

# INTAKE FORM

## Patient Information

## Insurance Information

Patient Name \_\_\_\_\_  
(last)

(first) \_\_\_\_\_ (middle initial) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone (\_\_\_\_) \_\_\_\_\_ Cell Phone (\_\_\_\_) \_\_\_\_\_

Email Address \_\_\_\_\_

SS# \_\_\_\_\_ Sex  M  F

Birth date \_\_\_\_\_ Age \_\_\_\_\_

Occupation \_\_\_\_\_

Employer \_\_\_\_\_

Work Phone (\_\_\_\_) \_\_\_\_\_ Extension \_\_\_\_\_

Married  Widowed  Single  Minor  
 Separated  Divorced  Partnered for \_\_\_\_\_ years

### IN CASE OF EMERGENCY

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Home Phone (\_\_\_\_) \_\_\_\_\_ Cell Phone (\_\_\_\_) \_\_\_\_\_

### Which of the following of our marketing have you seen?

Direct mail  Friend: \_\_\_\_\_  
 Internet  Magazine(Which One \_\_\_\_\_)  
 Radio  Talk: \_\_\_\_\_  
 Sign  Other: \_\_\_\_\_

What specifically prompted you to choose us for your healthcare needs? \_\_\_\_\_  
\_\_\_\_\_

Name of Primary Care Provider: \_\_\_\_\_  
\_\_\_\_\_

City, State: \_\_\_\_\_

Last check up: \_\_\_\_\_

Are you under a doctor's care at the present time?  Yes  No

If yes, for what? \_\_\_\_\_

Name of Doctor: \_\_\_\_\_

City, State: \_\_\_\_\_

Primary Subscriber \_\_\_\_\_

Relationship to Patient \_\_\_\_\_

Insurance Co. \_\_\_\_\_

ID # \_\_\_\_\_

Is there a Secondary Insurance?  Yes  No

Insurance Co. \_\_\_\_\_

ID # \_\_\_\_\_

### ASSIGNMENT AND RELEASE

I understand and agree that (regardless of whatever health insurance or medical benefits I have), I am ultimately responsible to pay \_\_\_\_\_ the balance due on my account for any professional services rendered and for any supplies, tests, or medications provided. I hereby authorize payment of any health insurance or medical plan benefits directly to \_\_\_\_\_ for medical services rendered and for any supplies, tests, or medications provided. I hereby authorize the release of any health status, conditions, symptoms or treatment information contained in your records that is needed to file and process insurance or medical plan claims, to pursue appeals on any denied or partially paid claims, for legal pursuit as to any unpaid or partially paid claims, or to pursue any other legal remedies necessary in connection with same. I hereby assign directly to \_\_\_\_\_ all current and prior rights, if any, to payment and benefits and all legal and other health plan rights that I (or my child, spouse, or minor dependent) may have under my/our applicable health plan(s) or health insurance policy(ies). This assignment includes, but is not limited to, a designation that \_\_\_\_\_ personnel can act on my / our behalf, as our representative or ERISA representative, as to any initial claim determination, to request any relevant claim or plan information from the applicable health plan or insurer, to file and pursue appeals to obtain benefits and/or payments that are due to \_\_\_\_\_ as a result of services rendered by \_\_\_\_\_ and authority to pursue any and all remedies to which I / we may be entitled, including the use of legal action against the health plan or insurer. This assignment and designation remains in effect unless revoked in writing, and a photocopy is to be considered as valid and enforceable as the original.

### FINANCIAL POLICY

We are honored to be of service to you and your family. This is to inform you of our billing requirements and our financial policy. Please be advised that payment for all services will be due at the time services are rendered, unless prior arrangements have been made. For your convenience, we accept Visa, Mastercard and Care Credit. I agree that should this account be referred to an agency or an attorney for collection, I will be responsible for all collection costs, attorney's fees and court costs.

I have read and understand all of the above and have agreed to these statements

\_\_\_\_\_  
Signature of Patient, Parent, Guardian or Personal Representative

\_\_\_\_\_  
Please print name of Patient, Parent, Guardian or Personal Rep.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Relationship to Patient

## Medical History

## Medications

### Gynecologic History

Are you currently pregnant?  Yes  No  
 Pregnancies #: \_\_\_\_\_ Dates: \_\_\_\_\_  
 Deliveries # \_\_\_\_\_ Natural delivery or C-section? \_\_\_\_\_  
 Menstrual: Onset: \_\_\_\_\_ Duration: \_\_\_\_\_  
 Are they regular?  Yes  No  
 Pain associated?  Yes  No  
 Last menstrual period: \_\_\_\_\_

### General History (Check all that apply to you)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> AIDS/HIV             | <input type="checkbox"/> Glaucoma                    | <input type="checkbox"/> Mumps                |
| <input type="checkbox"/> Alcoholism           | <input type="checkbox"/> Goiter                      | <input type="checkbox"/> Nervous              |
| <input type="checkbox"/> Allergy Shots        | <input type="checkbox"/> Gonorrhea                   | <input type="checkbox"/> Breakdown            |
| <input type="checkbox"/> Anemia               | <input type="checkbox"/> Gout                        | <input type="checkbox"/> Osteoporosis         |
| <input type="checkbox"/> Anorexia             | <input type="checkbox"/> Heart Attack                | <input type="checkbox"/> Pacemaker            |
| <input type="checkbox"/> Appendicitis         | <input type="checkbox"/> Heart Disease               | <input type="checkbox"/> Parkinson's Disease  |
| <input type="checkbox"/> Arthritis            | <input type="checkbox"/> Hepatitis                   | <input type="checkbox"/> Pinched Nerve        |
| <input type="checkbox"/> Asthma               | <input type="checkbox"/> Hernia                      | <input type="checkbox"/> Pleurisy             |
| <input type="checkbox"/> Bleeding Disorders   | <input type="checkbox"/> Herniated Disk              | <input type="checkbox"/> Pneumonia            |
| <input type="checkbox"/> Blood Transfusion    | <input type="checkbox"/> Herpes                      | <input type="checkbox"/> Polio                |
| <input type="checkbox"/> Breast Lump          | <input type="checkbox"/> High Blood Pressure         | <input type="checkbox"/> Prostate Problem     |
| <input type="checkbox"/> Bronchitis           | <input type="checkbox"/> High Cholesterol            | <input type="checkbox"/> Prosthesis           |
| <input type="checkbox"/> Bulimia              | <input type="checkbox"/> Hormone Replacement Therapy | <input type="checkbox"/> Psychiatric Care     |
| <input type="checkbox"/> Cancer               | <input type="checkbox"/> Hypertension                | <input type="checkbox"/> Rheumatoid Arthritis |
| <input type="checkbox"/> Cataracts            | <input type="checkbox"/> Jaundice                    | <input type="checkbox"/> Rheumatic Fever      |
| <input type="checkbox"/> Chemical Dependency  | <input type="checkbox"/> Kidney Disease              | <input type="checkbox"/> Scarlet Fever        |
| <input type="checkbox"/> Chest pain           | <input type="checkbox"/> Liver Disease               | <input type="checkbox"/> STD                  |
| <input type="checkbox"/> Chicken Pox          | <input type="checkbox"/> Malaria                     | <input type="checkbox"/> Stroke               |
| <input type="checkbox"/> Cholera              | <input type="checkbox"/> Measles                     | <input type="checkbox"/> Suicide Attempt      |
| <input type="checkbox"/> Constipation         | <input type="checkbox"/> Migraine                    | <input type="checkbox"/> Swelling feet        |
| <input type="checkbox"/> Diabetes             | <input type="checkbox"/> Headaches                   | <input type="checkbox"/> Thyroid Problems     |
| <input type="checkbox"/> Eating Disorder      | <input type="checkbox"/> Miscarriage                 | <input type="checkbox"/> Tonsillitis          |
| <input type="checkbox"/> Emphysema            | <input type="checkbox"/> Mononucleosis               | <input type="checkbox"/> Tuberculosis         |
| <input type="checkbox"/> Epilepsy             | <input type="checkbox"/> Multiple Sclerosis          | <input type="checkbox"/> Tumors, Growths      |
| <input type="checkbox"/> Fractures            |  | <input type="checkbox"/> Typhoid Fever        |
| <input type="checkbox"/> Gallbladder Disorder |  | <input type="checkbox"/> Ulcers               |
|   |  | <input type="checkbox"/> Vaginal Infections   |
|   |  | <input type="checkbox"/> Whooping Cough       |
|   |  | <input type="checkbox"/> Other: _____         |
|   |  | _____   |

### Medications:

### Dosages:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

(Use back of sheet if additional space is needed.)

**Birth Control:** \_\_\_\_\_

**Medication Allergies:** \_\_\_\_\_ **General Allergies:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Do you have any surgical devices in your body? (i.e. screws, pins, plates, etc?)**

**If yes, where are they located?** \_\_\_\_\_

## ACTIVITY LEVEL

**Select one of the following:**

- Inactive:** no regular physical activity with a sit-down job
- Light Activity:** no organized physical activity during leisure time
- Moderate Activity:** Occasionally involved in activities such as weekend golf, tennis, jogging, swimming or cycling.
- Heavy Activity:** consistent lifting, stair climbing, heavy construction, etc. or regular participation in jogging, swimming, cycling or active sports at least three times per week.
- Vigorous Activity:** participation in extensive physical exercise for at least 60 minutes per session, 4 or more times per week.

## Family History

*Possible Hereditary Diseases:* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Social Habits

**Habits:** (please select all that apply)

- |   |                    |
|---|--------------------|
| <input type="checkbox"/> Smoking                | Packs/day: _____   |
| <input type="checkbox"/> Alcohol                | Drinks/week: _____ |
| <input type="checkbox"/> Coffee/Caffeine drinks | Cups/day: _____    |
| <input type="checkbox"/> High Stress level      | Reason: _____      |

## Surgical History

*Past Surgical History* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Nutrition

Present Height: \_\_\_\_\_ feet \_\_\_\_\_ inches

Present Weight: \_\_\_\_\_ lbs.

Ideal Weight: \_\_\_\_\_ lbs.

Weight at age 20: \_\_\_\_\_ lbs.

Do you eat/snack after your evening meal? YES / NO

If yes, what and how much do you eat? \_\_\_\_\_

\_\_\_\_\_

What beverages do you drink throughout a day? \_\_\_\_\_

\_\_\_\_\_

## PHYSICAL MEDICINE CURRENT CONDITIONS

Reason for Visit? \_\_\_\_\_

When did your symptoms appear? \_\_\_\_\_

Is this condition getting progressively worse?  Yes  No  Unknown

Rate the severity of your pain on a scale from 1 (least pain) to 10 (severe pain) \_\_\_\_\_

Type of Pain:  Sharp  Dull  Throbbing  Numbness  Aching  Shooting  
 Burning  Tingling  Cramps  Stiffness  Swelling  Other

How often do you have this pain? \_\_\_\_\_

Is it constant or does it come and go? \_\_\_\_\_

Does it interfere with your  Work  Sleep  Daily Routine  Recreation

Indicate activities which are painful to perform:  Sitting  Standing  Walking  Bending  Lying Down

What treatment have you already received for your condition?  Medication  Surgery  Physical Therapy

Chiropractic Services  None  Other \_\_\_\_\_

Name and address of other doctor(s) who have treated you for your condition: \_\_\_\_\_  
\_\_\_\_\_

Date of Last: Physical Exam \_\_\_\_\_ Spinal Exam/X-Ray \_\_\_\_\_ Lab work \_\_\_\_\_

Chest X-Ray \_\_\_\_\_ MRI, CT-Scan, Bone Scan \_\_\_\_\_

Is your condition due to an accident?  Yes  No Date of Accident: \_\_\_\_\_

Type of Accident:  Auto  Work  Home  Other: \_\_\_\_\_

To whom have you made a report of your accident?  Auto Insurance  Employer  Work Comp.  Other

Name \_\_\_\_\_ Date \_\_\_\_\_

Please be sure to fill this form out extremely accurately. Mark the area(s) on your body where you feel the described sensation(s). Use the appropriate symbol(s). Mark areas of radiating pain and include all affected areas. You may draw on the face as well.

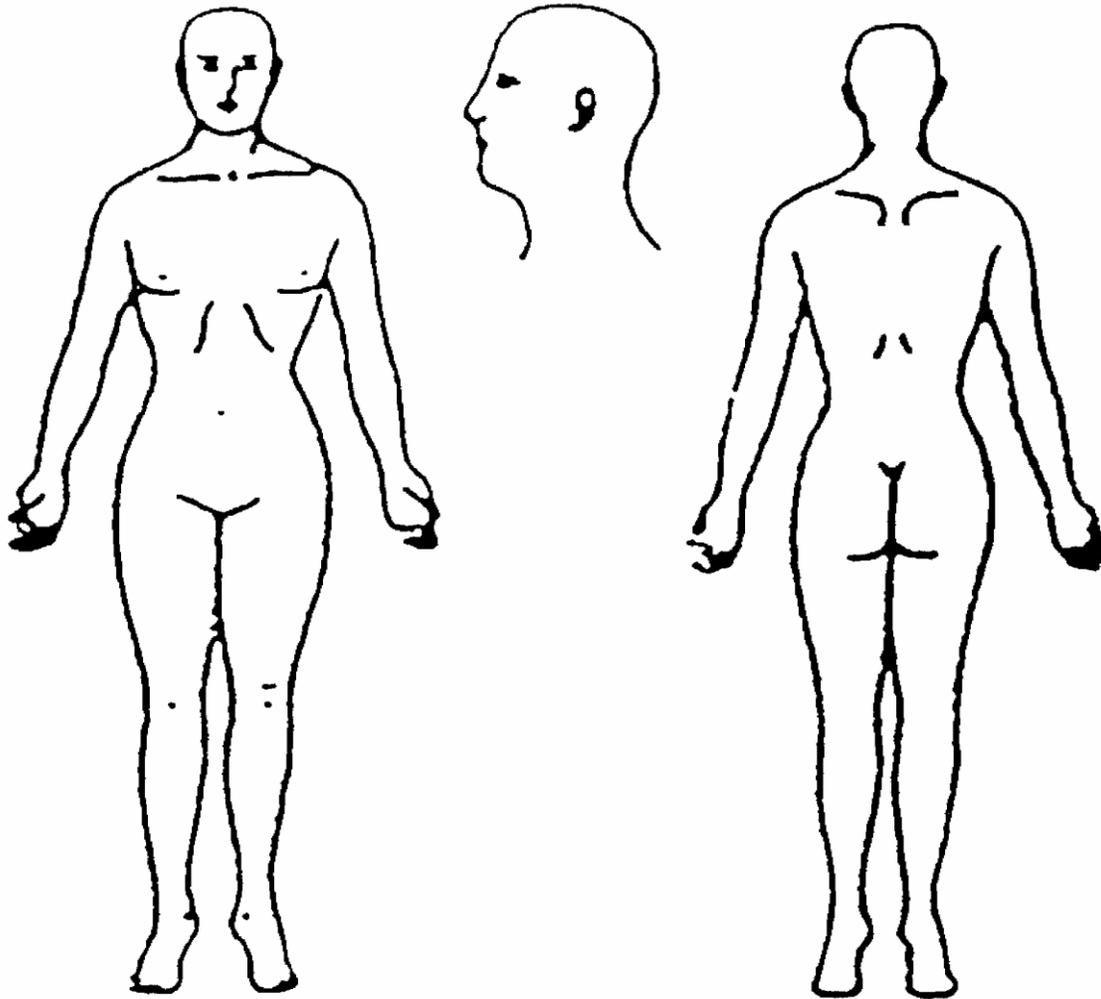
Aches  $\wedge/\wedge/\wedge$

Numbness oooo

Pins/Needles  $\# \# \# \#$

Burning xxxx

Stabbing  $///$



Indicate the severity of your symptoms by marking an "X" on the lines below:

How bad are your symptoms now?

\_\_\_\_\_

None

Most Severe

How bad have they been in the past?

\_\_\_\_\_

None

Most Severe



**X-ray Consent:**

I authorize the use of diagnostic x-rays if the doctor deems it necessary or advised in my treatment. Every effort will be taken by the doctor to conform with the Illinois Department of Radiation Bureau's Regulations when it comes to radiation exposure.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Minor:**

I am the Parent/Legal Guardian of \_\_\_\_\_ and authorize the use of diagnostic x-rays if the doctor deems it necessary or advised in my treatment. Every effort will be taken by the doctor to conform with the Illinois Department of Radiation Bureau's Regulations when it comes to radiation exposure.

Parent/Legal Guardian Signature \_\_\_\_\_ Date \_\_\_\_\_

**Females Only:**

**Pregnancy Release:**

I certify that, to the best of my knowledge, I am not pregnant. I authorize the use of diagnostic x-rays if the doctor deems it necessary or advised in my treatment. Every effort will be taken by the doctor to conform with the Illinois Department of Radiation Bureau's Regulations when it comes to radiation exposure. I have been advised that certain x-ray examinations, especially of the pelvis, can be harmful to an unborn child.

Signature \_\_\_\_\_ Date \_\_\_\_\_



## HIPPA and Cancellation Policy

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

\_\_\_\_\_

### **HIPPA Release of Medical Records:**

I authorize any, legal representative, attorney, medical, psychological, psychiatric, osteopathic or chiropractic physician, any other medical practitioner of healthcare provider, hospital, clinic, rehabilitation facility to disclose information from the medical and health care records/bills of the injured person. I understand that the specific type of information to be disclosed includes but not limited to, breakdown of any settlement, medical records/bills, including history, treatment, diagnosis, and billing records. This authorization also permits discussion in person, by telephone, electronically, or by mail.

### **Consent to Treatment & Release of Information:**

I voluntarily consent to receive medical and health care services that may include diagnostic procedures examinations and treatment. I authorize the release of any medical information necessary to process this claim. Risks and benefits to therapy have been explained to me.

### **Cancellation Policy**

In order to provide equal opportunity to all our patients and provide the best care possible, we really need your cooperation with keeping up with your appointments. Maintaining your schedule will help us give you the best clinical outcome possible. So please:

Please kindly give 24-hour notice if you are unable to keep your appointment, otherwise you will be charged a cancel fee:

**Physical Therapy/Chiropractic Cancel Fee-\$60**

**Nurse Practitioner Cancel Fee- \$30**

**Dietician Cancel Fee-\$60**

**Naprapathic Cancel Fee- \$75**

**Massage Cancel Fee - \$60**

**Court Representation Hourly-\$300**

*I certify that I have read this form and understand its contents. I agree to the terms and agree to abide*

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

Date: \_\_\_\_\_

Signature: \_\_\_\_\_



## Financial Disclosure and Responsibility

In some instance your insurance carrier may deem the services as not payable. In the event that my health insurance plan determines a service to be “not payable”, I agree to pay the costs of all services provided.

If I am uninsured, I agree to pay for the medical services rendered to me at time of service.

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

## Credit Card Authorization Form

Please complete all fields. You may cancel this authorization at any time by contacting us. This authorization will remain in effect until cancelled.

I, \_\_\_\_\_, hereby authorize Health First Wellness Center to charge my credit card below for agreed upon services as stated in the Financial Disclosure and Responsibility clause above. I understand that my information will be saved to file for future transactions on my account.

Credit Card Information			
Card Type:	<input type="checkbox"/> MasterCard	<input type="checkbox"/> VISA	<input type="checkbox"/> Discover <input type="checkbox"/> AMEX
	<input type="checkbox"/> Other _____		
Cardholder Name (as shown on card): _____			
Card Number: _____			
Expiration Date (mm/yy): _____			
Cardholder ZIP Code (from credit card billing address): _____			

[Click or tap to enter a date.](#)

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date