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**In advance of your INITIAL COUPLES' INTAKE APPOINTMENT each partner, please follow these steps, for yourself. Scroll down to print and complete the forms you need. Plan for 45 minutes or more to complete it all. This will benefit you by saving our time for discussion and is intended to be more convenient for you.**

**If you are being seen remotely, I need everything returned to me by noon, two business days before our appt. Otherwise, the appt may have to be postponed.**

**If being seen in office, you can bring it all with you when you come. If you haven't done all your paperwork in advance, you will need to complete yours during your appointment time and this will limit our discussion time.**

**All of the information is important; either to me or required by law or ethical codes to be provided to you. I do apologize for the quantity. I will be reviewing all of it. The information provides me a basis to begin to understand each of your upbringings, backgrounds & the foundations for your personal values, which you may have brought to your relationship.**

**Also, during our appointment time, I will personally ask you some of my Couple's Assessment questions. These will pertain to the nature of your concerns, your roles and responsibilities, your communication, and problem solving and/or dispute resolution styles. Be watching for me to separately send you my Payment & Rate Agreement and Release of Information consent form/s.**

**1. PSYCHOSOCIAL HISTORY FOR INDIVIDUAL Adult INTAKE**

**Each partner, does their own.**

**2. HOW CONFIDENTIALITY WORKS** Each, do your own.

**3. HIPAA** Each partner does their own.

**4. Driving DIRECTIONS** post Pandemic, only needed if seen in office.

**5. USE OF TECHNOLOGY in Counseling** this form can be shared but **ONLY** if you are both/all in the same location during your Virtual and Remote counseling sessions.

**Otherwise, each partner is to do their own.**

**I very much look forward to our Intake appt and working to assist you!**

**Rhonna W. Phillips, MA**

**Licensed Professional Counselor & Supervisor, Licensed Marriage and Family Therapist, Collaborative Practitioner, Qualified Family & Domestic Relations Mediator**

**2-2021**

# Rhonna W. Phillips

Counseling & Therapy Services, LLC

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**PSYCHOSOCIAL HISTORY and INTAKE & ASSESSMENT**  
for INDIVIDUAL Adult age 19yo +

Client Name: \_\_\_\_\_ Intake date: \_\_\_\_\_  
Preferred or nickname: \_\_\_\_\_ DOB: \_\_\_\_\_ Age: \_\_\_\_\_  
Address: \_\_\_\_\_ City \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_  
Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ IDs Gender as: \_\_\_\_\_  
Ethnicity as: \_\_\_\_\_ Country born in: \_\_\_\_\_  
Highest Grade/degree completed: \_\_\_\_\_ Major: \_\_\_\_\_  
Current School: \_\_\_\_\_ for \_\_\_\_\_  
Military service? You or close relative? \_\_\_\_\_  
Current Job: \_\_\_\_\_ Co: \_\_\_\_\_ How long? \_\_\_\_\_  
Currently living with? \_\_\_\_\_ Referred by: \_\_\_\_\_

**Problem? “** \_\_\_\_\_ **”**

**Event that triggered appt:** \_\_\_\_\_

Attach separate notes if you prefer to write more detail. If your counseling is CONJOINT, only submit what you're willing to share with other session members.

**SOCIAL & INTIMATE RELATIONSHIPS: IN THE PAST: 1st Significant intimate rel:**

Year met \_\_\_\_\_ You were Age \_\_\_\_\_ Location \_\_\_\_\_  
Year dated \_\_\_\_\_ You were Age \_\_\_\_\_ Yr moved in together \_\_\_\_\_ Age \_\_\_\_\_  
Year married \_\_\_\_\_ Partner was age \_\_\_\_\_ You were age \_\_\_\_\_ # yrs married \_\_\_\_\_  
If Divorced, how long/yrs \_\_\_\_\_ Why did the rel end? \_\_\_\_\_

Biological Children of this relationship	Stepchildren of this relationship
Names/Gender/Age:	Names/Gender/Age:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Rhonna W. Phillips**  
**Counseling & Therapy Services, LLC**

Which of these children visit w/you now? \_\_\_\_\_

Any that do not, why? \_\_\_\_\_

**Second Sig intimate relationship or Marriage:**

Year met \_\_\_\_\_ You were Age \_\_\_\_\_ Location: \_\_\_\_\_

Year dated \_\_\_\_\_ You were Age \_\_\_\_\_ Yr moved in together \_\_\_\_\_ Age \_\_\_\_\_

Year married \_\_\_\_\_ Partner was age \_\_\_\_\_ You were age \_\_\_\_\_ # yrs married \_\_\_\_\_

If Divorced, how long/yrs \_\_\_\_\_ Why did the rel end? \_\_\_\_\_

Biological Children of this relationship

Stepchildren of this relationship

Names/Gender/Age:

Names/Gender/Age:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Which of these children visit w/you now? \_\_\_\_\_

Any that do not, why? \_\_\_\_\_

**Current intimate relationship status:**

Dating, Girl/Boyfriend, Partner, Live together, Married. How long \_\_\_\_\_

Year met \_\_\_\_\_ You were age \_\_\_\_\_ Location \_\_\_\_\_

Year dated \_\_\_\_\_ You were age \_\_\_\_\_ Yr moved in together \_\_\_\_\_ Age \_\_\_\_\_

Year married \_\_\_\_\_ Partner was age \_\_\_\_\_ Your age \_\_\_\_\_ # yrs married \_\_\_\_\_

If Divorced, how long/yrs \_\_\_\_\_ Why did the rel end? \_\_\_\_\_

Biological Children of this relationship

Stepchildren of this relationship

Names/Gender/Age:

Names/Gender/Age:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Rhonna W. Phillips**  
**Counseling & Therapy Services, LLC**

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Which of these children visit w/you now? \_\_\_\_\_

Any that do not, why? \_\_\_\_\_

**Other PAST Significant Intimate Relationships effecting issues now?** \_\_\_\_\_

\_\_\_\_\_

Age 1<sup>st</sup> sexually active \_\_\_\_ Sexual identity \_\_\_\_ # sex partners in past 6 mos \_\_\_\_

Happiest memory of any intimate relationship \_\_\_\_\_

Worst memory of any intimate relationship's \_\_\_\_\_

Any: **Domestic Violence** (incl psychological abuse, phys and sexual abuse) Y/N \_\_\_\_

**Legal Probs** Y/N \_\_\_\_\_ Past or current Lawsuits Y/N \_\_\_\_\_

Arrests Y/N \_\_\_\_\_ DUI Y/N Outcome \_\_\_\_\_

Court Dates \_\_\_\_\_ Name of Lawyer \_\_\_\_\_

Court orders \_\_\_\_\_ Name of Probation officer \_\_\_\_\_

\_\_\_\_\_

\$ Concerns Y/N \_\_\_\_\_ Child Support paid & current or unpaid \_\_\_\_\_

Attach additional notes if needed, to explain above.

**Self harm:** your own thoughts or actions: \_\_\_\_\_

significant other's thoughts or actions \_\_\_\_\_

\_\_\_\_\_

**Suicidal:** your own thoughts or actions: \_\_\_\_\_

significant other's thoughts or actions \_\_\_\_\_

\_\_\_\_\_

**Homicidal:** your own thoughts or actions: \_\_\_\_\_

significant other's thoughts or actions \_\_\_\_\_

\_\_\_\_\_

**Weapons** you have access to? \_\_\_\_\_

Pistol/s, Rifles, Shotguns, ammo, Hunting knives, Dangerous pills, Other: \_

\_\_\_\_\_

# Rhonna W. Phillips

## Counseling & Therapy Services, LLC

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**Office use:** N/A, Ideation \_\_\_ Plan \_\_\_ Access \_\_\_ Attempts \_\_\_ Intent \_\_\_  
Current Risk: Low, Medium, High-Warn \_\_\_\_\_

**FAMILY OF ORIGIN:**

Who is your Support system is: \_\_\_\_\_

**Religion:** Raised \_\_\_\_\_ Current Religion: \_\_\_\_\_ Attend: \_\_\_\_\_

**Parents** Married \_\_\_\_\_ yrs, If Divorced you were age \_\_\_\_\_ You lived w/ \_\_\_\_\_

Mother remarried? \_\_\_\_\_ Relationship w/ 1<sup>st</sup> Step Fa was: \_\_\_\_\_  
\_\_\_\_\_ Rel w/ 2<sup>nd</sup> Step Fa was: \_\_\_\_\_  
\_\_\_\_\_ Rel w/ 3<sup>rd</sup> StepFa was: \_\_\_\_\_

Father Remarried? \_\_\_\_\_ Relationship w/1<sup>st</sup> Step Mo was: \_\_\_\_\_  
\_\_\_\_\_ Rel w/ 2<sup>nd</sup> Step Mo was: \_\_\_\_\_  
\_\_\_\_\_ Rel w/ 3<sup>rd</sup> Step Mo was: \_\_\_\_\_

Contact w/ non custodial parent was: \_\_\_\_\_

**Sibling Birth Oder:**

Name	Age	Gender	Biological/Step/or Half	Parent:
1 <sup>st</sup> _____	_____	_____	_____	_____
2 <sup>nd</sup> _____	_____	_____	_____	_____
3 <sup>rd</sup> _____	_____	_____	_____	_____
4 <sup>th</sup> _____	_____	_____	_____	_____
5 <sup>th</sup> _____	_____	_____	_____	_____
6 <sup>th</sup> _____	_____	_____	_____	_____

Happiest memory of childhood \_\_\_\_\_

Worst memory of childhood \_\_\_\_\_

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**Rhonna W. Phillips**  
**Counseling & Therapy Services, LLC**

**History of Abuse:** Verbal Y/N Emotional Y/N Physical Y/N Sexual Y/N Explain:

\_\_\_\_\_  
\_\_\_\_\_

**Family's mental health Hx :**Depress, Anxiety, Subst Abuse, Suicide Attmpts, Hosp

Mother: \_\_\_\_\_ Maternal Grandparents: \_\_\_\_\_

Aunts/Uncles: \_\_\_\_\_ Cousins: \_\_\_\_\_

Father: \_\_\_\_\_ Paternal Grandparents: \_\_\_\_\_

Aunts/Uncles: \_\_\_\_\_ Cousins: \_\_\_\_\_

Siblings: \_\_\_\_\_ Kids: \_\_\_\_\_

**MENTAL/ HEALTH TREATMENT:**

Past or present treatment by a **Psychiatric** Dr. Y/N:

Dr. \_\_\_\_\_ for \_\_\_\_\_ Yr \_\_\_\_\_

Dr. \_\_\_\_\_ for \_\_\_\_\_ Yr \_\_\_\_\_

If any more or any Residential treatment or Psychiatric hospitalizations please list, by date, on separate paper

**Mental health Counselors:** Current, name \_\_\_\_\_ Since \_\_\_\_\_ for \_\_\_\_\_  
\_\_\_\_\_ If considering a change why? \_\_\_\_\_

Past: Counselor name \_\_\_\_\_ Age/Year \_\_\_\_\_ how long \_\_\_\_\_  
for \_\_\_\_\_

Counselor \_\_\_\_\_ Age/ Year \_\_\_\_\_ how long \_\_\_\_\_ for \_\_\_\_\_

**Medical** Conditions current: \_\_\_\_\_ Past  
chronic conditions \_\_\_\_\_ Hosp: \_\_\_\_\_ Surgeries: \_\_\_\_\_

Past Medication: \_\_\_\_\_ for \_\_\_\_\_ by Dr. \_\_\_\_\_.

\_\_\_\_\_ for \_\_\_\_\_ by Dr. \_\_\_\_\_.

\_\_\_\_\_ for \_\_\_\_\_ by Dr. \_\_\_\_\_.

\_\_\_\_\_ for \_\_\_\_\_ by Dr. \_\_\_\_\_.

**Rhonna W. Phillips**  
**Counseling & Therapy Services, LLC**

**Current Medication**, Herbs & Supplements, include contraception:

\_\_\_\_\_ for \_\_\_\_\_ dose: \_\_\_\_\_ by Dr. \_\_\_\_\_  
\_\_\_\_\_ for \_\_\_\_\_ dose: \_\_\_\_\_ by Dr. \_\_\_\_\_  
\_\_\_\_\_ for \_\_\_\_\_ dose: \_\_\_\_\_ by Dr. \_\_\_\_\_  
\_\_\_\_\_ for \_\_\_\_\_ dose: \_\_\_\_\_ by Dr. \_\_\_\_\_

**Allergic** to any RX? \_\_\_\_\_

**Alcohol use:** Add separate page if additional space is needed

Beer: # per day \_\_\_\_\_, # days per week \_\_\_\_\_

Wine: # per day \_\_\_\_\_, # days per week \_\_\_\_\_

Hard Liquor: # per day \_\_\_\_\_, # days per week \_\_\_\_\_

Last Marijuana use \_\_\_\_\_ Get high # x per day \_\_\_\_\_ # x per week \_\_\_\_\_

**Substances** that you use socially/ recreationally: \_\_\_\_\_

Substances you abuse: \_\_\_\_\_ # per day \_\_\_\_\_ # per wk \_\_\_\_\_

Have you or anyone close to you ever been concerned about your Alcohol or substance use? \_\_\_\_\_ Tobacco use: # per day \_\_\_\_\_

Any other important information to share: \_\_\_\_\_

OFFICE NOTES: Potential Tx Goals: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Plan \_\_\_\_\_

HMWK \_\_\_\_\_ RTC \_\_\_\_\_

Rhonna W. Phillips, MA

Date

Licensed Professional Counselor & Supervisor, Licensed Marriage and Family  
Therapist, Collaborative Practitioner, Family & Domestic Relations Mediator

Rev. 02-2021

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**CONFIDENTIALITY: How it Works and INFORMED CONSENT**

Name: \_\_\_\_\_

Your expectations of confidentiality are a critical part of how Counseling can be helpful. Therefore, it is important for you to fully understand what level of privacy to expect and also what the legal limitations are.

In AL, from the age of 14 and up you are entitled to access medical/mental health treatment at your will and without the notification or consent of any parent, guardian or custodian. At age 14 & up, it is your choice to Request or Consent to Release any Information about your treatment. You can limit what is released and you can revoke your consent at any time. For **multiple participants**, ie Family or Couple's Counseling, all participants must be in agreement or I can only release a summary that is specific to the requestor only! Any communications must be available to all participants; this means I will not be the keeper of secrets. For **Couples**, be aware, AL does have some legal restriction of your use of a LMFT's testimony in an Alimony or Divorce action.

Your privacy is important to me. I will refer to you by your first name. I will not acknowledge you in public unless you initiate this. The outer office remains locked. My office door is locked and your files are kept in my locked cabinet. If I must transport files they will be in a locked briefcase and locked car. After services are ended, your files are kept locked for 7 years (adults) and 10 years for kids. **Technology I use**, like my **computer and work cell phone** are **password protected**. **My computer is encrypted**. Even so, **privacy cannot be guaranteed**. **No audio or video recording devices will be allowed or used at any time, by any participant, unless there has been written permission by all participants, in advance**. If you see any potential for privacy leaks please make me aware so I can do my best to resolve these immediately.

If your treatment causes me to seek professional consultation, I will use every precaution so as to not give any identifying information. If I am incapacitated my confidential Records' Custodian and Emergency Clinical Coordinator designee is Angel Jernigan, LPC 205-538-4710. Be sure to have this information for your future reference.

It is critical that you understand the circumstances in which, **BY LAW, I AM REQUIRED TO REPORT** limited information that you disclose to me.



**Rhonna W. Phillips**  
Counseling & Therapy Services, LLC

1. If there is **suspicion of ABUSE** of vulnerable persons such as children, the elderly (60yo +), the disabled... I must notify The Department of Human Resources (DHR) or the Police.
  
2. If you are in clear danger & imminent risk of committing **SUICIDE** or seriously harming yourself.
  
3. If you are in clear danger & imminent risk of **seriously harming or KILLING** another person. I have a **DUTY TO WARN**. For both #2 and #3 the Police and/or Emergency Medical Services (EMS) would be notified, unless you agree to have your designee transport you **immediately & voluntarily to the Hospital for Psychiatric** assessment. If you have a **communicable DISEASE** that can be fatal, and you intend to put a person at this risk, I have a duty to report it to the local Health Authorities & to warn the person at risk of harm. AL Health Depts. have an anonymous partner notification program.
  
4. **I must provide the records or testimony ordered, if a Judge orders me, or in situations like:** client mental health hospitalizations, court ordered assessments, any civil, criminal, or disciplinary **DEFENSE** of ME that involves your mental or emotional condition, or if a victim of sexual assault or family violence died, I may have no choice. Clients being treated with Substance Abuse disorders have special protections of those records, **EXCEPT** if they commit a crime on the premises (and it is a federally funded program like TASK or Beacon Addiction Ctr.)

Client's Emergency contact is:

\_\_\_\_\_ Hm: \_\_\_\_\_ C: \_\_\_\_\_

\_\_\_\_\_  
Client acknowledges as understood

\_\_\_\_\_  
Date

Rhonna W. Phillips, MA  
Licensed Professional Counselor & Supervisor  
Licensed Marriage and Family Therapist  
Collaborative Practitioner  
Qualified Family & Domestic Relations Mediator

Rev. 10-2019

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## **HIPAA Notice of Privacy Practices and Client Rights**

The Health Insurance Portability and Accountability Act of 1996, was effective as of 4/14/03 & updated Sept 2013. See [www.hhs.gov](http://www.hhs.gov). It applies to your “**Protected Health Information**” (PHI). This notice describes how medical/mental health information about you may be used and disclosed and how you can get access to this information. Please review it carefully.

### **Notice of Privacy Practices:**

This provider is required to maintain the privacy of your PHI and only releases your information in accordance with state and federal laws and the ethical codes of the Counseling & Marriage & Family Therapy professions. This notice describes the **policies related to the use and disclosure** of your PHI for the purposes of providing services. This includes **TREATMENT, COLLECTING PAYMENT, and CONDUCTING OPERATIONS including inquiries & scheduling appointments.**

Each contact or visit to this office generates a written note. This practitioner does not use electronic medical records. We do use Word to type notes, internet based email, website appointment and payment services, and cell phone communication services upon your initiation. The hard copy records are stored in the **mental health/medical file under your name**. It is the property of this provider. This file compiles a record of your symptoms, assessment, diagnosis, treatment, plan for future treatment, payments and any correspondence including other mental/health records received by this provider.

initial X\_\_\_\_\_

**Rhonna W. Phillips**  
Counseling & Therapy Services, LLC

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The file for you is used for: Planning your care & treatment, legal documentation, to contact you when needed

A communication tool to coordinate care among your health professionals

A third party payer, to verify the services billed were provided & payment can be retrieved

A tool for educating health professionals

A source of data for medical research which has privacy protocols

A source of information when public health officials require it ie: preventing disease, reporting adverse reactions to Rx, reporting abuse, neglect, domestic violence, preventing or reducing serious threat to anyone's health or safety

Use of data for planning and marketing of services

A tool for improving care and services

Verification of compliance with the HIPAA law

According to HIPAA law your information **may be disclosed to provide, manage or coordinate your care and services.** This can include mental and/or health care professionals, consultants, specialists, and referral sources. It can also include law enforcement/government officials (like the Police or FBI) for your or others' health & safety, worker's compensation, disability determination, related to organ/tissue donation, medical examiner or funeral directors if deceased, or response to legal actions like court orders. **Refer to "How Confidentiality Works"** for further information on AL Counselor & Therapist professional ethics and mandated disclosures by this practice.

initial **X**\_\_\_\_\_

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Your PHI **may be disclosed for processing payment, reimbursement for services** (including any 3<sup>rd</sup> party payer/insurance company verification of coverage or processing of claims), billing or collections of fees, including legal actions.

Your information may be used to **manually or electronically to conduct the business of healthcare operations** i.e.: Compliance w/laws or regulations, disaster/emergency situations, licensure, contract services for the office or your treatment, treatment alternatives, **business associates**, administration, quality improvement, inquiries for services, or **management of your appointments**. Only the reasonably minimum necessary amount of your PHI will be disclosed. You may have some choices in how we use or share this information. We never sell or market your PHI or fundraise with identifiable PHI. **You will be notified if a known breach** of information occurs that may have affected the security of your PHI.

**Client Rights:**

You can **request communications** by alternate means or locations & reasonable requests will be accommodated. You can choose someone to act in your behalf ie: Medical Power of Attorney or Legal Guardian. We will verify their authority.

You **authorize this provider to contact you for routine** purposes via:

Email: \_\_\_\_\_

Cell/ok to lv msg: \_\_\_\_\_ Hm/ok to lv msg:

\_\_\_\_\_ Wk/ok to lv msg:\_\_\_\_\_

Texting: Ok or NO; Other technology: \_\_\_\_\_

**If you initiate contact w/me via any form you are authorizing use of that form & accepting its' inherent risks. I will NOT interact with you**

**Rhonna W. Phillips**  
Counseling & Therapy Services, LLC

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via Social Media for your privacy protection.

If you are requesting an alternate mailing address be used for contacting you, please note it here: \_\_\_\_\_

You request to **NOT** be contacted at \_\_\_\_\_

This provider is **required to provide you with this notice**, abide by it, and notify you of any changes. A written copy will be available, in writing, at this providers' office.

You have a right to **inspect and/or copy** your PHI usually within 30 days & in electronic version if it's in that format. This can be limited according to this **provider's judgment** of potential clinical contraindications. You would be notified of this. **You do not have rights to clinical psychotherapy notes.** This provider may provide you a summary instead. Charges apply.

You have a right to **add to or correct your PHI.** The request must be in writing & explain why. Any denial will be given to you in writing within 60 days from receipt of the request. This request can be denied. You can put any disagreement in writing. This would all be added to the record & does not delete the original documentation.

You can **obtain a list of who has received any disclosures** about your PHI and why for six years from the start of your treatment with this provider. This accounting would apply only to disclosures other than about your treatment, payment, provider operations, or those you requested. One list per year is free otherwise the charges are based on the cost.

initial **X**\_\_\_\_\_

**Rhonna W. Phillips**  
Counseling & Therapy Services, LLC

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You can, in writing, **request restriction** on certain treatment, payment, or operations uses or **disclosures of your PHI** ie: disaster relief, provision of mental health care, marketing. We are not required and if this provider is unable to agree to your request you will be notified.

You can request, if you pay in full out of pocket, that **we not share PHI with your health insurer** for purpose of our payment or operations.

You have the right to release your PHI to family, friends, or your other health care providers, and can **revoke a prior authorization** for use or disclosure of your PHI. Each must be in writing. Revocation cannot apply to that which was already authorized and/or released.

If you have any concerns you can contact this provider; we will work for resolution. You have the **right to file a complaint**. There will be no retaliation for a complaint. Contact the Office of Civil Rights: U.S. Dept of Health & Human Services 200 Independence Ave. S.W. Room 509F HHH Bldg Washington, D.C. 20201; 1-877-696-6775; [www.hhs.gov/ocr/privacy/hipaa/complaints](http://www.hhs.gov/ocr/privacy/hipaa/complaints).

Remember, the above activities can be **case management** labor and those services can be charged according to the time **costs**. I have received in writing, read & understand this HIPAA notice.

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Client Signature

Date

**Rhonna W. Phillips, MA**

**Licensed Professional Counselor & Supervisor,**

**Licensed Marriage and Family Therapist, Collaborative Practitioner,**

**Qualified Family & Domestic Relations Mediator**

**Rev. 05-2016**

**Rhonna W. Phillips**  
Counseling & Therapy Services, LLC

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Please don't rely on GPS; you will likely be left lost in my parking lot.

**DIRECTIONS:**

**From I-65 Heading South:**

Take the Alford Avenue Exit.

Turn Left and cross over interstate bridge.

**From I-65 Heading North:**

Take the Alford Avenue Exit.

Turn right.

A Shell station will be on your right.

Just beyond the Shell station, turn left into the second office park parking lot.

Follow the building signs to **building # 1320**.

It will be the 3rd building on the far right side of the parking lot.

Parking Note: Because of the slope of the parking lot, please use caution when opening or closing your car door. It can potentially cause personal injury or damage to other cars.

To enter the office waiting area use the left doorway to **suite 101**. 1320 Alford Avenue Suite 101 Hoover, AL 35226

Rev 12-2019

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Use of Technology for Counseling  
like Video-conferencing or Cell phone, Email, or Text

If you are a new client, using technology for our session/s, **please be sure all the documents requested, have been completed and sent to me so I have them IN ADVANCE OF our first session.**

All clients: Please read all the information below. Use this to make your preparations to be ready for your session via technology. **At our appt time watch for contact from me.**

\_\_\_\_\_ For **Video-Conferencing**. I am glad you are able and/or willing to use my **confidential, simple to use, software “Doxy.Me”** for our appt which I use in a **HIPAA compliant** way.

Watch for an email from me, in it will have the link to click on. **Scroll down to see the diagram below, note step two. It is that easy.** You might need to turn on your video screen and/or microphone.

\_\_\_\_\_ For **Cell Phone** use: I will call you at the agreed #.

\_\_\_\_\_ For **Email**: watch for an email from me at our appt time.

\_\_\_\_\_ For **text**: Watch for a text from me at our appt time.

\_\_\_\_\_ For other: \_\_\_\_\_

If we run into any tech problems, like it keeps crashing... because the internet is overloaded.... our **backup plan** will be to use the phone. Use your discretion, as to how much you want to trust any technology, for your privacy. Keep in mind, all forms of technology have their risks, because of hackers and voyeurs. I’m using the best tools I know, in the most protective ways, **but I**



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cannot guarantee your privacy. We each have a responsibility to minimize any risks, if possible.

Most of you have already **prepaid \$\$\$\$ for your appt.** Thank you. No further action is required. For those who were due to pay in office, please send my payment to my email via PayPal or Venmo ([RPhillips@BirminghamCounselor.com](mailto:RPhillips@BirminghamCounselor.com)) or mail me a check (PO Box 26387 Bham AL 35260). If you intend to file with your Insurance, knowing I am NOT In-Network, please also know that Counseling via distance/technology may not be covered at all.

In order to see and hear and get as much out of the session as you could in person, please ensure you are set up in a **private, quiet, comfortable spot** to sit for the 50 or 80 minute session. If you have earbuds/phones use them. For video, sit where you/all can see the screen straight on and it can be stationary. Be sure **light is in front of you** and not behind you glaring, and the site line behind you is free from visual distractions.

Before we start, I will need to see your photo identification to **verify your identity, to verify your location, if you have privacy, and if you are ready to begin.** During our session I may refer to your file and I will **take notes, documenting our technology based session and our locations,** and retain the information securely. You can request to update your information at any time. If we need to pause, for privacy, state the code word “groceries”.

**I must have an emergency contact # for each location of any video session, at all times.**

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**#1. Current home address:** \_\_\_\_\_

**Current emergency contact at home:** \_\_\_\_\_

**Ph #:** \_\_\_\_\_

**#2. Current work address:** \_\_\_\_\_

**Current emergency contact at work:** \_\_\_\_\_

**Ph #:** \_\_\_\_\_

**#3. Other location for Tech based Counseling:** \_\_\_\_\_

**Emergency contact name this loc:** \_\_\_\_\_

**Ph #:** \_\_\_\_\_

**#4. Other location for Tech based Counseling:** \_\_\_\_\_

**Emergency contact name this loc:** \_\_\_\_\_

**Ph #:** \_\_\_\_\_

If **an emergency** occurs during our session, for immediate purposes, use the Doxy.Me text tool or you can call or text me on my cell phone 205-356-9834. Less prompt, but an option, is to leave a cell phone voice message or email me.

If I observe signs of potentially life threatening distress, significant out of character behavior/symptoms of a more severe condition, or you confirm an immediate need, I will contact your pre-designated emergency contact for your location. If I don't know where you are, 911 won't find you either. So, **yes, I really must have this info:**

**Non 911 emergency #'s (like County Sheriff or Municipal Police):**  
**for your residence:** \_\_\_\_\_

**for your work:** \_\_\_\_\_

**Other locations for video sessions:**

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**Rhonna W. Phillips**  
Counseling & Therapy Services, LLC

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Other: _____	Ph #: _____
Other: _____	Ph #: _____
Other: _____	Ph #: _____

**Rhonna's Office location:** 1320 Alford Ave Suite 101 Hoover AL 35226. For mailing, use PO Box.

Because technology will limit our use of visual & auditory cues, there is greater **chance for misunderstandings**. Please check and verify before concluding and reacting. Please share with me, informally, at any time, or on my evaluation form, any feedback or suggestions you may have.

We may **cease to use technology based tools for your counseling appt if:** connection or quality problems can't be resolved, if you don't like it, if your privacy can't be secured, if I am not able to retrieve information I need or to be effective communicating with you. Differences in aptitude for technology can affect comfort and even roles. Speech, language, auditory, visual, or attention problems can all be a barrier to progress via technology. Either of us may choose to cease its' use, for any reason. Once the circumstances for use of technology is over, we will resume face to face, in office sessions with me; elsewhere if referral is needed.

Our use of technology is only for our professional use, to provide accessible mental health services. **I do not use social media nor my personal accounts with clients** (like Facebook, LinkedIn, Twitter, Skype....). These are tools that others can possibly view or participate in. This is for YOUR privacy and protection.

**Rhonna W. Phillips**  
**Counseling & Therapy Services, LLC**

Once you have reviewed the instructions below, if you have any questions or concerns, please just call me and we'll address it. Your signature affirms your understanding and acceptance of the privacy risks with the use of technology for counseling. You may withdraw your consent at any time, if you choose to.

  x    
Client 1. signature

  x    
Date

  x    
Client 2. signature

  x    
Date

  x    
Client 3. signature

  x    
Date

  x    
Client 4. signature

  x    
Date

\_\_\_\_\_  
**Rhonna W. Phillips, MA**  
**Licensed Professional Counselor & Supervisor**  
**Licensed Marriage and Family Therapist**  
**Collaborative Practitioner**  
**Qualified Family & Domestic Relations Mediator**

\_\_\_\_\_  
Date

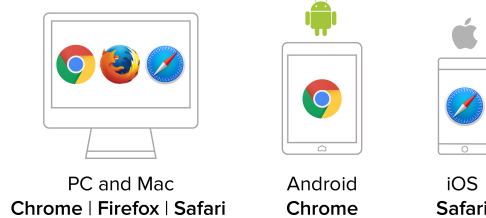
**Scroll down for:**

Flyer to help clients have their first video session with Rhonna:

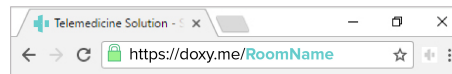
GETTING STARTED FOR PATIENTS

## How to check in for your video visit

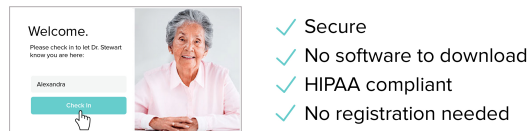
1 Use a computer or device with camera/microphone



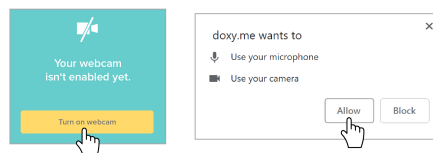
2 Enter your clinician's doxy.me web address into the browser



3 Type in your name and click check in



4 Allow your browser to use your webcam and microphone



5 Your care provider will start your visit

Call Tips

- Have a good internet connection
- Restart your device before the visit
- Use the [Start Test](#) button in the waiting room
- Need help? Send us a message <https://doxy.me>

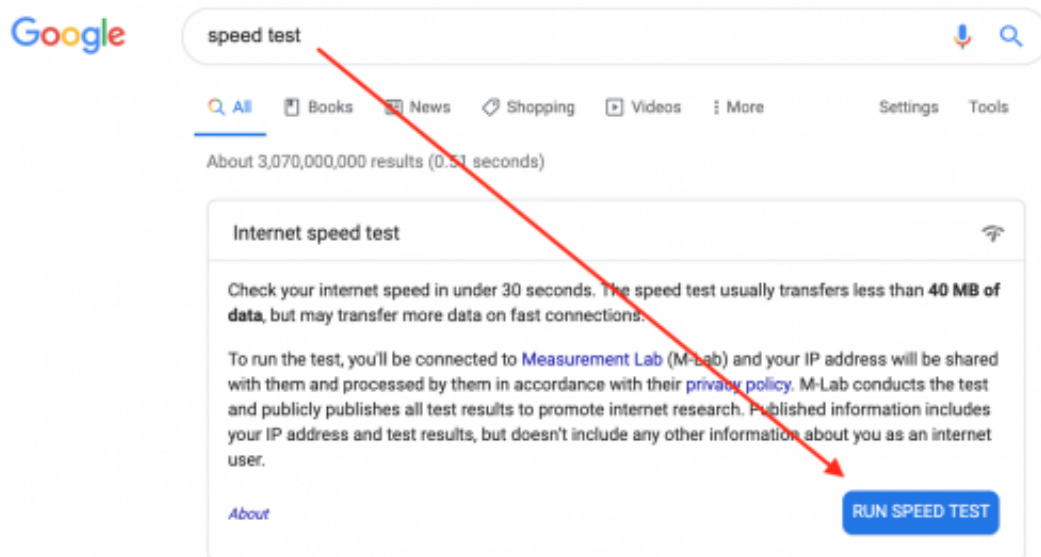
Powered by doxy.me

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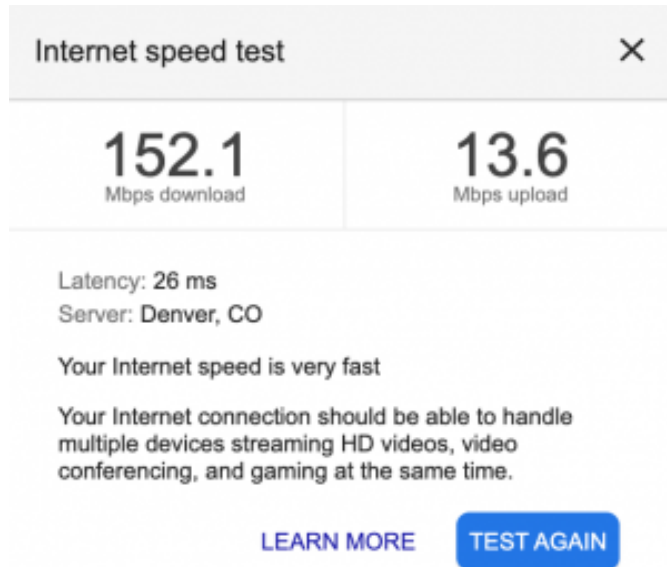
Doxy.Me: [CTO & Cofounder Dylan Turner 3445 Winton Place Suite 109 Rochester NY 14623](#) or [support@doxy.me](mailto:support@doxy.me)

A strong, reliable internet connection is integral to an effective technology based mental health session, especially using video. If you're able to use a wired connection, this will provide you with the best possible experience through your internet provider.

If you're not able to use a wired connection, you can still use a wireless network for your online sessions. However, you'll want to be sure that you're using Wi-Fi with a bandwidth (speed) of at least 10 MBPS on download and upload. If your bandwidth is any slower, your video will lag and cut out causing a negative experience for both you and your clients. To check your internet speed, type "speed test" into a Google search and click this button:



This will run short tests for both your download and upload speeds, which will take about 30 seconds overall. When complete, you'll be shown your results:



If either of your tests returns a speed lower than 10 Mbps, contact your Internet Service Provider (ISP) to ask about available options to improve your connection. This will likely require upgrading your service to a higher-level package but may be worth it in the long run.

### **Rhonna's training for technology use in Counseling:**

6/25-26/2015 (15 hours) Distance Counseling Training by The Telehealth Certification Institute, Ray Barrett, LPC, LMHC. NBCC ACEP# 6693.

2/22/2020 (3 hours) Technology in Marriage and Family Therapy by AL Association Marriage and Family Therapy Network, Scott Ketring, PhD, LMFT, Sponsored by AAMFT NBCC ACEP# 5209.

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4/10-4/11/2020 (15 hours) Certificate in Technology Assisted Services by AL Association Marriage and Family Therapy Network, Tony Watkins, LMFT and Dale Bertram, LMFT, Sponsored by AAMFT; NBCC ACEP# 5209.

**Licensure:**

LPC-S #1643/466 AL Board of Examiners in Counseling  
205-458-8716.

LMFT #L230 AL Board of Examiners in Marriage and Family  
Therapy 334-395-7455.

Only clients who are physically located in AL may receive services by Rhonna whose licenses only cover AL. The use of technology, unfortunately, does not provide an exception to this current law.

Tele- Mental Health Informed Consent Rev 6-10-2020  
with ongoing construction and updating.