

**Management & Behavior Consultants, PC**

955 East Eighth St., Ste. B #2; Traverse City, MI 49686

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[www.mbcctc.com](http://www.mbcctc.com)

**PATIENT INFORMATION**

Date \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Age \_\_\_\_\_ Marital Status \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_  
(Home) \_\_\_\_\_ (Cell) \_\_\_\_\_ (Work) \_\_\_\_\_

Address \_\_\_\_\_  
(Street) \_\_\_\_\_

\_\_\_\_\_ (City) \_\_\_\_\_ (State) \_\_\_\_\_ (Zip Code)

Circle Gender: Male Female Nonbinary/3rd gender Prefer to self-describe \_\_\_\_\_

Prefer not to say Sexual Orientation: \_\_\_\_\_ Race \_\_\_\_\_

Who Referred You? \_\_\_\_\_

May we contact your referral source? Circle: Yes No Phone \_\_\_\_\_ Fax \_\_\_\_\_

May we contact your primary care physician? Circle: Yes No

Physician Name \_\_\_\_\_ Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

Physician Address \_\_\_\_\_

Primary Insurance Company \_\_\_\_\_ Phone \_\_\_\_\_

Mental Health

Carrier \_\_\_\_\_ Phone \_\_\_\_\_

(If Different from Primary Insurance Company)

Name of Policy Holder \_\_\_\_\_ Policy Holder DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Address of Policy Holder \_\_\_\_\_

Phone number of Policy Holder \_\_\_\_\_ Relationship to Patient \_\_\_\_\_

Member I.D./Subscriber # \_\_\_\_\_ Group # \_\_\_\_\_ Employer \_\_\_\_\_

Authorization # \_\_\_\_\_ Co-Pay \$ \_\_\_\_\_ Deductible \$ \_\_\_\_\_

Emergency Contact \_\_\_\_\_  
(Name) \_\_\_\_\_ (Phone Number) \_\_\_\_\_ (Relationship to Patient) \_\_\_\_\_

**\*Email and text messaging are not HIPPA compliant forms of communication. MBCTC uses these for administrative purposes.**

**May we: Contact you by phone? Circle: Yes  No**

**Contact you by email? Circle: Yes  No**

**Leave you a text message? Circle: Yes  No**  **Leave you a voice mail message? Circle: Yes  No**

**Communication and privacy explained by:** \_\_\_\_\_

#### **PROFESSIONAL SERVICES AGREEMENT**

I understand that the effectiveness of mental health services depends on efforts of the patient as well as those of the practitioner (Clinician) and I promise to make my best effort to comply with these procedures. These best efforts will include open and honest discussion of my thoughts and feelings, as well as an effort to perform any exercises or homework assignments that may be recommended. I also agree to return, undamaged, any materials that have been loaned to me as part of the procedures and understand that I am liable for the cost of these materials. I understand that the effectiveness of the procedures cannot be guaranteed and that the Clinician has sole professional responsibility for all services provided. I understand that regular attendance will produce the maximum benefits but that I am free to discontinue treatment at any time. If I decide to do so, I will notify the Clinician at least two weeks in advance so that effective planning for continued care can be implemented. I also agree to notify the Clinician at least 24 business hours in advance if I will be unable to attend any session. I understand that if I fail to make such notification, I may be charged for the full cost of the session, which will not be reimbursable by my insurance company. I agree to be responsible for these charges. I understand that conversations with the Clinician will be of a confidential nature. I authorize my Clinician to discuss my treatment with other treatment providers to coordinate my care. I further understand that the Clinician, by law, must report actual or suspected child or elder abuse to the appropriate authorities. In addition, the Clinician has a legal responsibility to protect anyone that the patient may threaten with violence, harmful or dangerous actions (including those to myself) and may break the confidentiality of our communications if such a situation arises. I understand that the Clinician will make reasonable efforts to resolve these situations before breaking confidentiality. I also understand that in order to ensure patient confidentiality and privacy, electronic recording is strictly prohibited within any of Management & Behavior Consultants, PC offices. My signature below indicates that I have agreed to these terms and have read and understand a "HIPPA-Notice of Privacy Practices" describing my rights and responsibilities as a patient or guardian.

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(Signature of Patient or Guardian)

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(Date)

## FINANCIAL AGREEMENT

Patients are responsible for providing accurate information about their insurance benefits. Failure to complete this section or inaccurate information will make patients fully responsible for all charges. Patients are responsible for notifying Management & Behavior Consultants, PC of any changes in insurance within 30 days; otherwise, you will be responsible for payment in full. In most cases, patients are responsible for making the initial phone call to their insurance companies. I request that Management & Behavior Consultants, PC, as the agent for the Clinician, submit bills to the insurance company that I have listed above on this form, and I grant permission to the Clinician and Management & Behavior Consultants, PC to release such confidential information as is necessary to obtain payment from the insurance company. In the event, that my insurance company fails to observe Michigan prompt pay standards or otherwise fails to adhere to relevant rules and standards, I grant permission to Management & Behavior Consultants, PC to share information related to my insurance claim with the Michigan Department of Insurance and Financial Services. I understand that I am financially responsible for the cost of the mental health services to me (my child) and for any portion of the fees not reimbursed or covered by my health insurance. I understand that my copay/outstanding balance is due at time of service. If my mental health care is provided under the terms and conditions of a managed mental health care program to which the Clinician is contracted, my financial responsibilities may be limited by the terms of that contract. I understand if a personal check does not clear ("bounces") I will be charged \$15.00 per incident. I understand that my failure to pay these bills may result in collection procedures (including court proceedings) being taken against me by the Clinician or a collection agency contracted by the Clinician to collect these bills. I also understand that if my account is placed in collection procedures, neither I nor any other patient of Management & Behavior Consultants, PC for whom I am the guarantor will be able to schedule appointments with any other Management & Behavior Consultants, PC clinician. I understand that professional services will be rendered to me by \_\_\_\_\_ (Clinician) and that the fee for a 45-55 minute initial consultation session will be \$\_\_\_\_\_ and the fee for follow-up appointments will be \$\_\_\_\_\_ along with fees for any testing materials. I authorize the release of any medical information necessary to process my claim. Fees may be different for additional services such as psychological testing, legal consultation/testimony, report preparation, consultations with others on my behalf, phone/e-sessions etc. and will be explained to me if these services are necessary.

My signature below indicates that I have agreed to the above terms.

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(Signature of Patient or Guardian)

(Date)

### FINANCIAL RESPONSIBILITY (if other than patient)

Name \_\_\_\_\_ Circle: Male Female DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Address (If Different from Patient) \_\_\_\_\_ SSN \_\_\_\_\_ ONLY ON REQUEST \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_

Signature of Financially Responsible Party \_\_\_\_\_ Date \_\_\_\_\_

(Staff Use Only) Revised 01/01/2021