Please print and complete the attached information forms and send them to the EACC via USPS mail, fax using the HIPAA approved fax sheet, or email at uabeacc@uabmc.edu. Please note, the EACC cannot guarantee confidentiality if you choose to email your paperwork.

Individuals age 14 and older who will be involved in counseling (individual or family) must complete the Intake Forms for themselves. Parents/guardians must print, complete and submit an Intake Form for children age 13 and under.

For individuals age 14-19, the EACC needs to have a direct line of contact to that individual. Please ensure that the individuals cell phone number (if they have one) and/or home number is on the Client Information Sheet where it requests home, work and/or cell phone numbers. Parents/guardians cell phone number can be written in the emergency contact section on the bottom right of the form.

Thank you.

UAB Employee Assistance and Counseling Center
2112 11th Ave South
Suite 330
Birmingham, AL 35242
205-934-2281 (p)
205-975-7367 (f)
uabeacc@uabmc.edu
UAB Employee Assistance and Counseling Center (EACC) — Client Information

TODAY’S DATE: _____/____/____ AGE: __________ GENDER: _____M _____F

CLIENT FIRST NAME ___________________________ (MI) _____ (LAST) ___________________________ DATE OF BIRTH: _____/____/____

EMPLOYEE FIRST NAME ___________________________ (MI) _____ (LAST) ___________________________

ADDRESS _______________________________________________ CITY ___________________________ STATE _____ ZIP ______

EMAIL _______________________________________________ OK to Email? Y/N

HOME PHONE: (_____) _______-___________ WORK PHONE: (_____) _______-___________ CELL PHONE: (_____) _______-___________

OK to call Home? Y/N OK to leave VM? Y/N OK to call Work? Y/N OK to leave VM? Y/N OK to call Cell? Y/N OK to leave VM? Y/N

Health Plan
1__Viva UAB
2__Viva Choice
3__Viva Access/Health
4__Blue Cross
5__Peehip Viva
6__Peehip Blue Cross
7__Other________________

Education
1__8th grade or under
2__9th through 11th
3__High School Graduate
4__Some College
5__College Graduate
6__Advanced Degree

Ethnic Background
1__American Indian or Alaskan Native
2__Asian
3__Black or African American
4__Hispanic/Latino
5__Native Hawaiian or Pacific Islander
6__Two or More Races
7__White
8__Other________________

Relationship Status
1__Single
2__Married
3__Divorced
4__Separated
5__Widowed
6__Life Partner
7__Living w/Someone

Length of Time in Current Relationship: ___________________________

Relationship to Employee
1__Employee (Self)
2__Family/Household Member
3__Other

Have you been to the UAB Employee Assistance and Counseling Center before?
1__Yes
2__No
3__N/A Family Member

Work Performance Problems (Put a #1 and #2 next to the top two that apply to you, with #1 being the most serious)
1__Absent
2__Tardy
3__Safety Violations
4__Problems Relating to Other Employees
5__Quality/Quantity of Work Decreased
6__Workers Comp Case
7__Alcohol/Drugs Suspected on the job
8__Theft
9__Other
10__N/A Family Member
11__No Work Performance Problem/Personal

Personnel Actions Taken (Mark two most recent events #1 and #2, with #1 being the most recent)
1__Employee was counseled
2__Verbal/Written Warning
3__Suspension
4__Placed on Administrative Leave
5__Referred to EAP
6__Termination
7__Resignation
8__No Action Taken
9__N/A - Family Member
10__Other
11__Not Applicable

Days Absent in Last 12 Months
1__No Days
2__1 - 5 Days
3__6 - 10 Days
4__11 - 15 Days
5__16 + Days
6__N/A - Family Member

Have you lost time at work due to injury in last 12 months?
1__Yes
2__No
3__N/A Family Member

Are any of the following currently a problem?
1__Suicidal thoughts
2__Homicidal thoughts
3__Sexual Abuse
4__Physical Abuse
5__Combination of Above
6__None of Above

Circle one: CURRENT or PAST

How did you hear about the UAB Employee Assistance and Counseling Center?
1__Prior Participation
2__The UAB Reporter
3__Posters
4__Monday Mailing
5__Brochures
6__Supervisor Suggested
7__Co-Worker Suggested
8__Family Suggested
9__In-Service Training/Orientation
10__Other

May we send you a confidential follow-up questionnaire by email?
1__Yes, send an email link connecting to a confidential survey
2__No, I do not wish to participate

Do you have children? Yes/No
If so, please list their ages:

Emergency Contact
Name: ___________________________
Phone: ___________________________

UAB EACC Intake Form — LIFE COACHING
Revised November 2018
What are you most concerned about today?

- Look at the following list and circle the two things that are concerning you most today.
- Please circle ONLY the top two concerns that are most important to you today, even if more seem to fit.
- Put a #1 by the issue that is most significant to you today.

**Substance Abuse or Other Addiction (client)**
- ___ Alcohol Abuse/Addiction
- ___ Drug Abuse/Addiction
- ___ Gambling
- ___ Sexual Addiction
- ___ Eating Disorders
- ___ Smoking
- ___ Other

**Family Issues**
- ___ Family Conflict
- ___ Child
- ___ Teen
- ___ Parent/Child Relationship
- ___ Domestic Violence
- ___ Affected by Other’s Illness
- ___ Affected by Other’s Abuse/Addiction
- ___ Affected by Other’s Emotional Problem
- ___ Family Other

**Marital/Partner Relationship Issues**
- ___ Marital/Partner Relationship

**Stress/Emotional Issues**
- ___ Depression
- ___ Anxiety
- ___ Grief
- ___ Stress
- ___ Anger Management
- ___ Emotional Other

**Medical Issues**
- ___ Medical Condition

**Trauma and Abuse**
- ___ Physical Abuse
- ___ Sexual Abuse
- ___ Emotional Abuse
- ___ Post-Traumatic Stress
- ___ Trauma Other

**Work Related Issues**
- ___ Relationship with Co-workers
- ___ Relationship with Supervisor
- ___ Work Place Violence
- ___ Harassment
- ___ Job Performance
- ___ Work Related Other

**Work/Life Balance Issues**
- ___ Financial Issues
- ___ Childcare
- ___ Older Adult Services
- ___ Work Life Balance
- ___ Education
- ___ Work Life Other

**No Personal Issues**
- ___ No Personal Issue

**Other Issues**
- ___ Life Coaching
- ___ Distance Counseling*
- ___ Not Listed/Other

*Available to Homewood employees and for VIVA and UAB School of Medicine employees who work at a clinic/location outside of Birmingham, and members of their immediate households.

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If this is an emergency, defined as suicidal thoughts, homicidal thoughts, abuse, and/or domestic violence, please call 911, or one of the numbers below. Or call the EACC front desk at 205-934-2281 during regular business hours to speak with a counselor.

Birmingham Crisis Center: 205-323-7777
Alabama Domestic Violence Hotline: 1-800-650-6522
24hr National Suicide Prevention Hotline: 1-800-273-8255
24hr National Hopeline Network: 1-800-784-2433

You can also go into any Emergency Room if you are feeling suicidal and seek assistance.
Life Coaching Intake Questionnaire

*Please answer these questions to the best of your knowledge, at this time.*

1. What would you like to accomplish in Life Coaching?

2. What have you tried in the past to achieve this goal?

3. What's the most important thing for you to change right now?

4. What tools help you learn? (example: reading, worksheets, videos, etc.)

5. What does success mean to you?
Welcome to the UAB Employee Assistance and Counseling Center (EACC). We are pleased that you have decided to use our service. The EACC is a voluntary confidential employee assistance and counseling service. Our service is an employee benefit designed to provide employees and their immediate household members with resources for resolving work-related and personal problems. The EACC provides employee assistance, confidential counseling, life coaching, community referral, supervisor consultation, crisis management and a variety of educational programs. Licensed mental health professionals provide confidential individual, family and relationship counseling. Board Certified Coaches provide professional life coaching services. Our goal is to assist our clients in clarifying issues, exploring options, and finding solutions. Our service is provided as an employee benefit of UAB, UAB Medicine, VIVA and the Homewood School System at no cost to our clients.

ASSESSMENT
As a new counseling client, your assessment will take place via telephone with an intake counselor. The intake counselor will explore with you the reasons that caused you to seek counseling and the goals you hope to achieve. At the end of this session, the intake counselor will suggest an appropriate follow-up plan for you. A follow-up appointment may be scheduled at the end of your assessment visit. Please make note that our clinical staff works as a team, consulting with one another, to increase the effectiveness of our services to you.

If you are seeking life coaching services, please call to schedule an appointment for an assessment with one of our board certified coaches. During the first session, you and your coach will establish a schedule of sessions based on your needs.

Should you have questions or need to reschedule and appointment, please call us at 205-934-2281, or toll free within Alabama at 1-877-872-2327.

COUNSELING
Counseling sessions are usually 45 to 50 minutes in length. Intervals between sessions will be scheduled dependent upon your needs. Should you decide to terminate the counseling relationship, we recommend that you consult with your counselor to tie up loose ends and to allow for feedback concerning the counseling process.

Children under the age of 15 may be referred externally for individual counseling unless seen within the context of family therapy.

LIFE COACHING
Life coaching sessions are usually 30 to 45 minutes in length. These sessions will occur in person at the EACC, over the computer using distance software, or over the telephone. You and your coach will establish how the sessions will take place during the initial assessment. If you do not make progress towards your established goals, your coach may recommend a 2-6 week hiatus of services.

SCOPE OF BENEFIT AND ELIGIBILITY
The EACC provides services for all eligible persons, without regard to race, color, age, religion, sex, sexual orientation, national origin, disability, or veteran status. If it is determined by the clinical staff that an individual's needs exceed the scope of service or expertise available at the EACC, we will assist you to identify an appropriate referral to meet your needs. Services provided to you at the EACC are a benefit at no cost to you by UAB, UAB Medicine, VIVA, and the Homewood School System. The EACC does not pay the costs of therapy or community resources/treatment services to which you may be referred. UAB, UAB Medicine, and VIVA employees and members of their immediate households are eligible for up to 12 sessions each year. Detailed information regarding Homewood School Systems benefits is located on our website, uab.edu/eacc.

Initial
CONFIDENTIALITY
We understand that confidentiality is essential to your counseling or coaching progress. Our counselors and coaches are licensed master’s level or higher mental health professionals who are ethically and legally bound to maintain your confidentiality. A written and electronic record (date, time, nature of meeting) of your contacts with the EACC will be maintained in a secure manner. Only EACC staff members have access to your clinical record, except as required by law or as described below. Should you need to access your file please contact your therapist or life coach. Your therapist or coach will review the file with you and provide a written summary if requested.

CONFIDENTIALITY AND PRIVACY OF CHILDREN
According to Alabama law (Section 22-8-4), children of age 14 and above may decide who has access to their mental health records and contract for services without informing their parent/guardian. For children under the age of 14, the EACC will treat therapy as private to protect the child’s ability to speak freely about their relationships and concerns regarding each parent/guardian. The therapist will keep all information learned from and about the child confidential, although the parent/guardian may be given a broad overview of concerns and updates about treatment. If the child agrees that information is to be shared with parent/guardian, then specific disclosures will be made available to the them.

COMMUNICATION WITH PARENTS
Parent/guardians should understand that telephone, face-to-face, email, or written communication from either parent/guardian/guardian may be shared as is clinically appropriate at the discretion of the therapist, with the other parent/guardian or with the child. Written communications, emails and telephone messages become part of the child’s permanent record. The EACC expects parents/guardians to inform each other about scheduled appointments. The EACC is not responsible for routine communication with parents/guardians who do not attend appointments. For example, EACC therapists cannot routinely contact the non-custodial parent/guardian after each appointment. The expectation is that parents/guardians will communicate with each other openly regarding treatment and that each parent/guardian will cultivate a healthy relationship and open communication with the child.

PROGRAM EVALUATION
The non-clinical data that you provide may be used for our EAP program evaluation research. You will not be identified and your information is anonymous.

LIMITS OF CONFIDENTIALITY
All information disclosed in counseling sessions and coaching sessions is strictly confidential and will be released ONLY with your prior written permission, except as otherwise required by law. The counselor’s or coach’s legal responsibility to disclose information includes, but is not limited to, the following conditions: suspected or known child, elder, or disabled person abuse or neglect, mandatory reporting of health care providers experiencing psychiatric or substance abuse disorders that may present a danger to self or others to their licensing boards, threat of danger to another individual, imminent threat of suicide by the client, legal subpoena to present records to comply with a court order, mandatory state and federal requirements, and in any emergency medical circumstance that requires immediate medical attention. If you receive couples or family counseling, records require a written release by all parties or a judge’s order to be released.

Due to the strict adherence to our policy of client confidentiality, we are unable to report suspected cases of sexual harassment in the workplace. If you believe you have a sexual harassment complaint, UAB Policy encourages you to promptly report this situation to the designated official. If you are a UAB employee, contact the UAB Office of Human Resource Management Relations at 934-4458, Room 260 Administration Building, to report sexual harassment. If you are a UAB Medicine, VIVA or Homewood School System employee, ask your Human Resource Office for information on how to report sexual harassment.

Initial
EMERGENCY CONTACT
In the event of a medical or psychiatric emergency, your signature below signifies your consent for any counselor or a staff member of the EACC to contact the person identified as your emergency contact on your initial intake paperwork. A psychiatric emergency is defined as any situation where an assessment or crisis stabilization is warranted as a result of a situation involving imminent risk to you or someone else in accordance with State law.

FORMAL SUPERVISOR REFERRALS
If you have been referred to the EACC by your supervisor due to a work performance issue(s), you will be asked to sign a limited release. By signing the limited release, you are verifying that you attended one appointment with a counselor ONLY. An appointment card will be given to you as confirmation that you kept your appointment and should be given to your supervisor upon your return to work. The limited release also reiterates your rights to keep your personal information private. See the above paragraph regarding “Limits of Confidentiality” if you have further questions or concerns.

LEGAL TESTIMONY
It is not the practice of the UAB Employee Assistance and Counseling Center to provide legal testimony for EACC clients. Our therapists are not trained as forensic experts, so if you know that you will require the testimony of a therapist in a court case please let us know so that we can provide you with a referral to a therapist appropriately trained to represent your best interest in such situations. You will be responsible for a fee of $250 per hour should one of our therapist’s be called upon to provide testimony for you in a court of law. This fee also applies to any travel, preparation, and consultation time required of our therapist as a result of court action. The cost to you for record reproduction is $25 per page.

The EACC does not offer a court approved Anger Management Class. If a client has been court ordered to participate in Anger Management Classes and/or Counseling for domestic violence or any other reason, the EACC may provide counseling only if in addition the client participates in an Anger Management Class elsewhere.

YOUR RESPONSIBILITIES AS THE CLIENT
This service is provided to you as a benefit at no cost to you by UAB, UAB Medicine, VIVA, and Homewood School System. It is your responsibility to attend all appointments as scheduled and on time. If you are unable to attend an appointment, please call as soon as possible to cancel, as there are others who need our services. If you fail to show up for 2 scheduled appointments without calling to notify us, you may be placed on a waiting list for the next available appointment and you will need to speak with your therapist or coach regarding continued service or an appropriate referral.

As a client of the EACC, it is your responsibility to maintain the confidentiality and anonymity of other clients that you encounter while visiting our offices.

If at any point you have questions or concerns regarding your service provider or the counseling/life coaching process, it is your right and responsibility concerns to discuss those concerns with your counselor or coach.

INCLEMENT WEATHER POLICY
During inclement weather, the UAB Employee Assistance and Counseling Center will make every effort to maintain regular business hours (8 a.m. to 6 p.m.). However, when an announcement is made that the UAB campus is closed due to inclement weather, the EACC will also be closed. Such announcements are usually made on the UAB main webpage located at uab.edu, uab.edu/emergency, B-Alert, your local news stations, or WBHM radio (90.3 FM). Also, there may be rare occasions when the EACC office building (a non-UAB property) is closed due to weather or uncontrollable building-related circumstances to protect the safety of the public.
LATE APPOINTMENT POLICY

Tardiness to appointments can have an adverse effect on the therapeutic process if there is not enough time to discuss treatment concerns. If you are a current EACC client and you arrive 15 minutes late or more for your scheduled appointment, you will be asked to reschedule unless your counselor can accommodate you, if their schedule allows. This may mean you will have to wait until your counselor’s next available appointment which may be scheduled at least a week out or more. The EACC late appointment policy applies to life coaching clients as well.

Also, if you are a life coaching client and arrive at your scheduled intake appointment time 15 minutes late or more and have not completed your life coaching intake paperwork, you may be asked to reschedule your appointment. If you have not completed your intake paperwork as instructed, PLEASE arrive at least 30 minutes prior to your scheduled appointment.

DISTANCE LIFE COACHING

The EACC offers life coaching via face-to-face video conferencing to VIVA Health and Homewood City School employees and members of their immediate households. This service is available to clients who are assessed as being appropriate for life coaching after the initial face to face assessment.

Video conferencing coaching sessions are held via Zoom, which is HIPAA compliant and is encrypted to the federal standard. It is recommended that you sign on to your account at least 5 minutes prior to your session start time. You are responsible for initiating the connection with the EACC via the provided link at the time of your session.

Whenever there is communication that lacks visual or audio cues there is a risk of misunderstanding. When this happens, it is important to assume that your coach has positive regard for you, and to check out your assumptions with your coach. This will reduce any unnecessary hardship.

»Limitations of Distance Life Coaching

Distance life coaching should not be viewed as a substitute for face-to-face life coaching. It is an alternative form of life coaching with certain limitations.

By signing this document you agree that you understand that distance life coaching:

• May lack visual and/or audio cues, which may cause misunderstanding.
• May have disruptions in the service and quality of the technology used.

»Distance Life Coaching Backup Plan in Case of Technology Failure

The most reliable backup is a phone. Therefore, it is recommended that you always have a phone available and that your coach knows your phone number.

If you get disconnected from a video coaching session, restart the session. If you are unable to reconnect within ten minutes, please call your coach at (205) 934-2281.
I understand that it is my responsibility to read this information prior to my first counseling or coaching session and to ask an Employee Assistance and Counseling Center counselor to further explain any portions which I do not understand. I also understand that by participating in the UAB Employee Assistance and Counseling Center services, I am agreeing to abide by the guidelines set forth in the UAB Employee Assistance and Counseling Center Statement of Understanding. I hereby acknowledge that I have read and understand this Statement of Understanding. I acknowledge that I have received a copy of this agreement.

I hereby release and hold harmless the University of Alabama at Birmingham, the UAB Employee Assistance and Counseling Center, VIVA, Homewood City Schools, and their employees, agents, and assigns from any and all legal liability that may arise from my participation in the services offered by the UAB Employee Assistance and Counseling Center or by Homewood City Schools as part of its contractual relationship with the UAB Employee Assistance and Counseling Center. I certify that this release has been made freely, voluntarily and without coercion and the information given above is accurate to the best of my knowledge.

Participant Name (Please Print) ___________________________ Date __________

_____________________________ Date ______
Participant Signature

_____________________________ Date ______
Personal Representative Name (Please Print)

_____________________________ Date ______
Personal Representative Signature

If you are signing this form on behalf of someone other than yourself, please enclose with this form proof of your authority to do so and attach written documentation (i.e. Guardianship Order, Custody Order, Court Order) as appropriate.

_____________________________ Date ______
Witness

Thank you for choosing the UAB Employee Assistance & Counseling Center.
We look forward to working with you.

UAB Employee Assistance and Counseling Center
2112 11th Avenue South Suite 330, Birmingham, AL 35205
(205) 934-2281, FAX: (205) 975-7367
uab.edu/eacc

UAB EACC Intake Form — LIFE COACHING
Revised November 2018