ORTHOPAEDIC
SPECIALTY INSTITUTE
MEDICAL GROUP OF ORANGE COUNTY

Jeremy S. SmIth, M D

New Spine Patient Questionnaire

Name: ______________________________
Age: __________ Hand Dominance: ☐ R ☐ L
Today's Date: ______________________________
☐ Male ☐ Female Pregnant? ☐ Yes ☐ No
Height:______________ Weight:______________
Primary Physician:______________________________

Primary Dr. Address:______________________________
____
Phone Number: ______________________________
Referring Physician:______________________________
____
Referring Dr. Address:______________________________
Phone Number:______________________________

Chief Complaint:____
____

Date of Injury: ______________ Time of Injury: ______________ Injured at: ______________ County of:______________

Did your pain start: ☐gradually ☐suddenly

Are your symptoms now: ☐worse ☐better ☐no change

Degree of current pain: ☐none ☐mild ☐moderate ☐severe

How often do you experience the pain? ☐constant ☐intermittent

What is your pain scale (scale of 1-10; 10 being the worst pain)?______________________

Describe your pain ☐aching ☐burning ☐sharp ☐stabbing ☐numbness ☐tingling ☐______________________

What is your back pain to leg pain ration (i.e. 100% back/0%leg)?
☐100/0 ☐90/10 ☐80/20 ☐70/30 ☐60/40 ☐50/50 ☐40/60 ☐30/70 ☐20/80 ☐10/90 ☐0/100

What is your neck pain to arm pain ratio (i.e. 100% neck/0% arm)?
☐100/0 ☐90/10 ☐80/20 ☐70/30 ☐60/40 ☐50/50 ☐40/60 ☐30/70 ☐20/80 ☐10/90 ☐0/100

Where is your pain located? (check all that apply and circle side)
☐neck ☐neck and arm(s) R or L ☐arm(s) R or L
☐back ☐back and arm(s) R or L ☐leg(s) R or L

What aggravates your pain? (standing, sitting, etc.)______________________

What relieves your pain? (lying down, sitting, etc.)______________________

Do you have numbness? If so, where?______________________

Do you have weakness? If so, where?______________________

Do you have night pain? ______________________ Does it wake you up from sleep?______________

Do you have bowel or bladder problems? ☐incontinence ☐constipation ☐hesitancy

Are there any associated symptoms (i.e. nausea, loss of balance, etc.)?______________________
____

What treatments have made your pain better?______________________

What treatments have made your pain worse?______________________

Have you been in a physical therapy program? ☐yes ☐no Did it help you? ☐yes ☐no

When/where/how often did you go?______________________

Are you currently working? ☐no ☐yes what type of work?______________________
☐full duty ☐modified duty:______________________

Date last worked?______________ Are you able to perform your usual duties? ☐yes ☐no

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New Spine Patient Medical and Surgical History

Past Medical History

Check all items that apply and describe below if necessary. Otherwise check "none."				NONE
☐ Anesthesia problems:	Describe:			☐
☐ Heart problems:	☐Heart attack	☐Heart failure	☐Stroke	☐
☐ Circulation problems:	☐High blood pressure	☐Poor circulation		☐
☐ Lung problems:	☐Emphysema	☐Asthma ☐Lung Disease	☐Pneumonia ☐Tuberculosis	☐
☐ Diabetes:	☐Date diagnosed:	Controlled with: ☐Insulin	☐Oral meds	☐
☐ Neuropathy:	☐Loss of Feeling:	☐Hands	☐Feet	☐
☐ Endocrine problems:	☐Thyroid	☐Adrenal	☐Pituitary	☐
☐ Blood problems:	☐Anemia	☐Bleeding disorder		☐
☐ Blood clots:	☐Blood clot in leg	☐Blood clot in lung		☐
☐ Cancer:	Type(s):			☐
☐ Stomach problems:	☐Ulcers	☐Hiatal hernia	☐Gastric reflux	☐
☐ Kidney problems:	☐Kidney failure	☐Kidney stones		☐
☐ Liver problems:	☐Hepatitis	☐Cirrhosis		☐
☐ Mental illness:	☐Depression	☐Seizures	☐Alcoholism	☐
☐ Bone/Joint problems:	☐Fractures ☐Gout	☐Osteoarthritis ☐Rheumatoid arthritis	☐Osteoporosis	☐
☐ Immune problems:	☐AIDS	☐HIV	☐Other	☐
☐ Descriptions/Other:				

Past Surgical History ☐ no other surgery ☐ use back of page if more space needed

Type of Surgery	Date	Surgeon/Hospital

Medications (include vitamins and herbs) ☐no medications ☐use back of page if more space needed

Medication/Strength	Dosage	Reason	Medication/Strength	Dosage	Reason

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Allergies ☐no allergies ☐use back of page if more space needed

Allergy	Reaction(s)	Allergy	Reaction(s)

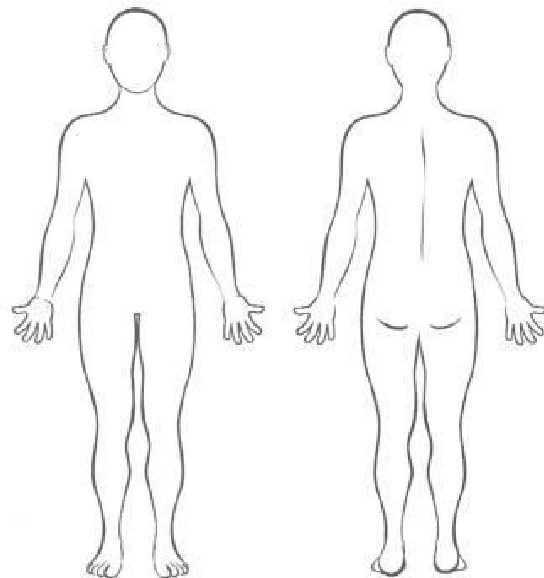
Family History (check all that apply) ☐none apply

☐heart problems ☐lung problems ☐kidney problems ☐stroke ☐arthritis
☐bleeding problems ☐alcoholism ☐seizures ☐spine problems ☐cancer
☐mental illness ☐hypertension ☐diabetes ☐gout
☐other: ______________________________

Social History (check all that apply)

Occupation:				
Work Status:	☐Employed	☐Retired	☐Unemployed	☐Disability leave
Marital Status:	☐Single ☐Co-habiting	☐Married	☐Divorced	☐Widowed
Who do you live with:	☐Alone ☐Other	☐Spouse/Sig. Other	☐Children	☐Roommate
Tobacco Use:	☐Never ☐Packs per day ____	☐Cigarettes For ________ years (total)	☐Cigar	☐Pipe chew ☐Quit _____ years ago
Alcohol Use:	☐Never ☐Alcoholic	☐Rare ☐Recovering Alcoholic	☐Social	☐Frequent (more than 2x per week)
Drug Use:	☐Never Types of Drugs:	☐In past	☐Currently	☐In treatment

Please mark the areas on your body where you are having symptoms. Use the symbol "XXXX." Just to complete the picture, please draw your face.



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New Spine Patient Medical and Surgical History

Review of Systems

Check all items that apply and describe below if necessary. Otherwise check "none."					NONE
☐Constitutional:	☐Weight loss	☐Weight gain	☐Fever	☐Chills	☐
☐Eyes:	☐Reading glasses	☐Change of vision			☐
☐Ears:	☐Hearing loss	☐Ear pain	☐Vertigo (dizziness)		☐
☐Nose/Mouth/Throat:	☐Nosebleeds	☐Hoarseness	☐Bleeding gums	☐Tooth/gum trouble	☐
☐Lungs:	☐Cough	☐Shortness of breath	☐Wheezing	☐Snoring	☐
☐Stomach:	☐Nausea	☐Ulcers	☐Vomiting	☐Stomach pain	☐
☐Bowels:	☐Diarrhea	☐Constipation	☐Bloody stool	☐Black stools	☐
☐Urinary Tract:	☐Difficulty starting urination		☐Frequent or burning urination		☐
☐Heart:	☐Chest pain	☐Palpitations	☐Abnormal heart beat	☐Swollen ankles	☐
☐Musculoskeletal:	☐Joint pain ☐Muscle pain	☐Swelling	☐Instability	☐Stiffness	☐
☐Skin:	☐Rashes ☐Poor healing	☐Itching	☐Skin changes	☐Redness	☐
☐Neuropathy:	☐Loss of feeling in:	☐Hands	☐Feet	☐Numbness	☐
☐Neurologic:	☐Seizures ☐Dizziness	☐Headaches	☐Memory loss	☐Uneasy gait	☐
☐Psychologic:	☐Sleep disturbance	☐Hallucinations	☐Frequent anxiety	☐Depression	☐
☐Blood:	☐Bleeding/bruising	☐Swollen lymph nodes	☐Blood clots	☐Anemia	☐
☐Non-Drug Allergies:	☐Foods	☐Seasonal	☐Other:		☐
☐Description/Other:					

ORTHOPAEDIC SPECIALTY INSTITUTE
MEDICAL GROUP OF ORANGE COUNTY

PATIENT REGISTRATION FORM

PATIENT INFORMATION: (Please use full legal name, no nicknames)

Last Name:	First Name:		Middle Initial:
Date of Birth:	Age:	Sex:	Social Security #:
Address:			
City:		State:	Zip:
Home Phone #:		Cell Phone #:	
E-mail Address:			Driver's License #:
Was this an injury? ☐ Yes ☐ No	If yes, where did your injury occur? ☐ Work ☐ Auto ☐ Home ☐ School		Date of injury:
Employer Name:		Occupation/Title/Position:	
Employer Address and Phone #:			
Emergency Contact Name:		Relationship:	Phone #:

GUARANTOR INFORMATION: (List person or insured name responsible for bill – use full legal name, no nicknames)

Relationship to Patient: ☐ Self ☐ Spouse ☐ Parent ☐ Other			
Last Name:	First Name:		Middle Initial:
Date of Birth:	Age:	Sex:	Social Security #:
Address:			
City:		State:	Zip:
Home Phone #:		Cell Phone #:	
Employer Name:		Occupation/Title/Position:	
Employer Address and Phone #:			

INSURANCE INFORMATION: (Please allow receptionist to photocopy your insurance ID cards)

IF SOMEONE OTHER THAN PATIENT IS THE INSURED PARTY, PLEASE INCLUDE DATE OF BIRTH FOR CLAIMS

PRIMARY INS	Insurance Company:	Copay:	☐ HMO ☐ PPO ☐ POS
	Policy/ID #:	Group #:	
	Claims Address & Phone #:		
	Insured's Name:	Relationship:	Insured's Date of Birth:
	Insured's Employer:	Insured's Social Security #:	
SECONDARY INS	Insurance Company:	Copay:	☐ HMO ☐ PPO ☐ POS
	Policy/ID #:	Group #:	
	Claims Address & Phone #:		
	Insured's Name:	Relationship:	Insured's Date of Birth:
	Insured's Employer:	Insured's Social Security #:	

I hereby assign the insurance benefits to which I am entitled, directly to ORTHOPAEDIC SPECIALTY INSTITUTE, a medical group. I understand that I am financially responsible for all charges regardless of insurance verification, benefits and eligibility. I authorize release of medical records and information regarding medical history that is requested by the insurance company. A photocopy of this authorization is accepted with the same authority as original. **Photo identification and insurance cards must be presented at the time of service to enable OSI to submit claims to your insurance carrier. Should identification and insurance cards not be presented, you will become a cash patient with payment in full due at the time of service.** This agreement will remain valid from this day forward to include all future services relating to the above patient.

SIGNATURE OF PATIENT/GUARDIAN **DATE**

ORTHOPAEDIC
SPECIALTY INSTITUTE

Medical Information Release Form (HIPAA Release Form)

Patient Name: ______________________________Date of Birth: ___/___/_____ MR #: ______________

If minor, Parent/Guardian Name: ______________________________

Release of Information

I authorize the release of information including diagnosis, records, examination results, medication dose changes and billing/collection/claims information.
This information may be released to:

[ ] Spouse/Name: _________________________________

[ ] Child(ren)/Name(s): ____________________________

[ ] Other: ____

[ ] Information is not to be released to anyone other than me.

Messages

Please call: [ ] my home phone # ________________ [ ] my cell phone # ________________.
If unable to reach me:

[ ] you may leave a detailed message.
OR
[ ] please leave a message asking me to return your call.

[ ] Do not leave messages on my voicemail.

The best time to reach me is (day of week) ____________________ between (time) __________________.

E-mail Messages/Portal

[ ] Use my e-mail or portal contact to send messages for me to contact the nurse for information.
OR
[ ] Use my e-mail or portal contact to leave detailed messages and information.
[ ] Attach lab results to e-mail/portal message.
My e-mail address is: ____.

This Release of Information will remain in effect until termination by me in writing. This release specifically excludes any psychiatry and psychology evaluations/records which are further restricted by HIPAA regulations.

Signature: ____ Date: ______________________

Witness: ____ Date: ______________________

Acknowledgement of Receipt of Notice of Privacy Practices and Notices to Consumers

Orthopaedic Specialty Institute

I hereby acknowledge that I received a copy of the medical practice's Notice of Privacy Practices as well as Consumers Notices. I further acknowledge that a copy of the current notice will be posted in the reception area, and that I will be offered a copy of any amended Notice of Privacy Practices and/or Consumer updates at each appointment.

NOTICE TO CONSUMERS	NOTICE TO CONSUMERS
PHYSICIAN ASSISTANTS ARE LICENSED AND REGULATED BY THE PHYSICIAN ASSISTANT COMMITTEE (916) 561-8780 WWW.PAC.CA.GOV	MEDICAL DOCTORS ARE LICENSED AND REGULATED BY THE MEDICAL BOARD OF CALIFORNIA (800) 633-2322 WWW.MBC.CA.GOV

Signature: ___________________________________ Date: ___________________________________

Print Name: _________________________________ Telephone: ______________________________

If not signed by the patient, please indicate
Relationship:

- ☐ Parent or guardian of minor patient
- ☐ Guardian or conservator of an incompetent patient
- ☐ Beneficiary or personal representative of deceased patient

Name of Patient: ____

280 S. Main Street · Suite 200 · Orange, CA 92868 · Tel. (714) 634-4567 · Fax (714) 634-4569
16300 Sand Canyon Ave · Suite 511 · Irvine, CA 92618 · Tel. (949) 255-9890 · Fax (949) 255-9776

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CONSENT FOR TREATMENT – NOTICE OF POLICIES

I hereby consent and authorize Orthopaedic Specialty Institute Medical Group of Orange County (OSI) healthcare providers to perform medical care, diagnostic tests, surgical care and other therapeutic measures, as may be indicated for my health and well-being. If I will not comply with the medical program of care provided or recommended, I understand that thereupon I relieve my physician(s), healthcare provider(s), medical staff, and the company, of all responsibility resulting from my action.

I also authorize OSI, all associated physicians and all associated agencies, to gather, maintain and release any and all of my information that might be required for processing of any of all claims for third party payers (including but not exclusive of, private insurance, Medi-Cal, Medicare, Tricare, Work-Comp, etc.)

I acknowledge that I have been given the ability to review OSI's policies including Financial Policy.

FINANCIAL POLICY

- We will submit claims to your insurance company for all medical services rendered at OSI. Any other services related to your medical care not rendered at OSI (i.e. laboratory, pathology, hospital fees, outpatient surgery center fees, anesthesiologist, co-surgeon, etc.), will be billed by the entity providing those services. It is **your** responsibility to verify that OSI is part of your insurance plan. We will attempt to verify your eligibility and benefits with your insurance carrier; however, this does not guarantee that they will pay for the services provided, and you will remain financially responsible if they do not provide payment.

- **OSI accepts the following insurance plans**:

  - **Medicare** – pays 80% after the deductible has been met. We will bill your coinsurance for the remaining 20% as a courtesy; however, you are responsible for the 20% coinsurance of the Medicare allowable amount.
  - **Contracted PPOs and HMOs** – you are responsible for the payment of co-pay and deductible at the time of the service, as well as for any charges for which you failed to secure prior authorization (if necessary).
  - **Non-Contracted PPOs** – you are responsible for all non-covered amounts. We will bill the insurance(s) as a courtesy. You are responsible for the balance in full if not paid by the insurance in 60 (sixty) days.
  - **Self-Pay** (uninsured) - you are expected to pay in full at the time of the service.
  - **Worker's Compensation** – you are not responsible for any charges unless the case has been dismissed or denied.

Initials______

- **Personal Injury/Motor Vehicle Accidents -** you are responsible for all non-covered amounts. We will bill the insurance(s) as a courtesy. You are responsible for the balance in full if not paid by the insurance in 60 (sixty) days.
- **Surgery Deposits** – once the decision for surgery is made, our surgery coordinator will contact your insurance carrier to confirm eligibility benefits and obtain authorization. The surgery coordinator will provide you with an estimated cost of your surgery. This amount will be collected as a deposit at or before the time of your pre-operative appointment.
- **Medical Records** – all medical records requests are subject to a preparation fee. Any additional costs related to shipping and handling will be added to these costs (if applicable).
- **Divorce Related** – the parent authorizing treatment for a child will be the parent responsible for the charges related to that care. If the divorce decree requires the other parent to pay all, or part of the treatment costs, it is the authorizing parent's responsibility to collect from the other parent.
- **Bad Debt** - patients who do not pay bills within 90 (ninety) days of the statement date, will be referred to a collections agency, and ***may be discharged from the practice for non-payment.***
- **Failed Appointment Charge for MRI –** we reserve the right to charge $25 (twenty-five) for each failed appointment not canceled at least 24 hours before the scheduled appointment time. This charge is not covered by your insurance.
- **Usual and Customary Rates -** our practice is committed to the best treatment for our patients. Our charges are considered usual and customary for our area. You are responsible for payment, regardless of any insurance company's arbitrary determination of usual and customary charges.

- **Financial Responsibility** – based on our contractual agreements with the insurance companies and our internal policies, we are informing you of the following:
  - Your health insurance deductibles and any expenses deemed not covered by your insurance company will be your financial responsibility.
  - All monies owed by you, such as office visits co-payments and non-covered services or supplies, are due at the time of the service.
  - If you are not prepared to pay any amounts due at the time of the visit, you will be asked to re-schedule the appointment, unless the physician determines that your medical condition prohibits this.

- **Method of Payment** - our office accepts the following forms of payment: credit cards, cash, money order, and checks. A $25 (twenty-five dollar) service charge will be assessed to your account for any returned check by your bank. This charge is not covered by your insurance.

Thank you for understanding our policies. If you have any questions or concerns, please do not hesitate to contact our office at **(714) 634-4567.**

By signing in the box below indicates that you are acknowledging and are in agreement with all of the above. Further, you understand and agree that your consents/assignments remain in effect until you choose to revoke them in writing.

____

(Signature of Patient or Authorized Representative) (Printed Name) (Date)

____

(If signed Above by Representative, Relationship of Signer to Patient) (Name of Patient if Different from Above)

Initials______