

## WELCOME LETTER

Congratulations. You've made a decision to improve the quality of your life through nutrition therapy. This involves not only addressing what you eat, but also how you think and feel about food and your body. As you may have already read on our website, this is not a one size fits all approach. We will strive to understand your needs, preferences, and goals in order to offer realistic and personalized solutions for your nutrition and health concerns. We hope to create a relationship built on trust so that we can honestly and openly communicate with one another. Please visit our website at [www.marciRD.com](http://www.marciRD.com) for more information about our background, philosophy, and other services offered.

Because our habits are deeply engrained, making changes that will last a life-time occurs in stages and often takes time. Be patient. People often wonder how many times we'll need to meet. That entirely depends on the purpose of our meeting, your goals, your readiness to change, what support systems you have in place, and many other factors. While we might not be able to answer that question definitely, here's what you can expect.

### **Initial session: 50 minutes**

Lifestyle and nutrition assessment, baseline goal setting and development of nutrition and/or exercise care plan based on your needs. ***Please bring the following items to your first appointment\****.

#### **1.) The Getting Started Packet:**

- Signed copy of the Privacy Agreement: page 6 of this packet
- Signed copy of the Payment & Cancellation Agreement: page 7 of this packet
- New Client Registration: Page 8 of this agreement
- Nutrition Consultation Questionnaire: pages 9-12 of this packet.

2.) **Insurance Script:** This is necessary if you are planning to use your insurance to pay for our time together. It can be found on the "Resources" page of the website. In order to use insurance as a form of payment for our sessions, this form must be completed and filled out at your initial appointment.

3.) **OPTIONAL: 3 Food Logs-** a sample food log can be found on page 13 of this packet

**\*Do your best to have all of this information filled out for our first session. If you become overwhelmed, have trouble or don't feel comfortable answering any of the questions, leave it blank! If there is additional info you'd like to include, please feel free to do so.**

### **Subsequent sessions: 45-50 minutes**

Re-evaluation of your nutrition and/or exercise care plan, review of goals and objectives, evaluation of follow up laboratory work (as needed), discussion about other resources that may help you meet your goals (i.e. nutritional supplements, working with a therapist, books to read, etc).

We look forward to working with you.

Sincerely,

Your team at MarciRD Nutrition Consulting,

Marci Evans MS, CEDRD, LDN, cPT  
Sarah Patten RD, LDN



## HIPAA NOTICE OF PRIVACY PRACTICES

*Effective Date: January 1, 2009*

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

If you have any questions about this Notice, please contact Marci E. Anderson.

### **MY PLEDGE REGARDING PROTECTED HEALTH INFORMATION:**

I understand that protected health information about you and your health is personal. I am committed to protecting health information about you. This Notice applies to all of the records of your care generated by me. This Notice will tell you about the ways in which I may use and disclose protected health information about you. It also describes your rights and certain obligations I have regarding the use and disclosure of protected health information.

The law requires me to:

- make sure that protected health information that identifies you is kept private;
- notify you about how I protect protected health information about you;
- explain how, when, and why I use and disclose protected health information;
- follow the terms of the Notice that is currently in effect.

I am required to follow the procedures in this Notice. I reserve the right to change the terms of this Notice and to make new Notice provisions effective for all protected health information that I maintain by:

- posting the revised Notice in my office and
- making copies of the revised Notice available upon request.

### **HOW I MAY USE AND DISCLOSE PROTECTED HEALTH INFORMATION ABOUT YOU.**

The following categories describe different ways that I may use and disclose protected health information about you without your written authorization.

- **For Treatment.** I may use and disclose protected health information about you to provide you with, coordinate, or manage your medical treatment or services. Specifically, I may share protected health information about you to the physician, therapist, or other health professional or agency that referred you to me, as part of my effort to coordinate your follow up care. I may also share protected health information about you in order to coordinate different things you need, such as prescriptions, lab work, or psychological services. I may disclose protected health information about you to people who provide services that are part of your medical care. And, I may use and disclose protected health information to contact you as a reminder that you have an appointment with me for medical nutrition therapy.
- **For Payment of Services.** I may use and disclose protected health information about you so that the treatment and services you receive from me may be billed to and payment may be collected from you, an insurance company, or a third party. For example, I may need to give your health plan information about the nutrition services you received so your health plan will pay me or reimburse you for the service. I may also tell your health plan about the nutrition services you are going to receive to obtain prior approval or to determine whether your plan will cover the treatment.
- **For Health Care Operations.** I may use and disclose protected health information about you for my health care operations, such as my quality assessment and improvement activities, case management, business planning,

customer services, and other activities. These uses and disclosures are necessary to run my practice, reduce health care costs, and make sure that all of my clients receive quality care. For example, I may use protected health information during professional supervision to review my treatment and services and to evaluate my performance. I may also combine protected health information about many of my clients to decide what additional services I should offer, what services are not needed, and whether certain treatment approaches are effective. I may also disclose information to doctors, nurses, therapists, fitness professionals, or other dietitians for review and learning purposes. I will always remove information that identifies you from this set of protected health information so others may use it to study health care and health care delivery without learning who the specific clients are.

Subject to applicable state law, in some limited situations the law allows or requires us to use or disclose your protected health information for purposes beyond treatment, payment, and operations. However, some of the disclosures set forth below may never occur in my practice.

- **As Required By Law.** I will disclose protected health information about you when required to do so by federal, state, or local law.
- **Research.** I may disclose your protected health information to researchers when their research has been approved by an institutional review board or privacy board that has reviewed the research proposal and established protocols to ensure the privacy of your information
- **Health Risks.** I may disclose protected health information about you to a government authority if I reasonably believe you are a victim of abuse, neglect, or domestic violence. I will only disclose this type of information to the extent required by law, if you agree to the disclosure, or if the disclosure is allowed by law and I believe it is necessary to prevent or lessen a serious and imminent threat to you or another person.
- **Judicial and Administrative Proceedings.** If you are involved in a lawsuit or dispute, I may disclose your information in response to a court or administrative order. I may also disclose health information about you in response to a subpoena, discovery request, or other lawful process by someone else involved in the dispute, but only if efforts have been made, either by us or the requesting party, to tell you about the request or to obtain an order protecting the information requested.
- **Business Associates.** I may disclose information to business associates who perform services on my behalf (such as billing companies); however, I require them to appropriately safeguard your information.
- **Public Health.** As required by law, I may disclose your protected health information to public health or legal authorities charged with preventing or controlling disease, injury, or disability.
- **To Avert a Serious Threat to Health or Safety.** I may use and disclose protected health information about you when necessary to prevent a serious threat to your health and safety or the health and safety of the public or another person.
- **Health Oversight Activities.** I may disclose protected health information to a health oversight agency for activities authorized by law. These activities include audits, investigations, and inspections, as necessary for licensure and for the government to monitor the health care system, government programs, and compliance with civil rights laws.
- **Law Enforcement.** I may release protected health information as required by law, or in response to an order or warrant of a court, a subpoena, or an administrative request. I may also disclose protected health information in response to a request related to identification or location of an individual, victims of crime, decedents, or a crime on the premises.
- **Organ and Tissue Donation.** If you are an organ donor, I may release protected health information to organizations that handle organ procurement or organ, eye or tissue transplantation or to an organ donation bank, as necessary to facilitate organ or tissue donation and transplantation.
- **Special Government Functions.** If you are a member of the armed forces, I may release protected health information about you if it relates to military and veterans activities. I may also release your protected health information for national security and intelligence purposes, protective services for the President, and medical suitability or determinations of the Department of State.
- **Coroners, Medical Examiners, and Funeral Directors.** I may release protected health information to a coroner or medical examiner. This may be necessary, for example, to identify a deceased person or determine the cause of

death. I may also disclose protected health information to funeral directors consistent with applicable law to enable them to carry out their duties.

- **Correctional Institutions and Other Law Enforcement Custodial Situations.** If you are an inmate of a correctional institution or under the custody of a law enforcement official, I may release protected health information about you to the correctional institution or law enforcement official as necessary for your or another person's health and safety.
- **Worker's Compensation.** I may disclose information as necessary to comply with laws relating to worker's compensation or other similar programs established by law.
- **Food and Drug Administration.** I may disclose to the FDA, or persons under the jurisdiction of the FDA, protected health information relative to adverse events with respect to drugs, foods, supplements, products and product defects, or post marketing surveillance information to enable product recalls, repairs, or replacement.

## **YOU CAN OBJECT TO CERTAIN USES AND DISCLOSURES**

Unless you object, or request that only a limited amount or type of information be shared, I may use or disclose protected health information about you in the following circumstances:

- I may share with a family member, relative, friend, or other person identified by you protected health information directly relevant to that person's involvement in your care or payment for your care. I may also share information to notify these individuals of your location, general condition, or death.
- I may share information with a public or private agency (such as the American Red Cross) for disaster relief purposes. Even if you object, I may still share this information if necessary for the emergency circumstances.

If you would like to object to use and disclosure of protected health information in these circumstances, please call or email me.

## **YOUR RIGHTS REGARDING PROTECTED HEALTH INFORMATION ABOUT YOU.**

You have the following rights regarding protected health information I maintain about you:

- **Right to Inspect and Copy.** You have the right to inspect and copy protected health information that may be used to make decisions about your care. Usually, this includes medical and billing records. To inspect and copy protected health information that may be used to make decisions about you, you must submit your request in writing to me. If you request a copy of the information, I may charge a fee for the costs of copying, mailing, or other supplies associated with your request, and I will respond to your request no later than 30 days after receiving it. There are certain situations in which I am not required to comply with your request. In these circumstances, I will respond to you in writing, stating why I will not grant your request and describe any rights you may have to request a review of my denial.
- **Right to Amend.** If you feel that protected health information I have about you is incorrect or incomplete, you may ask me to amend or supplement the information. To request an amendment, your request must be made in writing and submitted to me. In addition, you must provide a reason that supports your request. I will act on the your request for an amendment no later than 60 days after receiving the request. I may deny your request for an amendment if it is not in writing or does not include a reason to support the request, and I will provide a written denial to you. In addition, I may deny your request if you ask me to amend information that:
  - Was not created by me, unless the person or entity that created the information is no longer available to make the amendment;
  - Is not part of the protected health information kept by me;
  - Is not part of the information which you would be permitted to inspect and copy; or
  - I believe is accurate and complete.
- **Right to an Accounting of Disclosures.** You have the right to request an "accounting of disclosures." This is a list of the disclosures I made of protected health information about you. To request this list or "accounting of disclosures," you must submit your request in writing to me. You may ask for disclosures made up to six years before your request (not including disclosures made before April 14, 2003). The first list you request within a 12-month period will be free. For additional lists, I may charge you for the costs of providing the list. I am required to provide a listing of all disclosures except the following:
  - For your treatment

- For billing and collection of payment for your treatment
  - For health care operations
  - Made to or requested by you, or that you authorized
  - Occurring as a byproduct of permitted use and disclosures
  - For national security or intelligence purposes or to correctional institutions or law enforcement regarding inmates
  - As part of a limited data set of information that does not contain information identifying you
- **Right to Request Restrictions.** You have the right to request a restriction or limitation on the protected health information I use or disclose about you for treatment, payment, or health care operations or to persons involved in your care. I am not required to agree to your request. If I do agree, I will comply with your request unless the information is needed to provide you emergency treatment, the disclosure is to the Secretary of the Department of Health and Human Services, or the disclosure is for one of the purposes described on pages 2-3. To request restrictions, you must make your request in writing to me.
  - **Right to Request Confidential Communications.** You have the right to request that I communicate with you about medical matters in a certain way or at a certain location. For example, you can ask that I only contact you at work or by mail. To request confidential communications, you must make your request in writing to me. I will accommodate all reasonable requests.
  - **Right to a Paper Copy of This Notice.** You have the right to a paper copy of this Notice at any time by contacting me.

#### **OTHER USES AND DISCLOSURES**

I will obtain your written authorization before using or disclosing your protected health information for purposes other than those provided for above (or as otherwise permitted or required by law). You may revoke this authorization in writing at any time. Upon receipt of the written revocation, I will stop using or disclosing your information, except to the extent that I have already taken action in reliance on the authorization.

#### **YOU MAY FILE A COMPLAINT ABOUT MY PRIVACY PRACTICES**

If you believe your privacy rights have been violated, you may file a complaint with me or file a written complaint with the Secretary of the Department of Health and Human Services. A complaint to the Secretary should be filed within 180 days of the occurrence or action that is the subject of the complaint. If you file a complaint, I will not take any action against you or change my treatment of you in any way.

Please know that any information submitted via email or over the internet cannot be guaranteed as protected. You are sending this information at your own risk. If you are not comfortable with this policy, please communicate with me by phone, regular mail, or in person. Thank you for understanding.

Please detach, sign/date, and return the Acknowledgement Confirming Receipt of Privacy Notice below. We will keep this acknowledgment in your medical nutrition therapy record. Please retain a copy for yourself.



**ACKNOWLEDGMENT CONFIRMING RECEIPT OF PRIVACY NOTICE**

I acknowledge receiving a copy of Marci RD Nutrition Consulting, LLC HIPAA Notice of Privacy Practices.

**Printed Name of Client:** \_\_\_\_\_

**Signature of Client:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature of Parent:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
**Or Guardian**  
(if < 18 yrs. old)

**Comments:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Payment & Cancellation Agreement

### PLEASE READ CAREFULLY

• All services may be paid with cash, check, or credit card prior to the start of the service.

**Please make all checks payable to Marci RD Nutrition Consulting, LLC. Note: credit cards require a 3% service charge.**

- Marci RD Nutrition Consulting, LLC currently accepts Blue Cross Blue Shield (all plans), Harvard Pilgrim (all plans), and Tufts (PPO with out of network benefit) insurances. Additionally, I may request a superbill, which I may submit to my insurance company for reimbursement purposes.
- If utilizing insurance for payment, I give Marci RD Nutrition Consulting, LLC permission to bill my insurance company for services.
- I am responsible for bringing accurate payment at the start of every session. Failure to do so will result in a \$3 service charge to cover the cost of invoicing.
- If my insurance rejects a submitted claim for any reason, I am responsible and will pay the full fee for the service(s) rendered.
- All appointment cancellations must be completed 24 hours in advance. Failure to cancel within 24 hours will still require full payment for the cost of the scheduled appointment.
- There will be a \$30.00 charge for all returned checks.
- Appointments start on time. If I am late, I may use the remaining time of my appointment but not beyond that. I will be required to pay for the entire cost of the visit.
- Marci RD Nutrition Consulting LLC does not provide any refunds.
- I have an obligation to pay my account in full 60 days from the scheduled date of service. If I do not pay my account in full within this time period I acknowledge my credit card will be charged for the remaining balance + 3% processing fee.

Type of Card: \_\_\_\_\_ Card Number: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

I understand that by working with Marci RD Nutrition Consulting, LLC I must comply with the payment and cancellation policies listed above. This not only respects the time and expertise provided by the clinicians at Marci RD Nutrition Consulting, but will also help me to make progress on the goals and plans that I have committed to. By signing this agreement I am indicating that I understand these policies and agree to adhere to them.

I also understand that the recommendations and education provided by the clinicians at Marci RD Nutrition Consulting should not be used in place of medical advice.

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

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

For questions or comments regarding these policies,  
please contact Marci Anderson at [marci@marciRD.com](mailto:marci@marciRD.com) or 617-834-7336.

## New Client Registration

### Client Information

Name		DOB	
Address			
Marital Status		SS#	Sex M F

### Contact Information- please circle your preferred contact method

Telephone- Day/Evening		Cell Phone	
Email Address			

### Primary Care Physician

Name		Phone #	
Address			
National Provider #			
Relationship with Physician (i.e. what do you see him/her for, when was your last apt, etc.)			

### Psychotherapist/Counselor

Name		Phone #	
Address	City	State	Zip
Relationship with Therapist (i.e. how long have you been seeing them, how often do you see them, etc.)			

### Psychiatrist/Psychopharmacologist

Name		Phone #	
Address	City	State	Zip
Relationship with Psychiatrist (i.e. how long have you been seeing them, how often do you see them, etc.)			

I give my clinician at Marci RD permission to speak with and disclose my protected health information with the above named treatment providers.

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

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

## **Nutrition Consultation Questionnaire**

**Name:** \_\_\_\_\_ **Age:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Occupation (what are you doing in life and are how do you feel about it?):** \_\_\_\_\_

**Who do you live with?** \_\_\_\_\_

**Emergency Contact:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

### **Family History**

**Tell me about your family and family dynamics:**

**What was food like in your house growing up? What's it like now?**

**Does anyone in your family have a history of chronic illness including (like an eating disorder, diabetes, heart disease, high cholesterol, high blood pressure)?**

### **Purpose of Consult**

**Tell me about the primary purpose of our meeting.**

**Weight- if this section feels uncomfortable, leave it blank & we can discuss it together**

Height: \_\_\_\_\_ Current wt: \_\_\_\_\_ Ave wt for the past 2 to 3 years? \_\_\_\_\_  
Weight you feel most comfortable \_\_\_\_\_ When were you last at that weight? \_\_\_\_\_  
Highest adult weight? \_\_\_\_\_ Age: \_\_\_\_\_  
Lowest adult weight? \_\_\_\_\_ Age: \_\_\_\_\_  
Pre-pregnancy weight? \_\_\_\_\_ How much weight did you gain with pregnancy? \_\_\_\_\_  
Have you lost or gained weight recently? \_\_\_\_\_ How much? \_\_\_\_\_ Time frame? \_\_\_\_\_  
Do you weigh yourself currently? If yes, how frequently \_\_\_\_\_

Please circle how you currently feel about your body.

strongly dislike      dislike      slightly satisfied      satisfied      very satisfied

**Dietary History**

Tell me about your dieting history (types of diets, amount of weight lost, short/long-term results, etc.)

**Eating Patterns**

How many meals a day do you eat? \_\_\_\_\_ Do you skip meals? \_\_\_\_\_  
If yes, which ones do you skip and why? \_\_\_\_\_  
What are your snacking habits (ie frequency, time of day, foods you choose)? \_\_\_\_\_  
\_\_\_\_\_  
How many meals per week do you eat at a restaurant? \_\_\_\_\_ Which restaurants do you normally choose?  
\_\_\_\_\_  
How does your meal and snack pattern vary on the weekend vs. during the week? \_\_\_\_\_  
\_\_\_\_\_  
When you feel overwhelmed or life gets busy, do you neglect your eating habits?  yes  no  
If yes, please describe. \_\_\_\_\_  
\_\_\_\_\_

Do you feel that your life/schedule often conflicts with a healthy eating program?  yes  no

If yes, please describe. \_\_\_\_\_  
\_\_\_\_\_

Do you engage in other activities while eating (i.e. reading, driving, watching TV)?  yes  no

Do you eat at the table?  yes  no

Do you cook?  yes  no

Do you feel you eat fast?  yes  no

Do you like to cook?  yes  no

Who does the grocery shopping? \_\_\_\_\_ Who prepares the food at home? \_\_\_\_\_

Do you read food/nutrition labels?  yes  no

What do you look for on labels? \_\_\_\_\_

Do you travel and/or entertain for business?  yes  no How often? \_\_\_\_\_

Please list the usual time that you the following meals and your typical daily intake for each meal.

Breakfast: \_\_\_\_\_

Lunch: \_\_\_\_\_

Dinner: \_\_\_\_\_

Snacks: \_\_\_\_\_

What foods do you love? \_\_\_\_\_

What foods do you dislike? \_\_\_\_\_

Are there any foods that feel like binge foods for you? \_\_\_\_\_

Are there any foods that feel "safe" to you? \_\_\_\_\_

Does your diet have a lot of variety or does it tend to be the same from day to day? \_\_\_\_\_  
\_\_\_\_\_

Do you have any food allergies? \_\_\_\_\_ If yes, please list: \_\_\_\_\_

### Exercise and Activity

Have you ever had a consistent exercise routine?  yes  no Are you following one currently?  yes  no

If yes, please describe: \_\_\_\_\_  
\_\_\_\_\_

Tell me how you feel about exercise (what you like, don't like, etc.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Personal Health & Medical History

Please list/describe any medical diagnoses or procedures I should be aware of. \_\_\_\_\_

\_\_\_\_\_

If applicable, are you currently getting your period? \_\_\_\_\_

\_\_\_\_\_

Please list your current medications & supplement dosages: \_\_\_\_\_

\_\_\_\_\_

Please list/describe any mental health concerns should I be aware of (ie depression, anxiety, OCD, PTSD)? \_\_\_\_\_

\_\_\_\_\_

Please share any illicit drug, alcohol, cigarette use. \_\_\_\_\_

\_\_\_\_\_

Rate your health:     excellent                       good                       fair                       poor

Rate your current perceived level of stress on a scale of 1-10: \_\_\_\_\_

Sleeping habits (Total and Quality): \_\_\_\_\_

\_\_\_\_\_

On a scale of 1-10, 10 being the highest, how much support do you need when making lifestyle changes? \_\_\_\_\_

Do you have a strong support system? Please describe. \_\_\_\_\_

\_\_\_\_\_

Have you ever been advised by your physician to follow a special diet? (i.e. low salt/cholesterol, no sugar, etc)

yes     no    What changes did you make at that time? \_\_\_\_\_

\_\_\_\_\_

Have you ever worked with a dietitian/nutritionist?  yes     no    If yes, what was your experience?

\_\_\_\_\_

**Nutrition Consultation**

**What do you hope to accomplish through our visit?** \_\_\_\_\_

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**What are your short-term goals?** \_\_\_\_\_

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**What are your long-term goals?** \_\_\_\_\_

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**Please feel free to share any additional information here.**

