

### PATIENT DEMOGRAPHICS & INSURANCE

PATIENT Last Name		Firs	t Name					MI		Sex (c	heck one)
										🗆 Mal	e 🗌 Female
Street			Apt #		City				State	Zip	
Home Phone # Primary Num	ber W	ork Phone	#		Primary Nu	mber	Cell Ph	one	#	🗌 Pri	mary Number
( )	(		)				(		)		
Email Address			Marital Sta	atus (	check one)						
			Single		] Married	🗌 Divo	orced		Legally S	Separated	U Widowed
Date of Birth (mm/dd/yyyy)		Social S	Security Nur	nber	#	Emplo	oyer Nam	ne			
Primary Care Physician Name	Primary	Care Pho	ne #	Refe	erring Physicia	n Name			Ref	ferring Phon	e #

#### COMPLETE THIS SECTION ONLY IF THE PATIENT ABOVE IS A MINOR

≻	RESPONSIBLE PARTY Last Name	First Name M			MI	Relationship		Sex (check one)	
PARTY								🗌 Male	Female
	Street		Apt #	City			State	Zip	
BLE									
RESPONSIBLE	Home Phone #	Work Phone #				Cell Phone #			
õ	( )	(	)			(	)		
ESI	Email Address		Marital Status (	check on	e)				
R			Single	Married	l 🗌 Divo	rced 🗌 I	Legally Separa	ated [	Widowed
	Date of Birth (mm/dd/yyyy)	Social	Security Number	#	Emplo	oyer Name			

PRIMARY Insurance Company		Effe	ective Date	SECONDARY Insurance	SECONDARY Insurance Company			
Claims Mailing Addr	ns Mailing Address (Street or Box) Claims Mailing Address (Street or Box)			ox)				
City	St	tate	Zip	City		State	Zip	
Policy ID Number	I	Gro	pup ID Number	Policy ID Number		G	Group ID Number	
Subscriber Name (policy holder) Date of Birth		e of Birth	Subscriber Name (policy holder)         Date of Birth			ate of Birth		
Subscriber Social Security # Relationship to Pa		lationship to Patient	Subscriber Social Security #         Relationship t			elationship to Patient		
Subscriber Employer Work I		ork Phone #	Subscriber Employer		W	Work Phone #		
Subscriber Employer Address (Street or Box)		Subscriber Employer Address (Street or Box)						
City	St	tate	Zip	City		State	Zip	

INSURANCE & SUBSCRIBER INFORMATION



### LANGUAGE, ETHNICITY & RACE

Patient Name:	DOB:	Date:

**North Dallas Eye Associates** is implementing a systematic method of collecting data on communication needs, ethnicity, and race directly from patients or their caregivers. The purpose of collecting this information is to ensure that all patients receive high-quality care.

We would like for you to provide us with your race and ethnic background. We will only use this information to review the treatment patients receive and make sure everyone gets the highest quality of care.

	What language do you feel most comf	ortable speaking with your doctor or nurse?				
GE	English					
LANGUAG	Spanish	Hindi				
ANG		☐ Vietnamese				
-						
-						
	Which category best describes your e	thnicity?				
Ϋ́	Hispanic or Latino					
ЕТНИІСІТУ	<ul> <li>Not Hispanic or Latino</li> </ul>					
H						
ш	Patient Declined					
	Which category best describes your r	ace?				
	American Indian or Alaska Native	White or Caucasian				
	Asian	Other Race				
	Black or African American	Patient Declined				
	Native Hawaiian or Other Pacific Isla	ander				
щ						
RACI	Race Definition:					
	American Indian or Alaska Native: A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.					
	Black or African American: A person	naving origins in any of the black racial groups of Africa.				
	White or Caucasian: A person having of	origins in any of the original peoples of Europe, the Middle East, or North Africa.				
	<b>Asian:</b> A person having origins in any c for example, Cambodia, China, India, Ja	f the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, pan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.				
	Native Hawaiian or Other Pacific Islan other Pacific Islands.	nder: A person having origins in any of the original peoples of Hawaii, Guam, Samosa, or				



### PATIENT PREFERENCES REGARDING

#### COMMUNICATION OF PHI

(PATIENT HEALTH INFORMATION)

Patient Name:

DOB:

Date:

**North Dallas Eye Associates** staff may need to contact you regarding test results, appointments, financial concerns, or other healthcare operations. Your authorization is required for the following methods of communication.

I authorize the practice to disclose or provide PHI to me as described below. I understand that it is my responsibility to notify the practice of any change in this manner of communication and that any disclosure made to the designated address or number, indicated by me, is subject to the redisclosure statement within this authorization.

Home Phone	Cell Phone	(Text Messages Okay?)	🔿 Yes	Ο Νο		
Work Phone	🗌 Email					
Expirations or termination of aut ONE year.	horization: I understand that	t I must submit a new authorizati	on to continue t	he authorization after		
<b>Right to revoke or terminate:</b> As stated in the practice's Notice of Privacy Practices, I have the right to revoke or terminate this authorization at any time. This can be done in person or by mailing a written request to the practice, <b>Attn: Privacy Manager</b> .						
Redisclosure Statement: I under	ax number I have designated	I to receive my PHI. Therefore,				
under this authorization will no long	er be the responsibility of this	piùolioo.				

Keeping our patient's information private is important to us and by default we will only disclose information related to the patient's **Billing Account** and **Medical Conditions** to the **patient** or **legal guardian**.

If you would like to add additional contacts (other than the patient or legal guardian) that **North Dallas Eye Associates** (*NDEA*) is allowed to disclose this type of information to, please complete the fields below and select the appropriate checkboxes based on your approval for each person you list. In addition, please choose the person you would like **NDEA** to list as your **Emergency Contact** in the event an emergency situation was to take place at our office.

(Contact Name)	(Relationship to Patient)	(Contact Phone Number)			
(Contact Name)		(Contact Phone Wathber)			
Billing Account Information	Medical Condition Information	Emergency Contact			
(2,)					
(Contact Name)	(Relationship to Patient)	(Contact Phone Number)			
Billing Account Information	Medical Condition Information	Emergency Contact			
The duration of this authorization is indefinite unless otherwise revoked in writing. I understand that requests for health information from persons not listed on this form will require my specific authorization prior to the disclosure of any health information.					
Signature of Patient or Rep	Signature of Patient or Representative				

**APPROVED HIPAA CONTACTS** 



Patient	Name:	DOB:	Date:
	<ul> <li>The fee for this s addition to your co-</li> <li>Is used to determin</li> <li>Is required by you</li> </ul>	-pay) e an EyegLass Prescription	d at the time of service in
	may file directly with yo	our insurance company wi	our insurance company. You th your check-out receipt. If fee, then we will refund your
	Do you want to have re YES	efraction service today?	IF NEEDED
	that the refraction is a n	on-covered service. I acce	y information and understand opt full financial responsibility from, and not included in, the

(Patient or Legal Representative)

(Date)



### CONSENT TO TREAT AND FINANCIAL RESPONSIBILITY

W. Stephen Ku, M.D. Steven L. Elieff, M.D. Russell W. Snook, M.D. R. Raj Gupta, M.D.

Patient Name:

TREATMENT

**CONSENT FOR PAYMENT** 

**PAYMENT POLICY** 

CONSENT

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DOB:

Date:

I consent to the examination of my eyes by the physicians of **North Dallas Eye Associates**. I realize and understand that my eyes may be dilated for the examination. I realize and understand the potential risk to myself and others if I try to drive a vehicle or operate heavy machinery while the dilating drops are affecting my eyes. I realize and understand that the dilating may last from several hours to two days. I realize and understand that I may not be able to read while the dilating drops are affecting my eyes. I realize and understand that the dilating drops are affecting my eyes. I realize and understand that the dilating drops may affect my depth perception / ability to judge distances, and that even walking may cause some risk to me as far as judging the distance of things, (i.e. tripping over items or running into things).

The practice of North Dallas Eye Associates strives to provide comprehensive, ethical and cost-effective eye care for our patients. In order for us to continue this mission, we have instituted the following policy. <u>If you do not</u> understand these policies, please ask our staff to explain before you are seen.

- 1. We will file insurance only with plans the doctors are contracted with. All **insurance co-payment and/or deductible amounts are due at the time of the service.** Any disallowed amounts are due from the patient.
- 2. If we do not have proof of a valid insurance, we will hold the patient responsible for the full amount of the services. The insurance discounted fees will not be applicable in these circumstances.
- 3. Your insurance policy is a contract between you and your insurance company. It is important that you understand what physician services are and are not covered, before seeing your doctor. There is no guarantee of payment of your claims, by your insurance company. Reduction or rejection of your claim by your insurance company does not relieve the financial obligation you have incurred. If any portion of your claim or any service is not covered by your insurance, you will be responsible. For example, routine eye exams, gonioscopy, therapeutic contact lens, fundus photos, or HRT.
- 4. Referral Authorization for HMO and other managed care plans must be obtained prior to your visit. If a referral is not received at the time of the visit, the patient is responsible for payment when services are rendered.

I understand that I am responsible for all charges not paid by my insurance company(ies). I consent to pay for these charges in a timely manner in accordance with office policy. I am also responsible for all charges incurred by the office in collecting on my account if my bill goes unpaid, including but not limited to collection agency fees, attorney fees, and court costs. I authorize the release to my insurance company(ies) any information acquired in the course of my examinations, treatments, or surgeries. I authorize direct payment by my insurance company(ies) to Dr. Ku, Dr. Elieff, Dr. Snook, Dr. Gupta, WSK Eye Associates, P.A., or the North Dallas Eye Associates. I authorize that a copy of the below signature for insurance purposes is a valid as the original.

NOTICE REGARDING NONCOVERAGE OF EYE REFRACTION

Most insurance companies and Medicare, under section 1862 (a) (1) of the Medicare Law, <u>will not pay for eye</u> <u>refractions</u> (the procedure used to determine eyeglass prescriptions) because it is considered to be a routine service. If you choose to have a refraction performed, we will collect this amount at the time of your visit.

I have been notified by North Dallas Eye Associates that most insurance companies and Medicare will not pay for eye refraction services and agree to be personally responsible for this charge.

CERTIFICATION OF INFORMATION

Any person knowingly and with intent to defraud or deceive with incomplete or misleading information is guilty of a crime. I hereby certify that the information furnished by me in support of the above information is true and correct to the best of my knowledge.

Signature

(Patient or Legal Representative)

Date

Witness

Date



## ACKNOWLEDGEMENT OF NOTICE OF PRIVACY PRACTICES

W. Stephen Ku, M.D. Steven L. Elieff, M.D. Russell W. Snook, M.D. R. Raj Gupta, M.D.

Patient Name:

DOB:

Date:

I have reviewed the "NOTICE OF PRIVACY PRACTICES" of NORTH DALLAS EYE ASSOCIATES and have had all questions answered by this office.

I also consent to the use or disclosure of my **protected health information** for the following purposes:

### TREATMENT

It will be necessary to share protected health information with all members of the treatment team for treatment purposes. This can include employees in this office as well as other providers.

### PAYMENT

Necessary information will be shared with appropriate payer sources and their representatives for payment purposes including, but not limited to eligibility, benefit determination, and utilization review. It will also be necessary for your billing personnel including but not limited to employees, case managers, claims representatives, third party billing services or clearinghouses to have access to protected health information to carry out their job functions.

### HEALTHCARE OPERATIONS

Necessary information will be shared for the continuing operations of this office. Some examples include, but are not limited to peer review, accreditation, credentialing processes, and compliance with all federal and state laws.

I understand that my treatment may be conditioned upon my consent. This consent is given freely and I understand that I can revoke this consent at any time in writing which will apply to disclosures and uses made subsequent to the revocation date.

Signature

(Patient or Legal Representative)

Date

Last Name	First Name	DOB (mm/dd/yyyy)
Preferred Pharmacy	Location	Phone #
Referring Physician(s)	Specialty	Phone #

MEDICATION		
PLEASE LIST CURRENT MEDICATION:	None	See Attached List

ALLERGIES		
PLEASE LIST ANY MEDICATION ALLERGIES:	None	See Attached List

Last Name	First Name	DOB (mm/dd/yyyy)

## **Medical Problems**

Please check if applicable

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ASCVD – atherosclerosis	Dementia	Juvenile rheumatoid arthritis
Acid reflux disease (GERD)	Depression	Kidney stones
Alzheimer's disease	Diabetes – Type I	Leukemia
Anemia - chronic	Diabetes – Type II	Lupus - systemic
Arthritis – degenerative (DJD)	Dialysis - hemodialysis	Migraine
Arthritis - rheumatoid	Diverticulitis	Multiple sclerosis
Asthma	Eczema	Neurofibromatosis
Back pain - chronic	Emphysema	Obesity
Bipolar disorder	Epilepsy	Osteoporosis
Bleeding disorder	Fibromyalgia	Pain - chronic
Brain tumor - benign	Gallstones	Peptic ulcer disease (PUD)
Bronchitis - chronic	Gout	Peripheral artery disease
COPD - Chronic lung disease	Grave's disease	Prostate enlarged (BPH)
CVA - stroke		Psoriasis
Cancer - breast	Head injury	Renal insufficiency - chronic
Cancer - colon	Headache - chronic	Restless legs syndrome
Cancer - lung	Hearing loss	Rosacea
Cancer - prostate	Heart attack	Sarcoidosis
Cancer - skin	Heart disease	Schizophrenia
Cirrhosis	Hepatitis C	Sickle cell disease
Collagen vascular disease	Hypercholesterolemia	Sjogren's disease
Congestive heart failure	Hypertension	Sleep apnea
Coronary artery disease	Hyperthyroidism	Tuberculosis
Crohn's disease	Hypothyroidism	Vertigo
DVT – deep vein thrombosis	Irritable bowel syndrome	

## **Review of Systems**

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### Please check if applicable

Cardiovascular	Constitutional	Gastrointestinal	Genitourinary
Chest pain	fatigue	abdominal pain	genital discharge
irregular heart beat	fever fever	constipation	genital lesions
shortness of breath	night sweats	heartburn	painful urination
	weakness	nausea	urgency
	weight loss	vomiting	
Negative	<b>Negative</b>	<b>Negative</b>	Negative
HEENT	Hematologic	Metabolic	Musculoskeletal
dizziness	bleeding	cold intolerance	back pain
hearing loss	bruising	excess hunger	joint pain
hoarseness	tender nodes	excessive thirst	muscle aches
ringing in ears		frequent urination	stiffness
sore throat		heat intolerance	swelling
Negative	<b>Negative</b>	<b>Negative</b>	Negative
Neurological	Psychiatric	Respiratory	Skin
balance problems	anxiety	Cough	hair loss
headache	depression	trouble breathing	rash
numbness	insomnia insomnia	wheezing	skin lesions
tingling	irritability		
	nervousness		
Negative	Negative	Negative	Negative

# **Social History**

 $\checkmark$  Please check if applicable

Smoking	Alcohol	Recreation Drugs	Occupation	Hobbies
Frequency	Frequency	Frequency		
1 – Current Everyday Smoker	Never	Never	Business	Computers
2 – Current Some Day Smoker	Rarely	Rarely	Manual labor	Music
3 – Former Smoker	Occasional	Occasional	Office work	Sewing
4 – Never Smoked	Daily	Daily	Retired	Sports
5 – Smoker, Status Unknown	Frequently	Frequently	Student	Travel
9 – Unknown if Ever Smoked	Heavy	Heavy	Teacher	
Type of Tobacco	Type of Alcohol	Type of Drug		
Cigarettes	Beer	Amphetamines		
Cigar	Liquor	Cocaine		
Pipe	Wine Wine	Intravenous drugs		
		LSD		
		Marijuana		
Other	Other	Other	Other	Other

# Family History

### $\checkmark$ Please check if applicable

Eye Problems	Aunt	Brother	Cousin	Daughter	Father	Grandfather	Grandmother	Mother	Nephew	Niece	Sister	Son	Uncle	Other
Amblyopia	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Angle closure glaucoma	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Astigmatism	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cataract	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Choroid melanoma	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Corneal dystrophy	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Corneal graft	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Diabetic retinopathy	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Glaucoma	0	0	0	0	0	0	0	0	0	0	0	0	0	0
High myopia	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Macular degeneration	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retinal detachment	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Strabismus	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	$\circ$	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	$\circ$	0	0	0

Medical Problems	Aunt	Brother	Cousin	Daughter	Father	Grandfather	Grandmother	Mother	Nephew	Niece	Sister	Son	Uncle	Other
Anesthetic complications	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bleeding disorder	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Brain tumor	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cancer	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Diabetes	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Heart disease	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hypertension	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Migraine	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Neurofibromatosis	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rheumatoid arthritis	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Stroke	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Systemic Lupus	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Thyroid disease	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0

# Past Surgical History

#### $\checkmark$ Please check if applicable

	Right	Left	Date		Right	Left	Date
Abdominal aneurysm repair	0	0		Fracture repair - hip	0	$\circ$	
Angioplasty	0	0		Gall bladder removal	0	0	
Appendectomy	0	0		Gastric bypass surgery	0	0	
Back surgery	0	0		Hip replacement surgery	0	0	
Bladder repair	0	0		Hemorrhoid removal	0	0	
Brain aneurysm repair	0	0		Hysterectomy	0	0	
Brain tumor removal	0	0		Intestinal surgery	0	0	
Breast implants	0	0		Kidney resection	0	0	
Breast reduction	0	0		Knee replacement surgery	0	0	
Breast removal	0	0		Liposuction	0	0	
CABG – coronary artery surgery	0	0		Liver biopsy	0	0	
Caesarian section	0	0		Ovary removal	0	0	
Cancer surgery - breast	0	0		Pacemaker	0	0	
Cancer surgery - colon	0	0		Pituitary adenoma surgery	0	0	
Cancer surgery - kidney	0	0		Prostate removal	0	0	
Cancer surgery - lung	0	0		Prostate surgery - TURP	0	0	
Cancer surgery - ovarian	0	0		Rotator cuff surgery	0	0	
Cancer surgery - prostate	0	0		Shoulder surgery	0	0	
Cancer surgery - skin	0	0		Shunt - lumboperitoneal	0	0	
Cancer surgery - thyroid	0	0		Shunt - ventricular	0	0	
Cancer surgery - uterus	0	0		Sinus surgery	0	0	
Carotid endarterectomy	0	0		Splenectomy	0	0	
Carpal tunnel surgery	0	0	- ·	Testicular removal	0	0	
Cholecystectomy	0	0		Thymus resection	0	0	
Cochlear implant	0	0		Thyroid resection	0	0	
Colon resection	0	0		Tonsillectomy	0	0	
Coronary angioplasty	0	0		Transplant - heart	0	0	
Coronary artery stents	0	0		Transplant - kidney	0	0	
Ear tubes	0	0		Transplant - liver	0	0	
Face lift	0	0		Transplant - lung	0	0	
Fracture repair - back	0	0		TURP- prostate surgery	0	0	
Fracture repair - facial	0	0			0	0	

# Eye Surgeries History

Please check if applicable

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	<i>(Right Eye)</i> Surgery Date	<i>(Left Eye)</i> Surgery Date		<i>(Right Eye)</i> Surgery Date	<i>(Left Eye)</i> Surgery Date
Anterior Segment Surgery			Oculoplastic Surgery		
Cataract & IOL Surgery			Orbital Surgery		
Cornea Surgery			Refractive Surgery		
Glaucoma Surgery			Retinal Surgery		
Globe Surgery			Strabismus Surgery		
Lacrimal Surgery			Vitreous Surgery		