



# New patient health history questionnaire

All questions contained in this questionnaire will become part of your medical record.

<b>Name:</b>		<b>Birth date:</b> / /
<b>Marital status:</b> <input type="checkbox"/> Single <input type="checkbox"/> Partnered <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		
<b>Previous or referring doctor:</b>		<b>Date of last physical exam:</b> / /
<b>Personal health history</b>		
<b>Infectious illness:</b> <input type="checkbox"/> Measles <input type="checkbox"/> Mumps <input type="checkbox"/> Rubella <input type="checkbox"/> Chickenpox <input type="checkbox"/> Polio <input type="checkbox"/> Valley fever <input type="checkbox"/> Mono. <input type="checkbox"/> TB <input type="checkbox"/> HIV <input type="checkbox"/> Other: _____		
<b>Immunizations and dates:</b> <input type="checkbox"/> Hepatitis <input type="checkbox"/> Shingles <input type="checkbox"/> Pneumonia <input type="checkbox"/> MMR (measles, mumps, rubella) <input type="checkbox"/> Tetanus <input type="checkbox"/> Pertussis <input type="checkbox"/> Influenza <input type="checkbox"/> Other: _____		
<b>Please check any medical problems you have had in the past:</b>		
<input type="checkbox"/> Anemia <input type="checkbox"/> Anxiety <input type="checkbox"/> Arthritis <input type="checkbox"/> Asthma <input type="checkbox"/> Atrial fibrillation <input type="checkbox"/> Autoimmune disease <input type="checkbox"/> Blood transfusion <input type="checkbox"/> Cancer, type: _____ <input type="checkbox"/> Cataracts <input type="checkbox"/> Chronic lung disease or COPD <input type="checkbox"/> Chronic pain <input type="checkbox"/> Colon polyps <input type="checkbox"/> Congestive heart failure <input type="checkbox"/> Deep vein thrombosis/blood clots <input type="checkbox"/> Dementia	<input type="checkbox"/> Depression <input type="checkbox"/> Diabetes mellitus <input type="checkbox"/> Skin disorder, type: _____ <input type="checkbox"/> Fibromyalgia <input type="checkbox"/> GERD (heartburn) <input type="checkbox"/> GI bleed <input type="checkbox"/> Glaucoma <input type="checkbox"/> Heart attack <input type="checkbox"/> Heart disease or pacemaker <input type="checkbox"/> High cholesterol <input type="checkbox"/> High blood pressure <input type="checkbox"/> Inflammatory bowel disease <input type="checkbox"/> Irritable bowel syndrome <input type="checkbox"/> Insomnia <input type="checkbox"/> Kidney disease	<input type="checkbox"/> Kidney stones <input type="checkbox"/> Liver disease <input type="checkbox"/> Migraine headaches <input type="checkbox"/> Neuropathy <input type="checkbox"/> Osteoporosis/osteopenia <input type="checkbox"/> Parkinson's disease <input type="checkbox"/> Pulmonary embolism <input type="checkbox"/> Rheumatic fever <input type="checkbox"/> Seasonal allergies <input type="checkbox"/> Shingles <input type="checkbox"/> Sleep apnea <input type="checkbox"/> Stroke or TIA <input type="checkbox"/> Thyroid disease <input type="checkbox"/> Ulcers, type: _____ <input type="checkbox"/> Other (specify): _____
<b>Please check any surgeries you have had:</b>		
<input type="checkbox"/> Appendectomy <input type="checkbox"/> Bariatric surgery <input type="checkbox"/> Breast surgery <input type="checkbox"/> Colonoscopy <input type="checkbox"/> Cosmetic surgery <input type="checkbox"/> C-section	<input type="checkbox"/> Eye surgery, type: _____ <input type="checkbox"/> Gallbladder removal <input type="checkbox"/> Heart surgery, type: _____ <input type="checkbox"/> Hernia repair, type: _____ <input type="checkbox"/> Hysterectomy <input type="checkbox"/> Orthopedic surgery, type: _____	<input type="checkbox"/> Pacemaker <input type="checkbox"/> Spine surgery, type: _____ <input type="checkbox"/> Tubal ligation <input type="checkbox"/> Vasectomy <input type="checkbox"/> Other (specify): _____

Family health history							
		Age		Significant health problems			
		Age		Significant health problems			
Father						<input type="checkbox"/> M	
Mother						<input type="checkbox"/> F	
		<input type="checkbox"/> M				<input type="checkbox"/> M	
		<input type="checkbox"/> F				<input type="checkbox"/> F	
		<input type="checkbox"/> M				<input type="checkbox"/> M	
		<input type="checkbox"/> F				<input type="checkbox"/> F	
Siblings		<input type="checkbox"/> M				Grandmother (maternal)	
		<input type="checkbox"/> F				Grandfather (maternal)	
		<input type="checkbox"/> M				Grandmother (paternal)	
		<input type="checkbox"/> F				Grandfather (paternal)	

**List your prescribed drugs and over-the-counter drugs, such as vitamins and inhalers:**

Name of drug:	Dose/type:	Frequency/method taken:
<b>Aspirin</b>		<b>Daily?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Opioids</b>		<b>Chronic?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Medical marijuana</b>		
<b>Contraception</b>		

**Allergies to medications:**

Name of drug:	Reaction you had:

Health habits and personal safety	
Caffeine	<input type="checkbox"/> None <input type="checkbox"/> Coffee <input type="checkbox"/> Tea <input type="checkbox"/> Other      How much?
Alcohol	<b>Do you drink alcohol?</b> <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>
	<b>How many drinks per week?</b>
	<b>Have you ever felt you needed to cut down on your drinking?</b> <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>
	<b>Have people annoyed you by criticizing your drinking?</b> <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>
	<b>Have you ever felt guilty about drinking?</b> <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>
	<b>Have you ever felt you needed a drink first thing in the morning to steady your nerves?</b> <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>
Tobacco	<b>Do you use tobacco or nicotine products?</b> # of years <input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Cigarettes      # per day <input type="checkbox"/> Chew      # per day
	<input type="checkbox"/> Pipe      # per day <input type="checkbox"/> Cigars      # per day
Gynecological history	<b>Number of pregnancies:</b> <b>Number of live births:</b>
	<b>Menopause:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No

\_\_\_\_\_

Printed name

Signature (patient or guardian)

Date

# Financial policy

Thank you for choosing Optum as your health care provider. We are committed to providing quality medical care. In an effort to avoid confusion and misunderstanding, we have adopted the following financial policy and require you to read and sign it prior to the commencement of any treatment.

## **Insurance – all patients**

Your insurance policy is a contract between you and your insurance plan. We cannot bill your insurance company unless you give us current and valid insurance information. As a courtesy to you, we will file claims for those plans with which we have an agreement. Please be advised that you are ultimately financially responsible for payment of medical services rendered by this clinic. All health plans are not the same, and they do not always cover the same services. In the event your health plan determines a service to be "not covered," you will be responsible for the complete charge. Optum does not bill any third-party insurers. If you received services that are payable by a third-party insurer, you will be charged the appropriate amount from our standard fee schedule, and are responsible for payment at the time of service.

## **Non-insured patients**

If you have insurance coverage with a plan with which we do not participate or you have no health insurance plan, our charges for your care and treatment are due at the time of service. We will, as a convenience to you, provide a prepared claim form to allow the patient to submit for reimbursement if desired. We offer a competitive cash fee schedule for our patients with no insurance.

## **Deductibles/copays**

Our insurance contracts require us to collect deductibles and copays at the time of service.

## **Appointments**

We strive to provide the best possible service and availability to all of our patients. Our policy is to charge for missed appointments unless canceled at least 24 hours in advance. Our no-show/late cancellation charge is \$25. Please help us serve you better by keeping your scheduled appointments or by calling as early as possible to cancel.

## **Paperwork services**

Any paperwork filled out by our providers such as short-term disability, or FMLA are subject to a \$25 charge.

## **Medical record copies**

Copies of medical records for personal use or for parties other than your insurance company or other physicians involved with your care are subject to a \$25 charge.

## **Returned checks**

All checks returned from the bank for non-payment are subject to a \$25 charge.

## **Collection agency**

Any account turned over to a collection agency is subject to a fee amounting to 30% of the total amount turned over.

**This financial policy supersedes all prior written financial policies, contracts, or verbal agreements.**

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**Patient name**

**Date**

**Assignment of benefits:**

I request that payment of authorized insurance or medicare benefits be made to Optum for any services furnished me by the physician. I authorize any holder of medical information about me to release to the insurance company or to CMS (Centers for Medicare and Medicaid Services, formerly know as HCFA) and its agents any information needed to determine these benefits payable to related services.

I understand my signature requests that payment be made and authorizes release of medical information necessary to pay the claim. In Medicare assigned cases, the physician or supplier agrees to accept the charge determination of the Medicare carrier as the full charge, and the patient is responsible only for the deductible, coinsurance and non-covered services. Coinsurance and the deductible are based upon the charge determination of the Medicare carrier.

This assignment will remain in effect until revoked by me in writing. A photocopy of this assignment is to be considered as valid as an original. **I understand that I am financially responsible for all charges, whether or not paid by said insurance.**

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**Patient name**

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**Date**

# Acknowledgment of privacy practices and permission to leave messages

**Patient name:** \_\_\_\_\_ **Date of birth:** \_\_\_\_/\_\_\_\_/\_\_\_\_\_

I acknowledge that I have received and/or reviewed a copy of Optum notice of privacy practices.

I give permission to communicate messages in the following manner:

- You may leave a message on my answering machine located at this number: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_
- You may leave a message on my cell phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_
- You may leave a message with my spouse, \_\_\_\_\_, at this number: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_
- You may leave a message with another person, \_\_\_\_\_, at this number: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

I give permission to communicate messages about the following:

- Labs, X-rays and other test results
- Prescriptions
- Billing or insurance matters

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**Patient name**

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**Date**

# Authorization for the release of patient information

Provider or facility records are being requested from:

Provider/facility: \_\_\_\_\_

Address: \_\_\_\_\_

City, state, ZIP code: \_\_\_\_\_

Phone #: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ Fax #: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

RE: Patient name: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_

**I authorize and request the disclosure of all protected information for the purpose of review and evaluation. I expressly request that the designated record custodian of all covered entities under HIPAA identified above disclose full and complete protected medical information including the following:**

- |   |  |
|---|--|
| <input type="checkbox"/> Complete medical record, meaning every page in my record                     | <input type="checkbox"/> X-rays and other imaging reports  |
| <input type="checkbox"/> Office notes, consult notes, operative reports and hospital records          | <input type="checkbox"/> Pharmacy and prescription records |
| <input type="checkbox"/> Labs including, but not limited to, blood chemistry, pathology and histology | <input type="checkbox"/> Billing records                   |

I understand the information to be released or disclosed may include information relating to sexually transmitted diseases, acquired immunodeficiency syndrome (AIDS), or human immunodeficiency virus (HIV), and alcohol and drug abuse. I authorize the release or disclosure of this type of information.

This protected health information is disclosed for the purpose of: \_\_\_\_\_

**You are authorized to release the above records to:**

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

Address: \_\_\_\_\_

City, state, ZIP code: \_\_\_\_\_

Phone #: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ Fax #: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

I understand the following:

**That I have a right to revoke this authorization in writing at any time, except to the extent information has been released in reliance upon this authorization; that the information released in response to this authorization may be re-disclosed to other parties; and that my treatment or payment for my treatment cannot be conditioned on the signing of this authorization.**

Any facsimile, copy, or photocopy of the authorization shall authorize you to release the records requested herein. This authorization shall be in force and effect until two years from date of execution at which time this authorization expires.

\_\_\_\_\_  
**Patient signature or legal representative** \_\_\_\_\_  
**Date**

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