David F. Dahl, Ph.D.
Clinical and Forensic Neuropsychology
PSY 19014

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NEW PATIENT INTAKE FORMS: **ADULT**

Welcome to this professional psychology practice.

All new patients must fill out these forms in their entirety and submit them to Dr. Dahl.
Please note: all forms are double-sided to conserve paper use. Please fill out both sides of each page.

Please have your insurance ID card out and ready to be copied at the beginning of your first appointment.

It is imperative that all pages of Part 1 (pages 3-9) are completed, signed and dated before your first appointment begins.

We understand that these forms are very in-depth and thank you for taking the time needed to complete them as honestly and thoroughly as possible. Your cooperation in providing all of this information will greatly enhance your therapeutic process with Dr. Dahl. It is best if you can have the forms all completed before you enter your first session with Dr. Dahl. However, if you need additional time to fill in the remaining pages of personal and medical history in Part 2 (pages 11-15), you may either complete them on-site after your appointment concludes or finish them at home and bring them to your second appointment. **All forms must be complete and submitted by your second appointment with Dr. Dahl.**

We thank you for your help in ensuring that we have all your records up-to-date.

Notes:

For EAP patients, please provide the pre-authorization form from your insurance carrier with your EAP Claim Number and number of authorized visits (you can request this directly from your insurance carrier)

For Victim-Witness patients, please have your Victim Witness Application Number and confirmation letter from CalVCP available on your first appointment.

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Patient Intake Form: ADULT
PART 1

This is a strictly confidential patient medical record.

Today's Date:_____

1. Contact and Personal Information

Last name: _____ First name:_____ Middle initial:_____

Date of birth: _____ Age: _____ Gender: female__ male__ Relationship: Single__ Married__ Other__

Last 4 of Social Security #: XXX-XX-_____ Photo ID/Driver's license #: _____Handedness: R__ L__ Ambidextrous__

Race/Ethnicity: African-Am __ Asian (Specify) _____ Caucasian__ Hispanic__ Native Am__ Pacific Islander__ Other_____

First Language Spoken:_____ Other Languages:_____ Height: ___'_____" Weight: _____lbs.

Home address: _____ City:_____ State:_____ Zip:_____

Cell Phone: _____ OK to leave messages? ☐ yes ☐ no

Home Phone: _____ OK to leave messages? ☐ yes ☐ no

Work Phone: _____OK to leave messages? ☐ yes ☐ no

Email: _____

How and when do you prefer to be contacted? _____

How did you hear of this practice? ☐ web ☐ referral ☐ phone book ☐ other: _____

Emergency contact name and phone number: _____

2. Payment / Insurance Information

I will be paying for my sessions by cash, personal check, or credit card: ☐ yes ☐ no *(note: a 4% fee applies for credit card)*
I would like my insurance to be billed and have received approval for therapy from my insurance company: ☐ yes ☐ no

Please complete ALL below information if billing insurance AND provide insurance card to be photocopied:

Insurance company: _____Insured's ID number: _____

Policy group name/number: _____ Plan name/number: _____

Copay: _____ Deductible: _____ Number of appointments approved: _____

Relationship to Insured: self__ spouse__ child__ life partner__ other relationship__

If **other than SELF** please fill out insured's information:

Insured's name: Last _____ MI ___ First _____ Birthdate _____Gender_____

Insured's address: _____City_____State____Zip_____

Insured's employer: _____

3. Presenting Problems / Reason for today's appointment: _____

_____

_____

_____

Are you here in relation to the following (please check all that apply)?

Victim Witness case__ Employee Assistance Program (EAP)__ Addictions__ Family Problems__ Marital Problems__ Mood/anxiety__ Neurocognitive__ Worker's Compensation__ Other__

If applicable, please provide:
Victim Witness application number: _____

EAP Claim Number: _____
Number of pre-authorized EAP visits from your insurance provider: _____

CANCELLATION POLICY

If you fail to cancel a scheduled appointment, we cannot use this time for another client and you will be billed for $150.00, the entire cost of your missed appointment.

A full session fee is charged for missed appointments or cancellations with less than a 48-hour notice unless it is due to illness or an emergency. A bill will be mailed directly to all clients who do not show up for or cancel an appointment.

Thank you for your consideration regarding this important matter.

Credit Card ▫ American Express ▫ Visa ▫ Master Card ▫ Discover ▫ Health Savings Account

Card Number:_____ Expiration Date:_____ Security Code:_____

I understand the cancellation policy outlined above
I authorize Dr. David F. Dahl, Ph.D. to charge my credit card or health savings account for the balance of the fees due. I agree to pay all remaining fees at the final session.

_____ Client signature (Client's parent/guardian if under 18)

_____ Today's date

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PATIENT RIGHTS AND HIPAA AUTHORIZATION

The following specifies your rights about this authorization under the Health Insurance Portability and Accountability Act of 1996, as amended from time to time ("HIPAA").

1. Tell your psychologist if you do not understand this authorization, and the psychologist will explain it to you.
2. You have the right to revoke or cancel this authorization at any time, except: (a) to the extent information has already been shared based on this authorization: or (b) this authorization was obtained as a condition of obtaining insurance coverage. To revoke or cancel this authorization, you must submit your request in writing to the provider at the following address:

   David F. Dahl, Ph.D., 2542 South Bascom Avenue, Suite 265, Campbell, CA 95008.

3. You may refuse to sign this authorization. Your refusal to sign will not affect your ability to obtain treatment or payment or your eligibility for benefits. If you refuse to sign this authorization, and you are requesting a psychological evaluation for the purposes of:
   i. A court order
   ii. An attorney's recommendation
   iii. A pre-employment screening evaluation
   iv. A legal matter in which your mental status is at question, you must be aware that your refusal cancels the purpose for which the evaluation was ordered or recommended and you will still be held responsible for the fees ordinarily charged for this evaluation by the psychologist up to the point of the refusal.

   If you refused to sign this authorization, and you are in a research-related treatment program or have authorized your provider to disclose information about you to a third party, your provider has the right not to treat you or accept you as a patient in this practice.
4. Once the information about you leaves this office according to the terms of this authorization, this office has no control over how it will be used by the recipient. You need to be aware that at that point your information may no longer be protected by HIPAA.
5. If this office initiates this authorization, you must receive a copy of the signed authorization.
6. **Special instructions for completing this authorization for the use and disclosure of Psychotherapy Notes**. HIPAA provides special protections to certain medical records known as "Psychotherapy Notes". All Psychotherapy Notes recorded on any medium (i.e., paper, electronic) by a mental health professional (such as a psychologist or psychiatrist) must be kept by the author and filed separate from the rest of the client's medical records to maintain a higher standard of protection. "Psychotherapy Notes" are defined under HIPAA as notes recorded by a health care provider who is a mental health professional documenting or analyzing the contents of conversation during a private counseling session or a group, joint or family counseling session and that are separate from the rest of the individual's medical records. Excluded from the "Psychotherapy Notes" definition are the following: (a) medication prescription and monitoring, (b) counseling session start and stop times, (c) the modalities and frequencies of treatment furnished, (d) the results of clinical tests, and (e) any summary of: diagnosis, functional status, the treatment plan, symptoms, prognosis, and progress to date. In order for a medical provider to release "Psychotherapy Notes" to a third party, the client who is the subject of the Psychotherapy Notes must sign this authorization to specifically allow for the release of Psychotherapy Notes. Such authorization must be separate from an authorization to release other medical records.
7. According to HIPAA, you have the right to review the record within 10 days of your request. You will be charged the full hourly fee for reviewing the record in the office with the psychologist.
8. According to HIPAA, you have the right to a summary of the record within 15 days of your request. You will be charged the equivalent of the hourly fee required by the psychologist to review and summarize the record. This summary will be one page, brief and general. If there are more than one person in the record, each party will receive the same summary.

Name:_____ Signature:_____ Date: _____

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LIMITS OF CONFIDENTIALITY

Contents of all therapy sessions are considered to be confidential. Both verbal information and written records about a client cannot be shared with another party without the written consent of the client or the client's legal guardian. Noted exceptions are as follows:

_____

DUTY TO WARN AND PROTECT

When a client discloses intentions or a plan to harm another person, the mental health professional is required to warn the intended victim and report this information to legal authorities. In cases in which the client discloses or implies a plan for suicide, the health care professional is required to notify legal authorities and make reasonable attempts to notify the family of the client.

ABUSE OF CHILDREN AND VULNERABLE ADULTS

If a client states or suggests that he or she is abusing a child (or vulnerable adult) or has recently abused a child (or vulnerable adult), or a child (or vulnerable adult) is in danger of abuse, the mental health professional is required to report this information to the appropriate social service and/or legal authorities.

PRENATAL EXPOSURE TO CONTROLLED SUBSTANCES

Mental Health care professionals are required to report admitted prenatal exposure to controlled substances that are potentially harmful.

MINORS / GUARDIANSHIP

Parents or legal guardians of non-emancipated minor clients have the right to access the clients' records.

INSURANCE PROVIDERS (when applicable)

Insurance companies and other third-party payers are given information that they request regarding services to clients.

Information that may be requested includes, but is not limited to: types of service, dates/times of service, diagnosis, treatment plan, description of impairment, progress of therapy, case notes, and summaries.

I agree to the above limits of confidentiality and understand their meanings and ramifications

_____ Client signature (Client's parent/guardian if under 18)

_____ Today's date

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DISCLOSURE AUTHORIZATION FORM

Please sign the statement below giving your permission for me to communicate with individuals or agencies on your, or your dependent's behalf.

I (your name), _____

hereby give consent to David F. Dahl, Ph.D. to release or receive any information deemed necessary to or from:

name of individual or providing agency _____

address _____

phone _____

fax _____

which is relevant to the purpose stated below, from the case records of:

(name of patient) _____

Your relationship to the patient (circle one) self spouse parent child personal representative

for the purpose of: (check one)

□ Evaluation

□ Treatment

□ Other: _____

This authorization is valid for □ one year □ until revoked by me □ indefinite.

Authorization and signature: I authorize the release of my confidential protected health information, as described in my directions above. I understand that this authorization is voluntary, that the information to be disclosed is protected by law, and the use/disclosure is to be made to conform to my directions. The recipient may re-disclose the information that is used and/or disclosed pursuant to this authorization unless the recipient is covered by state laws that limit the use and/or disclosure of my confidential protected health information.

Signature:_____Personal representative:_____

Print name:_____Personal representative: _____

Signature:_____Personal representative:_____

Print name:_____Personal representative: _____

Date:_____

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Patient Intake Form: ADULT
PART 2

This is a strictly confidential patient medical record.

Patient Name:_____

1. Psychiatric History

Have you ever received psychological, psychiatric, drug or alcohol treatment or counseling services before? ☐yes ☐no

If yes, please list provider's name(s) and approximate dates of service: _____
_____

Do you have a current mental health diagnosis? ☐yes ☐no What? _____

Have you ever taken medications for psychiatric or emotional problems? ☐yes ☐no Adherence to prescription: full, partial, none

If yes, please list medication(s), dose, duration, problem(s) and results: _____
_____

Prior psychiatric hospitalizations? ☐ yes ☐ no When?_____How long?_____

Have you heard, seen or sensed things other people around you do not hear, see or sense? ☐ yes ☐ no When?_____
Describe:_____

Have you ever thought you would be better off dead than alive? ☐ yes ☐ no When?_____How long?_____

Have you ever attempted and/or had thoughts of suicide? ☐yes ☐no When?_____How?_____

Have you ever attempted to and/or thought of hurting yourself? ☐yes ☐no When?_____How?_____
Have you ever attempted to and/or thought of hurting SOMEONE ELSE? ☐yes ☐no When?_____How?_____

Self harm / Aggression? (check all that apply): Head banging__ cutting__ picking at skin__ pulling out hair__ eating dirt or other materials__ high risk behaviors__ hurt animals__

Have you ever been abused/tortured? ☐ yes ☐ no Physically__ emotionally__ sexually__ verbally__ Explain:_____
_____

Have you had a child protective services or police call? ☐yes ☐no When?_____ Regarding what?_____

Please indicate whether or not you are **currently / recently** experiencing any of the following symptoms:

Suicidal thoughts/impulse	☐ yes ☐ no	Homicidal thoughts/impulses	☐ yes ☐ no
Appetite problems	☐ yes ☐ no	Sleep problems	☐ yes ☐ no
Isolation/social withdraw	☐ yes ☐ no	Anxiety/panic	☐ yes ☐ no
Phobia	☐ yes ☐ no	Binging/purging	☐ yes ☐ no
Poor impulse control	☐ yes ☐ no	Violence toward others	☐ yes ☐ no
Destruction of property	☐ yes ☐ no	Strange or unusual behavior	☐ yes ☐ no
Confused or irrational thinking	☐ yes ☐ no	Bothersome thoughts or behaviors	☐ yes ☐ no
Self-harm	☐ yes ☐ no	Hearing or seeing things others do not	☐ yes ☐ no
Preoccupations	☐ yes ☐ no	Compulsive behaviors	☐ yes ☐ no
Fluctuations in your mood	☐ yes ☐ no	Collecting things that crowd things out	☐ yes ☐ no
Trouble making decisions	☐ yes ☐ no	Sexual difficulties	☐ yes ☐ no
People bugging you about internet use	☐ yes ☐ no	Relationship problems with a child	☐ yes ☐ no
Relationship problems at work	☐ yes ☐ no	Problems with credit cards	☐ yes ☐ no
Problems with gambling	☐ yes ☐ no	Financial difficulties	☐ yes ☐ no
Depression	☐ yes ☐ no	Chronic pain	☐ yes ☐ no

If you answered yes to any of the above questions, please supply details: _____
_____
_____

2. Drug and Alcohol History

NEVER USED DRUGS OR ALCOHOL _____ (Skip to Section 3)

Please fill in your age in relation to the first and last uses of the following substances, and your age (if applicable) you entered rehab

Substance	Age 1st use	Age last use	Age rehab	Substance	Age 1st use	Age last use	Age rehab
Alcohol				PCP			
Meth				Hallucinogen			
Coke / Crack				Tobacco			
Heroin/opium				Pills			
Cannabis				Ecstasy/MDMA			

Have you ever injected drugs? ☐ yes ☐ no
Have you ever shared needles? ☐ yes ☐ no
Have you ever felt the need to cut down on your drinking? ☐ yes ☐ no
Have you ever felt annoyed by criticism of your drinking? ☐ yes ☐ no
Have you ever felt guilty about your drinking? ☐ yes ☐ no
Have you ever used inhalants such as glue, gasoline or paint thinner? ☐ yes ☐ no
Have you ever used cough syrup or mouthwash as a psychoactive drug? ☐ yes ☐ no
Have you used medications not prescribed for you in the past ten years? ☐ yes ☐ no
Have you ever been in trouble with the law because of drinking or drug use? ☐ yes ☐ no

If you answered yes to any of the above questions, please supply details about your use of drugs or chemicals including amounts, how and why you used them?

_____
_____

Last time you consumed an alcoholic beverage: _____ How much? _____ How much in an average 24 hour period? _____ in an average week? _____ Are you an alcoholic? ☐ yes ☐ no

How much tobacco do you smoke or chew each day? _____ Week? _____

3. Medical Information and History

Primary care physician:_____ Phone: _____

When was your last physical examination?_____ Findings if any?_____

Did you have any peri-natal or developmental difficulties? ☐ yes ☐ no If yes, what?_____

Please list all diseases, illnesses, important accidents / injuries, surgeries, hospitalizations, convulsions, seizures and/or any other medical conditions that you have had since birth:

Age	Illness / Medical Problem	Treatment	Result

Do you have any allergies? (food, drug, etc.) ☐ yes ☐ no If yes, please describe them: _____
_____

Any diet restrictions? _____

Have you ever lost consciousness or had a head injury? ☐ yes ☐ no If yes, please describe: _____

_____

Past/current medical history *(please circle any specifics that apply):*

Cardio Vascular: HTN, murmurs, angina, tachycardia, shortness of breath, fainting, MCI, hyperlipidemia, leg pain, arrhythmia, bypass, angioplasty, stent
CNS: headache, migraine, TBI, tremors, dizziness, LOC, stroke, myasthenia gravis, parkinsons, dementia, tumor, seizures, MS, TIAs, neurosurgery
Skin: psoriasis, eczema, hair loss, itching, rashes, acne, surgery
Endocrine: polydipsia, polyuria, diabetes I or II, hyperthyroidism, hirsutism, polycystic ovarian syndrome, other, surgeries
EENT: pains, halo around light, blurring, red eye, double vision, floaters, glaucoma, tinnitus, ear pain, Otis media, hoarseness, other, surgeries
GI: nausea/vomiting, diarrhea, constipation, GERD, Crohn's, colitis, cancer, IBS, surgery
Respiratory: chronic cough, sore throat, bronchitis, asthma, COPD, pneumonia, cancer, sleep apnea, surgery
Genital/reproductive: miscarriage, abortion, amenorrhea, discharges, incontinence bowel/bladder, pregnancy problems, postpartum depression, sexual dysfunction, prostate, menopause, fibrocystic breast disease, UTI, pelvic pain, renal, cancer, surgeries
History of: enuresis, encopresis, bruxism, night terrors, nightmares, cancer, phobias: When? _____

4. Medications Information

Please list all prescribed and over-the-counter medications, drugs or other substances (vitamins, herbs) you take or have taken in the past year:

Drug	Dose	Helps?	Reason	Taking presently?
		+ -		
		+ -		
		+ -		
		+ -		
		+ -		

5. Self Care Information

What type of physical exercise do you get weekly? _____

What in your life is currently stressful for you? _____

What do you do for stress management?_____

When do you go to sleep?_____How long does it take you to fall asleep?_____When do you wake up?_____

What do you do to help fall asleep? _____If you wake up in the middle of sleep, for how long?_____

Has your weight fluctuated in the past 2 months? ☐ yes ☐ no By how much?_____lbs. gained__ lost__

Have you restricted your eating in any way? ☐ yes ☐ no How? Why? _____

6. Family / Social / Developmental Information

Where were you born? _____ raised? _____

US Citizen? ☐ yes ☐ no Date citizenship received_____ If immigrated, when?_____ from where?_____

Who do you currently live with? alone__ spouse__ partner__ friend(s)__ homeless__ shelter__ Section 8 housing__ hotel__

Was your mother using alcohol or drugs when she was pregnant with you? ☐ yes ☐ no What? _____

Did your mother suffer abuse during pregnancy? ☐ yes ☐ no What?_____

Birth: normal__ abnormal/problems__ Describe:_____

What (if any) developmental delays did you have in the first 6 years? _____

Family history of mental illness? ☐ yes ☐ no Who?_____ Describe _____
_____

*Please fill in the following information for **all family members**:*

Relative	Name / age	Living?	Illnesses/addictions	Occupation	Quality of Relationships
Father		☐ yes ☐ no			
Mother		☐ yes ☐ no			
Stepparents		☐ yes ☐ no			
Brothers		☐ yes ☐ no			
		☐ yes ☐ no			
		☐ yes ☐ no			
Sisters		☐ yes ☐ no			
		☐ yes ☐ no			
		☐ yes ☐ no			
Grandparents		☐ yes ☐ no			
Aunts/Uncles		☐ yes ☐ no			
Cousins		☐ yes ☐ no			

*Please fill in the following information for significant **non-marital relationships**:*

Name	Age	Relationship Status	Relationship Issues

*Please fill in the following information for **marital relationships**:*

Name	Age	Relationship Status	Relationship Issues

*Please fill in the following information for **children or stepchildren**:*

Name	Age	Relationship Status	Relationship Issues

Please describe your parents' relationship with one another: _____
_____

7. Educational Information Currently in School? ☐ yes ☐ no Full Time__ or Part Time__

Highest level completed: 12__ BA/BS__ MA/MS__ DOC__ JD__ Where?_____Diploma/certificates_____

What were your grades in elementary school? Failing__ Below Average__ Average__ Good__ Excellent__
What were your grades in middle school? Failing__ Below Average__ Average__ Good__ Excellent__
What were your grades in high school? Failing__ Below Average__ Average__ Good__ Excellent__

Best subject(s)_____ Worst subject(s)_____

Learning disability? ☐ yes ☐ no What?_____ How long?_____
Special education? ☐ yes ☐ no What?_____ How long?_____
Special assistance? ☐ yes ☐ no What?_____ How long?_____
Speech assistance? ☐ yes ☐ no What?_____ How long?_____

Did you ever have trouble in school with any of the following? (please check all that apply): Anxieties__ Obsessions__ Friends__ Cheating__ Stealing__ Fighting__ Setting fires__ Skipping school__ Running away__ Using drugs/alcohol__ Isolating__ Selling Drugs__ Talking too much in class__ Not sitting still__ Inattention__ Bullying__ Being picked on__ Harming animals__ None of the above__

8. Employment Information **Currently Employed? ☐ yes ☐ no**

Employer: _____Position: _____Length:_____Reason for Leaving:_____
Employer: _____Position: _____Length:_____Reason for Leaving:_____
Employer: _____Position: _____Length:_____Reason for Leaving:_____

Can you work part time? ☐ yes ☐ no Why?/why not?_____ Doing What?_____

9. Military Service

Previous military service? ☐ yes ☐ no Branch:_____ Discharge? Hon__ Gen__ Dishon__ Medical__ Years_____

Tour of duty: _____ Rank: _____ Combat: ☐ yes ☐ no Where?_____

10. Legal History

Have you ever been arrested? ☐ yes ☐ no For What?_____ How long?_____
Charged with a misdemeanor? ☐ yes ☐ no What?_____When?_____
Charged with a felony? ☐ yes ☐ no What?_____When?_____
Been to county jail? Juvenile Hall? ☐ yes ☐ no For What?_____ How long?_____
Been to state/federal/youth prison? ☐ yes ☐ no For What?_____ How long?_____

Are you now on probation? ☐ yes ☐ no Until?_____ Are you now on parole? ☐ yes ☐ no Until?_____

11. Personal

What are your hobbies? _____

What are some of your character strengths? _____

What are some of your character shortcomings? _____

Describe your religious or spiritual interests and practices: _____

What do you believe a therapist/evaluator should be like?_____

What are you prepared to change about yourself? How?_____

_____

_____

_____