expires at end of the supervision term or end of required treatment. Please see RCW 70.02.050 for information about possible disclosure without patient authorization.

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Client/Patient/Examinee Name: _____ Date: _____

Use of data for research and clinical demonstration

I authorize Blue Mountain Neuropsychological Associates, PS to use confidential information that is gathered about me or my dependent (if patient is a child) while providing professional services. Such information may be used in research studies and for purposes of clinical demonstration (e.g., training students and other professionals) to help advance scientific practices. **My personal information will be kept confidential and anonymous**:

Signature of Client/Patient/Examinee: _____ Date: ___/___/_____
(if 13+ years old)

Signature of guardian (if applicable): _____ Date: ___/___/_____

Staff signature: _____ Date: ___/___/_____

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Permission to Audio/Video Record

Client/Patient/Examinee Name: _____ Date: _____

I _____ authorize Blue Mountain Neuropsychological Associates, PS to audio and/or video record communications as part of rendering professional services.

This authorization will expire on: ___/___/_____
Additional information regarding expiration of this authorization: _____

Signature of Client/Patient/Examinee: _____ Date: ___/___/_____
(if 13+ years old)

Signature of guardian (if applicable): _____ Date: ___/___/_____

Staff signature: _____ Date: ___/___/_____

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Release of Claims

Client/Patient/Examinee Name: _____ Date: _____

In consideration of services provided by Blue Mountain Neuropsychological Associates, PS (BMNA), Blue Mountain Psychology, or Dr. Jameson C. Lontz, the client/patient/examinee as well as his/her delegate whose signature is below this paragraph releases and waives any and all claims they might possibly have against BMNA, its affiliates, or Dr. Jameson C. Lontz, whether aware of them or not. In legal terms, this means that the client/patient/examinee and his/her delegate whose signature is below this paragraph completely releases and forever discharges BMNA, its affiliates, Dr. Jameson C. Lontz, and respective directors, officers, agents, representatives, owners, employees, past and present, from all claims, demands, rights, actions, obligations, and causes of action of any and every kind, nature, and character, known or unknown, arising from or in any way connected to all actions, omissions, and conduct during the receipt of services by BMNA, its affiliates, or Dr. Jameson C. Lontz.

Signing this form basically means you understand that services provided here are driven by available psychological information and other scientific data. Signing this form also means you acknowledge that if for some reason the evaluation and report are not favorable or to your liking, then you would not hold BMNA or Dr. Lontz liable.

Signature of Client/Patient/Examinee: _____ Date: ___/___/_____
(if 13+ years old)

Signature of guardian (if applicable): _____ Date: ___/___/_____

Staff signature: _____ Date: ___/___/_____

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Please complete all sections prior to first appointment

Client/Patient/Examinee Name: _____ Birthdate: _____ Today's date: _____

Social History

Where was the child born & raised? Who has raised the child? Who has legal custody? _____
_____

Describe the relationship that the child has (had) with each parent. Does the child have any problems with either parent? _____
_____

Has the child ever been the victim of neglect or abuse (physical, sexual, emotional/verbal)? Has the child experienced any other trauma? _____
_____

Does the child have any brothers or sisters? How many, and how is the child's relationship with each of them? Where is this child in the birth order? _____
_____

Family history of mental illness, neurological problems, and substance abuse: _____
_____

The child's school grade, educational history, and grade point average? _____
_____

Any special education services: _____
Was the child ever suspended from school? _____
Is the child (has the child ever been) involved with any extracurricular activities (e.g., sports; clubs)? _____

Does the child have any work experience? What type of work do the parents do? If unemployed, when did either parent last work, and what type of work did they do? Does either parent have any military experience? _____
_____

Marital status and relationship history of the parents? _____
_____

Who currently lives in the child's home? _____

Spiritual history (e.g., church, racial, ethnic, and other cultural factors that affect the child's presenting concerns): _____

Who are the most supportive people in the child's life? _____

What does the child do for fun? _____

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Medical & Developmental Histories

Was this baby carried to term? If not, how many weeks? _____
Birth complications: _____
Childhood illnesses (e.g., excessive ear infections; breathing problems; slowed development)? __
_____

Age at which the child did the following:

Sit without help_____
Crawl_____
Walk _____
Show a clear hand preference_____
Fasten buttons, work zippers_____
Build with blocks_____
Sit still for t.v. or stories_____
Play with puzzles_____
Draw pictures_____
Play with other children_____
Say single words meaningfully_____
Combine two or more words_____
Use sentences_____
Other developmental concerns: _____

Concerns with the child's learning (compared to other children): _____
Head injuries: _____
Surgeries (inc. years): _____
Current and past illnesses or conditions that you have not mentioned: _____

How the child copes with stress: _____
How the child expresses anger: _____

Mark any of the following that are current areas of concern for the child:

☐Sleep
☐Diet
☐Energy level
☐Weight
☐Concentration
☐Leisure
☐Relationships
☐School functioning

Substance (Drug) Use

All current **medications**, over the counter and prescribed (continue on back of last page if necessary): _____
_____
Previous medications: _____
Is the child currently seeing any other doctors? If so, what for? Date of last physical exam:
_____

Are you or anyone else in the home a smoker? If so, how many per day? _____
Other tobacco products (e.g., *e-cigarette or other vaping*) used in the home: _____
Did the child's mother use tobacco, alcohol, marijuana or other recreational substances, any medications, or any illegal drugs during pregnancy? If so, how often, and how much? _____
_____

How often do you now drink alcohol, use marijuana, or use any other *recreational* substances? How much per occasion? _____

_____

Have you ever used illegal drugs to get high, sleep better, lose weight, or change your mood? Which drugs, how often, when in your life were you using the most, and how long did that period last? _____

_____

Do you have any concerns that the child being evaluated may be using any drugs, whether illegal or recreational (including but not limited to marijuana, tobacco, & alcohol)? _____

_____

Have you ever taken prescription medication in a way other than directed by a doctor? _____

_____

How many coffees, sodas, energy drinks, or other caffeinated beverages does the child drink in a day? _____

Legal History

Has the child ever been arrested? If so, what for? Was the child convicted? What was the sentence for each conviction (e.g., fines, jail time)? _____

_____

Have you ever been arrested (during childhood, adolescence, or adulthood)? If so, what for? Were you convicted? What sentences did you receive? _____

_____

Psychiatric History

Has the child ever been in therapy/counseling before? If so, with whom, how long, and what were the reasons? _____

Has the child ever been a patient in a psychiatric hospital? If so, where, how long, and what were the reasons? _____

_____

Has the child ever expressed thoughts of hurting themselves or someone else? _____

_____

Nature of Referral

What are the reasons you brought the child here? _____

_____

How long have you had the concerns that caused you to bring the child here? _____

Who referred you here? _____

Treatment Goals and Expectations

What are you hoping the child will gain from receiving services here? _____

_____

How will you know when the child is ready to end treatment? _____

_____

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For each sentence, please circle the *one* word (*None, Mild, Moderate, Severe, or Extreme*) that best tells about the child in the past *30 days*.

WHODAS 2.0

World Health Organization Disability Assessment Schedule 2.0

36-item version, proxy-administered

Patient Name: _____ **Age:** _____ **Sex:** ❑ Male ❑ Female **Date:**_____

This questionnaire asks about difficulties due to health/mental health conditions experienced by the person about whom you are responding in your role as friend, relative, or carer. Health conditions include **diseases or illnesses, other health problems that may be short or long lasting, injuries, mental or emotional problems, and problems with alcohol or drugs.** Think back over the **past 30 days** and, to the best of your knowledge, answer these questions thinking about how much difficulty your friend, relative, or carer had while doing the following activities. (Note: the questionnaire uses the term "relative" to mean "friend," "relative," or "carer.") For each question, please circle only **one** response.

H4[a]	I am the _____ (choose one) of this person	1 = husband or wife 2 = parent 3 = son or daughter 4 = brother or sister	5 = other relative 6 = friend 7 = professional carer 8 = other (specify)

							Clinician Use Only		
	Numeric scores assigned to each of the items:	1	2	3	4	5	Raw Item Score	Raw Domain Score	Average Domain Score
	In the last 30 days, how much difficulty did your relative have in:								
	Understanding and communicating								
D1.1	Concentrating on doing something for ten minutes?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.2	Remembering to do important things?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.3	Analyzing and finding solutions to problems in day-to-day life?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.4	Learning a new task, for example, learning how to get to a new place?	None	Mild	Moderate	Severe	Extreme or cannot do		___ 30	___ 5
D1.5	Generally understanding what people say?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.6	Starting and maintaining a conversation?	None	Mild	Moderate	Severe	Extreme or cannot do			
	Getting around								
D2.1	Standing for long periods, such as 30 minutes?	None	Mild	Moderate	Severe	Extreme or cannot do			
D2.2	Standing up from sitting down?	None	Mild	Moderate	Severe	Extreme or cannot do			
D2.3	Moving around inside their home?	None	Mild	Moderate	Severe	Extreme or cannot do		___ 25	___ 5
D2.4	Getting out of their home?	None	Mild	Moderate	Severe	Extreme or cannot do			
D2.5	Walking a long distance, such as a kilometer (or equivalent)?	None	Mild	Moderate	Severe	Extreme or cannot do			
	Self-care								
D3.1	Washing his or her whole body?	None	Mild	Moderate	Severe	Extreme or cannot do			
D3.2	Getting dressed?	None	Mild	Moderate	Severe	Extreme or cannot do		___ 20	___ 5
D3.3	Eating?	None	Mild	Moderate	Severe	Extreme or cannot do			
D3.4	Staying by himself or herself for a few days?	None	Mild	Moderate	Severe	Extreme or cannot do			

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							Clinician Use Only		
	Numeric scores assigned to each of the items:	1	2	3	4	5	Raw Item Score	Raw Domain Score	Average Domain Score
	Because of their health condition, in the past 30 days, how much difficulty did your relative have in								
	Getting along with people								
D4.1	Dealing with people he or she does not know?	None	Mild	Moderate	Severe	Extreme or cannot do			
D4.2	Maintaining a friendship?	None	Mild	Moderate	Severe	Extreme or cannot do			
D4.3	Getting along with people who are close to him or her?	None	Mild	Moderate	Severe	Extreme or cannot do		25	5
D4.4	Making new friends?	None	Mild	Moderate	Severe	Extreme or cannot do			
D4.5	Sexual activities?	None	Mild	Moderate	Severe	Extreme or cannot do			
	Life activities—Household								
D5.1	Taking care of his or her household responsibilities?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.2	Doing his or her most important household tasks well?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.3	Getting all the household work done that is needed?	None	Mild	Moderate	Severe	Extreme or cannot do		20	5
D5.4	Getting the household work done as quickly as needed?	None	Mild	Moderate	Severe	Extreme or cannot do			
	Life activities—School/Work								
	If your relative works (paid, non-paid, self-employed) or goes to school, complete questions D5.5-D5.8, below. Otherwise, skip to D6.1.								
	In the past 30 days, how much difficulty did your relative have in:								
D5.5	His or her day-to-day work/school?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.6	Doing his or her most important work/school tasks well?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.7	Getting all of the work done that is needed?	None	Mild	Moderate	Severe	Extreme or cannot do		20	5
D5.8	Getting all the work done as quickly as needed?	None	Mild	Moderate	Severe	Extreme or cannot do			
	Participation in society								
	Participation in society in the past 30 days:								
D6.1	How much of a problem did your relative have in joining in community activities (for example, festivities, religious, or other activities) in the same way as anyone else can?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.2	How much of a problem did your relative have because of barriers or hindrances around him or her?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.3	How much of a problem did your relative have living with dignity because of the attitudes and actions of others?	None	Mild	Moderate	Severe	Extreme or cannot do		40	5
D6.4	How much time did your relative spend on his or her health condition or its consequences?	None	Some	Moderate	A Lot	Extreme or cannot do			
D6.5	How much has your relative been emotionally affected by his or her health condition?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.6	How much has his or her health been a drain on his or her financial resources or the financial resources of other relatives?	None	Mild	Moderate	Severe	Extreme or cannot do			