

**Ashland Integrative Care PC**  
**Joann Gruber PMHNP-BC, FNP-BC**  
 1745 Ashland St  
 Ashland, Oregon 97520  
**Ph: 541.201.3173 Fax: 541.371.5551**

**PATIENT INFORMATION FORM**

(Please Print)

PATIENT INFORMATION				
Patient's Last Name:	First:	Middle:	Birthdate: / /	Sex: <input type="checkbox"/> M <input type="checkbox"/> F <input type="checkbox"/> Other
Phone (H): (    ) Phone (Cell): (    )	Patient's Email:	Preferred Communication? (circle one) Phone / Email	Marital Status (circle one) S / M / D / Other	
Street Address:			P.O. Box:	
City:	State:	ZIP Code:		
Primary Care Physician:			PCP Phone: (    )	
Referred by (please check one box): <input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Dr. _____ <input type="checkbox"/> Insurance Plan <input type="checkbox"/> Hospital <input type="checkbox"/> Website <input type="checkbox"/> Close to home/work <input type="checkbox"/> Other				
Previous Counseling? <input type="checkbox"/> Yes <input type="checkbox"/> No			Other family members seen here:	
Current Counselor Name:				

INSURANCE INFORMATION				
(Please give your insurance card to the receptionist.)				
Insurance Name:	Address:	City, State, Zip:		
ID/Policy #:	Group #:	Insurance Phone (MH/SA):		
Subscriber's Name:	Subscriber's Soc. Sec. #:	Birth date: / /	Patient's relationship to subscriber: <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other:	
Subscriber's Address:		Same address as patient? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Name of Secondary Insurance (if applicable):	Subscriber's name:	ID/Policy #:	Group #:	
Patient's relationship to subscriber: <input type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other				

IN CASE OF EMERGENCY			
Name of local friend or relative (not living at same address):	Relationship to Patient:	Home Phone no.: (    )	Work Phone no.: (    )

**DEMOGRAPHIC INFORMATION**

Highest Grade Completed:	Currently In School? <input type="checkbox"/> Yes <input type="checkbox"/> No	Veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No	Tribal Affiliation:			
<b>Race:</b>	<input type="checkbox"/> Alaska Native	<input type="checkbox"/> American Indian	<input type="checkbox"/> White	<input type="checkbox"/> Asian	<input type="checkbox"/> Black/African/American	
	<input type="checkbox"/> Native Hawaiian/Pacific Islander	<input type="checkbox"/> Other Single Race	<input type="checkbox"/> 2 or More Unspecified Races			
<b>Employment:</b>	<input type="checkbox"/> Full-Time	<input type="checkbox"/> Part-Time	Occupation: _____	Employer: _____		
	<input type="checkbox"/> Unemployed	<input type="checkbox"/> Homemaker	<input type="checkbox"/> Student	<input type="checkbox"/> Retired	<input type="checkbox"/> Disabled (unable to work)	<input type="checkbox"/> Other
<b>Living Arrangement:</b>	<input type="checkbox"/> Private Residence	<input type="checkbox"/> Foster Home	<input type="checkbox"/> Homeless	<input type="checkbox"/> Residential Facility		
	<input type="checkbox"/> Support Housing	<input type="checkbox"/> Alcohol/Drug Free Housing	<input type="checkbox"/> Other			

The above information is true to the best of my knowledge. I authorize my insurance benefits be paid directly to the physician. I understand that I am financially responsible for any balance. I also authorize [Name of Practice] or insurance company to release any information required to process my claims.

\_\_\_\_\_  
*Patient/Guardian signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Patient/Guardian name (Please Print)*

\*Legal guardians – please provide a copy of your legal guardianship documents.

## Child Checklist of Characteristics

Person completing this form: \_\_\_\_\_ Relationship: \_\_\_\_\_

Many concerns can apply to both children and adults. If you have brought a child for evaluation or treatment, first please mark all of the items that apply to your child on the "Adult Checklist of Concerns." Then review this checklist, which contains concerns (as well as positive traits) that apply mostly to children, and mark any items that describe your child. Feel free to add any others at the end under "Any other characteristics."

- Affectionate
- Argues, "talks back," smart-alecky, defiant
- Bullies/intimidates, teases, inflicts pain on others, is bossy to others, picks on, provokes
- Cheats
- Cruel to animals
- Concern for others
- Conflicts with parents over rule breaking, money, chores, homework, grades, choices in music/clothes/hair/friends
- Complains
- Cries easily, feelings are easily hurt
- Dawdles, procrastinates, wastes time
- Difficulties with parent's paramour/new marriage/new family
- Dependent, immature
- Developmental delays
- Disrupts family activities
- Disobedient, uncooperative, refuses, noncompliant, doesn't follow rules
- Distractible, inattentive, poor concentration, daydreams, slow to respond
- Dropping out of school
- Drug or alcohol use
- Eating—poor manners, refuses, appetite increase or decrease, odd combinations, overeats
- Exercise problems
- Extracurricular activities interfere with academics
- Failure in school
- Fearful
- Fighting, hitting, violent, aggressive, hostile, threatens, destructive
- Fire setting
- Friendly, outgoing, social
- Hypochondriac, always complains of feeling sick
- Immature, "clowns around," has only younger playmates
- Imaginary playmates, fantasy
- Independent
- Interrupts, talks out, yells
- Lacks organization, unprepared
- Lacks respect for authority, insults, dares, provokes, manipulates
- Learning disability
- Legal difficulties—truancy, loitering, panhandling, drinking, vandalism, stealing, fighting, drug sales

Child Checklist of Characteristics (p. 2 of 2)

- Likes to be alone, withdraws, isolates
  - Lying
  - Low frustration tolerance, irritability
  - Mental retardation
  - Moody
  - Mute, refuses to speak
  - Nail biting
  - Nervous
  - Nightmares
  - Need for high degree of supervision at home over play/chores/schedule
  - Obedient
  - Obesity
  - Overactive, restless, hyperactive, out-of-seat behaviors, restlessness, fidgety, noisiness
  - Oppositional, resists, refuses, does not comply, negativism
  - Prejudiced, bigoted, insulting, name calling, intolerant
  - Pouts
  - Recent move, new school, loss of friends
  - Relationships with brothers/sisters or friends/peers are poor—competition, fights, teasing/provoking, assaults
  - Responsible
  - Rocking or other repetitive movements
  - Runs away
  - Sad, unhappy
  - Self-harming behaviors—biting or hitting self, head banging, scratching self
  - Speech difficulties
  - Sexual—sexual preoccupation, public masturbation, inappropriate sexual behaviors
  - Shy, timid
  - Stubborn
  - Suicide talk or attempt
  - Swearing, blasphemes, bathroom language, foul language
  - Temper tantrums, rages
  - Thumb sucking, finger sucking, hair chewing
  - Tics—involuntary rapid movements, noises, or word productions
  - Teased, picked on, victimized, bullied
  - Truant, school avoiding
  - Underactive, slow-moving or slow-responding, lethargic
  - Uncoordinated, accident-prone
  - Wetting or soiling the bed or clothes
  - Work problems, employment, workaholism/overworking, can't keep a job
- Any other characteristics:

Please look back over the concerns you have checked off and choose the one that you most want your child to be helped with and circle it. This is a strictly confidential patient medical record. Rediscovery or transfer is expressly prohibited by law.

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 Ph: 541.201.3173 Fax: 541.371.5551

## PATIENT HISTORY FORM

Date: _____ / _____ / _____
NAME: _____ Birthdate: _____ / _____ / _____ <div style="display: flex; justify-content: space-around; font-size: small;"> <span>Last</span> <span>First</span> <span>M. I.</span> </div>
Age: _____ Sex: <input type="checkbox"/> F <input type="checkbox"/> M
How did you hear about this clinic?
Describe briefly your present symptoms:
Please list the names of other practitioners you have seen for this problem:
Psychiatric Hospitalizations (include where, when, & for what reason):
Have you ever had ECT? <span style="margin-left: 200px;">Have you had psychotherapy?</span>

<b>CURRENT MEDICATIONS</b>		
Drug allergies: <input type="checkbox"/> No <input type="checkbox"/> Yes To what?		
Please list any medications that you are now taking. Include non-prescription medications & vitamins or supplements:		
Name of drug	Dose (include strength & number of pills per day):	How long have you been taking this?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		

**PAST MEDICAL HISTORY**

Do you now or have you ever had:

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Diabetes            | <input type="checkbox"/> Heart murmur        | <input type="checkbox"/> Crohn's disease         |
| <input type="checkbox"/> High blood pressure | <input type="checkbox"/> Pneumonia           | <input type="checkbox"/> Colitis                 |
| <input type="checkbox"/> High cholesterol    | <input type="checkbox"/> Pulmonary embolism  | <input type="checkbox"/> Anemia                  |
| <input type="checkbox"/> Hypothyroidism      | <input type="checkbox"/> Asthma              | <input type="checkbox"/> Jaundice                |
| <input type="checkbox"/> Goiter              | <input type="checkbox"/> Emphysema           | <input type="checkbox"/> Hepatitis               |
| <input type="checkbox"/> Cancer (type) _____ | <input type="checkbox"/> Stroke              | <input type="checkbox"/> Stomach or peptic ulcer |
| <input type="checkbox"/> Leukemia            | <input type="checkbox"/> Epilepsy (seizures) | <input type="checkbox"/> Rheumatic fever         |
| <input type="checkbox"/> Psoriasis           | <input type="checkbox"/> Cataracts           | <input type="checkbox"/> Tuberculosis            |
| <input type="checkbox"/> Angina              | <input type="checkbox"/> Kidney disease      | <input type="checkbox"/> HIV/AIDS                |
| <input type="checkbox"/> Heart problems      | <input type="checkbox"/> Kidney stones       |  |

Other medical conditions (please list):

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**PERSONAL HISTORY**

Were there problems with your birth? (specify) \_\_\_\_\_  
 Where were you born & raised? \_\_\_\_\_  
 What is your highest education?     High school     Some college     College graduate     Advanced degree  
 Marital status:  Never married     Married     Divorced     Separated     Widowed     Partnered/significant other  
 What is your current or past occupation? \_\_\_\_\_  
 Are you currently working? :  Yes     No    Hours/week \_\_\_\_\_    If not, are you  retired     disabled     sick leave?  
 Do you receive disability or SSI?  Yes     No    If yes, for what disability & how long? \_\_\_\_\_  
 Have you ever had legal problems? (specify) \_\_\_\_\_  
 Religion: \_\_\_\_\_

**FAMILY HISTORY**

	IF LIVING		IF DECEASED	
	Age (s)	Health & Psychiatric	Age(s) at death	Cause
Father				
Mother				
Siblings				
Children				

**EXTENDED FAMILY PSYCHIATRIC PROBLEMS PAST & PRESENT:**

Maternal Relatives:

Paternal Relatives:

## SYSTEMS REVIEW

In the past month, have you had any of the following problems?

### GENERAL

- Recent weight gain; how much\_\_\_\_\_
- Recent weight loss: how much\_\_\_\_\_
- Fatigue
- Weakness
- Fever
- Night sweats

### MUSCLE/JOINTS/BONES

- Numbness
- Joint pain
- Muscle weakness
- Joint swelling

Where?

### EARS

- Ringing in ears
- Loss of hearing

### EYES

- Pain
- Redness
- Loss of vision
- Double or blurred vision
- Dryness

### THROAT

- Frequent sore throats
- Hoarseness
- Difficulty in swallowing
- Pain in jaw

### HEART AND LUNGS

- Chest pain
- Palpitations
- Shortness of breath
- Fainting
- Swollen legs or feet
- Cough

### NERVOUS SYSTEM

- Headaches
- Dizziness
- Fainting or loss of consciousness
- Numbness or tingling
- Memory loss

### STOMACH AND INTESTINES

- Nausea
- Heartburn
- Stomach pain
- Vomiting
- Yellow jaundice
- Increasing constipation
- Persistent diarrhea
- Blood in stools
- Black stools

### SKIN

- Redness
- Rash
- Nodules/bumps
- Hair loss
- Color changes of hands or feet

### BLOOD

- Anemia
- Clots

### KIDNEY/URINE/BLADDER

- Frequent or painful urination
- Blood in urine

### Women Only:

- Abnormal Pap smear
- Irregular periods
- Bleeding between periods
- PMS

### PSYCHIATRIC

- Depression
- Excessive worries
- Difficulty falling asleep
- Difficulty staying asleep
- Difficulties with sexual arousal
- Poor appetite
- Food cravings
- Frequent crying
- Sensitivity
- Thoughts of suicide / attempts
- Stress
- Irritability
- Poor concentration
- Racing thoughts
- Hallucinations
- Rapid speech
- Guilty thoughts
- Paranoia
- Mood swings
- Anxiety
- Risky behavior

### OTHER PROBLEMS:

### WOMENS REPRODUCTIVE HISTORY:

Age of first period:

# Pregnancies:

# Miscarriages:

# Abortions:

Have you reached menopause? Y / /N At what age?

Do you have regular periods? Y / N

SUBSTANCE USE					
DRUG CATEGORY (circle each substance used)	Age when you first used this:	How much & how often did you use this?	How many years did you use this?	When did you last use this?	Do you currently use this?
<b>ALCOHOL</b>					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>CANNABIS:</b> Marijuana, hashish, hash oil					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>STIMULANTS:</b> Cocaine, crack					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>STIMULANTS:</b> Methamphetamine—speed, ice, crank					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>AMPHETAMINES/OTHER STIMULANTS:</b> Ritalin, Benzedrine, Dexedrine					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>BENZODIAZEPINES/TRANQUILIZERS:</b> Valium, Librium, Halcion, Xanax, Diazepam, "Roofies"					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>SEDATIVES/HYPNOTICS/BARBITURATES:</b> Amytal, Seconal, Dalmane, Quaalude, Phenobarbital					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>HEROIN</b>					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>CAFFEINE</b>					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>CIGARETTES</b>					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>METHADONE</b>					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>OTHER OPIOIDS:</b> Tylenol #2 & #3, 282'S, 292'S, Percodan, Percocet, Opium, Morphine, Demerol, Dilaudid					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>HALLUCINOGENS:</b> LSD, PCP, STP, MDA, DAT, mescaline, peyote, mushrooms, ecstasy (MDMA), nitrous oxide					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>INHALANTS:</b> Glue, gasoline, aerosols, paint thinner, poppers, rush, locker room					Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>OTHER: (specify)</b> _____ _____ _____					Yes <input type="checkbox"/> No <input type="checkbox"/>

# Ashland Integrative Care PC

## Psychiatric Medication History

Please check all medications that you have previously taken or are currently taking.

### Antidepressants

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Prozac (fluoxetine)    | <input type="checkbox"/> Remeron (mirtazapine)    | <input type="checkbox"/> Tofranil (imipramine)     |
| <input type="checkbox"/> Paxil (paroxetine)     | <input type="checkbox"/> Cymbalta (duloxetine)    | <input type="checkbox"/> Desyrel (trazodone)       |
| <input type="checkbox"/> Zoloft (sertraline)    | <input type="checkbox"/> Serzone (nefazadone)     | <input type="checkbox"/> Sinequan (doxepin)        |
| <input type="checkbox"/> Celexa (citalopram)    | <input type="checkbox"/> Anafranil (clomipramine) | <input type="checkbox"/> Viibryd (vilazodone)      |
| <input type="checkbox"/> Lexapro (escitalopram) | <input type="checkbox"/> Luvox (fluvoxamine)      | <input type="checkbox"/> Fetzima (levomilnacipran) |
| <input type="checkbox"/> Effexor (venlafaxine)  | <input type="checkbox"/> Pamelor (nortriptyline)  | <input type="checkbox"/> Pristiq (desvenlafaxine)  |
| <input type="checkbox"/> Wellbutrin (bupropion) | <input type="checkbox"/> Elavil (amitryptiline)   | <input type="checkbox"/> Other (write in) _____    |

Comments on Effects: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

### Mood Stabilizers

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Lithium                | <input type="checkbox"/> Tegretol (carbamazepine)    | <input type="checkbox"/> Neurontin (gabapentin) |
| <input type="checkbox"/> Depakote (valproate)   | <input type="checkbox"/> Trileptal (oxcarbamazepine) | <input type="checkbox"/> Other (write in) _____ |
| <input type="checkbox"/> Lamictal (lamotrigine) | <input type="checkbox"/> Topamax (topiramate)        |   |

Comments on Effects: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

### Antipsychotics

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Risperdal (risperidone) | <input type="checkbox"/> Trilafon (perphenazine) | <input type="checkbox"/> Clozaril (clozapine)    |
| <input type="checkbox"/> Seroquel (quetiapine)   | <input type="checkbox"/> Saphris (ascenapine)    | <input type="checkbox"/> Rexulti (brexpiprazole) |
| <input type="checkbox"/> Zyprexa (olanzapine)    | <input type="checkbox"/> Latuda (lurasidone)     | <input type="checkbox"/> Vryalar (cariprazine)   |
| <input type="checkbox"/> Geodon (ziprasidone)    | <input type="checkbox"/> Invega (paliperidone)   | <input type="checkbox"/> Other (write in) _____  |
| <input type="checkbox"/> Haldol (haloperidol)    | <input type="checkbox"/> Fanapt (iloperidone)    |  |
| <input type="checkbox"/> Prolixin (fluphenazine) | <input type="checkbox"/> Abilify (aripiprizole)  |  |

Comments on Effects: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
**Provider Initials**

\_\_\_\_\_  
**Date**

# Ashland Integrative Care PC

## Psychiatric Medication History

Please check all medications that you have previously taken or are currently taking.

### ADHD

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Ritalin (methylphenidate) AKA: | <input type="checkbox"/> Dexedrine (dextroamphetamine) | <input type="checkbox"/> Strattera (atomoxetine)    |
| <input type="checkbox"/> <i>Concerta</i>                | <input type="checkbox"/> Focalin (dexmethylphenidate)  | <input type="checkbox"/> Wellbutrin (bupropion)     |
| <input type="checkbox"/> <i>Metadate</i>                | <input type="checkbox"/> Adderall (dextroamphetamine)  | <input type="checkbox"/> Vyvanse (lisdexamfetamine) |
| <input type="checkbox"/> <i>Methylin</i>                | <input type="checkbox"/> Tenex/Intuniv (guanfacine)    | <input type="checkbox"/> Other (write in) _____     |
| <input type="checkbox"/> <i>Daytrana</i>                | <input type="checkbox"/> Catapres/Kapvay (clonidine)   |   |

Comments on Effects: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Anxiolytics

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Xanax (alprazolam)    | <input type="checkbox"/> Tranzene (chlorazepate)    | <input type="checkbox"/> Vistaril (hydroxyzine) |
| <input type="checkbox"/> Ativan (lorazepam)    | <input type="checkbox"/> Serax (oxazepam)           | <input type="checkbox"/> Other (write in) _____ |
| <input type="checkbox"/> Klonopin (clonazepam) | <input type="checkbox"/> Buspar (buspirone)         |   |
| <input type="checkbox"/> Valium (diazepam)     | <input type="checkbox"/> Librium (chlordiazepoxide) |   |

Comments on Effects: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Sedative/Hypnotics

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Ambien (zolpidem)     | <input type="checkbox"/> Rozerem (ramelteon)        | <input type="checkbox"/> Halcion (triazolam)    |
| <input type="checkbox"/> Restoril (temazepam)  | <input type="checkbox"/> Vistaril (hydroxyzine)     | <input type="checkbox"/> Melatonin              |
| <input type="checkbox"/> Lunesta (eszopiclone) | <input type="checkbox"/> Benadryl (diphenhydramine) | <input type="checkbox"/> Other (write in) _____ |
| <input type="checkbox"/> Sonata (zaleplon)     | <input type="checkbox"/> Dalmane (flurazepam)       |   |

Comments on Effects: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
**Provider Initials**

\_\_\_\_\_  
**Date**

## Patient Rights, Responsibilities & Consent for Treatment (Including AI Use, Email, and Text)

### Patient Rights

You have the right to:

- Understand your diagnosis and treatment recommendations.
- Make informed decisions to accept or refuse treatment, and to voluntarily terminate treatment at any time (you remain financially responsible for services already provided).
- Be treated with dignity and respect regardless of race, religion, gender, ethnicity, age, or disability.
- Receive assistance in a prompt, courteous, and professional manner.
- Confidentiality of your personal and clinical information, except in cases of:
  - Life-threatening emergencies
  - Abuse/neglect of minors or elders
  - Danger to self or others
  - Required reporting by law
  - Insurance reimbursement (which may require sharing of diagnoses or treatment notes)

### Patient Responsibilities

You agree to:

- Present valid ID and insurance at each visit.
- Inform the office of any changes in contact or insurance information.
- Disclose full and accurate health information, including current medications and use of alcohol/recreational drugs.
- Notify the office of other psychiatric providers you are seeing (dual prescribing may result in discharge).
- Allow 72 hours for prescription refill processing and contact the office if you encounter issues with your pharmacy.
- Treat all staff with respect. Verbal or physical abuse may result in dismissal from care.

### Payment and Appointment Policies

- Payment (co-pays, fees for non-covered services, missed appointments) is due at time of service.
- You are responsible for remembering your appointments. A courtesy reminder will be provided via your preferred contact method.
- Three or more missed appointments without 24-hour notice may result in discharge.
- We may refer you elsewhere if your needs exceed our scope or therapeutic relationship cannot be established.

### Communication Policy

- Office Hours: Mon-Thu, 10:00 am-4:30 pm. Alternating Saturdays 10:00 am-3:00 pm. One Sunday/month. Closed on holidays.
- Emergencies: Call 911 or go to the nearest emergency room for immediate threats or severe medication reactions.
- Voicemail: Checked daily on business days.
- Phone Calls: Reserved for urgent issues and will be brief. No medication changes are made by phone.

- Text Messaging: Only used for appointment reminders. No clinical communication by text.
- Email: Email is not a secure platform and is not used for clinical issues. Messages will not be responded to if they include clinical content.

### AI Use Consent:

To assist with accurate documentation and quality care, this practice may use HIPAA-compliant AI tools to transcribe and summarize session notes. This may involve session recording.

By signing below, you acknowledge and consent that:

- Sessions may be recorded (audio only) for note generation purposes.
- HIPAA-compliant AI software will transcribe or summarize notes.
- Data is encrypted, stored securely, and not used for automated decision-making.
- You may withdraw consent at any time, and alternative documentation methods will be used.
- No recordings will be used beyond clinical documentation without your explicit written permission.

### Consent for Email and/or Text Messaging

By signing below, you consent to receive email and/or text communications (e.g., appointment reminders).

You:

1. Are the authorized user of the listed mobile number/email address.
2. Understand message/data rates may apply.
3. Can opt out at any time by notifying our office.

### Medication Policies

- Side Effects: Discuss all medication side effects with your provider before stopping or changing doses.
- Benzodiazepines: Subject to random urine drug screens. Short-term use is strongly preferred. Monthly appointments are required.
- Stimulants: Prescribed based on formal diagnosis. Urine drug screening may be required. Monthly follow-up is required.
- Insurance Formularies: While we aim to prescribe covered medications, it is your responsibility to verify coverage.
- You understand we may obtain your prescription history from your pharmacies to prevent drug interactions

### Inactive Patients

If you have not been seen in over 90 days (unless otherwise arranged), we will consider you inactive and discontinue refills.

### Acknowledgment & Signature

By signing below, you affirm that you understand and consent to the policies outlined above, including the use of AI tools and your communication preferences.

Patient Name (print): \_\_\_\_\_

Patient Signature: \_\_\_\_\_

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

Guardian Signature (if applicable): \_\_\_\_\_

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

Mobile Number (for texts): \_\_\_\_\_

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

Practitioner Signature: \_\_\_\_\_

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

## Authorization for Use & Disclosure of Information

Ashland Integrative Care PC • 1745 Ashland St • Ashland, Oregon 97520  
Ph: 541.201.3173 • Fax: 541.371.5551

<b>Section A</b>	Legal Last Name	First	MI	Date of Birth
	Other Names Used By Client/Applicant			Case ID#

**By signing this form, I authorize the following record holder (individual, school, employer, agency, or medical or other provider) to disclose the following specific confidential information about me:**

<b>Section B</b>	Release From	Specific Information to be Disclosed	Mutual Exchange: Yes/No

If the information contains any of the types of records or information listed below, additional laws relating to use and disclosure may apply. I understand that this information will not be disclosed unless I place my initials in the space next to the information:

HIV/AIDS \_\_\_\_\_ Mental Health \_\_\_\_\_ Alcohol/Drug diagnoses, treatment, referral \_\_\_\_\_ Genetic Testing \_\_\_\_\_

<b>Section C</b>	Release To (address required if mailed): If releasing to a team, list members.	Purpose	Expiration Date or Event*
<b>Section C</b>	Joann Gruber, PMHNP-BC, FNP-BC		
	Ashland Integrative Care		
	1745 Ashland St		
	Ashland, OR 97520		

I can cancel this authorization at any time. The cancellation will not affect any information that was already disclosed. I understand that state and federal law protects information about my case. I understand what this agreement means and I approve of the disclosures listed. I am signing this authorization of my own free will.

I understand that the information used and disclosed as stated in this authorization may be subject to re-disclosure and no longer protected under federal or state law. However, I also understand that federal or state law may restrict re-disclosure of HIV/AIDS, mental health, and drug/alcohol diagnosis, treatment, or referral information.

<b>Section D</b>	Full Legal Signature of Individual OR Authorized Personal	Relationship to Client	Date
	Name of Staff Person (print)	Initialing Agency Name/Location	Date

**\* The authorization is valid for one year from the date of signing unless otherwise specified.**

Full Legal Signature of Agency Staff Person Making Copies	<b>This is a true copy of the original Authorization document.</b>
Print Staff Name	

# Important Information for the Client

## Using This Form

1. **Terms Used: Mutual exchange:** A “yes” allows information to go back and forth between the record holder and the people or programs listed on the authorization. **Team:** A number of individuals or agencies working together regularly. The members of the team must be identified on this form.
2. **Assistance:** Whenever possible, your provider should fill out this form with you. **Be sure you understand the form before signing.** Feel free to ask questions about the form and what it allows. You may substitute a signature with making a mark or by asking an **authorized** person to sign on your behalf.
3. **Guardianship/Custody:** If the person signing this form is a personal representative, such as a guardian, a copy of the legal documents that verify the representative’s authority to sign the authorization must be attached to this form. Similarly, if an agency has custody, and their representative signs, their custody authority must be attached to this form.
4. **Cancel:** If you later want to cancel this authorization, contact your Jackson County staff person. You can remove a team member from the form. You may be asked to put the cancellation request in writing. Federal regulations do not require that the cancellation be in writing for the Drug and Alcohol Programs. No more information can be disclosed or requested after authorization is cancelled. Jackson County can continue to use information obtained prior to cancellation.
5. **Minors:** If you are a minor, you may authorize the disclosure of mental health or substance abuse information if you are age 14 or older; for the disclosure of any information about sexually transmitted diseases or birth control regardless of your age; for the disclosure of general medical information if you are age 15 or older.
6. **Special Attention:** For information about **HIV/AIDS, mental health, genetic testing or alcohol/drug abuse treatment**, the authorization must clearly identify the specific information that may be disclosed.

**Ashland Integrative Care PC**  
1745 Ashland St  
Ashland, Oregon 97520  
**Ph: 541.201.3173 Fax: 541.371.5551**

**Notice of Privacy Practices  
Receipt and Acknowledgment of Notice**

Patient/Client Name: \_\_\_\_\_

DOB: \_\_\_\_\_

SSN: \_\_\_\_\_

I acknowledge that I have received a Summary and have been given an opportunity to read a copy of the Notice of Privacy Practices for Ashland Integrative Care PC. I understand that if I have any questions regarding the Notice or my privacy rights, I can contact Ashland Integrative Care PC, Privacy Information Officer at: 541.201.3173.

\_\_\_\_\_  
Signature of Patient/Client

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature or Parent, Guardian or Personal Representative

\_\_\_\_\_  
Date

If you are signing as a personal representative of an individual, please describe your legal authority to act for this individual (power of attorney, healthcare surrogate, etc.).

\_\_\_\_\_

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Patient/Client Refuses to Acknowledge Receipt:

\_\_\_\_\_  
Signature of Staff Member

\_\_\_\_\_  
Date