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**Data Sheet**

Today's date: \_\_\_\_\_

Name: \_\_\_\_\_ Email \_\_\_\_\_

Name you prefer to be called: \_\_\_\_\_ Social Security # \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Race \_\_\_\_\_ Gender \_\_\_\_\_

Marital Status \_\_\_\_\_ Spouse/Partner name \_\_\_\_\_ Spiritual Preference \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell/other: \_\_\_\_\_

May we leave a message at Home \_\_\_\_\_ Work \_\_\_\_\_ Cell/other \_\_\_\_\_? What is the best time to reach you? \_\_\_\_\_

Would you like an appointment reminder by text or email? \_\_\_\_\_ If so at what number or email? \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_ Phone \_\_\_\_\_ Relationship to you \_\_\_\_\_

Referred by: \_\_\_\_\_ May we contact them to thank them for the referral? \_\_\_\_\_

If you were not referred, how did you find out about us? Facebook, Google, Psychology Today, Radio ad, Friend or family, Other: \_\_\_\_\_

Occupation: \_\_\_\_\_ Place of Work: \_\_\_\_\_ full-time student? \_\_\_\_\_

Number of hours per week that you work: \_\_\_\_\_ Highest education level: \_\_\_\_\_

Briefly describe the main reason that you are here for care: \_\_\_\_\_

**Insurance Information:**

Name of insured if different than client \_\_\_\_\_ Employer \_\_\_\_\_

Insured's SSN \_\_\_\_\_ Insured's DOB \_\_\_\_\_ Relationship to client \_\_\_\_\_

Insured's Address \_\_\_\_\_

Insurance Company \_\_\_\_\_ Plan name \_\_\_\_\_ Member ID# \_\_\_\_\_ Group# \_\_\_\_\_

Phone # (on back of card) \_\_\_\_\_ Claims address \_\_\_\_\_

**Have you called for authorization and to confirm mental health benefits as well as information regarding co-pays or deductible? \_\_\_\_\_ Please supply all information from confirmation call below.**

**(As stated in our Professional disclosure, it is your responsibility to call regarding authorization and benefits. You will be charged full session fees until coverage is confirmed.)**

Policy effective date \_\_\_\_\_ Ded. Amount for ind. \_\_\_\_\_ fam \_\_\_\_\_ Combined w/ medical? \_\_\_\_\_

Amount met \_\_\_\_\_ Policy covers LCSW? \_\_\_\_\_ Therapist in network? \_\_\_\_\_ Out of network benefits? \_\_\_\_\_

Number of visits allowed annually? \_\_\_\_\_ Copay \_\_\_\_\_ Authorization needed? \_\_\_\_\_ If so, authorization code? \_\_\_\_\_

Authorization units \_\_\_\_\_ CPT code \_\_\_\_\_ CPT code \_\_\_\_\_ Date range authorization: from \_\_\_\_\_ to \_\_\_\_\_

Referral needed? \_\_\_\_\_ **Do you have any Medicare Benefits?** \_\_\_\_\_