

Summit Orthopaedics, LLP
Dr. Wallace Intake Form

Patient Name: _____

Date of Birth: _____ Age: _____

Height: _____ Weight: _____

Problem/Injury: Right Left Both Body Part: _____

Date of Injury: _____

Describe how it happened: _____

Frequency:

It is worsened by:

It is improved by:

Current pain level (pain from 1-10 with 10 being the highest level) _____

Pain level at its worst: _____

Which have you tried for your problem/injury?

- Anti-inflammatory Medications
- Steroid injections
- Gel Injections
- Physical Therapy
- Activity Modification / Lifestyle Changes
- Weight Loss

- Brace
- Foot Orthotics / Shoe Lift
- Massage Therapy
- Narcotics / Opioids
- Surgery
- Walking Aids (Cane, Crutches, Walker)

Which of the following have you had done?

- X-Ray
- CT Scan
- MRI
- EMG / Nerve Study
- Ultrasound

Is this a work-related injury? _____

Were you treated in the ER? No Yes Which hospital?: _____

Have you previously been treated for this injury? No Yes Where? _____

How did you hear about us? _____

Did another provider refer you to our office? No Yes Which provider? _____

Primary Care Physician: _____

Other Physicians for Communication: _____

(continued >>>)

List all medical conditions: _____

Previous surgeries: _____

Current Medications:

Preferred Pharmacy: _____

Allergies to medications: _____

Relevant Family Medical History No Yes Where? _____

Tobacco use: current use, how much ___ packs / day; previous use, quit ___ ago; no tobacco use

Alcohol Use: None; Yes, how much _____

Drug Use: _____ Frequency

Marital Status: _____ Living Situation _____

Occupation: _____ Employer: _____

Review of Systems

- Fever
- Chills
- Blurry Vision
- Sore Throat
- Nausea/Vomiting
- Depression or Anxiety
- Easy Bruising
- Difficulty Urinating
- Skin Rash

- Cough
- Fatigue
- Chest Pain
- Abdominal Pain

- Joint Pain
- Tremors
- Headache
- Other: _____

Infection History

Pain Management History

Additional questions or concerns in relation to this injury: _____

Summit Orthopaedics | Go To Ortho – Patient Registration Profile

Name _____	Date of Birth _____
Guardian _____	Social Security _____
Address _____	Gender/Pronouns _____
Apt/Unit _____	Preferred Language _____
City/State/Zip _____	Interpreter Needed? <input type="checkbox"/> Yes <input type="checkbox"/> No
Email Address _____	
Would you like to be emailed a link to our online payment portal for future payments? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Cell Phone _____	Home Phone _____
Preferred Contact Method <input type="checkbox"/> Cell Phone <input type="checkbox"/> Home Phone <input type="checkbox"/> Email	
Would you like a text message or email reminders for your future appointments? <input type="checkbox"/> Text <input type="checkbox"/> Email	

Employment Information

Employment Status <input type="checkbox"/> Employed <input type="checkbox"/> Retired <input type="checkbox"/> Part Time <input type="checkbox"/> Not Employed	
Employer _____	Employer Address _____
Employer Phone _____	City/State/Zip _____

Medical Transportation Information

Do you utilize medical transport? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, which company? _____
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Insurance Information

Primary Care Physician _____	PCP Phone _____
Primary Insurance Company _____	Secondary Insurance Company _____
Primary Insurance Subscriber _____	Secondary Insurance Subscriber _____
Member Number _____	Member Number _____
Is this a Workers Comp injury? <input type="checkbox"/> Yes <input type="checkbox"/> No	Claim Number _____
Do you have an attorney? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, Attorney Name _____ Phone _____

How did you hear about us?

<input type="checkbox"/> Doctor referral: Name _____	<input type="checkbox"/> Emergency room	<input type="checkbox"/> Internet Search	<input type="checkbox"/> Family or Friend		
<input type="checkbox"/> Advertisement	<input type="checkbox"/> Saw our building	<input type="checkbox"/> Employer	<input type="checkbox"/> Insurance Company	<input type="checkbox"/> Previous Patient	<input type="checkbox"/> Other

Emergency Contact Name/Relationship _____ Phone _____

ALERT: Please sign a Release of Information Form if you would like to give us permission to speak to this person about your medical care.

AUTHORIZATION TO VERBALLY DISCLOSE PROTECTED HEALTH INFORMATION (PHI)

without this form completed we are unable to speak to anyone besides yourself about your care

Summit Orthopaedics, LLP & Go To Ortho, LLC are authorized to verbally disclose Protected Health Information (PHI) according to HIPAA regulations. Permitted reasons for released of PHI include: treatment, payment and healthcare options, or as otherwise allowed by specific signed authorization by the patient or authorized personal representative.

I hereby authorize verbal disclosure of the named individual’s health information:

Patient Name	Date of Birth	Patient Telephone Number
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Patient Address

Permission to Verbally Discuss Protected Health Information with the following Family Members/Caregivers:

Name	Relationship	Telephone

-or- **I decline.** Please do not discuss my care with anyone other than allowed by HIPAA regulations.

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I understand that certain information cannot be released without specific authorization as requested by State/Federal law. By initialing below, I authorize the release of the following protected or sensitive information:

___ Alcohol and Substance Abuse ___ Mental Health ___ HIV and Sexually Transmitted Diseases

- Unless otherwise revoked, this authorization will expire on the following date: _____
If I do not specify an expiration date, this authorization will expire in 5 years.
- I understand I have the right to revoke this authorization. I understand that if I revoke this authorization I must do so in writing. I understand that the revocation will not apply to information that has already been released based on this authorization.
- I understand that information used or disclosed pursuant to this authorization may be subject to redisclosure by the recipient and may no longer be protected by State or Federal Law.
- This form is not valid unless signed and dated.

Signature of Patient or Legal Representative	Date
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If signed by Legal Representative, Relationship to Patient
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HIPAA ACKNOWLEDGMENT AND CONSENT

I understand that **Summit Orthopaedics, LLP and Go To Ortho, LLC**, (referred to below as “This Practice”) will use and disclose **health information** about me.

I understand that my **health information** may include information both created and received by This Practice, may be in the form of written or electronic records or spoken words, and may include information about my health history, health status, symptoms, examinations, test results, diagnoses, treatments, procedures, prescriptions, and similar types of health-related information.

I understand and agree that This Practice may **use and disclose** my health information in order to:

- Make decisions about and plan for my care and treatment;
- Refer to, consult with, coordinate among, and manage along with other health care providers for my care and treatment;
- Determine my eligibility for health plan or insurance coverage, and submit bills, claims and other related information to insurance companies or others who may be responsible to pay for some or all of my health care; and
- Perform various office, administrative and business functions that support my physician’s efforts to provide me with, arrange and be reimbursed for quality, cost-effective health care.

I also understand that I have the right to receive and review a written description of how This Practice will handle health information about me. This written description is known as a **Notice of Privacy Practices** and describes the uses and disclosures of health information made and the information practices followed by the employees, staff and other office personnel of This Practice, and my rights regarding my health information.

I understand that the Notice of Privacy Practices may be revised from time to time, and that I am entitled to receive a copy of any revised Notice of Privacy Practices. I also understand that a copy or a summary of the most current version of This Practice’s Notice of Privacy Practices in effect will be posted in waiting/reception area.

I understand that I have the right to ask that some or all of my health information not be used or disclosed in the manner described in the Notice of Privacy Practices, and I understand that This Practice is not required by law to agree to such requests.

By signing below, I agree that I have reviewed and understand the information above and that I have received a copy of the Notice of Privacy Practices, if requested.

By: _____ Patient Signature
_____ Printed Name
Date: _____
-or-
By: _____ Patient Representative Signature
_____ Patient Representative Printed Name
Date: _____

Summit Orthopaedics, LLP | Go To Ortho, LLC
Financial Policy

Thank you for choosing us as your healthcare provider. We are committed to the success of your medical treatment and care. Please understand that payment of your bill is a part of this treatment and care. Our fees for services, including office visits and surgeries, are based on the level of professional skill required, the severity and complexity of the injury or illness as well as the time spent treating you. Please do not hesitate to inquire about the charges for our services, however, a precise estimate in advance may not be possible.

Insurance & Insurance Collection:

We make every effort to make sure your paperwork is filed accurately and promptly. We may bill your insurance as a courtesy at no expense to you. However, we will only bill insurance that has appropriate documentation presented at the *time of service*. Secondary or other insurances that you may have must be presented at *time of service* if it is to be billed.

Each physician in this practice bills separately. You will not receive a statement until there is a patient balance. You may receive more than one statement if you see more than one provider in our office.

It is the patient's responsibility to inform us of any changes in insurance and to present the appropriate documentation. Failure to do so could result in any balance being transferred to patient responsibility.

If your insurance company does not respond within 30 days, as required by law, you may be held responsible for all charges. We will not submit more than two claims to your insurance company. Failure of your insurance company to respond will result in automatic transfer of the balance to your responsibility.

In order to provide you with the highest quality service, while keeping our billing costs low, we offer paperless patient billing through Breeze, our online patient portal.

***WE ACCEPT ALL MAJOR CREDIT CARDS, DEBIT CARDS,
CHECK CARDS, CHECKS* AND CASH.***

Please understand that all personal balances are due within 30 days of receipt of the statement. We strongly recommend that you use the Breeze Patient Portal to satisfy your balance as it becomes due. Any returned checks will result in a \$25.00 charge to your account and no further checks will be accepted. We may agree to accept installment payments on your account balance in the form of a payment plan. Please inquire directly with our billing office.

Participating Plans:

We have agreed to accept the discounted rate from many insurance plans, however all co-insurance, co-payments and deductible balances are patient responsibility. Patient balances are due within 30 days of receipt of the statement. **You** are responsible for getting proper authorization/referral information in advance of your appointment. In the event that you do not have a valid authorization/referral at time of service, you may reschedule or sign a disclaimer that states you understand that there is not a valid authorization/referral in place for the service and that you will be responsible for the charges in the event your insurance company denies payment. Failure to obtain an authorization/referral or refusal to sign the disclaimer may result in rescheduling your appointment until this procedure is complete.

Non-Participating Plans:

We may bill your insurance as a courtesy. Our office, as a convenience and a service to you, will absorb all costs incurred for billing. However, failure to present appropriate documentation regarding your insurance coverage or changes in insurance coverage will result in balances being transferred directly to patient responsibility. In the event your insurance company does not respond within 30 days, as required by law, you may be held responsible for all charges. You have the right to request a Good Faith Estimate from us at any time.

Secondary & Tertiary Insurance:

Having more than one insurer DOES NOT necessarily mean that your services are covered 100%. Secondary and tertiary insurers will pay as a function of what your primary carrier pays. We may bill your secondary and tertiary carrier as a courtesy, if proper information is received **at time of service**. You are responsible for any balances after your insurance(s) has cleared.

Self Pay and Uninsured Patients:

Patient balances are due within 30 days of receipt of the statement. You have the right to request a Good Faith Estimate from us at any time. We may be able to offer a discount, agree to a payment plan or help direct you to other resources. Please inquire directly with our billing office.

Payments sent directly to Patient:

In the event your insurance company sends funds directly to you instead of our office, you can endorse the check and send it directly to us, or forward a personal check for no less than the full amount sent by the insurance company, along with copies of the documentation supporting that payment to insure your account is properly credited. Funds received by the subscriber results in automatic transfer of the complete balance to patient responsibility, no secondary insurance will be billed and no payment plan considerations will be given on the portion of funds received by the patient or subscriber.

Usual & Customary Rates:

Our practice is committed to providing the best treatment for our patients and we charge what is usual and customary for our area. You are responsible for payment regardless of the insurance company's arbitrary determination of usual and customary rates.

Minor Patients and/or Divorce Decrees:

This office is not a party to your divorce decree. Adult patients are responsible for their bill at the time of service. The responsibility for minors rests with the accompanying adult. The adult accompanying a minor and the parents (or guardians) of the minor are responsible for full payment.

Authorization & Consent:

I have read, understand and agree to the above Financial Policy. I understand that the charges not covered by my insurance company, as well as co-payments and deductibles, are my responsibility. I understand that in the event any unpaid balance is placed for collection with any third party collection agency a fee of the unpaid balance will be added to the total amount due. This amount shall be in addition to any other costs incurred directly or indirectly to collect amounts owed under this agreement such as court costs, attorney fees, late fees and any other fees so stated elsewhere.

I consent to and authorize that my insurance benefits can be paid directly to Summit Orthopaedics LLP, Go To Ortho LLC, and/or the provider's associated with the practice.

I consent to and authorize my physician to release pertinent medical information to my insurance company when requested, or to facilitate payment of a claim.

I consent to and authorize that Summit Orthopaedics LLP, Go To Ortho LLC, and/or the provider's associated with the practice can appeal payment denials or other adverse decisions on my behalf.

Please print Patient's Name

Patient's Date of Birth

Please print Responsible Party Name

Responsible Party Date of Birth

SAME AS PATIENT

X _____
Signature of Patient or Responsible Party

Today's Date