



## Office Policies & Agreement for Services

Welcome to K<sup>2</sup> Organizing. Your first session with a new person is very important, and you may have questions. These forms are to introduce myself and give you information to help you decide whether working with me might be helpful. Please take time to read this information carefully and let me know if you have questions or need more information. You will be asked to initial the Intake form verifying that you have read, understand, and agree to the terms of this document.

### **Consultation**

During our initial consultation I will determine if I can help you and you will determine if I am the right person to work with you. I do not accept clients if I don't believe I can help them, and if this is the case I will refer you to others who might be a better match. If you do not think I am the right person to help you, please ask me for other options. If we agree to work together, we will determine the best service or combination of services. You have the right to accept or decline any services offered to you.

### **Qualifications**

I am Karen Kruzan and I own and operate K<sup>2</sup> Organizing. I received my Bachelor of Science degree in 1987 from Providence College and my Master of Social Work degree in 1988 from The Ohio State University. I worked for almost 20 years as a therapist for children, families, and adults. I then worked in the health insurance industry and was the CEO for a small non-profit that helped families access ancillary behavioral health services. In 2007 I started K<sup>2</sup> Organizing and quickly learned the importance of my skills as a social worker and psychotherapist. I offer an integrated approach with a menu of services. Together we will determine the areas in which you are struggling and how I can help. In my psychotherapy practice I rely on a broad range of techniques, including but not limited to cognitive-behavioral (CBT), client-centered, solution-focused, and other integrative interventions. As a clinical social worker, I bring specialized knowledge of human development and behavior and social, economic, and cultural systems to help people restore or improve their functioning. You bring a wealth of strengths and abilities, the capacity to learn from your life experiences, and a vision of how you want your life to be. I am a Supervising Licensed Independent Social Worker (LISW) and a Certified Professional Organizer in Chronic Disorganization (CPO-CD). I fulfill continuing education requirements for my clinical license and meet the service requirements for maintaining my certification.

### **Description of Services**

Professional Organizing – You will be receiving services from a licensed social worker, and as such, certain aspects of organizing may differ from those of professional organizers who are not dually credentialed. Sometimes the goals are simply to create a more organized space or a process to make your life easier or more pleasant. In those situations, our work together may be very similar to those provided by other organizers. Whether you need help de-cluttering your home, managing daily responsibilities, or organizing your office, I will use all the knowledge and skills I have as a social worker and as a professional organizer. While working side-by-side on your organizing goals, I may ask questions to help us better understand your thinking styles, the barriers you have encountered, or other issues that are keeping you from meeting your goals.

Professional organizing does not involve the diagnosis of mental health disorders and is not psychotherapy or a substitute for psychotherapy. Additionally, professional organizing is not to be used as a substitute for expert, professional advice regarding legal, medical, financial, or spiritual matters.

When de-cluttering is involved, nothing will be thrown out or removed from your home without your consent. I will attempt to donate items to the charity of your choice, but I reserve the right to select the charity that receives your

donation. I reserve the right to refuse to take items to sell. I can only take donations and resell items that will fit in my car on the day of your session, and I do not make special trips to pick up items.

I appreciate your kindness in offering me items from your home or business. In order to honorably guide you in making decisions about what to keep and what to discard/donate, I am unable to accept your generous offers.

Consulting/Coaching – Consulting/coaching uses the knowledge and skills I have as a social worker, psychotherapist, professional organizer, and small business owner combined with previous experiences running a non-profit organization, working in quality improvement. I will help you determine your goals, develop strategies, and guide you to reach your desired outcomes. Coaching does not involve the diagnosis of mental health disorders, is not advice, therapy, or counseling, nor is it a substitute for professional psychotherapy. Additionally, coaching is not to be used as a substitute for professional advice regarding legal, medical, financial, or spiritual matters. Consulting/Coaching can be done by phone calls or a HIPAA-secure platform such as Skype for Business.

Psychotherapy – In psychotherapy you can expect to learn about your moods, feelings, thoughts, and behaviors. You will gain a better understanding of why you do what you do and learn how to take control of your life and respond to challenging situations with healthy coping skills. Within a reasonable period of time after starting treatment, we will discuss my proposed treatment plan and possible outcomes of therapy. If you have questions about any of the procedures used during therapy, their possible risks, my expertise in employing them, or about the treatment plan in general, please ask me. You also have the right to ask about other possible treatments for your condition and their risks and benefits. If you could benefit from any treatments that I do not provide, I will try to help you obtain them. After the first session and with periodic in-person sessions, individual psychotherapy can be done by phone calls or a HIPAA-secure platform such as Skype for Business.

I also offer group psychotherapy for those struggling with chronic disorganization or hoarding. Dr. Barbara Jo Dennison, PhD, LISW-S and I designed and co-lead the 10-week psychotherapy group, Fresh Start. We screen all participants to put together what we hope will be a supportive, dynamic, and change-oriented process. Fresh Start group uses cognitive behavioral, mindfulness, and trauma techniques to help people understand the reasons for their clutter or disorganization and how to make changes. Graduates are invited to any or all of the monthly Fresh Start and Beyond follow-up groups.

I often make referrals to therapists, cleaning services, auctioneers, attorneys, and other professionals. Whenever possible I will give you multiple businesses that I know about. K<sup>2</sup> Organizing assumes no liability for products, services, or outcomes of any other service professional. Ultimately, it is your responsibility to check out any business with which you do business.

Self-Help Workbook – I co-authored *Rise Above Your Stuff: A workbook for those struggling to find themselves amidst their stuff* with Dr. Barbara Jo Dennison. The activities in *Rise Above Your Stuff* are based on those used in the Fresh Start psychotherapy group. This workbook is a great option for anyone who wants to or needs to tackle the problem on their own in an affordable way. *Rise Above Your Stuff* can be found at [freshstartgroups.com](http://freshstartgroups.com) and [amazon.com](http://amazon.com).

## **Risks and Benefits**

Behavioral health treatment can help you improve your functioning and decrease the symptoms that led you to seek help. Working with a trained professional can help you better understand why you feel or behave the way you do. You can also learn how to deal with a specific problem or manage intense emotions. Therapy in particular requires your active involvement, honesty, and openness in order to change your thoughts, feelings, and/or behaviors. Your feedback and views on your services and progress are always appreciated.

There are, however, some risks to treatment. These include experiencing uncomfortable feelings resulting from discussing the situations and experiences that led you to treatment. Talking about and facing personal issues can be painful, but you should begin to feel better and have more skills to deal with issues in your life. I may challenge some of your assumptions or perceptions or propose different ways of thinking about or handling situations that may leave you upset, angry, or disappointed. Attempting to resolve issues may result in changes that were not originally intended. Our

work together may lead you to make decisions to change behaviors, employment, substance use, schooling, housing, or relationships. Change can sometimes be quick and easy, but more often it can be gradual and even frustrating. There is no guarantee that psychotherapy or other services will yield positive or intended results.

When you consent to treatment you are entering into a contractual agreement with Karen Kruzan, LISW-S, CPO-CD. This contract will include a treatment plan developed between us. Together we will decide which services you will receive, how often to meet, and how long each session will last. The length of treatment depends upon the presenting issue, diagnosis, and best practices guidelines. You have a right to terminate treatment at any time.

### **Termination and Follow-Up**

Deciding when to stop our work together is meant to be a mutual process. Before we stop, we will discuss how you will know if or when to come back or whether a regularly scheduled "check-in" might work best for you.

Noncompliance with treatment recommendations may necessitate early termination of services. Together we will look at your issues and I will exercise my educated judgment to recommend those services that will be in your best interest. Your responsibility is to make a good faith effort to fulfill the treatment recommendations to which you have agreed. If you have concerns or reservations about my recommendations, I strongly encourage you to express them so that we can resolve any possible differences or misunderstandings.

If I determine during our work together that I am not effective in helping you reach your therapeutic goals, I will discuss this with you and potentially make changes to the treatment plan. In cases where changes to the treatment plan are not possible or determined to be unlikely to be effective, treatment will be terminated. If that occurs I will give you referrals to other providers. If you request it and authorize it in writing, I will talk to the psychotherapist or other provider of your choice in order to help with the transition. If at any time you want another professional's opinion, I will assist you in finding someone qualified.

You have the right to terminate treatment at any time. If you choose to do so, I will offer to provide you with names of other qualified professionals whose services you might prefer.

If you commit violence to, verbally or physically threaten or harass me or my family, I reserve the right to terminate your treatment unilaterally and immediately. Failure or refusal to pay for services after a reasonable time is another condition for termination of services.

### **Emails, Phone Calls, Texts, and Emergencies**

For small administrative matters such as those involving appointment times, you can text me at 614.795.0626 or email me at [kkruzan@k2organizing.com](mailto:kkruzan@k2organizing.com). I generally receive and return these communications within 24 hours.

I will do everything I can to protect the privacy of our communications, however email and texts are not secure forms of communication. These forms of communication are not encrypted and thus not secure. There is a risk of being read by a third party. If you choose to use email or texts with me, we can discuss options to increase the privacy of these communications.

If you are having a medical or mental health emergency call 911 or go to the nearest emergency room. Do not contact me first or leave a message with an emergency situation.

### **Social Media**

I keep various social media pages for my professional practice to allow people to view and share my blog posts, to have access to books and other tools I create and/or use, and to have general information about my business. You can view my social media sites and read or share articles posted there. I do not follow or accept friend or contact requests from current or former clients on any social networking sites (Facebook, LinkedIn, etc.). I believe that adding clients as friends or contacts on these sites can compromise your confidentiality and our respective privacy. I also believe that it is best to be explicit to all who may view my lists of connections that they will not find client names on these lists. Connection on social media sites can also blur the boundaries of our professional relationship. On some social media sites you can

follow another person without asking permission. If you use an easily recognizable screen name and I happen to notice that you have followed me, we may briefly discuss it and its potential impact on our working relationship.

I believe that viewing clients' online content outside of the professional hour can create confusion about the purpose. Viewing your online activities without your consent and without an explicit agreement about a specific purpose can have a negative impact on our working relationship. If there are things from your online life that you want to discuss, please bring them into our sessions where we can view and explore them together.

### **Cancellations and Lateness**

I appreciate being informed of a cancellation as soon as possible so that I can better plan my schedule. I have an extremely flexible cancellation policy, unlike most therapists and organizers who charge for missed appointments. I choose to have a flexible policy because it reflects my beliefs that we are all doing the best we can to manage our lives. Sometimes things come up unexpectedly, and sometimes you may schedule an appointment with the best of intentions only to find that on the day of our appointment your depression is getting the best of you, you are ill, or you have a work project to finish that you thought would already be completed. You will get the most from our work together if you are fully present, and I want you to be successful. The reasons for cancellations and lateness are often some of the same reasons that prompted you to seek my help, so I am not comfortable pressuring you to keep appointments with the threat of a charge. If patterns emerge, we may discuss the issue to determine if there are opportunities for change.

If I am running more than 5 minutes late for your appointment, I will try to contact you to let you know that I will be late. This is not always possible, since I may be driving. If I am late I will add that time onto the end of our session or to a later session if that is better for you.

If you are late for our session we will still end at our regular time so that I have time to prepare for or get to my next appointment.

### **Payment and Financial Arrangements**

No services will be provided without your agreement. You will be charged for any tools or plans developed or tailored for your use or the use of your business, however this will be discussed with you prior to their development. You will not be charged without your prior agreement for time researching products, picking up or ordering products, or removing donations. Payment is due at the time of service delivery. Acceptable payment methods are cash, check, and credit card. You are responsible for payment based upon our agreed upon session time period unless I am late arriving or need to leave early.

Psychotherapy services can be billed to your insurance, provided I receive a copy of your insurance card and a completed *K<sup>2</sup> Organizing, LLC - Billing Form*. All insurance billing, deductibles, and co-pays are handled through Dennison Associates, Inc.

My standard fees are

- Individual or family psychotherapy: \$125.00 for a 45 - 50 minute session. For those without insurance the cost is \$80.00 for a 45 – 50 minute session
- Group psychotherapy: \$40.00 for a 45 - 50 minute group session
- Professional organizing: \$70/hour or \$650.00 for 10 pre-paid hours or \$900.00 for 15 pre-paid hours
- Consulting/Coaching: \$70/hour or \$650.00 for 10 pre-paid hours or \$900.00 for 15 pre-paid hours
- Travel costs less than 30 minutes one way are included in the hourly rate. I am “on-the-clock” when travel time is longer than 30 minutes under normal driving conditions. This applies to travel in both directions.

*This information is required by the Counselor, Social Worker, and Marriage and Family Therapist Board, which regulates the practices of professional counseling, social work, and marriage and family therapy in this state.*

CSWMFT Board 50 W. Broad St., Suite 1075 Columbus, OH 43215 614.466.0192

Some or all your psychotherapy fees may be covered by your health insurance. However, insurance companies do not reimburse all providers, all types of treatment, and all conditions that may be the focus of psychotherapy. It is your responsibility to verify the specifics of your coverage. Please remember that you are ultimately responsible for payment. Fees you pay for therapy services that are not reimbursed by insurance may be deductible as medical expenses if you itemize deductions on your tax return. As described below in the section "Health Insurance and Confidentiality of Record", be aware that submitting a mental health invoice for reimbursement carries a certain amount of risk.

## **Confidentiality**

As my client, you have privileged communication. This means that your relationship with me, all information disclosed in our sessions, and the written records of those sessions are confidential and may not be revealed to anyone without your written permission, except in the following situations:

- When there is a suspicion of child, dependent, or elder abuse or neglect
- When there is a danger of self-harm or harm to others
- To medical personnel in a medical emergency
- As allowed by a court order
- When your insurance company requires information to file a claim, do an insurance audit, conduct a case review, or file an appeal
- With a written agreement with a qualified service organization/business associate
- In some cases of natural disaster

Emergencies: If there is an emergency during our work together or after termination in which I become concerned about your personal safety, the possibility of you injuring someone else, or about you receiving psychiatric care, I will do whatever I can within the limits of the law to prevent you from injuring yourself or another, and to ensure that you receive appropriate medical care. For this purpose I may contact the person whose name you have provided on your Intake form.

Health Insurance and Confidentiality of Records: Your health insurance carrier may require disclosure of confidential information in order to process claims. Only the minimum necessary information will be communicated to your insurance carrier, including diagnosis, the date and length of our appointments, and what services were provided. Often the billing statement and your company's claim form are sufficient. Sometimes treatment summaries or progress toward goals are also required. Unless explicitly authorized by you, session notes will not be disclosed to your insurance carrier. While insurance companies claim to keep this information confidential, I have no control over the information once it leaves my office. Please be aware that submitting a mental health invoice for reimbursement carries some risk to confidentiality, privacy, or future eligibility to obtain health or life insurance.

Records: Insurance information, assessments, treatment plans, session notes, signed consents to release information, and all other clinical information are kept locked in a secure location for seven years after the conclusion of treatment. After that, records are destroyed in compliance with HIPAA regulations.

Confidentiality of E-mail, Text, and Voicemail Communication: E-mail, text, and voice mail communication can be easily accessed by unauthorized people, compromising the privacy and confidentiality of such communication. Please notify me at the beginning of treatment if you want to avoid or limit in any way the use of any or all of these communication methods. Please do not contact me via email for emergencies.

Consultation: In order to provide you with the best possible service, I often consult with other professionals regarding my clients. Names and other identifying information are never mentioned and your confidentiality will be fully maintained. If I believe it is important to have an in-depth consultation with another professional and I believe your identifying information may be shared, I will ask you to sign a release of information to allow me to share this information. Without such a release, I will not provide information during a consultation that might lead another person to identify you.

Release of Information: Considering all of the above exclusions, upon your request and with your written consent, I will release limited information to any person/agency you specify unless I conclude that releasing that information might be harmful to you. If I reach that conclusion, I will explain the reason for denying your request.

### **Complaints**

If you have a concern or complaint about your treatment, please talk to me about it. I will take this seriously and respond with care and respect. If you believe that I've been unwilling to listen and respond, or that I have behaved unethically, you can contact the Counselor, Social Worker, and Marriage and Family Therapy Board at:

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