

**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](mailto: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: _____ <b>First                      Last                      Middle</b>	Date of birth (DOB): ___/___/___
Patient's address:		Email:
Preferred contact#: (    )	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"/> _____
<b>Reason for referral (reason and/or diagnosis required):</b>		
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 Provider (PCP):	PCP address:	PCP phone: (    )

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Referral source:	Other professionals involved in patient's care for 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  
(include a copy if submitting this form electronically)\*\***

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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: _____ <b>First                      Last                      Middle</b>	Patient Date of Birth: ___/___/___
Primary insurance carrier:	Insurance phone#: (    )	Claims mailing address:
Member#:	Group ID#:	
Subscriber name: _____ <b>First                      Last                      Middle</b>	Subscriber's Date of Birth: ___/___/___	Subscriber employer:
Date verified ( <b>Staff only</b> ): ___/___/___	Contact person:	Call notes:
Secondary insurance:	Insurance phone#: (    )	Claims mailing address:
Contract #:	Group#:	
Subscriber name (if different): _____ <b>First                      Last                      Middle</b>	Subscriber's Date of Birth: ___/___/___	Subscriber employer:
Date verified ( <b>Staff only</b> ): ___/___/___	Contact person:	Call notes:
Other insurance (e.g., auto):	Insurance phone#: (    )	Claims mailing address:
Contract #:	Group#:	
Subscriber name (if different): _____ <b>First                      Last                      Middle</b>	Subscriber's Date of Birth: ___/___/___	Subscriber employer:
Date verified ( <b>Staff only</b> ): ___/___/___	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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**(if 13+ years old)**

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**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 THREE**

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**  
**Health Insurance Portability and Accountability Act of 1996 (HIPAA)**  
**PAGE TWO OF THREE**

NOTICE

*You have the right to restrict certain disclosures of Protected Health Information (PHI) to a health plan if they pay out-of-pocket in full for the healthcare service. You have the right to be notified if there is breach of your unsecured PHI. You must sign an authorization before BMNA can release your PHI for any uses and disclosures not described in this Privacy Notice.*

*Breach Notification Addendum to Policies & Procedures: 1. When the Practice becomes aware of or suspects a breach, as defined in Section 1 of the breach notification Overview, the Practice will conduct a Risk Assessment, as outlined in Section 2.A of the Overview. The Practice will keep a written record of that Risk Assessment. 2. Unless the Practice determines that there is a low probability that PHI has been compromised, the Practice will give notice of the breach as described in Sections 2.B and 2.C of the breach notification Overview. 3. The risk assessment can be done by a business associate if it was involved in the breach. While the business associate will conduct a risk assessment of a breach of PHI in its control, the Practice will provide any required notice to patients and HHS. 4. After any breach, particularly one that requires notice, the Practice will re-assess its privacy and security practices to determine what changes should be made to prevent the re-occurrence of such breaches.*

*This practice will also obtain an authorization from you before using or disclosing PHI in a way that is not described in this Notice: 1. When the use and disclosure without your consent or authorization is allowed under other sections of Section 164.512 of the Privacy Rule and the state's confidentiality law. 2. This includes certain narrowly-defined disclosures to law enforcement agencies, to a health oversight agency (such as HHS or a state department of health), to a coroner or medical examiner, for public health purposes relating to disease or FDA-regulated products, or for specialized government functions such as fitness for military duties, eligibility for VA benefits, and national security and intelligence. 3. Right to Restrict Disclosures When You Have Paid for Your Care Out-of-Pocket. You have the right to restrict certain disclosures of PHI to a health plan when you pay out-of-pocket in full for my services. 4. Right to Be Notified if There is a Breach of Your Unsecured PHI. You have a right to be notified if: (a) there is a breach (a use or disclosure of your PHI in violation of the HIPAA Privacy Rule) involving your PHI; (b) that PHI has not been encrypted to government standards; and (c) the risk assessment of this practice fails to determine that there is a low probability that your PHI has been compromised.*

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

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)**

**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 \$1.24 per page will be charged for the first 30 pages; 94 cents per page will be charged for all other pages (WAC 246-08-400 & RCW 70.02.010[38]).
- 2) There is a \$28 clerical fee for searching and handling of records.
- 3) Reviewing/editing/preparing/authenticating records assessed at \$325 for *any portion* of each hour.

Charges for clinical services

- 1) “Hourly” rate for services received is \$325 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 \$170 for *any portion* of each hour.
- 2) Intake appointments assessed at \$490.
  - a. Intake appointments by Master’s-level provider assessed at \$255.
- 3) **Consistent with standard fees, the following apply:**

Psychological &/or Forensic Psychological Evaluation	<b>\$1,625</b> (50% is retained if cancelled $\leq$ 7 days before appointment).
Neuropsychological &/or Forensic Neuropsychological Evaluation	<b>\$3,250</b> (50% is retained if cancelled $\leq$ 7 days before appointment).
Travel	<b>\$325</b> for <i>any portion</i> of each hour.
Consultation	<b>\$425</b> for <i>any portion</i> of each hour.
Deposition	<b>\$1,625</b> for <i>any portion</i> of the first hour, <b>plus \$715</b> for <i>any portion</i> of each additional hour. <b>All fees are due in advance &amp; non-refundable, even with a cancellation or no-show, unless alternate arrangements have been agreed upon.</b>
Live Testimony (including telephonic, video-teleconference, and any other formats)	<b>Minimum charge of \$7,150</b> (covers <i>up to</i> 4 hours of testimony); additional charge of <b>\$715</b> 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> ). <b>All fees are due in advance &amp; non-refundable, even with a cancellation or no-show, unless alternate arrangements have been agreed upon.</b>

**\*Insurance is not billed for any Forensic/Legal/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 equaling 100% of the maximum reimbursable (billable) rate."**
  - 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

**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:** \_\_\_\_\_ **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:** \_\_\_\_/\_\_\_\_/\_\_\_\_  
**(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 (if applicable)**

**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.**

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**(if 13+ years old)**

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**Client/Patient/Examinee Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Informed Consent for Teleneuropsychological (Telehealth) Services, if applicable**

**PAGE ONE OF TWO**

Prior to starting audio-/video-/tele-conferencing (telepsychology/telehealth) services, we discussed and agreed to the following:

- There are potential benefits and risks of receiving services in this way (e.g. limits to your confidentiality) that differ from in-person sessions.
- Confidentiality still applies for telepsychology (telehealth) services, and nobody will record the session without the permission from the others person(s).
- We agree to use the video-conferencing platform selected for our virtual sessions, and the provider will explain how to use it.
- You need to use a webcam or smartphone during the session.
- It is important to be in a quiet, private space that is free of distractions (including cell phone or other devices) during the session.
- It is important to use a secure internet connection rather than public/free Wi-Fi.
- It is important to be on time. If you need to cancel or change your appointment, you must notify the provider in advance by phone or email.
- We need a back-up plan (e.g., phone number where you can be reached) to restart the session or to reschedule it, in the event of technical problems.
- We need a safety plan that includes at least one emergency contact and the closest ER to your location, in the event of a crisis situation.
- If you are not an adult (18 or older), we need the permission of your parent or legal guardian (and their contact information) for you to participate in these sessions.
- You must confirm with your insurance company that these telepsychology (telehealth) sessions will be reimbursed; if they are not reimbursed, you are responsible for full payment.
- As your psychologist (or other provider), I may determine that due to certain circumstances, telepsychology (telehealth) is no longer appropriate and that we will terminate appropriately, or resume our sessions in-person.
- Due to Coronavirus (COVID-19) pandemic precautions, this evaluation reflects reduced exposure to the patient/client/examinee in terms of cognitive testing and documentation limited to essential psychological and neuropsychological issues: Although such tele-based assessment techniques have been shown to be reliable and valid (e.g., Cullum et al., 2014), you hereby acknowledge that there are limitations of objective neuro/psychological assessment when receiving services in this way.

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**Informed Consent for Teleneuropsychological (Telehealth) Services, if applicable**

**PAGE TWO OF TWO**

**Your preferred phone number:** \_\_\_\_\_

**Emergency contact Name:** \_\_\_\_\_

**Emergency contact phone number:** \_\_\_\_\_

**Address of the emergency room closest to your location:** \_\_\_\_\_

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**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)? \_\_\_\_\_

Do you approve of your child's friends? \_\_\_\_\_

How many boyfriends/girlfriends has your son/daughter dated (if applicable), and if none, why (e.g., family rule)? \_\_\_\_\_

Has your son/daughter been sexually active, and if so, with how many partners? \_\_\_\_\_

If not yet sexually active, why (e.g., moral rule)? \_\_\_\_\_

Does the child have any work experience? What type of work does each parent 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 child 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: \_\_\_\_\_

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

Concentration

Diet

Leisure

Energy level

Relationships

Weight

School functioning

**Substance (Drug) History**

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, other recreational substances, any medications, or any illegal drugs during pregnancy? If so, how often, and how much? \_\_\_\_\_

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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 recreational drugs,  
whether illegal or legal (including *but not limited to* marijuana, tobacco, alcohol)? \_\_\_\_\_

Have you or your child 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? \_\_\_\_\_

**Psychological & 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 or killing 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 and/or you will gain from receiving services here? \_\_\_\_\_

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



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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
Because of their health condition, in the past <u>30 days</u> , how much <u>difficulty</u> did your relative have in														
<b>Getting along with people</b>														
D4.1	Dealing with people <u>he or she does not know</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do								
D4.2	Maintaining a <u>friendship</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do								
D4.3	Getting along with people who are <u>close</u> to him or her?	None	Mild	Moderate	Severe	Extreme or cannot do						25	5	
D4.4	Making <u>new friends</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do								
D4.5	<u>Sexual</u> activities?	None	Mild	Moderate	Severe	Extreme or cannot do								
<b>Life activities—Household</b>														
D5.1	Taking care of his or her <u>household responsibilities</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do								
D5.2	Doing his or her most important household tasks <u>well</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do								
D5.3	Getting all the household work <u>done</u> that is needed?	None	Mild	Moderate	Severe	Extreme or cannot do						20	5	
D5.4	Getting the household work done as <u>quickly</u> as needed?	None	Mild	Moderate	Severe	Extreme or cannot do								
<b>Life activities—School/Work</b>														
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 <u>30 days</u> , how much <u>difficulty</u> did your relative have in:														
D5.5	His or her day-to-day <u>work/school</u> ?	None	Mild	Moderate	Severe	Extreme or cannot do								
D5.6	Doing his or her 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 is needed?	None	Mild	Moderate	Severe	Extreme or cannot do						20	5	
D5.8	Getting all the work done as <u>quickly</u> as needed?	None	Mild	Moderate	Severe	Extreme or cannot do								
<b>Participation in society</b>														
Participation in society in the <u>past 30 days</u> :														
D6.1	How much of a problem did your relative 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 your relative have because of <u>barriers or hindrances</u> around him or her?	None	Mild	Moderate	Severe	Extreme or cannot do								
D6.3	How much of a problem did your relative have <u>living with dignity</u> because of the attitudes and actions of others?	None	Mild	Moderate	Severe	Extreme or cannot do						40	5	
D6.4	How much <u>time</u> did <u>your relative</u> spend on his or her health condition or its consequences?	None	Some	Moderate	A Lot	Extreme or cannot do								
D6.5	How much has <u>your relative</u> been <u>emotionally affected</u> 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 <u>drain on</u> his or her <u>financial resources</u> or the financial resources of other relatives?	None	Mild	Moderate	Severe	Extreme or cannot do								