



The Equine Healing Collaborative Welcome!

Hello and welcome to The Equine Healing Collaborative! We are happy to have you join us and hope your time here can assist you in building new experiences that will help you as you move forward with any challenges you may be facing. We at the Equine Healing Collaborative will be spending time with you and hope you will find, as we have, the healing power of Mindful EAP. Regardless of your level of comfort or experience with horses we have found that horses can be helpful in almost any situation.

Your first session with us will encompass an assessment, treatment plan, and safety plan (if needed) that you will build with your primary therapist. Once that is complete, we will begin the process of engaging in Mindful EAP. When we end our time together your therapist will provide you with referrals for continued services if needed.

We offer several options for our services, including Coastal TPA, Medi-Cal/Beacon, Medicare, superbills for out of network benefits, and limited spots for sliding scale or scholarships. Our funds are used to assist us with taking care of our horses. The animals help us help you, and they love to interact with people, receive veterinary care, and benefit from your generosity.

We also have forms for you to sign and will provide you with The Equine Healing Collaborative Notice of Privacy Practices. The forms we will need include:

- Consent for treatment
- Acknowledgement that you received notice of privacy practices
- Release of liability

You will be asked to sign copies and bring them to your first appointment. Fill them out to the best of your abilities and we will guide you if needed. If you have any questions or concerns regarding these forms, please contact Jennifer Fenton LMFT @ 831-582-1017.

Sincerely,

The Equine Healing Collaborative Staff

Client Name: _____

Clinician Name: _____

Instructions for your intake session:

- *Please arrive on time. If you are unable to complete the paperwork, please arrive 15 minutes prior to your appointment. If you need the intake packet upon arrival, please text your clinician's cell phone to let them know you have arrived and need the paperwork.*
- *Please park in the guest parking area and wait there until your clinician comes to greet you.*
- *All minors will need at least 1 parent or guardian to be with them during the first ½ of the intake session to go over the paperwork.*
- *Please do not turn left into the property! We want you to be safe and ask that you drive down to the traffic signal at Pasadera/Boots Rd just past our ranch, turn around there, and turn right into the property.*
- *Please text your therapist when you arrive.*
- *Because therapy takes place throughout the ranch and in the area with the pigs and goats, we ask that you remain in the parking area while waiting for therapy and that families remain in the parking area during therapy sessions.*

Site rules

- All personal pets must stay in your vehicle at all times for their safety.
- No smoking of any kind on the property including vaping.
- All guests must stay in their cars or in the parking lot area.
- For the privacy of clients and others, no photos or videos can be taken of clients unless they have been given permission and are in the parking lot area.
- We do not cancel for inclement weather.
- Please share these guidelines with anyone who brings you to therapy.

Initial _____

Addresses and Directions:

- Mailing Address: P.O. Box 1087, Monterey, CA 93942
- Bella Tierra Ranch (main site): 902 Monterey Salinas Highway, Salinas, CA 93908
 - When arriving from Salinas, please pass the ranch and turn around at the Pasadera/Boots Road stoplight. Enter the property from the right side.
 - When arriving from Monterey, pass the Passadera/Boots Rd. stoplight and the entrance will be on the right.
- Flying Pig Ranch (Prunedale): 10101 Equestrian Place, Salinas, CA 93907
 - When arriving from 101 North, take Reese Road, then a right turn at Equestrian Estates. Last house in the cul-de-sac of Equestrian Place.
- Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy (La Selva Beach): 783 San Andreas Road, Watsonville, CA 95076. Please note that this is a shared space. You will check in at the guard area when you arrive. Tell them you are with the Equine Healing Collaborative. You will turn left at the sign for Monterey Bay Riding Academy, turn right when that driveway ends, and park to the left in the parking area. Please wait there for your therapist to greet you.
- South San Jose Ranch: 1011 Metcalf Road San Jose, CA 95138: Park on the side of the road and your therapist will meet you at the gate.
- Scotts Valley: 3400 Bean Creek Road Scotts Valley, CA 95066: Park in the parking lot and your therapist will greet you.
- **Yorba Linda:** 6122 Ridge Way, Yorba Linda CA 92866: Park in the parking lot/driveway and your therapist will greet you.

**All sites are by appointment only, and the homes on all properties are private and employee only.
No entry at any time.**

Informed Consent for Equine Assisted Psychotherapy

Welcome to The Equine Healing Collaborative (EHC)! We hope you will find healing in your work with us and your equine partner. There is no riding in our program and all work takes place on the ground. Equine Assisted Psychotherapy (EAP) is a relationship between individuals and equines that works in part because of clearly defined responsibilities and rights held by all. As a client in EAP, you have certain rights and responsibilities as well as legal limitations to those rights that are important for you to understand. I, as your therapist, have corresponding responsibilities to you. These rights and responsibilities are described in the following sections.

EAP comes with certain risks. Although every effort has been made to ensure that our equines are safe around individuals, they are large animals of prey and will attempt to escape any threat (escape can include, pulling, running, kicking, jumping, or biting) if they feel threatened or trapped. It is imperative that you wear appropriate clothing (jeans and closed-toed sturdy shoes) to every session. If at any time, you feel your safety is threatened by your equine partner, please let us know. Two basic areas to avoid are standing directly in front of or behind your equine partner. Our clinicians will remind you of these and other safety rules if needed.

EHC relies on the generous allowance of space by the owners and operators of Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy and Flying Pig Ranch, as well as the EHC main location at Bella Tierra Ranch. There are members of the public on these properties at various times, and clinicians will make every effort to guard your privacy by ensuring your therapy session takes place away from the milieu of the barn. However, barn members have access to all parts of the property. If another person approaches your session, we will suspend the session temporarily and resume once we feel your confidentiality can be secured.

EAP has both benefits and risks. Risks may include experiencing uncomfortable feelings, such as sadness, guilt, anxiety, anger, frustration, loneliness and helplessness, because the process of EAP can require discussing the unpleasant aspects of your life. However, EAP has been shown to have benefits for individuals who undertake it. EAP often leads to a significant reduction in feelings of distress, greater personal awareness and insight, increased satisfaction in interpersonal relationships, and increased skills for managing stress and resolutions to specific problems. But there are no guarantees about what will happen. EAP requires a very active effort on your part. In order to be most successful, you will have to work on things we discuss outside of sessions.

EAP is a strength-based type of therapy. The first session will involve an evaluation of your needs, followed by a treatment plan where we will agree to the goal of EAP. You should evaluate this information and make your own assessment about whether you feel comfortable working with EHC. If you have questions about our procedures, please discuss them whenever they arise. EHC will provide you with at least three referrals if you wish to continue psychotherapy upon termination with us, and we encourage you to continue your journey to healing.

APPOINTMENTS

Appointments will ordinarily be approximately 40-55 minutes in duration, once per week, at a time we agree on. Sessions may be more or less frequent as needed. The time scheduled for your appointment is assigned to you and you alone. If you need to cancel or reschedule a session, please provide 24 hours notice. If you do not contact us within the 24 hours, you will be charged a 50.00 no show fee. In addition, you are responsible for coming to your session on time; if you are late, your appointment will still need to end on time. In addition to on site therapy services, we also offer telehealth services in the event of inclement weather, illness or other reasons. We take your treatment seriously and weekly appointments are necessary to assist you in achieving your treatment goals. If you are unable to attend your weekly appointments and you miss more than three sessions in three months, we will need to re-evaluate your current treatment regimen including termination or placement on our waitlist if you are unable to attend regularly.

ABOUT OUR THERAPISTS

EHC utilizes pre-licensed clinicians that are in the process of completing their requirements for full licensure. These clinicians have been given the authorization by the Department of Mental Health of the State of California to provide mental health services. All pre-licensed clinicians work under the supervision of a licensed mental health professional. Listed below is the name of the pre-licensed clinician that will be providing services to you, your child (or ward) and/or your family. The name of the licensed mental health professional who provides supervision to our clinicians is **Jennifer Fenton LMFT 51078 expiration date 08/31/2027**. Please call Jennifer at 831-582-1017 if you have any questions about this arrangement. Your signature below indicates that you have been informed of this arrangement and that you consent to receive services from a pre-licensed, supervised clinician.

Name _____ License Type _____ Expiration Date _____

Name _____ Title _____

Supervised by Jennifer Fenton LMFT 08/31/2027

EHC FEES

EHC is a not-for-profit organization, and we offer our services billing insurance. We are in network with Medi-Cal/Beacon, Coastal TPA, Scholarship, cash pay with superbill provided, and Victims of Crime. You will not be turned away based on your ability to pay; however, you may be placed on a waitlist. Please discuss your ability to pay with your clinician. The total amount of treatment will depend on the number of sessions needed. The number of sessions needed is unknown at the onset of treatment and will be based on your needs, preferences, and progress made in treatment. Signing this document includes an understanding that we have provided you with a “good faith estimate” of costs to you. Your clinician will discuss costs to you, enter all payments collected in our electronic health record, and keep open lines of communication with you about payment.

PROFESSIONAL RECORDS

We are required to keep appropriate records of the psychological services that we provide. Your records are maintained via an electronic health record. We keep brief records noting that you were here, your reasons for seeking therapy, the goals and progress we set for treatment, your diagnosis, topics we discussed, your medical, social, and treatment history, records we receive from other providers, copies of records we send to others, and your donation records. You may have access to your records at any time; in the event you would like to obtain these records, please contact Jennifer Fenton LMFT, in writing at theequinehealingcollaborative@gmail.com

CONFIDENTIALITY

Our policies about confidentiality, as well as other information about your privacy rights, are fully described in a separate document entitled Notice of Privacy Practices. A copy of that document is included in this packet, and we have discussed those issues. Marriage Family Therapists and Social workers are mandated reporters. We are required by law to report any client safety concerns to the appropriate agency. You may reopen the conversation at any time during our work together.

RECORDING SESSIONS

The State of California does not allow the recording of confidential interactions without the consent of both parties present (see Ca. Penal Code 632). This law applies where an individual has an objectively reasonable expectation of confidentiality. EHC staff may ask to record all or part of a therapy session for educational purposes and will maintain transparency about recording. All agreements to record sessions will be documented in our electronic health record.

PARENTS & MINORS

While privacy in therapy is crucial to successful progress, parental involvement can also be essential. For the treatment of children, we request an agreement between the client and the parents allowing us to share general information about treatment progress and attendance, as well as a treatment summary upon completion of therapy if requested by either party. All other communication will require the child’s agreement, unless we feel there is a safety concern, in which case we will make every effort to notify the child of our intention to disclose information ahead of time and make every effort to handle any objections that are raised.

CONTACTING US

We are often not immediately available by telephone. We do not answer the phone when we are with clients or otherwise unavailable. At these times, you may leave a message on our confidential voice mail and your call will be returned as soon as possible, but it may take a day or two for non-urgent matters. If, for any number of unseen reasons, you do not hear from us or we are unable to reach you, and you feel you cannot wait for a return call or if you feel unable to keep yourself safe, 1) contact the crisis team with Monterey County Behavioral Health at 888-258-6029 (follow prompts to speak to crisis team member), 2) go to your local hospital emergency room, or 3) call 911 and ask to speak with a CIT trained officer (these are police officers trained to deal with mental health emergencies). We will make every attempt to inform you in advance of planned absences and provide you with the name and phone number of the mental health professional covering our practice.

OTHER RIGHTS

If you are unhappy in any way with our services or locations, please speak with us so we can respond to your concerns. Feedback will be taken seriously and handled with care and respect. You may also request that we refer you to another therapist and are free to end therapy at any time. You have the right to respectful, considerate, and safe care, without discrimination as to race, ethnicity, color, gender, sexual orientation, age, religion, national origin, or source of payment. You have the right to ask questions about any aspects of therapy and about my specific training and experience.

CONSENT TO PSYCHOTHERAPY

I have read this Agreement and the Notice of Privacy Practices and agree to the terms.

Name of Client

Signature of Client

Date

If client is under 18: Name of Guardian

Signature of Guardian

Date

Name of Therapist

Signature of Therapist

Date

The Equine Healing Collaborative Notice of Privacy Practices

Your Information. Your Rights. Our Responsibilities. This notice describes how medical information about you may be used and disclosed and how you can get access to this information. Please review it carefully.

Your Rights

You have the right to:

- Get a copy of your paper or electronic medical record
- Correct your paper or electronic medical record
- Request confidential communication
- Ask us to limit the information we share
- Get a list of those with whom we've shared your information
- Get a copy of this privacy notice
- Choose someone to act for you
- File a complaint if you believe your privacy rights have been violated

Your Choices

You have some choices in the way that we use and share information as we:

- Tell family and friends about your condition
- Provide disaster relief
- Include you in a hospital directory
- Provide mental health care
- Market our services and sell your information
- Raise funds

Our Uses and Disclosures

We may use and share your information as we:

- Treat you
- Run our organization
- Bill for your services
- Help with public health and safety issues
- Do research
- Comply with the law
- Respond to organ and tissue donation requests
- Work with a medical examiner or funeral director
- Address workers' compensation, law enforcement, and other government requests
- Respond to lawsuits and legal actions

Your Rights

When it comes to your health information, you have certain rights. This section explains your rights and some of our responsibilities to help you.

Get an electronic or paper copy of your medical record

- You can ask to see or get an electronic or paper copy of your medical record and other health information we have about you. Ask us how to do this.
- We will provide a copy or a summary of your health information, usually within 30 days of your request. We may charge a reasonable, cost-based fee.

Ask us to correct your medical record

- You can ask us to correct health information about you that you think is incorrect or incomplete. Ask us how to do this.
- We may say "no" to your request, but we'll tell you why in writing within 60 days.

Request confidential communications

- You can ask us to contact you in a specific way (for example, home or office phone) or to send mail to a different address.
- We will say "yes" to all reasonable requests.

Ask us to limit what we use or share

- You can ask us not to use or share certain health information for treatment, payment, or our operations. We are not required to agree to your request, and we may say "no" if it would affect your care.
- If you pay for a service or health care item out-of-pocket in full, you can ask us not to share that information for the purpose of payment or our operations with your health insurer. We will say "yes" unless a law requires us to share that information.

Get a list of those with whom we've shared information

- You can ask for a list (accounting) of the times we've shared your health information for six years prior to the date you ask, who we shared it with, and why.
- We will include all the disclosures except for those about treatment, payment, and health care operations, and certain other disclosures (such as any you asked us to make). We'll provide one accounting a year for free but will charge a reasonable, cost-based fee if you ask for another one within 12 months.

Get a copy of this privacy notice

You can ask for a paper copy of this notice at any time, even if you have agreed to receive the notice electronically. We will provide you with a paper copy promptly.

Choose someone to act for you

- If you have given someone medical power of attorney or if someone is your legal guardian, that person can exercise your rights and make choices about your health information.
- We will make sure the person has this authority and can act for you before we take any action.

File a complaint if you feel your rights are violated

- You can complain if you feel we have violated your rights by contacting us using the information on page 1.
- You can file a complaint with the U.S. Department of Health and Human Services Office for Civil Rights by sending a letter to 200 Independence Avenue, S.W., Washington, D.C. 20201, calling 1-877-696-6775, or visiting www.hhs.gov/ocr/privacy/hipaa/complaints/.
- We will not retaliate against you for filing a complaint.

Your Choices

For certain health information, you can tell us your choices about what we share. If you have a clear preference for how we share your information in the situations described below, talk to us. Tell us what you want us to do, and we will follow your instructions.

In these cases, you have both the right and choice to tell us to:

- Share information with your family, close friends, or others involved in your care
- Share information in a disaster relief situation
- Include your information in a hospital directory

If you are not able to tell us your preference, for example if you are unconscious, we may go ahead and share your information if we believe it is in your best interest. We may also share your information when needed to lessen a serious and imminent threat to health or safety.

In these cases, we never share your information unless you give us written permission:

- Marketing purposes
- Sale of your information
- Most sharing of psychotherapy notes

In the case of fundraising:

- We may contact you for fundraising efforts, but you can tell us not to contact you again.

Our Uses and Disclosures

How do we typically use or share your health information?

We typically use or share your health information in the following ways.

Treat you

We can use your health information and share it with other professionals who are treating you.

Example: A doctor treating you for an injury asks another doctor about your overall health condition.

Run our organization

We can use and share your health information to run our practice, improve your care, and contact you when necessary.

Example: We use health information about you to manage your treatment and services.

Bill for your services

We can use and share your health information to bill and get payment from health plans or other entities.

Example: We give information about you to your health insurance plan so it will pay for your services.

How else can we use or share your health information?

We are allowed or required to share your information in other ways – usually in ways that contribute to the public good, such as public health and research. We have to meet many conditions in the law before we can share your information for these purposes. For more information see:

www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/index.html

Help with public health and safety issues

We can share health information about you for certain situations such as:

- Preventing disease
- Helping with product recalls
- Reporting adverse reactions to medications
- Reporting suspected abuse, neglect, or domestic violence
- Preventing or reducing a serious threat to anyone’s health or safety

Do research

We can use or share your information for health research.

Comply with the law

We will share information about you if state or federal laws require it, including with the Department of Health and Human Services if it wants to see that we’re complying with federal privacy law.

Respond to organ and tissue donation requests

We can share health information about you with organ procurement organizations.

Work with a medical examiner or funeral director

We can share health information with a coroner, medical examiner, or funeral director when an individual dies.

Address workers’ compensation, law enforcement, and other government requests

We can use or share health information about you:

- For workers’ compensation claims
- For law enforcement purposes or with a law enforcement official
- With health oversight agencies for activities authorized by law
- For special government functions such as military, national security, and presidential protective services

Respond to lawsuits and legal actions

We can share health information about you in response to a court or administrative order, or in response to a subpoena.

Our Responsibilities

- We are required by law to maintain the privacy and security of your protected health information.
- We will let you know promptly if a breach occurs that may have compromised the privacy or security of your information.
- We must follow the duties and privacy practices described in this notice and give you a copy of it.
- We will not use or share your information other than as described here unless you tell us we can in writing. If you tell us we can, you may change your mind at any time. Let us know in writing if you change your mind.

For more information see: www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/noticepp.html.

Changes to the Terms of this Notice

We can change the terms of this notice, and the changes will apply to all information we have about you. The new notice will be available upon request and on our website. By signing below you acknowledge you have read and understand the Terms of this Notice.

Name of Client

Signature of Client

Date

If client is under 18: Name of Guardian

Signature of Guardian

Date

The Equine Healing Collaborative Authorization for Use/Exchange, and or Disclosure of Confidential Behavioral Health Information



Completion of this document authorizes the use or release of confidential behavioral health information about your or your child. It is important that you complete this Authorization if you wish to authorize The Equine Healing Collaborative to use, disclose, or exchange confidential health information about you or your child.

I, _____ (name or representative) hereby authorize The Equine Healing Collaborative to disclose confidential information about me/my child to the following person/entity.

_____ (name of person or entity), for the following purpose(s):

This authorization expires 90 days after my or my child's treatment ends or when there is no longer any need for access by The Equine Healing Collaborative treatment providers, whichever is sooner.

I may refuse to sign this authorization. I may inspect or obtain a copy of the health information that I am being asked to allow the use or disclosure of.

I may revoke authorization at any time either in writing or by verbally informing my Equine Healing Collaborative Clinician. My revocation will take effect upon receipt, except to the extent others have acted in reliance on this Authorization.

I have a right to receive a copy of this authorization.

Information used, exchanged, and disclosed pursuant to this authorization will not be redisclosed by any user or recipient except as required or permitted by law.

Name of Client

Signature of Client

Date

If client is under 18: Name of Guardian

Signature of Guardian

Date

Name of Therapist

Signature of Therapist

Date

The Equine Healing Collaborative Release of Liability

In exchange for participation in the activity of Mindful EAP organized by The Equine Healing Collaborative LLC and/or use of the property at Flying Pig Ranch (10101 Equestrian Place, Salinas, CA 93907), Chez Serdip (3400 Bean Creek Road Scotts Valley, CA 95066), Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy (783 San Andreas Road, Watsonville, CA 95076), Yorba Linda Ranch, 6122 Ridge Way, Yorba Linda, CA 92886, and Bella Tierra Ranch (902 Monterey Salinas Highway, Salinas, CA 93908) all animals and staff of The Equine Healing Collaborative, services of The Equine Healing Collaborative LLC, I agree for myself and if applicable, for the members of my family to the following:

Agreement to follow directions. I agree to observe and obey all posted rules and warnings and further agree to follow any oral instructions or directions given by The Equine Healing Collaborative staff, agents, and/or volunteers.

Assumption of the risks and release. I recognize that there are inherent risks associated with the above described activity and I assume full responsibility for personal injury to myself and (if applicable) my family members, and further release and discharge The Equine Healing Collaborative LLC, Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy, Bella Tierra Ranch, Flying Pig Ranch, and its owners and operators, loss or damage arising out of my or my family's use or presence upon the facilities used by The Equine Healing Collaborative LLC, whether caused by fault of myself, my family, the Equine Healing Collaborative LLC or any of The Equine Healing Collaborative's horses.

Indemnification. I agree to indemnify and defend The Equine Healing Collaborative LLC, Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy, Flying Pig Ranch, Chez Serendip, Yorba Linda Ranch and Bella Tierra Ranch against all claims, causes of action, damages, judgments, costs or expenses, including attorney fees and other litigation costs, which many in any way arise from my or my family's use of or presence upon the facilities of The Equine Healing Collaborative LLC, Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy, Flying Pig Ranch, and Bella Tierra Ranch.

Fees. I agree to pay for all damages to the facilities of The Equine Healing Collaborative LLC, Monterey Bay Horsemanship & Therapeutic Center/Monterey Bay Academy, Bella Tierra Ranch, Chez Serendip, Yorba Linda Ranch and Flying Pig Ranch property caused by any negligent, reckless, or willful actions by me or my family.

Consent. I, _____ (name) consent to the participation of myself and/or my child _____ (child's name) in the activities of The Equine Healing Collaborative LLC and agree on behalf of the minor to all of the terms and conditions of this agreement. By signing this Release of Liability, I represent that I have legal authority over and custody of _____ (child's name).

Medical Authorization. In the event of an injury to participant and/or above minor during the above described activities, I give my permission to The Equine Healing Collaborative LLC, or employees, volunteers, or other representative to arrange for all necessary medical treatment for which I will be financially responsible. This temporary authority will begin on date shown below and will remain in effect during the duration of my presence in The Equine Healing Collaborative's program. The Equine Healing Collaborative LLC shall have the following powers:

- a. The power to seek appropriate medical treatment or attention on behalf of me or my child as may be required by the circumstances, including without limitation, that of a licensed medical physician and/or a hospital;
- b. The power to authorize medical treatment or medical procedures in an emergency situation; and
- c. The power to make appropriate decisions regarding clothing, bodily nourishment and shelter.

Applicable Law. Any legal or equitable claim that may arise from participation in the above shall be resolved under California Law.

No Duress. I agree and acknowledge that I am under no pressure or duress to sign this agreement and that I have been given a reasonable opportunity to review it before signing. I further agree and acknowledge that I am free to have my own legal counsel review this agreement if I should so desire.

Arbitration. Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association in accordance with its Commercial Arbitration Rules, and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.

Name of Client

Signature of Client

Date

If client is under 18: Name of Guardian

Signature of Guardian

Date

Emergency Contact _____ Phone Number _____

EHC Payment Options

Here at the Equine Healing Collaborative, we believe in building stronger communities and individuals through the use of EAP. To ensure this, we have created a form with several payment options.

Please check one:

- € **Superbil/Out of Network:** You pay your clinician up front and your clinician will provide you with a “Superbill” to provide to your insurance company for reimbursement.
- € **Scholarship or Sliding Scale:** Please speak with the EHC office prior to your initial appointment as limited spots are available.
- € **Medi-Cal/Beacon/Carelon/Central Coast Alliance:** Please provide insurance information and number below and we will bill directly for your session.
- € **Medi-Care:** Please provide insurance information and number below and we will bill directly for your session.
- € **Coastal TPA:** Please provide insurance information and number below and we will bill directly for your session. Your clinician will discuss co-pay arrangements with you. *Please provide your group number and policy holder date of birth.*

Please Note: It is your responsibility to notify your clinician of any changes to insurance or payment information as soon as possible in order to avoid a large bill for services.

Insurance Information

Primary Insurance: _____ Member ID: _____
Policy holder: _____ DOB: _____ Group #: _____
Secondary Insurance: _____ Member ID: _____
Policy holder: _____ DOB: _____ Group #: _____

Credit Card Information

Credit Card Number _____
Expiration Date _____ Security Code _____
Billing Address _____
City _____ Zip _____
Signature Authorizing Use of Credit Card _____

Please note: For cash pay clients, your credit card will be charged the agreed upon amount after each session and your card will be securely held in your electronic health record until you notify your therapist about any change needed for payment. If the EHC has an issue with billing for any reason, the therapist will connect with the client or their guardian to notify them of the situation.

The Equine Healing Collaborative

Name _____
Date of Birth _____ Gender Identity _____ Pronouns _____
Address/City/State/Zip _____
Personal Phone Number _____ Text ok? _____ Voicemail ok? _____
Preferred Email Address _____
Emergency Contact _____ Phone number _____
If under age 18: Guardian Name _____
Guardian Phone Number _____

Demographics

This optional section provides information that may be requested on grant applications

Sexual orientation _____ Marital Status _____
Race _____ Ethnicity _____
Primary language _____ Other languages _____
Do you or have you ever smoked cigarettes? _____

Intake Information

What brings you to The Equine Healing Collaborative? _____

How long has your current problem been present? _____

Have you ever been given any mental health diagnoses? If so, please list _____

Have you ever had any mental health services with a psychotherapist, psychiatrist, school counselor, school therapist, or other type of counselor? If so, please describe _____

Have you ever had thoughts, feelings or plans to harm yourself or someone else? If so, please describe _____

Have you ever been psychiatrically hospitalized? If so, why and when? _____

What is the scariest thing that has ever happened to you? _____

Medical History

Please list any medical conditions _____

Name of Primary Care Physician _____ Date of Last Visit _____

Current medications and dosages (including vitamins and/or supplements) _____

Self Care and Social Support

Please list your hobbies and interests _____

Who do you primarily rely on for support? _____

What are your cultural, spiritual, or religious beliefs?

History

As a young child, did you experience any developmental concerns? _____

Please describe your educational and/or vocational history _____

Do you have or have you had an IEP or 504 plan? If so, please explain any accommodations

Have you ever had any legal issues/arrests? If so, please describe

Do you or have you ever used any substances? If so, how long and what kind? _____

Family History

Who do you currently live with? _____

Please describe any family issues (past or present) that impact your life _____

Has anyone in your family been diagnosed with a mental health issue? If so, please describe

Has anyone in your family ever used or struggled with substances? If so, how long and what kind?

Goals

What is a goal you would like to achieve while here?

What would you describe as your main strengths?

Is there anything else you would like us to know about?
