

## Office Policies & Practices of SoCal Wellness

*This document contains the office policies and practices of providers at SoCal Wellness. It includes the terms and conditions of the services provided. It also includes declarations of the rights and responsibilities of patients and responsible parties who pay for services provided. Please retain for your records.*

**Fees:** SoCal Wellness providers are not in-network for any insurance companies. This requires patients and/or responsible parties to pay for services at time of rendering. **Payment is required at time of service unless prior arrangements have been agreed upon.** Preferred payment methods are cash, check or Venmo. There will be a \$25 fee for each returned check. Accommodations can be made for payments via credit card however this will incur a 4% convenience fee. Even if the patient's insurance company will reimburse for part or all of the cost of care, the patient and all responsible parties must still pay up front for all services. If the patient or responsible party would like to request reimbursement from their insurance company, SoCal Wellness can assist in this process, as further described in the document, "Patient Billing Form". Each patient and responsible party will regularly receive a statement reflecting the services that the patient received and the payments that have been paid for services.

**Non-payment:** Patients and responsible parties should notify SoCal Wellness if problem arise that impact their ability to pay for services in a timely fashion. The information for at least one valid credit card will be kept on file for each patient. If payment is not received **within one week** of the date of service, the credit card on file will be charged with the addition of a 4% convenience fee. If a patient has an outstanding balance that cannot be paid, providers at SoCal Wellness reserve the right to terminate services with the patient.

**Cancellations:** If a patient needs to cancel a scheduled appointment, we ask that he or she notify your provider via phone (858.218.6544) as soon as possible. Cancellations of more than 48 hours before appointment will not incur a cancellation charge. Cancellations with less than 48 hours before appointment will result in a charge of 50% of the fee for scheduled service. After two cancellations that occur within a six month period with less than 48 hours notice, 100% of the appointment fee will be charged.

**Missed appointments:** Missed appointments without notification will be billed at 100% of the appointment fee.

**Confidentiality and privacy practices:** Providers at SoCal Wellness are committed to protecting the privacy of patients, legal guardians (as applicable) and those responsible for payment of services ("responsible parties"). Providers abide by all applicable laws and regulations related to protecting patient privacy and HIPPA. Information provided as part of services and care is confidential except in the following circumstances:

- 1. For treatment:** In order to provide and coordinate care that meets current standards of medical practice, your provider may need to communicate and share information,

including a patient's mental health information with patient's other health care providers. These providers include, but are not limited to, the following:

- a. therapist and/or counselor
  - b. Primary care provider
  - c. Other physicians, nurses, physician assistants, nurse practitioners
  - d. Pharmacy or pharmacist
  - e. Hospital or outpatient laboratories
  - f. Social worker or community care agencies
  - g. Hospital staff - should patient require hospitalization
2. **For payment:** SoCal Wellness providers do not accept payment from insurance companies, therefore generally do not communicate with them directly. In some circumstances the insurance company may request information to support efforts to obtain reimbursement for services providers and or medications prescribed.
  3. **For contacts designated by patient/guardian:** It may be important for a patient's family or other appropriate contacts be informed of patient's health status. At a patient's request and with the patient's/guardian's permission, your provider may provide information about the care received. Although responsible parties may help pay for a patient's care, providers cannot release information about the patient's mental health care without express permission. At a minimum, however, providers request permission to allow communication with the responsible party of the following: date, time, type of service, fee and amount of fee for which the party is responsible.
  4. **For parents or legal guardians of minors:** Patients under 18 years of age are not legally entitled to the same confidentiality laws that apply to adult patients. Providers will prioritize the privacy of minor patients to optimize treatment. While a patient's parent(s) or legal guardian will be informed about a minor's diagnosis, treatment, risks and benefits, the provider typically will not reveal details of psychotherapeutic interactions without the minor's permission to do **unless deemed necessary to prevent harm (see section 6)**.
  5. **As required by law:** Local, state and federal laws and regulations require the disclosure of private information in certain circumstances. Providers of SoCal Wellness must abide by these laws.
  6. **To prevent harm:** Your provider may be required by law and legal precedent to disclose private information if such disclosure will prevent a serious or imminent threat to the health or safety of a patient, another person or the public. In such circumstances, your provider will generally be releasing information to the police or other legal entity that is able to assist in the prevention of harm. If your provider learns that a patient may harm another person, they may be required by law and legal precedent to warn that person.
  7. **To public health agencies:** Governmental public health agencies require physicians and medical providers to release private information about patients in specific circumstances, including: to prevent or control infectious diseases and foodborne illness, to mitigate child abuse/neglect and to mitigate elder abuse/neglect. Providers of SoCal Wellness must abide by these laws.

- 8. To health oversight agencies:** As authorized or required by law, your provider may disclose private information to governmental and other agencies responsible for the oversight, regulation, licensing, accreditation and auditing of health care services.
- 9. For lawsuits and other legal actions:** Your provider may be required to release private information in response to lawsuits, other legal proceedings, court or administrative orders, subpoenas, warrants, summons or other lawful processes.
- 10. With patient permission:** With a patient's or legal guardian's written permission, your provider may release the patient's mental health information to any other outside party. He or she may revoke this permission at a later time; however any information already released cannot be retracted.

**Medical records vs. psychotherapy notes:** For each patient, a medical record is created that documents the services provided, including the following: dates and times of each encounter, type of services, reason for encounter, history, examination, diagnostic test results, risk and protective factors, assessments, diagnoses, treatment plan, treatment response and billing and coding information (CPT or ICD coding). For individual and family psychotherapy patients, a separate set of psychotherapy notes may be created, which are used to document and analyze the psychotherapy work. In the interest of maintaining the privacy and confidentiality of psychotherapy, the privacy of these notes is protected to a greater extent than medical records. Nonetheless, your provider may be required to release these notes in certain circumstances as outlined in the aforementioned circumstances.

**Medical information rights:** Although a patient's medical records are the property of SoCal Wellness, the patient, legal guardian and/or responsible parties have the following rights related to the patient's medical records:

1. *Right to inspect and copy:* With certain exceptions, a patient or legal guardian has the right to inspect and/or receive a copy of the patient's medical records. If the patient or legal guardian requests a copy of their medical records, there will be a fee at the standard hourly rate for the time it takes to prepare the request.
2. *Right to request an amendment or addendum:* If a patient or legal guardian believes the medical records are incorrect or incomplete, her or she may ask to amend the information or create an addendum. This request must be submitted in writing that is dated, timed and signed. Your provider may choose to deny the request, particularly if the record in question was not originally created by that individual (e.g. copies of outside records).

**Care of minors (under 18 years of age):** To protect the safety of patients and their families, no minor may be left unattended in the waiting area. For patients under 18 year of age, a parent, legal guardian or adult chaperone must accompany the patient and must be available in the waiting area 10 minutes prior to expected end of appointment.

**Communications outside of office:** Please be advised that your provider at SoCal Wellness will not be available on weekends and after 5pm PST Monday through Friday. For emergent

matters, particularly to prevent harm to the patient or others, 911 should be called or patient must present to nearest emergency room. Patients may always leave a voicemail and can expect a response by the next business day.

There is typically no charge for brief phone contact outside of scheduled appointment times. However, if an extended phone conversation (> than 10 minutes) is required, this service will be charged to the patient at the standard hourly rate.

**Workers' Compensation:** Unfortunately, at this time SoCal Wellness providers are unable to offer neither evaluation for nor treatment of Workers' Compensation cases.

**Termination:** A patient may discontinue care at any time. Your provider reserves the right to discontinue services with a referral to another provider.