Disclosure Statement

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Welcome to my practice-

I am pleased that you chose Wellspring Center to be your provider of behavioral health services and I look forward to working with you as we address the concerns that led you to take this important step. I want to share with you some information regarding my background and our obligations to one another as participants in your treatment. I completed the Honors in Psychology Program and earned my master's degree in psychology from Wake Forest University in May of 1986, went on to complete a year of doctoral study at UNC-Chapel Hill in the developmental psychology graduate degree program from 1986 to 1987 and received my license to practice psychology as a Psychological Associate in May of 1988 (Lic #1229). I received my license as a Professional Counselor (now referred to as Licensed Clinical Mental Health Counselor) in August of 2008 (#7104) and my National Counselor Certification in May 2009 (#252625). (My NCC certification was not essential or beneficial to maintain and I voluntarily relinquished it in 2023).

I have been practicing as a licensed clinician since 1988. Early on, I worked as part of a multidisciplinary team with inpatients in an adult treatment unit of a private psychiatric hospital throughout my internship, and following graduation served as Clinical Intake Director until 1989. I worked in private practice with child, adolescent and adult outpatients for several years and received my certification as a Health Services Provider (LPA) from the NC Psychology Board in 1994. I continued to work in private practice and teach fulltime as part of the psychology faculty at a local college, training nursing and allied health students in psychology and worked intensively with chemically dependent adults in a 15-month therapeutic recovery community. While having worked in hospital-based administration and practice management, supervising clinical staff, my primary focus has been in direct healthcare service with inpatient and outpatient clinical populations, civilian and military, for most of my career. I worked extensively with special forces military personnel and their families for stress-related and trauma issues, and I served as an embedded counselor with a Marine infantry regiment for four years. I have owned and operated several private practices and have extensive experience in psychological evaluation, diagnosis and treatment of mental health disorders, psychotherapy, teaching, research, consultation and community education. I work with adults, couples and families regarding a multitude of behavioral, mental and emotional health issues: attention-deficit disorder, depression, bipolar disorder, anxiety disorders, marriage and family issues, academic and school issues, adult autism, stress-related disorders, PTSD, trauma, sexual abuse, self-esteem, parenting issues, life transition issues, and substance abuse issues on a limited basis. I also provide Christian counseling for those seeking therapy with a similar faith-based perspective. While I no longer see children, I do provide parent consultation and parent training regarding behavior management, developmental disorders and other childhood issues.

I draw from a variety of theoretical models in the approaches I use in talk therapy but rely heavily upon cognitivebehavioral interventions (CBT), DBT, trauma-focused intervention, developmental theory, family systems models,

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psychodynamic theory, motivational theory, short-term solution-focused therapy and bio/psycho/social models which emphasize the interplay between biological, psychological and environmental factors in the development of problems in functioning. In working with a new client, I make a diagnosis based upon clinical observation and the information you provide and devise a plan of treatment based upon the goals desired in treatment. The diagnosis and treatment plan, as well as notes taken during each session, become a part of your confidential clinical record. Every effort is made, with your collaboration, to establish a deadline for attaining your goals. Length of treatment will vary, depending upon the symptoms presented, the role of significant others in treatment (e.g. individual vs. family or couples therapy), availability of other supports and client's motivation toward change. Therapy sessions are typically 60" in duration. It is not uncommon for clients to feel "stuck" at times or to resist the therapy process because therapeutic change can be difficult and emotionally painful. These are normal responses to therapy. Discussing these feelings will be an important part of the therapy process. If at any point you feel your goals are not being addressed adequately or that there is not a good fit between your needs and my treatment approaches, you are encouraged to discuss those with me so we can make appropriate adjustments or provide a referral to another provider.

While regular attendance produces maximum benefit, it is not uncommon for clients to take a scheduled break from therapy in to reevaluate progress/goals or, to apply insights and techniques learned in treatment prior to tackling additional goals. You are encouraged to maintain a regular schedule of therapy sessions but are free to discontinue treatment at any time, and your wishes will be respected. Frequent missed appointments and cancellations, however, are considered a compliance issue, and may result in discharge from treatment if the issue is not resolved. Please communicate your intent to terminate treatment should you decide to do so, or if you desire a referral elsewhere.

I am qualified by my education, training and experience to treat most psychological issues, but there are a few exceptions. I do not accept clients who are court-ordered for treatment or who are not seeking treatment voluntarily. I do not provide treatment for individuals with a record of violent or sexual offenses as I see many clients who have a history of abuse or trauma and I must guarantee a safe environment for them. Out of concern for patient safety, I do not accept clients for outpatient treatment who are not medically stable or who may require more intensive intervention such as hospitalization or residential care. I do not provide disability or fitness for duty evaluations; nor do I provide support/service animal recommendations.

Diagnoses and Testing: The services I provide are referred to interchangeably at times as therapy or counseling but there are slight distinctions. "Therapy" is a term typically used to refer to the application of psychological theory and method to address symptoms of a diagnosis while "counseling" is a broad term that encompasses not just treatment of diagnoses but also relationship counseling, life transition issues, academic and occupational concerns, etc. While insurance companies will reimburse for treatment of certain clinical diagnoses, many do not cover counseling services. If a qualifying diagnosis is warranted in your case, it will be recorded in your medical record and you will be informed of the diagnosis as part of your treatment plan. That diagnosis will be indicated on any claims submitted on your behalf to your insurance company. Discussion of diagnosis and response to treatment are a central part of effective care. I no longer provide formal psychological testing; diagnoses are based upon clinical interview and assessment, and history.

Payment for Services: The fee for the initial clinical evaluation is \$175; a full therapy session is \$125.00; sessions last 50" to an hour and are scheduled on the hour. Your insurance provider may reimburse at a rate lower than the posted fee due to negotiated discounts with contracted providers who accept the lower rate in exchange for referrals and direct assignment of payments. <u>No-show and late cancellation fees (\$50 per incident for first 3 occurrences, \$125 thereafter)</u> are not reimbursed by insurance companies and are the responsibility of the client. Clients using insurance are not charged for amounts beyond the allowable rate paid by your insurance provider. You are not charged for medical documents provided directly to your other healthcare providers. For review of records, written reports and other

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documents requested for legal, occupational or personal reasons a fee of \$30/15 min is charged. The rate is equivalent to professional fee rates since your provider handles these tasks personally and must allocate time otherwise spent in clinical contact.

Client portion of payment is due at the time services are rendered. Full payment is expected when (1) insurance benefits have not been verified in advance; when (2) this provider is not contracted with your insurance company for payment; and/or when (3) insurance makes payment directly to the client rather than to this provider. Most major insurance companies and third-party payors cover some or all cost of therapy once deductibles are met, but there are exceptions. I am a contracted in-network BCBS and Tricare-certified non-network provider. This office extends the courtesy of filing insurance on your behalf for those insurers but you are ultimately responsible for inquiring with your insurance company to determine whether your benefits cover the services I provide and for ensuring that any necessary authorizations are obtained prior to treatment. Tricare Prime clients require a referral; Tricare Select do not. BCBS clients do not require a referral. Clients are responsible for any charges not covered by insurance (which includes copays, coinsurance, deductibles, non-covered services and no-show/late cancel fees) and may pay with cash, local check, VISA, MC, or Discover card. A fee of \$35 will be charged for returned checks and for transactions not honored by your financial institution for insufficient funds. Balances due for no-shows or late cancellations are due on the date of the missed appointment and must be paid before future appointments can be scheduled. In cases where financial hardship may prevent a client from seeking or continuing treatment, the client is encouraged to consult with me regarding affordable options for treatment. Many insurance companies impose limits on the types or number of services allowed within a certain time frame. Please keep track of the number of visits used to ensure that you do not exceed your allowable limits.

Confidentiality and Records: Information obtained during the course of therapy and regarding your treatment is confidential, protected by law, and typically cannot released to anyone without your written consent. There are some exceptions, however. Certain information must be shared with your health insurance provider for this office to collect payment for services rendered to you. Your written consent for release of that information will be requested when you arrive for your first visit. There are other specific instances in which it may be necessary to release otherwise protected information: (1) In order to protect the welfare of the client in an actual emergency; (2) when court-ordered in the course of a legal proceeding (does not generally apply to divorce litigation in NC); (3) if a client presents an imminent threat of harm to self or others; (4) in cases of suspected child/elder abuse or neglect which I am required by law to report; (5) and to professional boards, public health agencies, or clinical supervisors if a there is an issue regarding client or public safety/welfare. There may also be instances in which I may discuss a case with a professional in private consultation or supervision, in which case personal identifying information is not released. Please refer to the additional information (Privacy Notice Form) provided to you by this provider regarding the Health Insurance Portability and Accountability Act (HIPAA), a federal law that provides privacy protections and patient rights regarding the use and disclosure of your Protected Health Information (PHI) used for the purpose of treatment, payment, and health care operations.

Information obtained during sessions and collected in the process of treatment is recorded manually by this provider in hardcopy form and maintained in each client's medical record. Records are accessible only by this provider (or my designated practice representative should I be unavailable) and are secured in a locked area when not in use. Minimal information is provided to your insurer in the filing of your claims. This provider typically informs the client if and when any request is made by a third party for protected health information. While the physical records remain the property of this practice/provider, you may have access to the information in your medical record upon written request. It is this the policy of this provider to be present during review of the medical record in order to answer questions and clarify any information. Clinical summaries can be provided upon request with 7 days' notice.

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Appointments and Cancellations: This provider typically maintains a full caseload at all times and is committed to keeping scheduled appointments; clients are expected to demonstrate similar commitment and consistency. A limited number of weekend appointment slots are available in addition to weekday appointments. New clients are offered a fixed appointment schedule at the outset of treatment, for the same day/time on a recurring weekly, biweekly or monthly basis, depending upon the treatment needs. Appointments for one-time consultations or brief interventions are made on a first-come, first-served basis when unassigned appointment slots are available. Completion of new-client forms (accessible online) is required before a new client can be seen—no exceptions. Walk-ins are not accepted. <u>Clients will be charged a \$50 fee for missed appointments or for failure to give 24 hours notice of cancellation in order to cover operating costs</u>. Insurance does not cover charges for missed appointments. Charges for my services are based not only upon the service provided but also the time reserved for that service and the cost of operating an outpatient practice. Please call to cancel within 24 hours and indicate the reason for cancellation. <u>If you have an outstanding balance with this office, you must make payment in full prior to scheduling any further appointments</u>.

Emergency Contact: I am committed to responding promptly to your needs. Routine calls made to the office during business hours will be received on confidential voicemail if I am in session or out of the office. Because of my limited availability during office hours (I am in sessions all day), you are encouraged to communicate with me via text for routine concerns. I will generally return calls as soon as possible on the day your voice message is received and typically no later than the next business day. Please do not communicate with me via email unless prearranged, due to confidentiality concerns. My emergency contact number is 910-308-7270. Clients experiencing a medical emergency are directed to call 911 and report to the nearest emergency room for assessment and treatment--911 will be called to assist you if there is any potential and imminent risk for harm to self or others. Clients in crisis but not at risk for harm are also encouraged to call the new NC crisis line at 988. Concerns regarding medications should be directed to your physician.

Procedure for Registering Complaints or Grievances: All disciplines of professional mental health practice have established professional and ethical standards by which all licensed and certified clinical providers must abide. The various licensing boards which govern mental health practice generally provide public access to those standards online or upon request. I abide by the ACA Code of Ethics (<u>http://www.counseling.org/Resources/aca-code-of-ethics.pdf</u>) and the APA Ethical Principles of Psychologists and Code of Conduct (2017). If at any time you believe that those standards have been violated by this or another provider, please contact the following boards to register your concern:

NC Board of Licensed Clinical Mental Health Counselors Post Office Box 77819 Greensboro, North Carolina 27417 Phone (336) 217-6007 Fax (336) 217-9450 Complaints@ncblcmhc.org

NC Psychology Board 895 State Farm Road, Ste 101 Boone, NC 28607 (828) 262-2258

I have read and I understand the above information, and I agree to the terms of treatment as outlined.