

## PATIENT INFORMATION AND INSURANCE FORM

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

Preferred Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Gender: ☐ Male ☐ Female

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

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

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

Email: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer Phone: \_\_\_\_\_

Preferred Communication: ☐ Home Phone ☐ Cellphone ☐ Text

## Race (choose one):

- ☐ American Indian / Alaska Native  
☐ African American  
☐ Asian  
☐ Native Hawaiian / Pacific Islander  
☐ White / Caucasian  
☐ Other / Decline

## Ethnicity (choose one):

- ☐ Hispanic or Latino  
☐ Not Hispanic or Latino  
☐ Declined

## Marital Status (choose one):

- ☐ Single  
☐ Married  
☐ Divorced  
☐ Widowed  
☐ Other

## INSURANCE INFORMATION

Primary Insurance Plan: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Group Number (if any): \_\_\_\_\_

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

Policy Holder Name &amp; DOB: \_\_\_\_\_ Relationship to Patient: \_\_\_\_\_

Secondary Insurance Plan: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Group Number (if any): \_\_\_\_\_

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

Policy Holder Name &amp; DOB: \_\_\_\_\_ Relationship to Patient: \_\_\_\_\_

Emergency Contact: \_\_\_\_\_ Relationship to Patient: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Preferred Pharmacy Name: \_\_\_\_\_ Address: \_\_\_\_\_

## LEGAL

Do you have a medical durable power of attorney? ☐ Yes ☐ No Do you have an advanced directive? ☐ Yes ☐ No

If yes to either, please provide the office with a copy of the legal documents for our files.



Patient Name: \_\_\_\_\_ DOB: \_\_\_\_\_

## MEDICAL HISTORY

**Allergies** (list ALL medication, food, and environmental allergies): \_\_\_\_\_

**Medications** (Please list ALL medications prescribed or OTC with dose and frequency): \_\_\_\_\_

**\*\*Please bring copies of all immunization records\*\***

### Past Medical History (choose all that apply):

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> A-Fib                          | <input type="checkbox"/> Fibromyalgia                        | <input type="checkbox"/> Osteoarthritis                  |
| <input type="checkbox"/> ADD / ADHD                     | <input type="checkbox"/> Gallbladder Disease                 | <input type="checkbox"/> Osteoporosis                    |
| <input type="checkbox"/> Anxiety / Depression           | <input type="checkbox"/> Gastroesophageal Reflux (GERD)      | <input type="checkbox"/> Peptic Ulcers                   |
| <input type="checkbox"/> Asthma                         | <input type="checkbox"/> Glaucoma                            | <input type="checkbox"/> Pneumonia                       |
| <input type="checkbox"/> Blood / Clotting Disorder      | <input type="checkbox"/> Gonorrhea, Chlamydia, Herpes, Other | <input type="checkbox"/> Psoriasis                       |
| <input type="checkbox"/> Benign Prostatic Hyperplasia   | <input type="checkbox"/> STD                                 | <input type="checkbox"/> Pulmonary Embolism              |
| <input type="checkbox"/> Chicken Pox                    | <input type="checkbox"/> Headaches / Migraines               | <input type="checkbox"/> Rheumatic Fever                 |
| <input type="checkbox"/> Colon Polyps                   | <input type="checkbox"/> Hearing Loss                        | <input type="checkbox"/> Rheumatoid Arthritis            |
| <input type="checkbox"/> Concussion                     | <input type="checkbox"/> Heart Disease / Heart Attack        | <input type="checkbox"/> Seasonal Allergies              |
| <input type="checkbox"/> Congestive Heart Failure       | <input type="checkbox"/> Hemorrhoids or Rectal Disease       | <input type="checkbox"/> Sleep Apnea                     |
| <input type="checkbox"/> Coronary Artery Disease        | <input type="checkbox"/> Hepatitis A, B or C                 | <input type="checkbox"/> Stroke / TIA                    |
| <input type="checkbox"/> Crohn's Disease                | <input type="checkbox"/> Hernia                              | <input type="checkbox"/> Systemic Lupus Erythematosus    |
| <input type="checkbox"/> Deep Vein Thrombosis           | <input type="checkbox"/> High Blood Pressure                 | <input type="checkbox"/> Thyroid Disease / Hypo or Hyper |
| <input type="checkbox"/> Dementia / Alzheimer's Disease | <input type="checkbox"/> High Cholesterol                    | <input type="checkbox"/> Tuberculosis                    |
| <input type="checkbox"/> Diabetes, Type I               | <input type="checkbox"/> Irritable Bowel Syndrome (IBS)      | <input type="checkbox"/> Ulcerative Colitis              |
| <input type="checkbox"/> Diabetes, Type II              | <input type="checkbox"/> Kidney Stones / Kidney Disease      | <input type="checkbox"/> Other: _____                    |
| <input type="checkbox"/> Emphysema / COPD               | <input type="checkbox"/> Lung Nodules                        | _____  |
| <input type="checkbox"/> Epilepsy / Seizures            | <input type="checkbox"/> Lyme Disease                        | _____  |
| <input type="checkbox"/> Erectile Dysfunction           | <input type="checkbox"/> Mental Illness / PTSD               | _____  |

Have you ever been diagnosed with cancer? ☐ Yes ☐ No

If yes please specify type of cancer and date of diagnosis: \_\_\_\_\_

**Surgical History** (list ALL past surgeries): \_\_\_\_\_

Do you use any Assistive Devices? ☐ Cane ☐ Walker ☐ Wheelchair ☐ Hearing Aids ☐ Support Cane (for seeing impaired)

Do you see any specialist? (If yes, please list their names and specialty) \_\_\_\_\_



Patient Name: \_\_\_\_\_ DOB: \_\_\_\_\_

**Tobacco:** Do you smoke? ☐ Yes ☐ Former ☐ Never If yes/former, how many packs per day? \_\_\_\_\_  
**Alcohol:** Do you drink alcohol? ☐ Yes ☐ Former ☐ Never If yes/former, how frequently? \_\_\_\_\_  
**Other:** Do you use any illegal substances? ☐ Yes ☐ No Have you been treated for substance abuse problems? ☐ Yes ☐ No  
**Safety:** Are there guns in your home? ☐ Yes ☐ No Do you wear a seatbelt? ☐ Yes ☐ No

**Health Maintenance:**

Date of last Physical Exam: \_\_\_\_\_ Date of last Colonoscopy: \_\_\_\_\_  
Date of last Tetanus Vaccine: \_\_\_\_\_ Date of last Pneumovax Vaccine: \_\_\_\_\_

**Women ONLY:**

Age at menses onset: \_\_\_\_\_ Date of last period: \_\_\_\_\_  
Date of last PAP: \_\_\_\_\_ Colposcopy/Biopsy/Surgery: \_\_\_\_\_  
Name of GYN: \_\_\_\_\_ Number of Pregnancies: \_\_\_\_\_  
Number of Children: \_\_\_\_\_ Pregnancy Complications: \_\_\_\_\_

**Men ONLY:**

Weak Urine Stream: ☐ Yes ☐ No Discharge from Penis: ☐ Yes ☐ No  
Painful/Swollen Testis: ☐ Yes ☐ No Prostate Trouble: ☐ Yes ☐ No

**Review of Symptoms** (Choose ALL that apply within the past 6 months):

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> Black Stool           | <input type="checkbox"/> Fatigue               | <input type="checkbox"/> Nausea              | <input type="checkbox"/> Swollen Feet           |
| <input type="checkbox"/> Bloody Sputum / Vomit | <input type="checkbox"/> Fever / Chills        | <input type="checkbox"/> Nighttime Urination | <input type="checkbox"/> Throat Discomfort      |
| <input type="checkbox"/> Bruise Easily         | <input type="checkbox"/> Hair / Nail Problem   | <input type="checkbox"/> Nose Bleeds         | <input type="checkbox"/> Trouble Sleeping       |
| <input type="checkbox"/> Chest Pain            | <input type="checkbox"/> Hearing Problems      | <input type="checkbox"/> Numbness            | <input type="checkbox"/> Trouble with Vision    |
| <input type="checkbox"/> Cough (Unexplained)   | <input type="checkbox"/> Heart Palpitations    | <input type="checkbox"/> Poor Appetite       | <input type="checkbox"/> Unexpected Weight Gain |
| <input type="checkbox"/> Diarrhea              | <input type="checkbox"/> Heartburn             | <input type="checkbox"/> Rectal Bleed        | <input type="checkbox"/> Unexpected Weight Loss |
| <input type="checkbox"/> Difficulty Swallowing | <input type="checkbox"/> Incontinence          | <input type="checkbox"/> Rectal Discomfort   | <input type="checkbox"/> Urgent Urination       |
| <input type="checkbox"/> Dizziness             | <input type="checkbox"/> Increased Thirst      | <input type="checkbox"/> Ringing of Ears     | <input type="checkbox"/> Urination Problems     |
| <input type="checkbox"/> Ear Pain / Discharge  | <input type="checkbox"/> Itching               | <input type="checkbox"/> Sexual Problems     | <input type="checkbox"/> Voice Change           |
| <input type="checkbox"/> Excess Sweating       | <input type="checkbox"/> Joint Pain            | <input type="checkbox"/> Shortness of Breath | <input type="checkbox"/> Wheezing               |
| <input type="checkbox"/> Fainting              | <input type="checkbox"/> Muscle Aches/Weakness | <input type="checkbox"/> Skin Problems       |   |

**FAMILY HISTORY**

Has any of your **FIRST** or **SECOND** degree relatives been diagnosed with any of the following health conditions? If so, **please specify who the relative is and if it is maternal or paternal side**. If history of cancer or heart disease, please **indicate age** when diagnosed.

Cancer: \_\_\_\_\_ Stroke: \_\_\_\_\_  
Type: \_\_\_\_\_ Mental Illness: \_\_\_\_\_  
Alcoholism: \_\_\_\_\_  
Diabetes: \_\_\_\_\_ Suicide: \_\_\_\_\_  
Thyroid Disease: \_\_\_\_\_ Asthma: \_\_\_\_\_  
High Cholesterol: \_\_\_\_\_ Early Death (prior to 55 years old): \_\_\_\_\_  
High Blood Pressure: \_\_\_\_\_ Heart Disease: \_\_\_\_\_

