



NextGen MRN: \_\_\_\_\_

Client Last Name \_\_\_\_\_ Legal First Name \_\_\_\_\_ M.I. \_\_\_\_\_ Preferred Name \_\_\_\_\_

( ) \_\_\_\_\_  
Home Phone # \_\_\_\_\_ Cell Phone # \_\_\_\_\_ Email Address \_\_\_\_\_

Street Address \_\_\_\_\_ Apt or Lot # \_\_\_\_\_ County \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

/ /  
Birth Date \_\_\_\_\_ Social Security \_\_\_\_\_

Employer/School \_\_\_\_\_ Street Address \_\_\_\_\_ ( )  
Work Phone # \_\_\_\_\_

Occupation or Grade Level \_\_\_\_\_

**ETHNICITY**

- ☐ Hispanic - Mexican  
☐ Hispanic - Cuban  
☐ Hispanic - Puerto Rican  
☐ Hispanic - Other  
☐ Not Hispanic or Latino  
☐ Declined

**BIRTH SEX**

- ☐ Male  
☐ Female

**RACE**

- ☐ American Indian/Alaskan Native  
☐ Asian  
☐ Black/African American  
☐ Native Hawaiian/Pacific Islander  
☐ White  
☐ Declined

**PRONOUNS**

- ☐ She/her/hers  
☐ He/him/his  
☐ They/Them/Theirs  
☐ Ze/Zir/Zem  
☐ Declined  
☐ Fill In: \_\_\_\_\_

**MARITAL STATUS**

- ☐ Never Married  
☐ Married  
☐ Separated  
☐ Widowed  
☐ Divorced

**PREFERRED  
LANGUAGE**

- ☐ English  
☐ Spanish  
☐ Fill In: \_\_\_\_\_

**ARE YOU A VETERAN  
OR ACTIVE MILITARY?**

- ☐ Yes  
☐ No

**DO YOU NEED ANY  
ACCOMODATIONS?**

- ☐ Blind  
☐ Deaf  
☐ Mobility  
☐ Transportation  
☐ None  
☐ Fill In: \_\_\_\_\_

\_\_\_\_\_ ( )  
In Case of Emergency, Call (First/Last Name) Phone # Relationship



NextGen MRN: \_\_\_\_\_

Preferred Name \_\_\_\_\_

Today's Date \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

**If younger than the age of 15 or adult with legal guardian:**

Parent/Guardian 1 \_\_\_\_\_

Phone # \_\_\_\_\_

Relationship \_\_\_\_\_

Parent/Guardian 2 \_\_\_\_\_

Phone # \_\_\_\_\_

Relationship \_\_\_\_\_

What type of decision making rights does the parent/guardian have?

- ☐ Full  
☐ Joint  
☐ Unsure  
☐ Other: \_\_\_\_\_

Is there a custody plan/court documentation?

- ☐ Yes  
☐ No

Do you have supporting custody/court documentation with you today?

- ☐ Yes  
☐ No

**Please briefly describe why you are here today.** \_\_\_\_\_

**Have you used any alcohol or drugs in the last 24 hours (including marijuana)? If yes, please list what substance(s) and last use.** \_\_\_\_\_

**Check if you are experiencing:**

Thoughts about ending your life: ☐ Today ☐ In the past month ☐ In the past year

Thoughts about killing other people: ☐ Today ☐ In the past month ☐ In the past year

**Check the reasons why you are seeking services. Please note: Medications are not prescribed during your intake. Appointments for medication can be as far out as 30 days.**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Individual therapy | <input type="checkbox"/> Medications                                | <input type="checkbox"/> Probation evaluation   |
| <input type="checkbox"/> Group therapy      | <input type="checkbox"/> Resources for housing, shelter, food, etc. | <input type="checkbox"/> Drug/alcohol treatment |
| <input type="checkbox"/> Family therapy     | <input type="checkbox"/> Recent mental health hospitalization       | <input type="checkbox"/> Fill in: _____         |

**Do you currently have a therapist or counselor?** ☐ Yes ☐ No

**If yes, please write their name and what they are treating you for.** \_\_\_\_\_

*If you are experiencing a behavioral health crisis please call The Suicide and Crisis Lifeline at 988.*

*If you are experiencing a life threatening emergency, please call 911 or go to the nearest emergency room.*



NextGen MRN #: \_\_\_\_\_

## Medical History

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Primary Care Doctor: \_\_\_\_\_ PCP Office/Clinic: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone Number: (\_\_\_\_\_) \_\_\_\_\_ Fax Number: (\_\_\_\_\_) \_\_\_\_\_

Date of last physical: \_\_\_\_\_

### Physical Conditions (example: Diabetes, High Blood Pressure, surgeries, etc.)

☐ No known physical conditions

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### Current Medications

☐ No current medication

| Medication name | Strength<br>(example: 50mg) | Frequency (example: at<br>bedtime, 2x/day, etc.) | Prescribing Physician |
|-----------------|-----------------------------|--|-----------------------|
|                 |                             |  |                       |
|                 |                             |  |                       |
|                 |                             |  |                       |
|                 |                             |  |                       |
|                 |                             |  |                       |
|                 |                             |  |                       |
|                 |                             |  |                       |
|                 |                             |  |                       |

### Medication Allergies

☐ No known medication allergies

| Medication | Reaction (example:<br>hives, rash, etc.) | Medication | Reaction (example:<br>hives, anaphylaxis, etc.) |
|------------|--|------------|---|
|            |  |            |   |
|            |  |            |   |
|            |  |            |   |

Dental: Please list any dental problems: \_\_\_\_\_

☐ No known dental problem

# COMMUNITY REACH CENTER

## CONSUMER FINANCIAL FORM

### FEE AGREEMENT

### ASSIGNMENT OF BENEFITS

### RELEASE OF INFORMATION

|                              |  |                          |  |
|------------------------------|--|--------------------------|--|
| Date:                        |  | NextGen MRN #:           |  |
| Consumer's Last Name:        |  | First Name: M.I.         |  |
| Consumer's Soc. Sec. Number: |  | Consumer's Date of Birth |  |

### PERSON FINANCIALLY RESPONSIBLE

|                               |  |                                 |  |                                    |  |  |           |                                 |  |
|-------------------------------|--|---------------------------------|--|------------------------------------|--|--|-----------|---------------------------------|--|
| <input type="checkbox"/> Self |  | <input type="checkbox"/> Spouse |  | <input type="checkbox"/> Dependent |  | <input type="checkbox"/> Parent/Guardian |           | <input type="checkbox"/> Other: |  |
| Last Name                     |  |                                 |  | First Name M.I.                    |  |  |           |                                 |  |
| Street Address                |  |                                 |  |                                    |  | Apartment/Space Number                   |           |                                 |  |
| City                          |  | State                           |  | Zip Code                           |  | Head of Household (Check One)<br>YES NO  |           |                                 |  |
| Home Phone Number:            |  |                                 |  | Work Phone Number and Ext:         |  |  | Employer: |                                 |  |

### PRIMARY INSURANCE INFORMATION

**Copy of insurance card (front & back) attached**

Insurer's Relationship to Consumer: (Check One)

|                               |  |                                 |  |                                    |                                    |  |  |                                 |  |
|-------------------------------|--|---------------------------------|--|------------------------------------|------------------------------------|--|--|---------------------------------|--|
| <input type="checkbox"/> Self |  | <input type="checkbox"/> Spouse |  | <input type="checkbox"/> Dependent |                                    | <input type="checkbox"/> Parent/Guardian |  | <input type="checkbox"/> Other: |  |
| Medicare Number:              |  | Medicaid Number:                |  | County                             |                                    | CORE Household Number:                   |  | Other:                          |  |
| Insured's Soc.Sec. Number     |  |                                 |  | Insured's Last Name                |                                    | First Name                               |  | M.I.                            |  |
| Insurance Co. Name            |  |                                 |  | Insurance Phone Number:            |                                    |  |  |                                 |  |
| Mailing/Street Address        |  |                                 |  | City                               |                                    | State                                    |  | Zip Code                        |  |
| Policy Number:                |  | Group Number                    |  |                                    | Authorization Number (If required) |  |  |                                 |  |

### SECONDARY INSURANCE INFORMATION

**Copy of insurance card (front & back) attached**

Insurer's Relationship to Consumer: (Check One)

|                               |  |                                 |  |                                    |                                    |  |  |                                 |  |
|-------------------------------|--|---------------------------------|--|------------------------------------|------------------------------------|--|--|---------------------------------|--|
| <input type="checkbox"/> Self |  | <input type="checkbox"/> Spouse |  | <input type="checkbox"/> Dependent |                                    | <input type="checkbox"/> Parent/Guardian |  | <input type="checkbox"/> Other: |  |
| Medicare Number:              |  | Medicaid Number:                |  | County                             |                                    | CORE Household #:                        |  | Other:                          |  |
| Insured's Soc. Sec. Number:   |  |                                 |  | Insured's Last Name                |                                    | First Name                               |  | M.I.                            |  |
| Insurance Co. Name            |  |                                 |  | Insurance Phone Number:            |                                    |  |  |                                 |  |
| Mailing/Street Address        |  |                                 |  | City                               |                                    | State                                    |  | Zip Code                        |  |
| Policy Number                 |  | Group Number                    |  |                                    | Authorization Number (If required) |  |  |                                 |  |

I have reviewed the Consumer Financial Form above and the Fee Billing Policies and Financial Agreement for the Center. I have completed the requested information completely and to the best of my knowledge. I have received a copy of this form and as well as the fee policy agreement and agree to its terms. I agree to assume responsibility and pay the Center the assigned fee.

### RELEASE OF INFORMATION

I authorize Community Reach Center to release information for insurance purposes as may be required by the insurance company.

### AUTHORIZATION OF BENEFITS

I authorize payment to be made to directly to Community Reach Center.

\_\_\_\_\_  
Signature of Consumer/Parent or Guardian      Date

\_\_\_\_\_  
Signature of Insured      Date

### FOR OFFICE PURPOSES ONLY – TO BE COMPLETED BY COMMUNITY REACH CENTER STAFF

|                                   |                          |                  |
|-----------------------------------|--------------------------|------------------|
| Gross Annual Household Income: \$ | No. of Dependents:       | Fee Per Session: |
|                                   | No. of Child Dependents: |                  |



## Community Reach Center, Inc. Fee Policy and Financial Agreement

**PAYMENT IS EXPECTED AT THE TIME SERVICES ARE RENDERED.**

Community Reach Center, Inc. (CRC) is a non-governmental, not for profit organization that relies on fees and insurance payments for a major portion of its operating expenses. You are ultimately financially responsible for all services you or members of your household receive from the Center.

### **If you have insurance, Medicare or Medicaid, we require you to:**

- Provide a copy of your CURRENT Medicaid card (front and back) at the time of each visit or at least once a month thereafter. Failure to provide a copy of your current card could result in being charged full rate for services.
- Provide CRC with any insurance claim form(s) from your employer, insurance agent or company with required information filled in and/or a copy of your insurance card (front and back). Verification of insurance benefits is not a guarantee of payment. The contract for your insurance is between you and your insurance carrier. We will assist you in every way possible to receive payment from them. However, you are ultimately responsible for payment. You are responsible for any/all deductibles and copays.
- Provide a copy of your Medicare card at the time of each visit or at least once a month which reflects whether you are eligible for services under your Medicare Part B insurance. Services provided by Physicians, Licensed Psychologist or Licensed Therapist who are supervised by a physician or psychologist present and available on the premises at the time services are rendered. You are responsible for any/all deductibles and copays not covered by Medicare.
- If at any time your coverage changes, it is your responsibility to notify CRC. Failure to do so could result in the fees billed to you instead of Medicaid, Medicare, your insurance company, special grant or other third party payor.
- In the event additional services are requested or required that are not covered under your insurance or payor plan, you will be solely responsible for those services.

### **Fee/Billing Policies:**

- It is your responsibility to notify CRC of any changes in your financial situation during the term of this agreement. Failure to do so may result in the termination of this agreement and/or changes in your fee.
- At the time of intake, you will be asked to complete a financial statement, if requesting a reduced fee. This reduced fee will be in effect as long as the account remains current. This fee agreement will remain in effect for 1 year unless otherwise noted. An annual review is required on each consumer's account.
- CRC policy states that consumers who fail to pay for three (3) sessions are at risk of termination of services. The decision to terminate services will be based on both clinical and financial information.
- A NO SHOW fee of \$15.00 may be charged if you fail to notify CRC, at least 24 hours prior to your scheduled appointment. This fee will be due at your next appointment.
- Payment is expected prior to any psychological or interactional evaluation for all self-pay consumers.

### **Delinquent Accounts:**

- In the event it becomes necessary to assign your account to a collection agency, you are responsible for any/all costs of collection which may include attorney fees and other costs incurred.



### Income Attestation Form

Client name: \_\_\_\_\_ NextGen MRN #: \_\_\_\_\_

I understand that I must provide proof of income in order to set my fee for services received at Community Reach Center. This is according to the State of Colorado Department of Human Services, Division of Mental Health Ability to Pay schedule.

I will provide Community Reach Center with such evidence for each member of my family who contributes to the household income. Income includes wages earned, retirement, child support, maintenance/alimony, investment income, money received from public assistance, and cash received as a gift to aid in the support of the family.

\_\_\_\_\_ I currently receive Social Security Income in the amount of \$\_\_\_\_\_ per month

I currently receive Social Security Disability Income in the amount of \$\_\_\_\_\_ per month

I do attest that my total household income is \$\_\_\_\_\_ ( ) per year ( ) per month

This income supports \_\_\_\_\_ adults (including myself) and \_\_\_\_\_ children under age 18.

I understand that this information needs to be updated according to the following events and I may be asked to sign this form at such time:

- Clients must provide documentation annually (at least once every state fiscal year);
- Family income has changed significantly;
- The number of dependents in the family has changed; or
- Information provided was not accurate.

\_\_\_\_\_  
Client's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness (CRC Staff)

\_\_\_\_\_  
Date

#### Acceptable Forms of Proof of Income

| Income Type               | Supporting Documentation Required                               |
|---------------------------|---|
| Wages/Tips/Salary         | Paystubs  |
| Unemployment Compensation | Award letter or statement                                       |
| Self-Employment Income    | Prior year income tax return                                    |
| Worker's Compensation     | Award or determination of benefits letter                       |
| SSDI or SSI               | Benefit letter, statement of benefits received, notice of award |
| Alimony                   | Court Decree  |
| Rental Income             | Copy of lease   |
| Trust Fund                | Letter from trustee   |

If Paystub will be used please complete the following:

Average number of hours worked per week: \_\_\_\_\_ Hourly Rate: \_\_\_\_\_