

## NEW ADULT PATIENT INTAKE FORM

Today's Date: \_\_\_\_\_

Patient Name: \_\_\_\_\_ Date of Birth \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
Please print Age: \_\_\_\_\_

Address(s):  
\_\_\_\_\_  
\_\_\_\_\_

Home Phone(s): \_\_\_\_\_ Work Phone(s): \_\_\_\_\_

Cell Phone(s): \_\_\_\_\_ Email Address(s): \_\_\_\_\_

Best place(s) to leave messages:  Home  Work  Cell

Number in household: \_\_\_\_\_

Children: \_\_\_\_\_

Occupation: \_\_\_\_\_

Employer: \_\_\_\_\_

Will you be submitting bills to an insurance carrier for reimbursement?  Yes  No

If yes:  Health or  Auto Insurance

Insurance Carrier: \_\_\_\_\_ Name on Policy: \_\_\_\_\_

Policy Holder DOB: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Please indicate if you receive coverage through:  Disability  Work Comp  Medicare

Emergency Contact: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone: \_\_\_\_\_

Referred by: \_\_\_\_\_

Reason for your visit today: \_\_\_\_\_

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Duration of problem: \_\_\_\_\_

## ADULT HEALTH QUESTIONNAIRE

Page 1 of 2

Family History – Did any blood relative suffer any of the following?

Please indicate the following: M = mother; F = father; B = brother; S = sister; MGM = maternal grandmother; MGF = maternal grandfather; PGM = paternal grandmother; PGF = paternal grandfather)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> _____ Epilepsy       | <input type="checkbox"/> _____ Anemia           | <input type="checkbox"/> _____ Hepatitis |
| <input type="checkbox"/> _____ Migraine       | <input type="checkbox"/> _____ Bleeds easily    | <input type="checkbox"/> _____ Cancer    |
| <input type="checkbox"/> _____ Mental Illness | <input type="checkbox"/> _____ Osteoporosis     | <input type="checkbox"/> _____ _____     |
| <input type="checkbox"/> _____ Glaucoma       | <input type="checkbox"/> _____ Arthritis        | <input type="checkbox"/> _____ _____     |
| <input type="checkbox"/> _____ Diabetes       | <input type="checkbox"/> _____ Heart disease    | <input type="checkbox"/> _____ _____     |
| <input type="checkbox"/> _____ Thyroid        | <input type="checkbox"/> _____ Hypertension     | <input type="checkbox"/> _____ _____     |
| <input type="checkbox"/> _____ Hay fever      | <input type="checkbox"/> _____ High cholesterol | <input type="checkbox"/> _____ _____     |
| <input type="checkbox"/> _____ Asthma         | <input type="checkbox"/> _____ Alcoholism       |  |

Allergies (drugs, foods, environmental):

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Healthcare Practitioner(s) from whom you are *currently* receiving medical care:

Physician/ Practitioner	Condition being treated	Medications/Supplements

Past Surgical Procedures	Date	Reason performed

# ADULT HEALTH QUESTIONNAIRE

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## MEDICAL HISTORY

- Decreased hearing
- Ringing in ear
- Ear infections
- Dizzy or fainting spells
- Failing vision or eye pain
- Double or blurred vision
- Nose bleeds – recurrent
- Sinus trouble
- Sore throats – frequent
- Hoarseness – prolonged
- Hayfever /Allergies
- Pneumonia / Pleurisy
- Bronchitis / Chronic cough
- Asthma / Wheezing
- Shortness of breath
  - On exertion  lying flat
- Chest pain
- High blood pressure
- Heart murmur
  - swollen ankle
  - irregular pulse
  - palpitations
- Leg pain when walking
- Varicose veins / Phelebitis
- Cold numb feet
- Loss of appetite - recent
- Difficulty swallowing
  - heartburn
  - peptic ulcer
  - persistent Nausea / vomiting
- Abdominal Pain - chronic
- Gallbladder trouble
- Jaundice / Hepatitis
- Diarrhea  Constipation
- Diverticulosis  Crohn's / Colitis
- Inflammatory Bowel Syndrome
- Bloody or tarry stool
- Hemorrhoids  Hernia
- Urination / Overactive bladder
  - Overnight more than twice
  - More than 8 times / 24 hrs
  - Urgency to urinate
  - with leakage
- Decrease in force/flow  painful
- Stress incontinence – urine leakage with exercise /movement
- Blood in urine  Kidney stones
- Urine infections – frequent
- Sexually transmitted diseases
- Sexual problems
- Weight loss  Gain – recent
- Anemia  Bruise easily
- Blood transfusions
- Cancer  Chronic fatigue
- Diabetes  Thyroid disease
- Seizures  Stroke
- Tremor / hands shaking
- Numbness / tingling sensations
- Headaches – frequent
- Arthritis / Rheumatism
- Back pain – recurrent
- Bone fracture / joint injury
- Osteoporosis
- Foot pain  Gout
- Rashes  Hives
- Psoriasis  Eczema
- Any type of sleeping difficulty
- Depression  Nervousness
- Agitation  Memory loss
- Moodiness  Suicidal thoughts
- Phobias  Mental illness
- Feelings of worthlessness
- Rheumatic fever  Scarlet fever
- Chickenpox  Polio  Mumps
- Measles  German measles
- Tuberculosis  Herpes
- AIDS / HIV
- Alcohol \_\_\_\_\_ oz per week
- Coffee / Tea \_\_\_\_\_ cups per day
- Smoking \_\_\_\_\_ cig/day
  - # years \_\_\_\_\_ year quit \_\_\_\_\_
- Exercise \_\_\_\_\_
- Street drugs \_\_\_\_\_
- Acupuncture / tattoos
- Hair loss
  - progressive  recent
- MALES:**  Prostate problems
- FEMALES** *Please complete:*
- Menstrual Flow:
  - Regular
  - Irregular
  - Pain/Cramps
- Days of flow \_\_\_\_\_
- Length of cycle \_\_\_\_\_
- Date of 1<sup>st</sup> day of last period \_\_\_\_\_
- Pain / Bleeding during or after sex
- Number of Pregnancies \_\_\_\_\_
- Abortions \_\_\_\_\_
- Miscarriages \_\_\_\_\_
- Live Births \_\_\_\_\_
- Birth control method \_\_\_\_\_
- Flushing / Menopause
- Date of last PAP test \_\_\_\_\_
  - Normal  Abnormal
- Date of last mammogram \_\_\_\_\_
  - Normal  Abnormal

## OFFICE POLICIES

**Welcome:** To help you get acquainted with our office, we have prepared a few words about our policies. If you have any questions or suggestions, please feel free to discuss these with us at any time. Please read and sign each form; this indicates to us that you have read and understand our guidelines.

**Your Appointment:** Appointments can be made either online or by phone. Every effort is made to examine newborn infants as soon as possible after birth. Special priority is also given to those with acute injuries or medical conditions and pregnant or post-partum women. Your appointment is time set aside for you to see your doctor. Note that we have a two-business day or 48 hour cancellation policy. If you cancel an appointment less than 48 hours prior to its scheduled time, you will be billed *one-half* the visit fee. Appointments may be cancelled online or by phone (please see our online instruction form). A message may be left on our voicemail at any time. The earlier you can inform us of a change in your plans, the sooner we can give your appointment to someone else in need.

**Fragrances:** Some of our patients are allergic to environmental pollutants, such as perfumes and hair sprays; we would appreciate it if you refrain from wearing these to our office.

**Cell phones:** We make every effort to cultivate a tranquil, healing environment for our patients. Please refrain from using cell phones in the building and silence any ringers and alarms. Emergent calls can be taken outside the building. We appreciate your understanding.

**Fees & Payment:** *We require payment for services at the time they are provided.* We supply a standard itemized receipt, also known as a “superbill”, which you may submit to your insurance company in case you qualify for reimbursement.

*Dr. Hering is not a contracted provider with Medicare, therefore Medicare beneficiaries are not allowed to submit claims to Medicare for reimbursement.* If you have Medicare, please read and sign our Medicare Beneficiary Agreement.

In the case of minors, the parent or guardian who accompanies the minor is responsible for payment, even if the parents are separated or divorced and the person responsible for paying medical bills is not present at the time of the visit. If your check is returned from the bank, we will charge a \$30.00 “return check” fee. For patients requesting photocopies of their medical records, a \$25 copying fee applies.

**Children:** Children must be supervised by their caretaker. For their own safety, please do not allow children to roam about in other rooms or to touch electrical objects.

Thank you for taking the time to read this policy sheet. If you have any questions about this policy, please ask them now. We understand that you have come here to seek specialized treatment and we will endeavor to assist you in a speedy recovery; however, we cannot guarantee any specific result.

I have read and understand the above policy and agree to it.

Patient/Guardian Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(Print Name of Patient/Guardian \_\_\_\_\_)

# 902 Santa Fe

Carmen Hering, DO

902 Santa Fe Avenue, Albany, CA 94706

(510) 526-5256 • fax (510) 526-5256

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902santafe@gmail.com

## MEDICAL RELEASE FORM

Today's Date: \_\_\_\_\_

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

Please print

### **1. Permission to release information to Insurance Carriers:**

I give permission to this office to release medical information to my health or automobile insurance company.

Patient/Guardian Signature: \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
(Print Name of Patient/Guardian)

Please contact me when you receive requests for information from my insurance carrier.

### **2. Permission to Share Information with Health providers:**

I give permission to this office to share my medical information with my other health providers so that they may coordinate my care.

Patient/Guardian Signature: \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
(Print Name of Patient/Guardian)

Please contact me before sharing any information with my other health providers.

## OFFICE PATIENT PRIVACY POLICY

In order to protect sensitive personal and medical information, we have instituted a number of measures aimed at maintaining your privacy. The National Institutes of Health have newly developed the *Health Insurance Portability and Accountability Act* (HIPAA), which requires that every medical provider makes a privacy policy available to their patients. This effort is set in place to maintain privacy of patient information in an era of high technology and data-laden medical systems. The following is the policy for patients of this office regarding patient privacy and confidentiality of information collected and stored in this office:

1. For payments and scheduling, Yvonne Kanis (our office manager), will assist you.
2. An information sheet with demographic data, insurance information, consent for treatment and medical disclosure will be completed by every patient as part of her/his record. A copy of this sheet will be available to our office manager for billing purposes.
3. All superbills for office visits will be shared with the office manager in order to process insurance claims and record business transactions for tax purposes.
4. Any paper trash with patient information will be shredded prior to discarding it.
5. Employees and staff are required to sign a confidentiality agreement regarding any information they are exposed to in the office setting, which is not to be discussed or revealed to any person(s)/business(es) outside of the office setting without prior written consent by the patient/legal guardian.
6. Medical release forms are required to be signed by the individual or parent/guardian in order to release any medical information to themselves, medical offices, insurance companies, or to any other desired location. A copying charge may apply for extensive record copying.
7. All medical related conversations will occur in private.
8. All papers related to patient care will be stored in locked cabinets when not in use, where only authorized medical and administrative staff has access to them.
9. Any breach of confidentiality must be submitted in writing to Carmen Hering D.O. for proper action to be taken to amend the situation and/or policy.

I have read and understand the above Patient Privacy Policy.

Patient/Guardian Signature: \_\_\_\_\_

\_\_\_\_\_ Date

\_\_\_\_\_  
(Print Name of Patient/Guardian)

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## HIPPA NOTICE OF PRIVACY PRACTICE - ACKNOWLEDGEMENT OF RECEIPT

I hereby acknowledge that a current copy of the medical practice's Notice of Privacy Practices is available online at [www.hhs.gov/hipaa](http://www.hhs.gov/hipaa) as well as in the reception area. I further acknowledge that a copy of any amended Notice of Privacy Practices will be available at each appointment.

Patient: \_\_\_\_\_

Patient/Guardian Signature: \_\_\_\_\_

## MEDICARE BENEFICIARY AGREEMENT

I, \_\_\_\_\_ Medicare beneficiary, clearly understand that by signing this contract, I will:

1. Agree not to submit a claim (for such items or services, even if such items or services are otherwise covered by Medicare).
2. Agree to be responsible, whether through insurance or otherwise, for payment of such items or services, and understand that no reimbursement will be provided for such items or services by Medicare.
3. Acknowledge that no limits apply to amounts that may be charged for such items or services.
4. Acknowledge that Medigap plans do not, and other supplemental plans may elect not to make payments for such items or services, because payment is not made with Medicare.
5. Acknowledge that, as a Medicare beneficiary, I have the right to such items and services provided by other physicians or practitioners, for whom payment would be made under Medicare.

Patient/Guardian Signature: \_\_\_\_\_

\_\_\_\_\_ Date

\_\_\_\_\_