



Dear Patient,

Your appointment is scheduled for \_\_\_\_\_ at \_\_\_\_\_ AM/PM  
with Dr. \_\_\_\_\_.

To effectively provide the best care to our patients as a Patient-Centered Medical Home, we ask that our patients/families provide complete and accurate patient information at every visit, including current medications, visits to specialists, medical history, health status, recent test results, self-care information and data from recent hospitalizations, specialty care or ER visits.

To make the best use of your visit time, I ask that you please:

- ☐ Complete the attached new patient packet and bring it with you at the time of your appointment.
- ☐ Complete the attached Authorization to Use or Disclose Protected Health Information form only if records need to be requested from another physician's office.
- ☐ Place all of your medication vials in a bag and bring them with you or bring a list which details the dosage and timing of each medication.
- ☐ Bring your current insurance card and photo ID.
- ☐ Notify the office staff in advance of your appointment if we can accommodate any special needs.
- ☐ Notify us in advance if you will be late or need to reschedule for any reason.

I look forward to seeing you soon.

Sincerely,

## TOTAL FAMILY WELLNESS

## PATIENT REGISTRATION (please print clearly)

\*\*\*\* All Fields Must Be Completed \*\*\*\*

Date: \_\_\_\_\_ Social Security #: \_\_\_\_\_

First Name: \_\_\_\_\_ MI \_\_\_\_\_ Last: \_\_\_\_\_ Suffix: \_\_\_\_\_

Sex: M / F Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

(Please circle one)

**Marital Status:** Single Married Divorced Widowed Legally Separated

**Nationality:** African Amer. Amer. Indian Asian Caucasian Hispanic Other

**Ethnicity:** Latino/Hispanic Other Refused

**Primary Language:** \_\_\_\_\_

**Patient's Permanent Address****Employment status: (Please Circle One)**

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

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Please Circle Preferred Number for Primary Communication

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Write in **NONE** if no e-mail address is available

EMPLOYED SELF EMPLOYED RETIRED DISABLED UNEMPLOYED STUDENT

Employer Name \_\_\_\_\_

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Who is your Primary Care Doctor: \_\_\_\_\_

Who can we thank for referring you today? (Please circle one) Referral Svc Walk-In Provider Directory Friend Website

Referring Physician: \_\_\_\_\_ Self Referred Billboard Other \_\_\_\_\_

Financial Responsible Party or Guarantor Name: \_\_\_\_\_

DOB: \_\_\_\_\_

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

Address: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Primary Carrier:** \_\_\_\_\_

Subscriber: \_\_\_\_\_

Subscriber DOB: \_\_\_\_\_

Subscriber ID #: \_\_\_\_\_

**Secondary Carrier:** \_\_\_\_\_

Subscriber: \_\_\_\_\_

Subscriber DOB: \_\_\_\_\_

Subscriber ID #: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship to pt: \_\_\_\_\_

Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ SSN: \_\_\_\_\_

Who is the legal guardian for the patient? Please circle one: **Self** or **Other**

\* If other is selected please print name and phone number

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

Smoker? Please circle one: **Current Smoker** **Former Smoker** **Never Smoked**

Do you have a visual impairment that would hinder you from reading written materials from your physician?

Please circle one: **Yes** or **No**

Do you have a hearing impairment that would impede verbal communication with your provider?

Please circle one: **Yes** or **No**



TOTAL  
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\_\_\_\_\_  
Patient Name (printed)

\_\_\_\_\_  
Date of Birth

**ALTERNATIVE COMMUNICATION RELEASE FORM**

I authorize Total Family Wellness, in regards to my protected health information:

- ☐ To call me at work  
☐ To call me at home  
☐ To call my cell phone  
☐ To speak with anyone listed on the Right To Share Information list  
☐ To only speak with me  
☐ To fax information to me at this secured number \_\_\_\_\_  
☐ Other \_\_\_\_\_  
(Alternative address) \_\_\_\_\_

**RIGHT TO SHARE INFORMATION WITH FAMILY AND FRIENDS**

Total Family Wellness reserves the right to communicate PHI with family or friends when it is deemed in the best interest of the patient as described in the Notice of Privacy.

In order to have your PHI shared in other circumstances with members of your family or friends please list those individuals that we are authorized to release information.


\_\_\_\_\_  
Signature of Patient

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date



*Financial Notice*

Patient \_\_\_\_\_ DOB \_\_\_\_\_

Thank you for choosing Total Family Wellness as your healthcare provider. In an effort to avoid any misunderstanding, we have provided information concerning our financial policy. By signing this agreement, you confirm that you have read, understand and agree to comply with this policy.

**INSURANCE**

Your health insurance does not guarantee payment for medical care. Typically, payment by your health insurance is dependent on if Total Family Wellness is a contracted provider with your health insurance. Some insurance plans may pay Total Family Wellness as a non-contracted provider under out-of-network benefits, but often result in higher out-of-pocket expenses for the patient. You will be responsible for these expenses. We recommend that new patients or patients with a recent change to their health insurance contact their health insurance company to confirm that the provider you are scheduled to see participates with your health insurance. You are responsible for any balance not covered by your health insurance. Total Family Wellness reserves the right not to accept corrected information after timely filing guidelines have expired.

The medical care provided to you is based on prevailing standards of care and your best interest. The providers' determinations of care are independent of health insurance coverage. Knowing the benefits and coverage of your health insurance policy is your responsibility. Each health insurance company has their own payment determination guidelines. We will attempt to address general questions or concerns you may have regarding your health insurance; however your insurance contract is between you, your employer and the insurance company. In most cases we are not in a position to know your coverage limitations or exclusions to your policy. You should contact your health insurance company should you have questions concerning coverage or payment of your claims.

**REFERRALS AND AUTHORIZATIONS**

New patients whose health insurance requires a referral or prior-authorization from your physician prior to seeing a Total Family Wellness provider are responsible to obtain such referral or prior-authorization. Failure to do so may result in denied or reduced payment for services from your health insurance, which may render you responsible for additional balances. Total Family Wellness may cancel or reschedule an appointment until you have obtained the required referral or prior-authorization.

Total Family Wellness will obtain referrals or prior-authorizations for established patients; however it is ultimately your responsibility to confirm the required referral or prior authorization has been obtained. You must notify Total Family Wellness of any insurance changes at the time of check-in. Failure to do so may result in non-payment by the insurance, which may render you responsible for the entire cost of any services.

**COPAYS/DEDUCTIBLES AND PAST DUE BALANCES**

Cash, personal checks and all major credit cards are acceptable forms of payment. Post-dated checks will not be accepted. Please refer to your patient statement for additional payment options.

Copays, deductibles, co-insurance and any past-due balances are due at the time of services unless prior arrangement has been made with our central billing office. Your appointment may be rescheduled if your amount due is not paid at check-in.

Should financial situations arise that may prevent timely payment of your balance, you are encouraged to contact our central billing office for assistance in the management of your account balance. There are instances in which we may develop a mutually acceptable payment plan until the balance is paid in full.

For delinquent balances, Total Family Wellness reserves the right to:

- Report non-payment of copays, coinsurance and deductibles to your health insurance.
- Refer past-due balances to an outside collection agency for collection and/or to report the past-due balance to a credit reporting agency.

- Dismiss you from Total Family Wellness for non-payment.
- Patients are responsible for the original past-due balance in addition to all costs of collection, including but not limited to collection agent fees and attorney fees.

#### **Returned Checks**

A returned check will result in a service fee of \$25 and may require all future payments to be made by cash or credit card.

#### **Refunds and Credits**

Refunds will be issued within 2-3 weeks of the request and only after any outstanding balances have been resolved. This includes any outstanding claims and any balance on other accounts for which you may be financially responsible (such as a child).

#### **Divorce and Child Custody Cases**

Regarding divorce, the person who receives care at Total Family Wellness is responsible for payment of copays, co-insurance, or deductibles at the time of service.

Regarding child custody, the parent who presents their child for care at Total Family Wellness is responsible for payment of copays, co-insurance, or deductible at the time of services.

#### **CANCELLED APPOINTMENTS**

Notice of 24 hours should be given if you need to cancel or reschedule an appointment. A no-show fee may be charged in the event that you do not notify the office within 24 hours.

#### ***Patient Consent***

I request that payment of Medicare and/or insurance benefits be made on my behalf to Total Family Wellness for any services provided. I authorize release of any medical information necessary to determine these benefits.

I acknowledge that I will be fully responsible for any services deemed "non-covered" by my health insurance company or Medicare.

#### **AGREEMENT OF FINANCIAL RESPONSIBILITY**

I agree to be financially responsible for services provided as applicable.

Total Family Wellness agrees to file my claim to my insurance as provided. I understand that payment of services will not be delayed or withheld because of insurance discrepancies within my ability to correct (e.g. coordination of benefits, terminated coverage, etc.) I understand that services denied due to unfulfilled insurance requests will become my responsibility. Total Family Wellness agrees to file my secondary insurance plan if applicable on a courtesy basis. I understand that balances remaining unsatisfied due to nonpayment from my secondary insurance plan may become my responsibility after 60 days. In the event that legal action should become necessary to collect an unpaid balance due, I agree to pay reasonable attorney's fees or other such costs as the court determines proper.

**Patient/Guardian** \_\_\_\_\_

**Date** \_\_\_\_\_

**Staff Member/Witness** \_\_\_\_\_

**Date** \_\_\_\_\_



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### Privacy Notices

Patient \_\_\_\_\_ DOB \_\_\_\_\_

**NOTICE OF PRIVACY PRACTICES:** I acknowledge I have received the notice of privacy practices.

Patient/Guardian \_\_\_\_\_ Date \_\_\_\_\_

Staff Member/Witness \_\_\_\_\_ Date \_\_\_\_\_

Reason for not obtaining Signature \_\_\_\_\_  
*This acknowledgement must be retained in patient's chart for 7 years from date of signature.*

### Medical Record Requests

At your request and with a completed authorization on file, medical records may be provided to another physician as a professional courtesy.

Our facility may choose to engage a vendor to fulfill any other medical record request. This partnership allows our clinical staff to continue to solely focus on your healthcare needs. By utilizing our selected vendor we can ensure that your protected health information (PHI) is safely and expediently transferred from our organization to the authorized requester(s). Our vendor offers HIPAA compliance, advanced technology, and heightened security measures. Their employees receive extensive HIPAA training and sign confidentiality and code of conduct agreements to remain aligned with our BayCare values. Due to the strict procedural regulations and associated costs involved in the release of PHI (Protected Health Information) you may be billed applicable copy fees (Florida rule; 64B8-10.003) should you wish to have a copy of your records for personal use. You may receive a separate invoice from them for these services.

To request records, please submit a completed authorization to your provider's office or your completed form may be faxed to Medical Records (727) 754-5910.



TOTAL  
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## Patient No-Show Policy and Procedure

Total Family Wellness provides standards for scheduling patient appointments that help enhance patient care. Please understand that our appointment times are scheduled to allow us to take care of each patient's individual needs during the patient's visit. To promote efficient access to our office, we require that any appointment that is no longer needed or unable to be kept must be cancelled more than 24 hours in advance.

In the event an appointment is missed or cancelled with less than 24 hours' notice or no notice, Total Family Wellness follows the process below:

- ◆ **1<sup>st</sup> missed appointment:** We will call you and reschedule the appointment.
- ◆ **2<sup>nd</sup> missed appointment:** We will call and offer to reschedule. You will receive a letter explaining our policy, and you may be charged a missed appointment fee of up to \$35.
- ◆ **3<sup>rd</sup> missed appointment:** This could result in discharge from our practice. You may be asked to find another physician outside of the Total Family Wellness group of physicians.

Our main concern is to manage your health care with the highest quality skill and efficiency we can offer. If you have questions, our staff will be happy to answer them.

I \_\_\_\_\_, have read and understand the above policy regarding missed appointments.  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



TOTAL  
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1831 N. Belcher RD • Suite C3 • Clearwater, FL 33765 • Phone: 727-754-4959 • Fax: 727-754-5910

## Authorization to Release Protected Information

Patient Name:	Date of Birth:
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**Instructions:** Following section to be completed by office. Last section is to be completed by Patient or Guardian.

Release Information From	Release Information To
<input type="checkbox"/> Total Family Wellness 1831 N. Belcher RD Suite C3 Clearwater, FL 33765	<input type="checkbox"/> Total Family Wellness 1831 N. Belcher RD Suite C3 Clearwater, FL 33765
<input type="checkbox"/> Other (Specify facility/individual & address below, including phone/fax if known).	<input type="checkbox"/> Other (Specify facility/individual & address below, including phone/fax if known).
_____	_____
_____	_____
_____	_____

### Purpose of Release

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Treatment/Continued care  | <input type="checkbox"/> Personal                 | <input type="checkbox"/> Legal purposes             |
| <input type="checkbox"/> Application for insurance | <input type="checkbox"/> Disability determination | <input type="checkbox"/> Payment of insurance claim |
| <input type="checkbox"/> Other                     |   |   |

### Information To Be Released

(Required - check all that apply)

- |  |   |   |  |
|--|---|---|--|
| <input type="checkbox"/> Clinic notes  | <input type="checkbox"/> Hospital discharge summary | <input type="checkbox"/> Laboratory reports | <input type="checkbox"/> Radiology reports   |
| <input type="checkbox"/> History and physical  | <input type="checkbox"/> EKG's                      | <input type="checkbox"/> Operative reports  | <input type="checkbox"/> Radiology images    |
| <input type="checkbox"/> Hospital notes  | <input type="checkbox"/> Immunization records       | <input type="checkbox"/> Pathology reports  | <input type="checkbox"/> Billing information |
| <input type="checkbox"/> Other (specify information to be released in the space below) |   |   |  |

Service dates (optional)

From To

Information needed by (optional)

I understand the information to be released may include records related to behavior and/or mental health care, alcohol and drug abuse treatment, HIV/AIDS, and genetics. This authorization may be revoked at any time except to the extent that action has been taken in reliance upon it. Revocation must be made in writing to the provider/facility releasing the information. The provider/facility will not condition treatment on whether I sign the authorization. **I may be charged for copies in accordance with state law.** Information used or disclosed pursuant to this authorization may be subject to redisclosure by the recipient and may no longer be protected by federal law.

**ATTENTION:** This is a legal document. Please read carefully. By signing, you agree that you understand and accept the terms on this form.

• **If the patient is 18 years of age or older**, the patient must sign and date the form.

• **If the patient is 18 years of age or older and is incapable of signing**, a legally authorized substitute may sign and date the form.

Please indicate your legal authority and include documentation of your relationship:

- ☐ Legal Guardian or Conservator      ☐ Health Care Agent (Health Care Power of Attorney)

• **If the patient is 17 years of age or younger**, the patient's parent or legal guardian must sign and date the form, unless an exception exists under state or federal law. Please indicate your relationship:

- ☐ Parent      ☐ Legal Guardian

Signature (Required)

Date Signed (Required) (Month DD, YYYY)

Printed Name of Person Signing (If Not Patient)

Mailing Address of Patient - Street

City

State

ZIP Code

Phone

Date \_\_\_\_\_

**Total Family Wellness**

**New Patient History**

(Please Print Clearly)

Patient Name: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Sex: Male \_\_\_\_ Female \_\_\_\_

Reason for Visit: (Please list your major medical concerns)

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**Allergies**

**Reaction**


**MEDICATIONS** Please list all medications you are taking including prescription, over the counter, vitamins and herbal

(Please list each Medication and dosage)

Medication Name

Dosage

How Many Times a Day?

Refill Needed?  
Yes / No


Preferred Pharmacy \_\_\_\_\_  
Name Location/Address

Patient Initials \_\_\_\_\_

Name \_\_\_\_\_

DOB \_\_\_\_\_ Date \_\_\_\_\_

### PAST MEDICAL HISTORY

Medical History – Please check any of the following that you have been diagnosed with.

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Anorexia/Bulimia          | <input type="checkbox"/> Frequent Urinary Infections    | <input type="checkbox"/> Irritable Bowel Syndrome                     |
| <input type="checkbox"/> Anemia                    | <input type="checkbox"/> Gallstones                     | <input type="checkbox"/> Kidney Disease                               |
| <input type="checkbox"/> Anxiety/Depression        | <input type="checkbox"/> GERD                           | <input type="checkbox"/> Kidney Stones                                |
| <input type="checkbox"/> Arthritis                 | <input type="checkbox"/> Glaucoma                       | <input type="checkbox"/> Meningitis                                   |
| <input type="checkbox"/> Asthma                    | <input type="checkbox"/> Gout                           | <input type="checkbox"/> Obesity                                      |
| <input type="checkbox"/> Bleeding Disorder         | <input type="checkbox"/> Headaches                      | <input type="checkbox"/> Osteopenia                                   |
| <input type="checkbox"/> Blocked Arteries          | <input type="checkbox"/> Heart Attack                   | <input type="checkbox"/> Osteoporosis                                 |
| <input type="checkbox"/> Blood Clots               | <input type="checkbox"/> Heart Failure                  | <input type="checkbox"/> Peripheral Vascular Disease/Poor Circulation |
| <input type="checkbox"/> Bronchitis                | <input type="checkbox"/> Heart Murmur                   | <input type="checkbox"/> Pneumonia                                    |
| <input type="checkbox"/> Cancer Type: _____        | <input type="checkbox"/> Hemorrhoids                    | <input type="checkbox"/> Prostate Problems                            |
| <input type="checkbox"/> Cataracts                 | <input type="checkbox"/> Hepatitis                      | <input type="checkbox"/> Rheumatic Fever                              |
| <input type="checkbox"/> Chronic Constipation      | <input type="checkbox"/> Herniated Disc                 | <input type="checkbox"/> Seasonal Allergies                           |
| <input type="checkbox"/> Colon Polyps              | <input type="checkbox"/> High Blood Pressure            | <input type="checkbox"/> Seizures                                     |
| <input type="checkbox"/> COPD                      | <input type="checkbox"/> High Cholesterol/Triglycerides | <input type="checkbox"/> Sleep Apnea                                  |
| <input type="checkbox"/> Macular Degeneration      | <input type="checkbox"/> Hyperthyroidism                | <input type="checkbox"/> Stroke                                       |
| <input type="checkbox"/> Degenerative Disc Disease | <input type="checkbox"/> Hypothyroidism                 | <input type="checkbox"/> Tuberculosis                                 |
| <input type="checkbox"/> Diabetes/Pre-Diabetes     | <input type="checkbox"/> Inflammatory Bowel Disease     | <input type="checkbox"/> Varicose Veins                               |
| <input type="checkbox"/> Diverticulitis            | <input type="checkbox"/> Insomnia                       | <input type="checkbox"/> Ulcers                                       |
| <input type="checkbox"/> Emphysema                 | <input type="checkbox"/> History of Blood Transfusion   | <input type="checkbox"/> Alcohol Abuse      Quit Date: _____          |
|  |   | <input type="checkbox"/> Substance Abuse      Quit Date: _____        |

Any Others: \_\_\_\_\_

Surgical / Procedure History – Please check any of the following you have had, and list the month/year performed.

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Appendectomy _____    | <input type="checkbox"/> C-Section _____        | <input type="checkbox"/> Joint Surgery _____       |
| <input type="checkbox"/> Bunionectomy _____    | <input type="checkbox"/> Cataract Removal _____ | <input type="checkbox"/> Cardiac Bypass _____      |
| <input type="checkbox"/> Carotid Surgery _____ | <input type="checkbox"/> Hemorrhoidectomy _____ | <input type="checkbox"/> Gallbladder Removal _____ |
| <input type="checkbox"/> D&C _____             | <input type="checkbox"/> Hip Surgery _____      | <input type="checkbox"/> Hernia Repair _____       |
| <input type="checkbox"/> Lumpectomy _____      | <input type="checkbox"/> Kidney Stones _____    | <input type="checkbox"/> Cardiac Stents _____      |
| <input type="checkbox"/> Lasik Surgery _____   | <input type="checkbox"/> Hip Replacement _____  | <input type="checkbox"/> Thyroidectomy _____       |
| <input type="checkbox"/> Tonsillectomy _____   | <input type="checkbox"/> Prostate Removed _____ | <input type="checkbox"/> Knee Replacement _____    |
| <input type="checkbox"/> Tubal Ligation _____  | <input type="checkbox"/> Ovaries Removed _____  | <input type="checkbox"/> Vasectomy _____           |
| <input type="checkbox"/> Uterus Removal _____  |   | <input type="checkbox"/> Back Surgery _____        |

Any Others: \_\_\_\_\_

Hospitalizations – Please list any other hospitalizations you may have had.

- |                  |                  |
|------------------|------------------|
| 1. Reason: _____ | 2. Reason: _____ |
| Date: _____      | Date: _____      |
| Hospital: _____  | Hospital: _____  |
| 3. Reason: _____ | 4. Reason: _____ |
| Date: _____      | Date: _____      |
| Hospital: _____  | Hospital: _____  |

### Women's Health

Number of Vaginal Deliveries: \_\_\_\_\_  
Number of Miscarriages: \_\_\_\_\_  
Number of Abortions: \_\_\_\_\_  
Age of First Period: \_\_\_\_\_

Number of Pregnancies: \_\_\_\_\_  
Number of C-Sections: \_\_\_\_\_  
Abnormal PAP's? \_\_\_\_\_

Patient Initials \_\_\_\_\_

Name \_\_\_\_\_

DOB \_\_\_\_\_ Date \_\_\_\_\_

### **PHYSICIANS YOU HAVE RECENTLY SEEN**

Prior Primary Care Physician: Name: \_\_\_\_\_ Location: \_\_\_\_\_

Specialists: Please list most recent physician and specialists you see or have seen;

Name: \_\_\_\_\_  
Type of Doctor: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Reason for Visit: \_\_\_\_\_ Mo/Yr \_\_\_\_\_

Name: \_\_\_\_\_  
Type of Doctor: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Reason for Visit: \_\_\_\_\_ Mo/Yr \_\_\_\_\_

Name: \_\_\_\_\_  
Type of Doctor: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Reason for Visit: \_\_\_\_\_ Mo/Yr \_\_\_\_\_

Name: \_\_\_\_\_  
Type of Doctor: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Reason for Visit: \_\_\_\_\_ Mo/Yr \_\_\_\_\_

### **HEALTH MAINTENANCE**

If you have had any of the following performed, please check the box and list the month/year

☐ Last Physical Exam \_\_\_\_\_  
☐ Last EKG \_\_\_\_\_  
☐ Last Eye Exam \_\_\_\_\_  
☐ Labs including a Cholesterol Screen \_\_\_\_\_

☐ Mammogram (Females Only) \_\_\_\_\_  
☐ Clinical Breast Exam (Females Only) \_\_\_\_\_  
☐ Pap Smear (Females Only) \_\_\_\_\_  
☐ Bone Density \_\_\_\_\_

☐ Colonoscopy \_\_\_\_\_  
☐ Fecal Occult Blood Test (Blood in stool) \_\_\_\_\_

☐ PSA (Males Only) \_\_\_\_\_

☐ Shingles Vaccine (Zostavax) \_\_\_\_\_  
☐ Human Papilloma Virus Vaccine (HPV-Gardasil) \_\_\_\_\_  
☐ Vaccines Against Hepatitis \_\_\_\_\_  
☐ Influenza Vaccine \_\_\_\_\_

☐ Tetanus Diphtheria (Td) \_\_\_\_\_  
☐ Tetanus Diphtheria Pertusis (Tdap) \_\_\_\_\_  
☐ Pneumonia Vaccine (Pneumovax) \_\_\_\_\_  
☐ TB Screening \_\_\_\_\_

### **SOCIAL HISTORY**

What is your current marital status? ☐ **Single** ☐ **Married** ☐ **Divorced** ☐ **Widowed** ☐ **Other:** \_\_\_\_\_

Number of Children: \_\_\_\_\_ Ages of Children: \_\_\_\_\_

With whom do you currently live?

☐ **Self** ☐ **Sibling** ☐ **Spouse** ☐ **Spouse/Children** ☐ **Parents** ☐ **Significant Other** ☐ **Friend/Roommate**

Your Occupation: \_\_\_\_\_ If retired, from what: \_\_\_\_\_

Please indicate the highest level of education you have received:

Hobbies/interests and physical activities: \_\_\_\_\_

Please list any dietary restrictions or special diets you may follow: \_\_\_\_\_

Regular Exercise **YES** **NO** Type: \_\_\_\_\_ Frequency: \_\_\_\_\_

Patient Initials \_\_\_\_\_

Name \_\_\_\_\_

DOB \_\_\_\_\_

Date \_\_\_\_\_

Operate a motor vehicle? **YES NO** Use a seatbelt? **YES NO**

Hazardous chemicals labeled & kept in a safe place? **YES NO**

Do you know the number to Poison Control Center? **YES NO**

Do you currently use tobacco products? **NO YES** Type: \_\_\_\_\_

Amount per day? \_\_\_\_\_ How long have you used? \_\_\_\_\_

Do you have a history of using tobacco products? **NO YES** Type & Amount: \_\_\_\_\_

How long did you use: \_\_\_\_\_ When did you quit? \_\_\_\_\_

How much alcohol do you typically drink in **one week**?

☐ **I do not drink alcohol**

☐ **Less than one**

☐ **Drinks per week:** \_\_\_\_\_

Do you use drugs? **NO YES** What type? \_\_\_\_\_ Do you have a history of drug addiction? **YES NO**

Are you sexually active? **YES NO NEVER** Do you use condoms? **YES NO**

Sexual Partners: **Male** \_\_\_\_\_ **Female** \_\_\_\_\_ **Both** \_\_\_\_\_

Do you have any history of STD's? **NO YES** If **YES**, what type? \_\_\_\_\_

The CDC recommends that everyone be screened for HIV. Do you have any concerns about possible exposure that you would like to discuss or be tested for? **YES NO**

Are you currently, or have you ever been, a victim of domestic violence? **YES NO**

Do you have any spiritual/religious needs/restrictions? If so, please indicate: \_\_\_\_\_

Do you need help with the following? (check everything that applies)

\_\_\_\_\_ Dressing

\_\_\_\_\_ Walking

\_\_\_\_\_ Checkbook balancing

\_\_\_\_\_ Toileting

\_\_\_\_\_ Eating

\_\_\_\_\_ Shopping

\_\_\_\_\_ Bathing  
or showering

\_\_\_\_\_ Getting in  
and out of bed

\_\_\_\_\_ Answering the phone

\_\_\_\_\_ Taking your medications

Patient Initials \_\_\_\_\_

Name \_\_\_\_\_

DOB \_\_\_\_\_

Date \_\_\_\_\_

During the **past four weeks**, have you often been bothered by feeling down, depressed or hopeless? **YES NO**

During the **past four weeks**, have you often been bothered by lack of interest or pleasure in doing things? **YES NO**

During the **past four weeks**, was someone available to help you if you needed and wanted help? (For example, if you felt very nervous, lonely or blue; got sick and had to stay in bed; needed someone to talk to; needed help with daily chores; or needed help just taking care of yourself)

**YES, as much as I wanted YES, quite a bit YES, some YES, a little NO, not at all**

Have you fallen in the past year? **YES NO**

Do you have complaints of balance or difficulty walking? **YES NO**

How often do you have trouble taking medications the way you have been told to take them?

- ☐ **I do not have to take medicine**
- ☐ **I always take them as prescribed**
- ☐ **Sometimes I take them as prescribed**
- ☐ **I seldom take them as prescribed**

If you do have trouble, are there specific barriers that interfere with medication adherence?

Please check all that apply:

- ☐ **Cost/Financial constraints**
- ☐ **Remembering doses**
- ☐ **Understanding importance of taking medications**
- ☐ **Ability to read prescription labels or instructions**
- ☐ **Religious beliefs**
- ☐ **Cultural differences**
- ☐ **Other:**

Do you have an advanced directive/living will? **YES NO**

Would you like to discuss living wills/advanced directives with your provider today? **YES NO**

If you use any other medical suppliers (oxygen, CPAP, home health, etc.) please list those company names below:

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Patient Initials \_\_\_\_\_

Name \_\_\_\_\_

DOB \_\_\_\_\_

Date \_\_\_\_\_

### **Self-Care and Self-Management Questions**

**As partners in your health care, we recognize the importance of understanding how comfortable you feel in managing your health. Below are questions that will help us better serve your needs:**

How confident are you that you can control and manage most of your health problems?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT   I DO NOT HAVE HEALTH PROBLEMS**

How confident are you that you can judge when the changes in your health mean you should visit a doctor?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT**

How confident are you that you can do the different tasks and activities needed to manage your health so as to reduce your need to see a doctor?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT**

How confident are you that you can control any emotional distress or health problems you have so that they don't interfere with your everyday life and the things you want to do?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT**

How confident are you that you can do things other than just take medication to reduce how much a health condition affects your everyday life?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT**

How confident are you that you can get emotional support from resources other than friends and family, if needed?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT**

How confident are you that you can get help with your daily tasks (such as housecleaning, yard work, meals or personal hygiene) from resources other than friends and family, if needed?

**VERY CONFIDENT   SOMEWHAT CONFIDENT   NOT VERY CONFIDENT**

Would you be willing to obtain support from local resources (smoking cessation, weight management programs, hospice, etc.) to help manage your health if referred by your provider?   **YES   NO**

Patient Initials \_\_\_\_\_

Date \_\_\_\_\_

DOB

Name

	Deceased? Y/N	Current age or age at death	Aneurysm	Arthritis	High BP	Heart Problems	High Cholesterol	Lung Problems	Gout	Stroke	Seizures/Epilepsy	Breast Cancer	Skin Cancer	Ovarian Cancer	Colon Cancer	Prostate Cancer	Diabetes	Kidney Disease	Thyroid Problems	Osteoporosis	Bleeding Problem	Allergies/Asthma	Mental Illness	Tuberculosis	Others (list)
Father																									
Mother																									
Paternal Grandfather																									
Paternal Grandmother																									
Maternal Grandfather																									
Maternal Grandmother																									
Brother																									
Brother																									
Sister																									
Sister																									
Son/Daughter																									
Son/Daughter																									
Other																									
Other																									

Check the appropriate item listed across the top row for each relative. Please list only blood relatives.

Patient Initials \_\_\_\_\_

Name \_\_\_\_\_

DOB \_\_\_\_\_

Date \_\_\_\_\_

**Please check any of the following symptoms that you are currently experiencing or have experienced in the last 7-10 days.**

**GENERAL**

- ☐ Recent Fever
- ☐ Excessive Fatigue
- ☐ Unexplained Weight Loss/Gain

**EYES**

- ☐ Discharge
- ☐ Pain or Burning
- ☐ Blurred Vision
- ☐ Loss of Sight
- ☐ Itching or Watering

**BREAST**

- ☐ Pain
- ☐ Lumps
- ☐ Nipple Discharge

**RESPIRATORY**

- ☐ Cough
- ☐ Coughing up Blood
- ☐ Shortness of Breath
- ☐ Wheezing
- ☐ Snoring

**REPRODUCTIVE-WOMEN**

- ☐ Irregular Periods
- ☐ Spotting between periods
- ☐ Vaginal discharge/burning/itching
- ☐ Unusually painful periods
- ☐ Pain/Trouble during intercourse

**REPRODUCTIVE-MEN**

- ☐ Discharge from Penis
- ☐ Pain or Swelling of Testicles
- ☐ Pain/Trouble during intercourse
- ☐ Problems with Erection

**MENTAL HEALTH**

- ☐ Thoughts of Suicide
- ☐ Marital Problems
- ☐ Trouble Sleeping
- ☐ Panic Attacks
- ☐ Anxiety
- ☐ Thoughts of Harming Others

**SKIN**

- ☐ Change in Nails
- ☐ Lumps
- ☐ Recurrent Rashes
- ☐ Sores that will not heal or bleed
- ☐ Moles that are changing

**EARS**

- ☐ Hearing Loss
- ☐ Ringing
- ☐ Earache
- ☐ Feeling of Ear Fullness

**MOUTH & THROAT**

- ☐ Dry Mouth
- ☐ Soreness or Bleeding in mouth area
- ☐ Sore Throat
- ☐ Mouth Ulcers
- ☐ Hoarseness
- ☐ Dental Issues

**ENDOCRINE**

- ☐ Unusual intolerance of heat
- ☐ Unusual intolerance of cold
- ☐ Excessive Thirst
- ☐ Excessive Hunger

**URINARY**

- ☐ Pain/Burning with Urination
- ☐ Frequent Urination
- ☐ Blood in Urine
- ☐ Trouble starting to Urinate
- ☐ Waking up to Urinate
- ☐ Leakage of Urine
- ☐ Change in Stream

**NERVOUS SYSTEM**

- ☐ Headaches
- ☐ Seizures/Convulsions
- ☐ Fainting Spells
- ☐ Frequent Memory Loss
- ☐ Weakness
- ☐ Shakiness or Tremor
- ☐ Loss of Sensation/Numbness
- ☐ Feeling of Tingling in Limb
- ☐ Speech Difficulty

**NOSE & SINUSES**

- ☐ Bleeding
- ☐ Nasal Congestion
- ☐ Sneezing
- ☐ Loss of Sense of Smell

**NECK**

- ☐ Pain
- ☐ Lumps

**CARDIOVASCULAR**

- ☐ Abnormal/Irregular Heart Beat
- ☐ Chest Pain
- ☐ Awaken at night with breathing problems
- ☐ Passing Out
- ☐ Shortness of Breath
- ☐ Swelling of Ankles
- ☐ Leg Pain/Resting
- ☐ Leg Pain/Walking

**GASTROINTESTINAL**

- ☐ Unable to eat certain foods
- ☐ Loss of Appetite/Weight
- ☐ Food sticks in throat
- ☐ Painful Swallowing
- ☐ Heartburn
- ☐ Indigestion
- ☐ Vomiting
- ☐ Nausea
- ☐ Vomiting Blood
- ☐ Abdominal or Stomach Pain
- ☐ Diarrhea
- ☐ Constipation
- ☐ Recent Change in Bowel Habits
- ☐ Blood in Stools
- ☐ Black Stools

**MUSCULOSKELETAL**

- ☐ Joint Pain
- ☐ Joint Stiffness
- ☐ Muscle Soreness

**BLOOD DISORDERS**

- ☐ Easy Bruising
- ☐ Excessive Bleeding

Patient Initials \_\_\_\_\_