



WOMEN'S NEW GROUP MEMBER FORM

CLIENT INFORMATION

Today's Date ____ / ____ / ____

Client Name _____
First Name Last Name DOB ____ / ____ / ____ (____)

Address _____
Street City State Zip Code

_____ - - - - -
 Email Home Telephone Number

_____ - - - - -
 Work Telephone Number Mobile Telephone Number

GROUP PREFERENCE

Women's Groups (Ongoing)

Facilitated by Marlene Holsclaw

- Ashes to Beauty (Tuesday 10:00 AM)
- 12-Step Group (Tuesday 6:00 PM)
- 12-Step Group (Friday 9:00 AM)

REFERRED BY Church Family Friend Internet Support Group Other _____

GROUP POLICIES

Please read the following group policies.

FEES

The fee for each 60-90 minute group therapy session is \$30.00 per week for all groups, which will be charged the first day of each month.

LATE FEES

A \$10.00 late fee will be assessed on unpaid accounts after the 15th of each month. After 30 days, any unpaid balance will be assessed at 20% of the total due.

COMMITMENT

A consecutive, 12-week commitment is required for all group members.

[GROUP MEMBER FORM CONTINUES ON PAGE 2]

ATTENDANCE

Unattended group meetings are non-refundable.

CONFIDENTIALITY

All group members agree to keep all teleconference numbers, access codes, online access user IDs and passwords confidential. All group members must adhere to confidentiality-what is said in group stays in group.

CONTRACT TERMINATION

Termination of group participation must be submitted via the online termination form prior to the next monthly billing cycle, no later than the 24th of the current month. If you fail to provide written notification to terminate your group membership, you will be charged on the credit or debit card you provide below. Group membership fees cannot be terminated prior to completing the full 12-week commitment.

IMMEDIATE TERMINATION

If your group payment is not received by the 15th of the current month (15 days late), Transformed Hearts reserves the right to terminate your group membership effective immediately due to non-payment or lack of attendance.

REFUNDS

Once a counseling service has been provided, no refunds will be provided for ANY reason regardless of client dissatisfaction. Transformed Hearts is not responsible for the outcome.

MAILING LIST

By signing below, you agree to be included on our email list. If you prefer not to be included, check this box.

PAYMENT METHOD

Credit Card Other _____

If you will be paying by credit card, please include the information requested below.

Credit Card Number _____ - _____ - _____ - _____

CVC2 Code _____ Expiration Date ____ / ____ / ____
(The CVC2 code is a 3 or 4-digit number located on the back of your credit card.)

By signing below, I agree to all the terms listed above.

Client's Printed Name

Client's (or Responsible Party's) Signature Date

Life Coach's Signature Date

FOR OFFICE USE ONLY

Start Date: ____ / ____ / ____

Contract End Date: ____ / ____ / ____

[GROUP MEMBER FORM CONTINUES ON PAGE 3]

WOMEN'S GROUP MEMBER PARTICIPATION AGREEMENT

This document is for the purpose of solidifying an agreement between the group therapy "group member" (signed below) and Marlene Holsclaw, Certified Life Coach. The following represents the covenants known as "Group Membership" by which parties abide.

1. All group members are expected to treat each other with dignity and respect as well as adhere to confidentiality-what is said in group stays in group.
2. This is a "group," and it is important members actively participate in an order to receive the benefit of the group.
3. All group members agree not to talk more than 5-10 minutes at one time to allow others to speak.
4. All group members will refrain from giving advice and only speak of their own experience during and after group.
5. All group members will attend group on time as a courtesy to other group members.
6. The *Women's 12-Step* group and *Ashes to Beauty* group are designed for women only and meet weekly.
7. Participants attending group and appearing grossly impaired due to drugs or alcohol will be asked to remove themselves from group and may return the following week.
8. By the third group session, *Ashes to Beauty* members are expected to purchase *Ashes to Beauty (The Workbook)* and *Ashes to Beauty (The Steps)* by Cory & Kerry Schortzman, and *Women's 12-Step* group members are expected to purchase any 12-Step recovery workbook set as outlined on the Transformed Hearts website.
9. It is understood the group will meet once per week for 50-90 minutes unless prior notice is given to the client by the life coach.
10. The fee for the group is \$30 per week, which will be billed at the first of each month. There are no refunds for missed meetings. *Please refer to the current group calendar for specific billing dates and amounts. This is posted on the Transformed Hearts (group members only) website.*
11. All group members agree to a minimum 12-week commitment. If for any reason this commitment is broken prematurely, the group member will continue to be billed for the remainder of the 12 weeks.
12. The groups are not "drop-in" type; and therefore, weekly attendance is expected and maintained by all except in cases of urgency or emergency, whereby the client is to make every attempt to inform the life coach before the meeting, if possible or as soon as possible thereafter.
13. Each week group members will receive feedback from other group members and will consider and apply this feedback appropriately as he/she progresses through their workbook.
14. *Ashes to Beauty* and *Women's 12 Step* group members are welcome to continue past the 12-week time period, as long as they are active in their recovery and come to an agreement with the life coach.
15. Group members are highly encouraged, though not required, to commit to monthly telephone therapy with Marlene Holsclaw, Certified Life Coach or a member of the therapeutic team at 15455 Gleneagle Drive, Ste 200. in Colorado Springs, CO for the duration of their commitment. This may include a life coach, therapist or colleague. If a group member chooses a therapist other than Marlene Holsclaw, Certified Life Coach, the group member agrees to sign a Release of Information Form allowing colleagues to communicate with each other about the group member's significant clinical matters.

I attest that I have read all the above information and that I understand the conditions as stated. The undersigned releases The Pearl Exchange from any claim to litigation whatsoever arising from the undersigned's participation. I agree to fully accept the above terms of this agreement.

Client's Printed Name

Client's (or Responsible Party's) Signature

Date

Life Coach's Signature

Date



DISCLOSURE STATEMENT

Welcome to The Pearl Exchange. I am pleased you have chosen us to serve you. **Please read carefully the following information in regard to ethical, legal and financial issues. If you have questions in regard to anything on this form, please discuss it with me before signing the consent.** After you have read this disclosure statement thoroughly, please sign and date for The Pearl Exchange to retain in your client file.

CREDENTIALS

Marlene Holsclaw's credentials include the following:

Certified Life Coach, iPEC (Institute for Professional Excellence in Coaching)

STATE REGULATIONS

The practice of licensed or registered persons in the field of psychotherapy is regulated by the Mental Health Licensing Section of the Division of Registrations. The Board of Licensed Professional Counselors Examiners can be reached at 1560 Broadway, Suite 1350, Denver, Colorado 80202, (303) 894-7800. As to the regulatory requirements applicable to mental health professionals:

- **Registered Psychotherapist** is a psychotherapist listed in the State's database and is authorized by law to practice psychotherapy in Colorado but is not licensed by the state and is not required to satisfy any standardized educational or testing requirements to obtain a registration from the state.
- **Certified Addiction Counselor I (CAC I)** must be a high school graduate, complete required training hours and 1,000 hours of supervised experience.
- **Certified Addiction Counselor II (CAC II)** must complete additional required training hours and 2,000 hours of supervised experience.
- **Certified Addiction Counselor III (CAC III)** must have a bachelor's degree in behavioral health, complete additional required training hours and 2,000 hours of supervised experience.
- **Licensed Addiction Counselor** must have a clinical master's degree and meet the CAC III requirements.
- **Licensed Social Worker** must hold a masters degree in social work.
- **Psychologist Candidate, Marriage and Family Therapist Candidate,** and a **Licensed Professional Counselor Candidate** must hold the necessary licensing degree and be in the process of completing the required supervision for licensure.
- **Licensed Clinical Social Worker, Licensed Marriage and Family Therapist,** and a **Licensed Professional Counselor** must hold a master's degree in their profession and have two years of post-masters supervision.
- **Licensed Psychologist** must hold a doctorate degree in psychology and have one year of post-doctoral supervision.
- **Certified Life Coach** is a person who coaches and encourages clients on matters having to do with careers or personal challenges.

GENERAL INFORMATION

We are committed to providing high quality services to my clients and providing them with all of the information necessary to be informed regarding the treatment process. As a client, you are entitled to receive information from me about the methods of coaching, the techniques used, the duration of your coaching (if known), and the fee structure.

We accept in our private practice only clients whom I believe have the capacity to resolve their own problems with our assistance. Some clients need only a few coaching sessions to achieve their goals, whereas others may require months or even years of coaching. As a client, you are in complete control and may seek a second opinion from another life coach, and/or end our coaching relationship at any time. We, too, have the right to withdraw from your treatment if a conflict arises. In that eventuality, you will be informed and given appropriate referrals.

[OVER]

PROFESSIONAL RELATIONSHIP

Although our session may be very intimate psychologically, it is important for you to realize that we have a professional relationship rather than a personal one. Our contact will be limited to the paid sessions you have with me. Please do not invite me to social gatherings, offer gifts, or ask me to relate to you in any way other than in the professional context of our counseling sessions. This is a requirement of the ethical guidelines for Certified Life Coaches and is in your best interest. You will be best served if our relationship stays professional, and if our sessions concentrate exclusively on your concerns. You will learn a great deal about me as we work together during our coaching experience. However, it is important for you to remember that you are experiencing us only in our professional role. Please note that it is impossible to guarantee any specific results regarding your coaching goals, but together, we will work to achieve the best possible results for you.

Colorado law requires me to inform you that in our professional relationship physical intimacy is never appropriate and should be reported to the board that licenses, registers, or certifies the licensee, registrant or certificate holder. If you have a grievance against any professional, you may notify the appropriate governmental agency.

If at any time for any reason you are dissatisfied with services, please let us know. If we are not able to resolve your concerns, you may report your complaints to the appropriate authorities.

CONFIDENTIALITY

Generally speaking, the information provided by you, the client, and from me the Certified Life Coach is legally confidential, and I cannot be forced to disclose the information without your, the client's, consent. Information disclosed to me is privileged communication and cannot be disclosed in any court of competent jurisdiction in the State of Colorado without the consent of the person to whom the testimony sought relates. There are exceptions to the general rule of legal confidentiality, which are listed in the Colorado statues (C.R.S. 12-43-218) and Federal law. However, please be aware that provisions concerning disclosure of confidential communications shall not apply to any delinquency or criminal proceedings, except as provided in section 13-90-107 C.R.S. If a legal exception arises during therapy, if feasible, you will be informed accordingly. The Mental Health Practice Act (CRS 12-43-101, et seq.) is available at: <http://www.dora.state.co.us/mental-health/Statute.pdf>.

Exceptions to confidentiality:

1. Any evidence or disclosure by the client of perpetrating child or elderly abuse (past or present, physical or sexual abuse) must be reported to Legal Authorities.
2. Any evidence or disclosure by the client of downloading child pornography (past or present) must be reported to Legal Authorities.
3. Any evidence or disclosure by the client of any suspected threat to national security to federal officials.
4. If an individual intends to take harmful, dangerous or criminal actions against another human being or against him/herself, it is my duty to report such action or intent to medical and legal authorities. In the unlikely event, it is my clinical judgment that you are a danger to yourself or someone else, by signing the consent, you authorize me to contact either the persons listed as your emergency contacts, or someone else to provide assistance through this crisis situation. This would include, at our discretion, contacting an intended victim. By law, your consent is not necessary.
5. Sexual improprieties by a former therapist are a criminal offense and must be reported.
6. Certain court orders/actions, such as custody cases, malpractice actions, etc., may legally require disclosure of certain material covered in our sessions.
7. Collection of fees may require disclosure that you have been in a counseling process.
8. Consultation and Supervision with other professionals to aid in your treatment process.

FEES, CANCELLATIONS & INSURANCE

Fees: The initial fee for a 90-minute coaching session is \$90, the fee for a follow up, 90-minute coaching session is \$180 or 45-minute coaching session is \$90. Group fees are \$30.00 per session. You will be given additional information if you are participating in a group. By consenting to coaching with Marlene Holsclaw you acknowledge that you are responsible for the cost of the provided services (to you or to your minor child) at the time the service is rendered. Payment is expected at the beginning of each coaching session. I offer the use of credit cards for your convenience.

Late Fees: A \$10.00 late fee will be assessed on unpaid accounts 15 days after your scheduled appointment. After 30 days, any unpaid balance will be assessed at 20% of the total due. **[OVER]**

Cancellations: Notification of cancellation of appointments scheduled but not attended must be made 24 hours before the appointment time. If you miss an appointment without notification, you will be charged on the credit or debit card you provide on the New Client Form or card number given during your initial appointment.

Insurance: **We do not file insurance claims for individual or group Life Coaching Sessions.** However, we can provide a billing statement for you to submit to your insurance company.

Legal

In the unlikely event of time spent on legal correspondence, record requests or time away from the office due to court appearances resulting from legal issues, additional hourly fees will be assessed. Our fee is \$300.00 per hour. If travel is required, the fee begins from the time I leave my office until I return to my office. If you are involved in a divorce or custody litigation, you need to understand that my role as a life coach is not to make recommendations for the court concerning custody, parenting issues or to testify in court, concerning opinions on issues involved in the litigation. By signing this disclosure statement, you agree not to call me as a witness in any such litigation or subpoena for summons or records. Experience has shown that testimony by life coaches in domestic cases causes damage to the clinical relationship between a life coach and client. Only court-appointed experts, investigators or evaluators can make recommendations to the court on disputed issues concerning parental responsibilities and parenting plans.

I understand in a marriage coaching sessions all individual times are collateral sessions intended to facilitate the understanding of the marriage. **Therefore no insurance can be billed for individual therapy sessions** since the marriage is the client. Any individual coaching sessions with Marlene Holsclaw is also understood to be collateral to the marriage.

I understand notes may be written during the course of coaching and ongoing sessions. Written notes are not intended to be, nor are they part of, a "medical" record. They are intended solely for the life coach's use, to assist in determining the course of the coaching relationship. There is no presumption that any 3rd party reading such notes would, in any way, be able to interpret or infer anything whatsoever about the client's mental health state or treatment. Notes will be properly destroyed when they are no longer appropriate for treatment. If you complete a Release of Information Form to request information to be released or transmitted to another mental health professional in written form, a summary can be provided for a fee. I am not required to comply with any request for coaching notes. You will not have a right to review or appeal any such denial.

I understand that no material is required for life coaching or ongoing sessions. If I elect to purchase any materials I do so without influence or coercion from Marlene Holsclaw or anyone employed by The Pearl Exchange.

If an ongoing coaching relationship is established, it is expected a face-to-face visit would occur. By signing this, I accept full responsibility for future face-to-face visits. Also, I understand no recording of sessions is ever permitted and is illegal in most cases without consent. I acknowledge I am not recording, in any manner, my sessions with Marlene Holsclaw.

By signing below you agree that you have read and understood the preceding information, which has also been provided verbally. You understand your rights as a client or as the client's responsible party and are consenting to coaching with The Pearl Exchange, Marlene Holsclaw, Certified Life Coach. The signed copy of this document will become part of your file at The Pearl Exchange. If you have any questions, please address them during our initial session.

Client's Printed Name

Client's (or Responsible Party's) Signature

Date

Life Coach's Signature

Date