PATIENT NAME: _____
DATE OF BIRTH: ___/___/____

# PATIENT INFORMATION FORM

(PLEASE PRINT)

DATE: ___/___/___

PATIENT NAME: _____ _____ ___ DATE OF BIRTH: ___/___/___ AGE: ___ SEX: M F
LAST FIRST MI

HOME ADDRESS: _____ CITY/STATE: _____ ZIP: _____

MAY WE LEAVE A MESSAGE?

HOME PHONE #: (___) ___-____ YES NO

WORK PHONE #: (___) ___-____ YES NO

CELL PHONE #: (___) ___-____ YES NO

E-MAIL: _____ YES NO

PRIMARY LANGUAGE: _____

RACE: _____ ETHNICITY: _____

DO YOU HAVE A LEGAL GUARDIAN OR HEALTHCARE POWER OF ATTORNEY? YES NO
IF YES, NAME: _____ RELATIONSHIP: _____ PHONE #: (___) ___-____

EMERGENCY CONTACT: _____ RELATIONSHIP: _____ PHONE #: (___) ___-____

PRIMARY CARE DOCTOR: _____ PHONE: _____
PHARMACY: _____ LOCATION: _____ PHONE #: (___) ___-____

IS THERE A FAMILY MEMBER OR OTHER PERSON YOU WOULD LIKE FOR US TO SHARE YOUR MEDICAL INFORMATION?
NO____ YES____ NAME(S) _____

WHO IS GUARANTOR FOR PAYMENT? _____DOB: _____RELATIONSHIP TO PATIENT? _____

ADDRESS: _____ CITY/STATE: _____ ZIP: _____ PHONE #: (___) ___-____

HOW DID YOU HEAR ABOUT OUR OFFICE? _____

## INSURANCE INFORMATION

PRIMARY INSURANCE COMPANY NAME: _____

ADDRESS: _____ CITY/STATE: _____ ZIP: _____ PHONE #: (___) ___-____

INSURED NAME: _____ DATE OF BIRTH _____ EMPLOYER _____

CONTRACT # _____ GROUP # _____

SECONDARY INSURANCE COMPANY NAME: _____

ADDRESS: _____ CITY/STATE: _____ ZIP: _____ PHONE #: (___) ___-____

INSURED NAME: _____ DATE OF BIRTH _____ EMPLOYER _____

CONTRACT # _____ GROUP # _____

**PATIENT NAME:** _____
**DATE OF BIRTH:** ____/____/_____

**PLEASE LIST ALL MEDICATIONS YOU ARE CURRENTLY TAKING** (INCLUDE PRESCRIPTIONS, OVER-THE-COUNTER MEDS AND HERBAL SUPPLEMENTS):

| NAME | DOSE | HOW OFTEN DO YOU TAKE? |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

**PLEASE LIST ALL PRIOR SURGERIES:**

| TYPE OF SURGERY | DATE | TYPE OF SURGERY | DATE |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

**PLEASE LIST ALL PRIOR HOSPITALIZATIONS** (OTHER THAN FOR SURGERY):

| REASON FOR HOSPITALIZATION | DATE | REASON FOR HOSPITALIZATION | DATE |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

**IMMUNIZATION/ DATE OF ADMINISTRATION**
INFLUENZA:_____
PNEUMONIA:_____

**SOCIAL HISTORY**
MARITAL STATUS: ☐ SINGLE ☐ MARRIED ☐ PARTNERED ☐ SEPARATED ☐ DIVORCED ☐ WIDOWED

USE OF ALCOHOL: ☐ NEVER ☐ NO LONGER USE ☐ HISTORY OF ALCOHOL ABUSE
☐ CURRENT USE - TYPE _____ ☐ RARE ☐ OCCASIONAL ☐ MODERATE ☐ DAILY

USE OF TOBACCO: ☐ NEVER ☐ QUIT – HOW LONG AGO? _____ ☐ SMOKE ___ PACKS/DAY FOR ___ YEARS

USE OF RECREATIONAL DRUGS: ☐ NEVER ☐ QUIT – HOW LONG AGO? _____ TYPE _____
☐ CURRENT USE - TYPE _____ ☐ RARE ☐ OCCASIONAL ☐ MODERATE ☐ DAILY

EMPLOYER: _____ OCCUPATION: _____

HOW MUCH ARE YOU ON YOUR FEET AT WORK? ☐10% ☐25% ☐50% ☐75% ☐100%

TYPES OF SHOES FOR WORK/PLAY:_____
TYPES OF SHOES FOR HOME: _____ DO YOU GO BAREFOOTED: Y N

EXERCISE: ☐ NEVER ☐ RARE ☐ OCCASIONAL ☐ WEEKLY ☐ SEVERAL TIMES A WEEK ☐ DAILY

TYPES OF EXERCISE: _____

PATIENT NAME: _____
DATE OF BIRTH: ____/____/_____

## FAMILY HISTORY

DO YOU HAVE A FAMILY HISTORY OF: ☐ DIABETES: TYPE 1 OR TYPE 2 ☐ CANCER _____ ☐ HEART DISEASE
☐ HIGH BLOOD PRESSURE ☐ STROKE ☐ CORONARY ARTERY DISEASE ☐ THYROID DISEASE
☐ RHEUMATOID ARTHRITIS ☐ OTHER _____

## YOUR MEDICAL HISTORY:

HEIGHT: _____ WEIGHT: _____

ALLERGIES: ☐ MEDICATIONS _____ ☐ NONE KNOWN
☐ ANESTHESIA _____ ☐ FOODS _____
☐ TAPE ☐ LATEX ☐ SHELLFISH ☐ IODINE ☐ OTHER _____

HAVE YOU EVER HAD ANY OF THE FOLLOWING?

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ACID REFLUX | Y | N | FIBROMYALGIA | Y | N | NEUROPATHY | Y | N |
| ANEMIA | Y | N | GOUT | Y | N | PACEMAKER | Y | N |
| ARTHRITIS | Y | N | HEART ATTACK | Y | N | PNEUMONIA | Y | N |
| ASTHMA | Y | N | HEART DISEASE/FAILURE | Y | N | POLIO | Y | N |
| BACK TROUBLE | Y | N | HEPATITIS | Y | N | REFLUX/GERD | Y | N |
| BLADDER INFECTIONS | Y | N | HIV+/AIDS | Y | N | SICKLE CELL DISEASE | Y | N |
| ABNORMAL BLEEDING | Y | N | HIGH BLOOD PRESSURE | Y | N | SKIN DISORDER | Y | N |
| BLOOD CLOTS/FILTER | Y | N | KIDNEY DISEASE | Y | N | SLEEP APNEA | Y | N |
| BLOOD TRANSFUSION | Y | N | LIVER DISEASE | Y | N | STOMACH ULCERS/IBS | Y | N |
| BLEEDING DISORDERS | Y | N | LOW BLOOD PRESSURE | Y | N | CROHN'S | Y | N |
| BRONCHITIS/EMPHYSEMA | Y | N | JOINT REPLACEMENTS | Y | N | SEIZURES | Y | N |
| | | | | | | STROKE | Y | N |
| CANCER TYPE: | Y | N | MIGRAINE HEADACHES | Y | N | THYROID DISEASE | Y | N |
| DIABETES: TYPE 1 OR TYPE 2 (CIRCLE) | Y | N | MITRAL VALVE PROLAPSE | Y | N | TUBERCULOSIS | Y | N |
| OTHER CONDITIONS: | | | | | | | | |

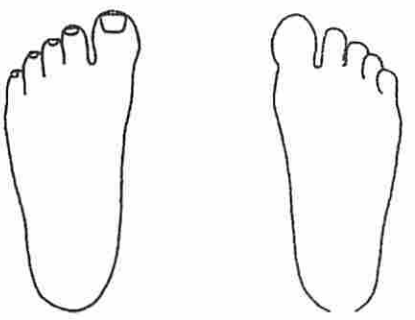
## CURRENT PROBLEM

WHAT SPECIFIC PROBLEM BRINGS YOU TO OUR OFFICE TODAY? _____

WHERE IS THE PAIN/PROBLEM LOCATED? PLEASE MARK ON THE PICTURES BELOW.

Shoe size_____

LEFT FOOT



TOP OF FOOT BOTTOM OF FOOT

INSIDE OF FOOT OUTSIDE OF FOOT

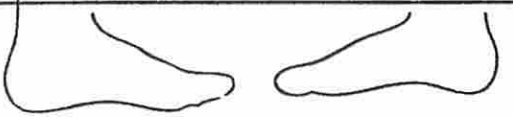


RIGHT FOOT



BOTTOM OF FOOT TOP OF FOOT

OUTSIDE OF FOOT INSIDE OF FOOT



PATIENT NAME: _____
DATE OF BIRTH: ____/____/_____

HOW LONG AGO DID THIS PROBLEM FIRST START? _____ DAYS / WEEKS / MONTHS / YEARS

DID YOUR PAIN OR PROBLEM: ☐ BEGIN ALL OF A SUDDEN ☐ GRADUALLY DEVELOP OVER TIME

HOW WOULD YOU DESCRIBE YOUR PAIN? ☐ NO PAIN ☐ SHARP ☐ DULL ☐ ACHING ☐ BURNING
☐ RADIATING ☐ ITCHING ☐ STABBING ☐ OTHER _____

HOW WOULD YOU RATE YOUR PAIN ON A SCALE FROM 0 TO 10? (PLEASE CIRCLE)
*(NO PAIN)* 0 1 2 3 4 5 6 7 8 9 10 *(WORST PAIN POSSIBLE)*

SINCE THE TIME YOUR PAIN OR PROBLEM BEGAN, HAS IT: ☐ STAYED THE SAME ☐ BECOME WORSE ☐ IMPROVED

WHAT MAKES YOUR PAIN OR PROBLEM FEEL WORSE? ☐ WALKING ☐ STANDING ☐ DAILY ACTIVITIES
☐ RESTING ☐ DRESS SHOES ☐ HIGH HEELS ☐ FLAT SHOES ☐ ANY CLOSED TOE SHOE
☐ RUNNING ☐ OTHER _____

WHAT MAKES YOUR PAIN OR PROBLEM FEEL BETTER? _____

WHAT TREATMENTS HAVE YOU HAD FOR THIS PROBLEM? _____

HOW HAS THIS PROBLEM AFFECTED YOUR LIFESTYLE OR ABILITY TO WORK? _____

WAS THIS PROBLEM CAUSED BY AN INJURY? ☐ YES (DESCRIBE) _____ ☐ NO

IF YES: WORK AUTO OTHER INJURY_____

CLAIM #_____WHERE WAS IT FILED_____

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TO THE BEST OF MY KNOWLEDGE, I HAVE ANSWERED THE QUESTIONS ON THIS FORM ACCURATELY. I UNDERSTAND THAT PROVIDING INCORRECT INFORMATION CAN BE DANGEROUS TO MY HEALTH. I UNDERSTAND THAT IT IS MY RESPONSIBILITY TO INFORM THE DOCTOR AND OFFICE STAFF OF ANY CHANGES IN MY MEDICAL STATUS.

_____ _____
PRINT NAME OF PATIENT, PARENT OR GUARDIAN SIGNATURE OF DOCTOR

_____ _____
IF OTHER THAN PATIENT, RELATIONSHIP TO PATIENT DATE

_____
SIGNATURE

_____
DATE

Revised June 2015

HEART & SOLE
FOOT AND ANKLE
Dr. Karen J. Lee, DPM

## Patient Financial Policy

Your understanding or our financial policies is an essential element of your care and treatment. If you have any questions, please discuss them with our front office staff or supervisor.

- As our patient, you are responsible for all authorizations/referrals needed to seek treatment in this office. _____
- It is the patient's responsibility to know whether our office is participating or non-participating with their insurance plan. Failure to provide all required information may necessitate patient payment for all charges. _____
- Unless other arrangements have been made in advance by you, or your health insurance carrier, payment for office services are due at the time of service. We will accept Zelle, VISA, MasterCard, Discover, cash, or personal check._____
- Your insurance policy is a contract between you and your insurance company. As a courtesy, we will file your insurance claim for you if you assign the benefits to the doctor. In other words, you agree to have your insurance company pay the doctor directly. If your insurance company does not pay the claim within a reasonable period, we will have to look to you for payment. _____
- We have made prior arrangements with certain insurers and other health plans to accept an assignment of benefits. We will bill those plans with which we have an agreement and will only require you to pay the co-pay/co-insurance/deductible as outlined by your insurance carrier. _____
- If you have insurance coverage with a plan with which we do not have a prior agreement, we will prepare and send the claim for you on an unassigned basis. This means your insurer will send the payment directly to you. Therefore, all charges for your care and treatment are due at the time of service. _____
- All health plans are not the same and do not cover the same services. In the event your health plan determines a service to be "not covered," or you do not have an authorization, you will be responsible for the complete charge. We will attempt to verify benefits for some specialized services or referrals; however, you remain responsible for charges to any service rendered. Patients are encouraged to contact their plans for clarification of benefits prior to services rendered. _____
- You must inform our office of all-insurance changes and authorization/referral requirements. In the event the office is not informed, you will be responsible for any charges denied. _____
- For most services provided in the hospital, we will bill your health plan. Any balance due is your responsibility. _____

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- There are certain elective surgical procedures for which we require pre-payment. You will be informed in advance if your procedure is one of those. In that event, payment will be due one week prior to the surgery. _____

- **Past due accounts** are subject to collection proceedings. Interest of 2% will incur if a balance remains unpaid after 60 days. In addition to the balance due for services performed by this office, all costs incurred including, but not limited to, collection fees, attorney fees and court costs shall be your responsibility. _____

- **Returned Checks:** There is a service fee of $35.00 for all returned checks. Your insurance company does not cover this fee. _____

- **Missed appointments:** We require notice of 24 hours in advance. This allows us to offer the appointment to another patient. If you fail to keep your appointment without notifying us in advance: a missed appointment fee without notification will apply. This fee is $50.00. Repeated missed appointments without notification may cause you to be discharged from the practice so that we can provide care to other patients.

- **Medical Record Fees:** Patients are entitled under federal law to have access to their protected health information, and we follow all rules, guidelines and exceptions to ensure compliance with patient's right. Our fees are a reasonable cost-based fee for copies and include the copying, supplies, labor, and postage of the files, and or summaries. _____

- **Forms/Reports:** The time it takes to write/dictate a report is not a part of regularly scheduled appointments: therefore, the provider must work overtime, and this work is subject to a fee. _____

- **Returns/Exchange Policy:** All returns must be in original package, unworn, unaltered within 14 days of purchase. Refunds will be issued as the form of payment made. Returns or exchange after 14 days but within the 30 days are subject to a 10% stocking fee. No returns or refunds will be made after 30 days of purchase. _____

- **Timeliness of Appointments:** We try to see everyone in a timely manner but if we are taking too long, please let our receptionist know so we can best serve your needs and reschedule you if necessary. _____

Signature of Patient/Responsible Party: _____

Printed Name of Patient/Responsible Party _____ Date _____

_____ Patient initials to indicate copy received.

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