

Blue Mountain Neuropsychological Associates, PS (Blue Mountain Psychology)

1624 W. Dean Ave., Spokane, WA 99201

Phone: (509) 939-6863; Fax: (509) 464-6463

DrLontz@BlueMountainPsychology.com

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

ADULT CLIENT/PATIENT/EXAMINEE INFORMATION

Today's date: ___/___/___	Patient Name: _____ First Last Middle	Date of birth (DOB): ___/___/___
Patient's address:		Marital status:
Employer name:	Job title:	Employer address:
Patient's home phone: ()	Patient's work phone: ()	Patient's cell phone: ()
Email address:		
Preferred contact #: <input type="checkbox"/> Home, <input type="checkbox"/> Work, <input type="checkbox"/> Cell	Patient's SSN: _____-_____-_____	Previous patient: <input type="checkbox"/> Yes Dates:_____ <input type="checkbox"/> No
Patient's race:	Patient's ethnicity:	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> _____
Reason for referral (reason and/or diagnosis required):		
Emergency contact name:	Emergency contact phone number: ()	
Patient's Primary Care Provider (PCP):	PCP address:	PCP phone: ()
Referral source:	Other professionals involved in patient's care for current services:	
Allergies:	Current medications:	

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Is referral auto related?	If so, date of injury: ___/___/____	
Is referral work related?	If so, date of injury: ___/___/____	
Does patient have a legal guardian?:	Name of legal guardian:	
Phone number of legal guardian: ()	Address of legal guardian:	

****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:** ___/___/___

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

Signature of Client/Patient/Examinee: _____ **Date:** ___/___/___

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

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

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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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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:** ___/___/___

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

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 \$1.17 per page will be charged for the first 30 pages; 88 cents per page will be charged for all other pages (WAC 246-08-400)
- 2) There is a \$26 clerical fee for searching and handling of records
- 3) Reviewing and/or editing of records assessed at \$250 for *any portion* of each hour

Charge for clinical services

- 1) “Hourly” rate for services received is \$250 for *any portion* of each hour (“hourly” is typically defined as a period of 45-50 minutes)
 - a. Hourly rate for Master’s-level provider is \$130 for *any portion* of each hour
- 2) Intake appointments assessed at \$375
 - a. Intake appointments by Master’s-level provider assessed at \$195
- 3) **Consistent with standard fees, the following applies:**

Psychological and/or Forensic Evaluation	\$1,250 (50% is retained if cancelled ≤ 7 days before appointment)
Neuropsychological and/or Forensic Neuropsychological Evaluation	\$2,500 (50% is retained if cancelled ≤ 7 days before appointment)
Travel	\$250 for <i>any portion</i> of each hour
Consultation	\$325 for <i>any portion</i> of each hour
Deposition	\$1,250 for <i>any portion</i> of the first hour, plus \$550 for <i>any portion</i> of each additional hour (all fees are due in advance & non-refundable, even in a case of cancellation or no-show, unless alternate arrangements have been agreed upon)
Live Testimony (including telephonic, video-teleconference, and any other formats)	Minimum charge of \$5,500 (covers <i>up to</i> 4 hours of testimony); additional charge of \$550 for <i>any portion</i> of each hour beyond the initial 4-hour block of testimony (<i>charges begin at the arranged start time, and last until my departure</i>) All fees are due in advance & non-refundable, even in a case of cancellation or no-show (unless alternate arrangements have been agreed upon)

Insurance is not billed for any Forensic (including Parenting Competency) Evaluations

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Financial Obligations
PAGE TWO OF TWO

- 1) 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
- 2) Reports may be withheld until balance is paid in full
- 3) 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 **\$325** 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, deductibles, and other out-of-pocket expenses are due at time of appointment unless other arrangements have been made
- 3) Cash, check, and credit cards (4% 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 applicable attorney fees
- 4) You are responsible for notifying BMNA of any changes to your insurance carrier or coverage

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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: _____ **Today's Date:** _____
DOB: _____

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:** ____/____/____

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:** ___/___/___

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:** ____/____/_____

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:** ___/___/___

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

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Please complete all sections prior to first appointment

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

Social History

Where were you born & raised? Who raised you? _____

Describe your parents and your relationship with them currently (if living) as well as while growing up. How were (are) your parents employed? Any problems with either parent? _____

Do you recall ever being the victim of neglect or abuse (physical, sexual, emotional/verbal)? _____

Other traumatic experiences: _____

Do you have any brothers or sisters? Where are you in the birth order? How many siblings, and how is your relationship with each of them? _____

How are your siblings employed? _____

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

What is your educational history (i.e., how far did you go in school, and what year did you graduate)? _____

Grade point average: _____

Concerns with your learning (compared to peers): _____

Any special education services: _____

Were you ever suspended from school, and what for? _____

While growing up, were you involved with any extracurricular activities (e.g., sports; clubs)? _____

What type of work do you do? If unemployed, when did you last work, and what type of work did you do? _____

Military experience: _____

Marital status and relationship history? _____

Ages and genders of your children (if applicable): _____

How are your relationships with your children/grandchildren? _____

Who currently lives in your home? _____

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

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Who are the most supportive people in your life? _____

What do you do for fun? _____

Medical & Developmental Histories

Birth complications: _____

Were you carried full-term? If not, how many weeks? _____

Childhood illnesses (e.g., excessive ear infections; breathing problems; slowed development)? _____

Age at which you did the following:

Sit without help _____	Play with puzzles _____
Crawl _____	Draw pictures _____
Walk _____	Play with other children _____
Show a clear hand preference _____	Say single words meaningfully _____
Fasten buttons, work zippers _____	Combine two or more words _____
Build with blocks _____	Use sentences _____
Sit still for t.v. or stories _____	Other developmental concerns: _____

Head injuries: _____

Surgeries (inc. years): _____

Current and past illnesses or conditions that you have not mentioned: _____

How you cope with stress: _____

How you express anger: _____

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

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> Sleep | <input type="checkbox"/> Concentration |
| <input type="checkbox"/> Diet | <input type="checkbox"/> Leisure |
| <input type="checkbox"/> Libido | <input type="checkbox"/> Relationships |
| <input type="checkbox"/> Energy level | <input type="checkbox"/> School functioning |
| <input type="checkbox"/> Weight | |

Substance (Drug) Use

All current **medications**, over the counter and prescribed (continue on back of last page if necessary): _____

Previous medications: _____

Are you seeing any other doctors? If so, what for? Date of last physical exam: _____

Are you a smoker? If so, how many per day? _____

Other tobacco products you use (e.g., *e-cigarette or other vaping*): _____

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Did your 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? _____

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 do you drink in a day? _____

Legal History

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

Psychiatric History

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

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

When was the last time you had thoughts of hurting or killing yourself or someone else? _____

Nature of Referral

What are the reasons you are here? _____

How long have you had these concerns? _____

Who referred you here? _____

Treatment Goals and Expectations

What are you hoping to gain from receiving services here? _____

How will you know when you are 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 you in the past 30 days.

WHODAS 2.0

World Health Organization Disability Assessment Schedule 2.0

36-item version, self-administered

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

This questionnaire asks about difficulties due to health/mental health conditions. 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 answer these questions thinking about how much difficulty you had doing the following activities. For each question, please circle only **one** response.

Numeric scores assigned to each of the items:							Clinician Use Only		
	1	2	3	4	5	Raw Item Score	Raw Domain Score	Average Domain Score	
In the <u>last 30 days</u> , how much difficulty did you have in:									
Understanding and communicating									
D1.1	<u>Concentrating</u> on doing something for <u>ten minutes</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do	30	5	
D1.2	<u>Remembering</u> to do <u>important things</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.3	<u>Analyzing and finding solutions to problems</u> in day-to-day life?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.4	<u>Learning a new task</u> , for example, learning how to get to a new place?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.5	<u>Generally understanding</u> what people say?	None	Mild	Moderate	Severe	Extreme or cannot do			
D1.6	<u>Starting and maintaining a conversation</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
Getting around									
D2.1	<u>Standing for long periods</u> , such as <u>30 minutes</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do	25	5	
D2.2	<u>Standing up</u> from sitting down?	None	Mild	Moderate	Severe	Extreme or cannot do			
D2.3	<u>Moving around inside your home</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D2.4	<u>Getting out of your home</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D2.5	<u>Walking a long distance</u> , such as a kilometer (or equivalent)?	None	Mild	Moderate	Severe	Extreme or cannot do			
Self-care									
D3.1	<u>Washing your whole body</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do	20	5	
D3.2	Getting <u>dressed</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D3.3	<u>Eating</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D3.4	Staying <u>by yourself</u> for a <u>few days</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
Getting along with people									
D4.1	<u>Dealing with people you do not know</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do	25	5	
D4.2	<u>Maintaining a friendship</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D4.3	<u>Getting along</u> with people who are <u>close to you</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D4.4	<u>Making new friends</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D4.5	<u>Sexual activities</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			

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Numeric scores assigned to each of the items:							Clinician Use Only		
In the <u>last 30 days</u> , how much difficulty did you have in:							Raw Item Score	Raw Domain Score	Average Domain Score
1	2	3	4	5					
Life activities—Household									
D5.1	Taking care of your <u>household responsibilities</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.2	Doing most important household tasks <u>well</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.3	Getting all of the household work <u>done</u> that you needed to do?	None	Mild	Moderate	Severe	Extreme or cannot do		20	5
D5.4	Getting your household work done as <u>quickly</u> as needed?	None	Mild	Moderate	Severe	Extreme or cannot do			
Life activities—School/Work									
If you work (paid, non-paid, self-employed) or go to school, complete questions D5.5–D5.8, below. Otherwise, skip to D6.1.									
Because of your health condition, in the past 30 days, how much <u>difficulty</u> did you have in:									
D5.5	Your day-to-day <u>work/school</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.6	Doing your most important work/school tasks <u>well</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
D5.7	Getting all of the work <u>done</u> that you need to do?	None	Mild	Moderate	Severe	Extreme or cannot do		20	5
D5.8	Getting your work done as <u>quickly</u> as needed?	None	Mild	Moderate	Severe	Extreme or cannot do			
Participation in society									
In the <u>past 30 days</u> :									
D6.1	How much of a problem did you have in <u>joining in community activities</u> (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 you have because of <u>barriers or hindrances</u> around you?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.3	How much of a problem did you have <u>living with dignity</u> because of the attitudes and actions of others?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.4	How much <u>time</u> did you spend on your health condition or its consequences?	None	Some	Moderate	A Lot	Extreme or cannot do		40	5
D6.5	How much have you been <u>emotionally affected</u> by your health condition?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.6	How much has your health been a <u>drain on the financial resources</u> of you or your family?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.7	How much of a problem did your <u>family</u> have because of your health problems?	None	Mild	Moderate	Severe	Extreme or cannot do			
D6.8	How much of a problem did you have in doing things <u>by yourself</u> for <u>relaxation or pleasure</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do			
General Disability Score (Total):								180	5

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