



# PETER THOMAS, PHD.

## WELCOME

**We strive to provide quality, comprehensive care to children, adolescents and adults.**

Date: \_\_\_\_\_

Acct.#: \_\_\_\_\_

### ***Patient information***

Patient Name: \_\_\_\_\_  
Last First Middle Initial Preferred Name (nickname)

SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Gender:  F  M Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Age: \_\_\_\_\_

Home Address: \_\_\_\_\_ Apartment # \_\_\_\_\_

City State Zip Code

Primary Phone: (\_\_\_\_) \_\_\_\_\_ type: \_\_\_\_\_

Alternate number: (\_\_\_\_) \_\_\_\_\_ type: \_\_\_\_\_

Email Address: \_\_\_\_\_

Marital Status:  Single  Married  Divorced  Separated  Widowed

Race:  White  Black  Hispanic  Native American  Other: \_\_\_\_\_

Ethnicity: \_\_\_\_\_

Employed:  Yes  No Student:  Yes  No

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_

Address: \_\_\_\_\_

Wk. Phone: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_

May we contact you by phone for appointment reminders? Primary phone:  Yes  No Work:  Yes  No

### ***Additional Contact Information***

Emergency Contact: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Relationship to Patient: \_\_\_\_\_

Referral Source: \_\_\_\_\_

Specialty: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_

Please check this box if you **DO NOT** want a copy of your evaluation sent to the referral source you have listed above.

Spouse's Name: \_\_\_\_\_ Spouse's Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Last First

Spouse's Employer: \_\_\_\_\_

Spouse's Work Phone: (\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ Spouse's SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Is patient under the age of 18?  Yes  No

**IF YES, PARENT / GUARDIAN MUST FILL OUT**

**IF NO, PLEASE STOP HERE AND SIGN THE BOTTOM.**

Parent Name: \_\_\_\_\_

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

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Last

First

Address: \_\_\_\_\_ SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_\_

Employer: \_\_\_\_\_ Work Phone: \_\_\_\_\_

(\_\_\_\_) \_\_\_\_\_ x \_\_\_\_\_ Relationship to patient: \_\_\_\_\_

\_\_\_\_\_  
Signature of Patient / Parent / Guardian

\_\_\_\_\_  
Date

***THANK YOU FOR CHOOSING US FOR YOUR CARE.***

**The Holiner Psychiatric Group**  
**ASSIGNMENT OF BENEFITS, ASSIGNMENT OF RIGHTS TO PURSUE ERISA AND OTHER LEGAL AND ADMINISTRATIVE CLAIMS**  
**ASSOCIATED WITH MY HEALTH INSURANCE AND/ OR HEALTH BENEFIT PLAN (INCLUDING BREACH OF FIDUCIARY DUTY) AND**  
**DESIGNATION OF AUTHORIZED REPRESENTATIVE**  
**PETER THOMAS, PHD.**

**Primary**

Carrier Name: \_\_\_\_\_  
 ID#: \_\_\_\_\_  
 Group Name / Number: \_\_\_\_\_  
 Policy #: \_\_\_\_\_  
 Ins. Co. Phone #: (\_\_\_\_) \_\_\_\_\_  
 Insured Party Information **(If other than Patient)**:  
 Name: \_\_\_\_\_  
 Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Address: \_\_\_\_\_  
 SS#: \_\_\_\_-\_\_\_\_-\_\_\_\_  
 Insured's Employer: \_\_\_\_\_  
 Relationship to patient: \_\_\_\_\_

**Medicare Supplement/Secondary**

Carrier Name: \_\_\_\_\_  
 ID#: \_\_\_\_\_  
 Group Name / Number: \_\_\_\_\_  
 Policy #: \_\_\_\_\_  
 Ins. Co. Phone #: (\_\_\_\_) \_\_\_\_\_  
 Insured Party Information **(If other than Patient)**:  
 Name: \_\_\_\_\_  
 Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Address: \_\_\_\_\_  
 SS#: \_\_\_\_-\_\_\_\_-\_\_\_\_  
 Insured's Employer: \_\_\_\_\_  
 Relationship to patient: \_\_\_\_\_

I hereby assign and convey directly to the above- named health care provide, as my designated authorized representative, all medical benefits and/or insurance reimbursement, if any, otherwise payable to me for services, treatments, therapies and/or medications rendered or provided by the above- named healthcare provider, regardless of its managed care network participation status. I understand that I am financially responsible for all charges regardless of any applicable insurance or benefits payments. I hereby authorize the above-named healthcare provider to release all medical information necessary to process my claims. Further, I hereby authorize my plan administrator fiduciary, insurer, and/or attorney to release to the above-named healthcare provider any and all plan documents, summary benefit description, insurance policy, and/or settlement information upon written request from the above-named health care provider or its attorneys to order to claim such medical benefits.

In addition to this assignment of medical benefit and/or insurance reimbursement above, I also assign and/or convey to the above-named healthcare provider any legal or administrative claim or chose an action arising under any group health plan, employee benefits plan, health insurance, or tortfeasor insurance concerning medical expenses incurred as a result of medical services, treatments, therapies and/or medications I receive from the above-named health care provider (including any right to pursue those legal or administrative claims or chose an action). This constitutes an express and knowing assignment of ERISA breach or fiduciary duty claims other legal and/or administrative claims.

I intend by this assignment and designation of authorized representative to convey to the above-named provider all of my rights to claim (or place a lien on) the medical benefits related to the services, treatments, therapies and/or medications provided by the above-named health care provider, including rights to any settlement, insurance or applicable legal or administrative remedies (including damages arising from ERISA breach of fiduciary duty claims) .The assignee and/or designated representative (above-named provider) is given the right by me to (1) obtain information regarding the claim to the same extent as me; (2) submit evidence; (3) makes statements about facts or law; (4) make any request including providing or receiving notice of appeal proceedings (5) participate in any administrative and judicial actions and pursue claims or chose in action or right against any liable party, insurance company, employee benefit plan, health care benefit plan or plan administrator. The above-named provider as my assignee and my designated authorized representative may bring suit against any such health care benefit plan, employee benefit plan, plan administrator or insurance company in my name with derivative standing at provider's expense.

Unless revoked, this assignment is valid for all administrative and judicial reviews under PPACA (health care reform legislation), ERISA, Medicare and applicable federal and state laws. A photocopy of this assignment is considered valid, the same as if it was the original.

**I HAVE READ AND FULLY UNDERSTAND THE AGREEMENT.**

\_\_\_\_\_  
 Patient signature (Parent /Guardian's signature if patient is under 18)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Patient Name (please print)

\_\_\_\_\_  
 Relationship to patient

\_\_\_\_\_  
 Witness

\_\_\_\_\_  
 Date

Peter Thomas Office Policies

**Appointments: \_\_\_\_\_ (initial)**

- Our office hours are 8:00am to 12:00pm, and 1:00pm to 5:00pm Monday through Thursday; On Fridays our office hours are from 8:00am to 12:00pm. Patient appointments are scheduled by calling during regular office hours.

**Financial Policy: \_\_\_\_\_ (initial)**

- An estimated payment is due at time of service by cash, check, money order, Visa, MasterCard, Discover, or American Express. Depending on the level of service provided there may be an additional fee that is patient responsibility to pay within 30 days of receipt of your statement.
- Patients are responsible for their co-payments and/or deductibles at the time services are rendered for patients on Preferred Provider Plans (PPO's) or Health Maintenance Organizations (HMO's).
- Any balance on an account that is greater than 30 days old is considered past due. A statement will be mailed on a monthly basis and will reflect the current balance for all services rendered prior to the date on the statement. Payment is due upon receipt of statement.
- Payment plans are offered upon request.
- If admitted to the hospital you will receive a physician's bill that is separate from the hospital bill.

**Insurance: \_\_\_\_\_ (initial)**

- Your insurance policy is a contract between you and your insurance company. While our billing professionals will do all they can to help our patients in communicating and negotiating with their insurance plan or other persons, we must inform patients that have any questions regarding coverage, benefits, or payment for services provided, is their responsibility to resolve.
- ***In the event of denials, errors, or non-covered services, the patient is responsible for all services rendered.*** If payment from your insurance carrier is not received within forty-five (45) days, we will seek full payment from you. Balance of services that are delayed or denied by your insurance company due to Coordination of Benefits information will become your responsibility after thirty (30) days.
- The Holiner Psychiatric Group and its employees do not guarantee that payment will be authorized for medical services; therefore, this office is not responsible for any adverse payment decisions or misuse of information.
- Notification of any change in your insurance status (i.e. new company, deductible, co-pay amounts) must be provided to the office forty-eight (48) hours in advance of next visit, or payment in full will be required.

**Red Flag Policy: \_\_\_\_\_ (initial)**

- "The Holiner Psychiatric Group must collect and store our patients' private medical, financial, and personally identifying data. We must therefore be vigilant in protecting the patient information to which we have access including medical, financial, and any other personal information contained in The Holiner Psychiatric Group's medical, appointment, or billing records."
- You must present a valid state issued photo identification card **prior** to being seen at **each** appointment.
- If you would like us to bill your insurance carrier, you must present a valid insurance card **prior** to being seen at **each** appointment, or payment in full will be required.

**Miscellaneous Charges: \_\_\_\_\_ (initial)**

- For charts in paper format you will be charged \$25.00 for the first 20 pages and .50 for each page thereafter. For records in electronic format you will be charged \$25.00 for 500 pages or less and \$50.00 for more than 500 pages.) and may take up to 15 business days to obtain. Report preparation fees are based on the time involved.
- Any returned checks are subject to a \$30 service fee. Any returned check must be resolved before any future appointments can be arranged.
- The Holiner Psychiatric Group contracts with RS Clark and Associates, collection agency, to collect delinquent accounts. Once an account is placed with RS Clark and Associates, the patient must deal directly with RS Clark and Associates, for payment of the account. In the event of account placement with RS Clark and Associates, the applicable collection fees will be added to that account. Currently, these additional fees are equal to 25% of the total balance owed.
- ***If you do not cancel your appointment 24 hours in advance, our policy is to charge the rate of (\$50.00) and is payable prior to future visits.*** These will not be billed to your insurance company. Please help us to serve you better by keeping your scheduled appointments or canceling in advance.

**Refill Requests / Messages: \_\_\_\_\_ (initial)**

- Any phone messages left after 3:00pm Monday through Thursday will be returned the next business day. Any phone messages left after 10:00am on Friday will be returned the following Monday.
- In the event that you call our office and your clinician is out your call will be returned the next business day. If you feel that your call needs urgent attention, please contact our main phone number at: 972-566-4591.

**Emergency Situations / After Office Hours: \_\_\_\_\_ (initial)**

- For urgent matters after 5:00 PM Monday through Thursday and urgent matters after 12:00pm on Friday please call our main phone number for the physician on call. In an emergency, call 911 or go directly to the nearest emergency room.

**Cellular devices, cameras, camcorders or any other recording/ photo taking devices are prohibited: \_\_\_\_\_ (initial)**

- To reduce the potential risk of a Federal HIPAA Violation recording and/or photo taking devices are prohibited, including but not limited to: cellular devices, camcorders, recorders

**Disclosure: \_\_\_\_\_ (initial)**

- During the course of your physician/patient relationship with The Holiner Psychiatric Group you may be referred to PsychIQ. The address of the entity is 7777 Forest Lane Building C Suite A-94, PMB#157 Dallas, Tx. 75230. In connection with any referral to the entity, you are hereby advised that Joel Holiner has an investment interest in the entity and therefore will receive, directly or indirectly, remuneration as a result of such referral. Should The Holiner Psychiatric Group at any time refer you to the entity and you prefer to use a different health care provider, you will be advised of the alternative health care providers and your right to choose one of these alternative health care providers.
- Rooms are being monitored for patient safety purposes

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I have read and understand the Office Policy, and I agree to accept responsibility as described above. I also understand the Office Policy may be amended or modified from time to time by the practice. I am expressing my understanding by initialing next to each item on this page as well as signing below. If you have any questions, please feel free to ask our staff for assistance. Thank you for choosing us for your care.

\_\_\_\_\_  
Patient Name (please print)

\_\_\_\_\_  
Date

**PETER THOMAS, PHD.**  
**FEE DISCLOSURE ACKNOWLEDGEMENT**

We will make available our fee schedule for procedures upon request. Most fees are for office and/or hospital procedures. However, fees will also be incurred when you request services in addition to your regular services.

The following is a brief, non-comprehensive listing of such services:

- |  |              |
|--|--------------|
| 1. Medical records processed for transfer (PhotoStat)        | 25.00 and up |
| 2. Returned checks (NSF)                                     | 30.00        |
| 3. Letters to employer, school, etc.                         | 25.00 and up |
| 4. Disability forms, letters, etc                            | 25.00 and up |
| 5. Missed scheduled appointment without 24 hour notification | 100.00       |
- Our office will not fill out any paperwork, forms or write any letters in regards to CHL (concealed handgun license) clearance.

**The above fees may not be recovered by your insurance plan and are payable at the time services are rendered.**

\_\_\_\_\_  
Name of Patient (Print)

\_\_\_\_\_  
Signature of Patient / Date

\_\_\_\_\_  
Patient Representative (Print)

\_\_\_\_\_  
Signature of Representative / Date

\_\_\_\_\_  
Representative Relationship to Patient (Print)

\_\_\_\_\_  
Witness / Date

## **NOTICE OF PRIVACY POLICIES AND PRACTICES**

The Holiner Psychiatric Group  
120 S. Central Expwy, # 100, McKinney, TX 75070  
Office: 469-742-0199 Fax: 972-542-4106  
Peter Thomas, PhD.

**THIS NOTICE DESCRIBES HOW HEALTH INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.**

All items outlined in this policy apply to both paper and electronic formats of medical records and protected health information.

### **INTRODUCTION**

The Holiner Psychiatric Group is committed to treating and using protected health information about you responsibly. We are permitted to use and disclose health information about you for treatment, to obtain payment for treatment, for administrative purposes and to evaluate the quality of care you receive. This notice describes our privacy practices. We may change our policies and this notice at any time. You can request a paper copy of this notice, or any revised notice, at any time. This Notice is effective April 14, 2003 and applies to all protected health information as defined by federal regulations. For more information about this notice or our privacy practices and policies, please contact the person listed at the end of this document.

### **HOW WE MAY USE AND/OR DISCLOSE YOUR HEALTH INFORMATION**

**We are permitted to use and disclose your health information to those involved in your treatment.** Your health information may be used by staff members or disclosed to other health care professionals for the purpose of evaluating your health, diagnosing medical conditions, and providing treatment. For example: results of laboratory tests and procedures will be available in your medical record to all health professionals who may provide treatment or who may be consulted by staff members.

**We are permitted to use and disclose your health information to bill and collect payment for the services we provided to you.** Your health plan may request and receive information on dates of service, the services provided, and the medical condition being treated in order to pay for the service rendered to you.

**We are permitted to use and disclose your health information for the purpose of health care operations, which are the activities that support this practice and ensure that quality care is delivered.** For example: information on the services you received may be used to support budgeting and financial reporting, and activities to evaluate and promote quality.

### **DISCLOSURES THAT CAN BE MADE WITHOUT YOUR AUTHORIZATION**

These are situations in which we are permitted to use or disclose your health information without your written authorization or an opportunity to object.

**Public Health:** We may disclose your health information for public health activities mandated by federal, state or local government for the collection of information about disease, vital statistics or injury by a public health authority.

**Abuse or Neglect:** Because Texas law requires physicians to report child abuse or neglect, we may disclose health information to a public agency authorized to receive reports of child abuse or neglect.

**Healthcare Oversight:** We may disclose your health information to a health oversight agency for those activities authorized by law. Examples of these activities are audits, investigations, licensure applications and inspections.

**Law Enforcement and Legal Proceedings:** We may disclose your medical information if asked by a law enforcement official. We may also release information if we believe the disclosure is necessary to prevent or lessen imminent threat to the health or safety of a person. We may disclose your health information in the course of judicial or administrative proceedings in response to an order of the court or other appropriate legal process.

**Worker's Compensation:** We may disclose your health information as required by worker's compensation law.

**Military and National Security:** We may disclose your health information for specialized governmental functions.

**Research and Medical Examiners:** We may release health information to researchers for research purposes. We may release your health information to a coroner or medical examiner to identify a deceased person or a cause of death.

“associates” require your health information in order to accomplish the tasks that we ask them to provide. Some examples of “business associates” might be a billing service, collection agency, answering services and computer software/hardware provider.

**Appointment Reminders:** We may contact you by telephone, mail or both to provide appointment reminders.

**Required by Law:** We may release your health information when the disclosure is required by law.

**Other Uses or Disclosures:** Disclosure of your health information or its use for any purpose other than those listed above requires your specific written authorization. If you change your mind after authorizing a use or disclosure of your information you may submit a written revocation of the authorization. However, your decision to revoke the authorization will not affect or undo any use or disclosure of information that occurred before you notified us of your decision.

## **YOUR RIGHTS UNDER FEDERAL LAW**

You have certain rights under the federal privacy standards. These include:

- The right to request restrictions on the use and disclosure of your protected health information, WE DO NOT HAVE TO AGREE TO THIS RESTRICTION.
- The right to limit disclosure to family members, relatives or friends who may or may not be involved in your care. Restrictions must be submitted in writing to the person listed at the end of this document.
- The right to request that we send communications concerning health information by alternative means or to an alternative location. The request must be submitted in writing to the person at the end of this document and we are required to accommodate only reasonable requests.
- The right to inspect and copy your protected health information that is within the designated record set. Texas law requires that request for copies are made in writing and we require requests for inspection also be made in writing. Texas law requires us to provide copies or a narrative within 15 business days from receipt of your proper request. If we deny access, we will inform you in writing. HIPAA permits us to charge a reasonable cost-based fee.
- The right to amend or submit corrections to your protected health information in the designated record set. If we refuse to allow amendment, we will inform you in writing.
- The right to receive an accounting of disclosures that are other than for treatment, payment, health care operations or made via an authorization signed by either you or your representative.
- The right to receive a printed copy of this notice.

## **FOR MORE INFORMATION OR TO REPORT A PROBLEM**

If you have complaints, questions or would like additional information regarding this notice or the privacy practices of The Holiner Psychiatric Group please contact:

Privacy Officer  
The Holiner Psychiatric Group  
7777 Forest Lane, Suite C-833  
Dallas, Texas 75230  
972-566-4591

If you believe that your privacy rights have been violated, please contact the aforementioned practice Privacy Official, or, you may file a complaint with the Office for Civil Rights, U.S. Department of Health and Human Services. There will be no retaliation for filing a complaint with either the practice’s Privacy Official or with the Office for Civil Rights. The address for the Office for Civil Rights is listed below:

OFFICE FOR CIVIL RIGHTS  
U.S. Department of Health and Human Services  
200 Independence Avenue, S.W.  
Room 509F, HHH Building  
Washington, D.C., 20201

## **OUR RESPONSIBILITIES**

The Holiner Psychiatric Group is required by law and regulation to protect the privacy of your health information, to provide you with this notice of our privacy practices with respect to protected health information and to abide by the terms of the notice of privacy practices in effect.

The Holiner Psychiatric Group  
120 S. Central Expwy, # 100, McKinney, TX 75070  
Office: 469-742-0199 Fax: 972-542-4106

**REVIEW ACKNOWLEDGEMENT OF NOTICE OF PRIVACY POLICIES AND PRACTICES**

**Peter Thomas, PhD.**

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I have reviewed The Holiner Psychiatric Group's Notice of Privacy Practices, which explains how my health information will be used and disclosed. I understand that I am entitled to receive a copy of this document.

\_\_\_\_\_  
Name of Patient or Personal Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Patient or Personal Representative

\_\_\_\_\_  
Description Personal Representative's Authority

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date



**AUTHORIZATION TO DISCLOSE VERBAL HEALTH INFORMATION**

**The Holiner Psychiatric Group**

**Peter Thomas, PhD**

**120 S. Central Expwy, # 100, McKinney, TX 75070**

**Office: 469-742-0199**

**Fax: 972-542-4106**

\_\_\_\_\_  
Patient Name (please print)

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

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

**I HEREBY AUTHORIZE DISCLOSURE OF INFORMATION TO/FROM THE NAMED INDIVIDUAL(S) OR ORGANIZATION(S) LISTED:**

\_\_\_\_\_  
**Full Name**

\_\_\_\_\_  
**Relationship to Patient**

\_\_\_\_\_  
**Daytime or cell phone**

Release all Health Information

Release all Billing (including payments, collections, ect.)

Release Other (Specify): \_\_\_\_\_

\_\_\_\_\_  
**Full Name**

\_\_\_\_\_  
**Relationship to Patient**

\_\_\_\_\_  
**Daytime or cell phone**

Release all Health Information

Release all Billing (including payments, collections, ect.)

Release Other (Specify): \_\_\_\_\_

\_\_\_\_\_  
**Full Name**

\_\_\_\_\_  
**Relationship to Patient**

\_\_\_\_\_  
**Daytime or cell phone**

Release all Health Information

Release all Billing (including payments, collections, ect.)

Release Other (Specify): \_\_\_\_\_

- **I understand that incomplete forms will be null and void; no exceptions.**
- **I understand that disclosure of my health information does not include mailing or faxing copies of my medical records; I must complete a medical records release in order to have copies of my medical records mailed or faxed to the named individual(s) or organization(s).**
- I understand that specific information to be disclosed may include history of *Drug or Alcohol Abuse* or *Mental Health Treatment*, information concerning communicable diseases such as *Human Immunodeficiency Virus (HIV)*, and *Immune Deficiency Syndrome (AIDS)*, laboratory test results, treatment progress, and any other such related information. **This authorization will expire 1 year from the date of my signature.**
- I understand that the information released is for the specific purpose stated above. Any other use of this information without the written consent of the patient is prohibited.
- I understand that a revocation is not effective to the extent that the practice has relied on this authorization in its actions. Also, a revocation is not effective if this authorization was obtained as a condition of obtaining insurance coverage, as other law provides the insurer with the right to contest a claim under the policy or the policy itself.
- I further authorize that a photocopy of this authorization is acceptable as an original.
- I understand that information used or disclosed pursuant to this authorization may be subject to re-disclosure by the recipient and may no longer be protected by federal HIPAA privacy regulations.
- The practice will not condition my treatment, payment, and enrollment in a health plan or eligibility for benefits on whether I provide authorization for the requested use or disclosure. I understand that I have the right to revoke this authorization, in writing, at any time by sending written notification to: Privacy Officer: 7777 Forest Lane, Suite C-833 Dallas, TX 75230 **Phone:** 972-566-4591 **Fax:** 972-566-6679

\_\_\_\_\_  
Name of Patient or Personal Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Patient or Personal Representative

\_\_\_\_\_  
Description of Personal Representative's Authority

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date