



## ABOUT YOU

Today's Date: \_\_\_\_\_

Name: \_\_\_\_\_  
LAST FIRST MI MR MRS MS DR

**I prefer to be called:** \_\_\_\_\_

SS #: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_  Male  Female  Gender Neutral

Home Address: \_\_\_\_\_  
APT/CONDO #:  
 \_\_\_\_\_  
CITY STATE ZIP

Cell #: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

How do you prefer to be contacted?  E-Mail  Phone  Text

Employer: \_\_\_\_\_

**Occupation:** \_\_\_\_\_

Single  Married  Divorced  Widowed  Separated

Other family members seen by us: \_\_\_\_\_

Previous / Present Dentist: \_\_\_\_\_  
(Please Circle)

Last Visit Date: \_\_\_\_\_

How did you find out about us?  Friend  Google  ZocDoc  
 Yelp  Facebook  Other

Whom may we Thank for referring you? \_\_\_\_\_

## INSURANCE COVERAGE

### Primary

Dental Coverage:  Yes  No

Insurance Co. Name: \_\_\_\_\_

Insurance Co. Address: \_\_\_\_\_

Insurance Co. Phone #: \_\_\_\_\_

Group # (Plan, Local or Policy #): \_\_\_\_\_

Insured's Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Insured's Birthdate: \_\_\_\_\_ Insured's ID #: \_\_\_\_\_

Insured's Employer: \_\_\_\_\_

### Secondary

Dental Coverage:  Yes  No

Insurance Co. Name: \_\_\_\_\_

Insurance Co. Address: \_\_\_\_\_

Insurance Co. Phone #: \_\_\_\_\_

Group # (Plan, Local or Policy #): \_\_\_\_\_

Insured's Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Insured's Birthdate: \_\_\_\_\_ Insured's ID #: \_\_\_\_\_

Insured's Employer: \_\_\_\_\_

## SPOUSE INFORMATION

His / Her Name: \_\_\_\_\_

Employer: \_\_\_\_\_

SS #: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Person Responsible for Account: \_\_\_\_\_

Cell: \_\_\_\_\_ Employer: \_\_\_\_\_

Billing Address: \_\_\_\_\_

Relation: \_\_\_\_\_ SS #: \_\_\_\_\_

## EMERGENCY CONTACT

In the event of an emergency, is there someone who lives near you that we should contact?

His / Her Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Wk #: \_\_\_\_\_ Cell #: \_\_\_\_\_

## MEDICAL HISTORY

Do you have a personal physician?  Yes  No

Physician's Name: \_\_\_\_\_

Phone #: \_\_\_\_\_ Date of last visit: \_\_\_\_\_

Are you currently under the care of a physician?  Yes  No

Please explain: \_\_\_\_\_

Your current physical health is:  Good  Fair  Poor

Are you taking any prescription/over-the-counter or herbal supplement drugs?  
 Yes  No

Please list each one: \_\_\_\_\_

Have you ever taken Fosamax, or any other bisphosphonate?  Yes  No

**For Women:** Are you pregnant?  Yes  No Week #: \_\_\_\_\_

Are you nursing?  Yes  No

Have you ever had any of the following diseases or medical problems?

- |   |   |
|---|---|
| <input type="checkbox"/> Abnormal Bleeding              | <input type="checkbox"/> Hepatitis                    |
| <input type="checkbox"/> Alcohol / Drug Abuse           | <input type="checkbox"/> Herpes / Fever Blisters      |
| <input type="checkbox"/> Anemia                         | <input type="checkbox"/> High Blood Pressure          |
| <input type="checkbox"/> Arthritis                      | <input type="checkbox"/> HIV+ / AIDS                  |
| <input type="checkbox"/> Artificial Bones/Joints/Valves | <input type="checkbox"/> Hospitalized for Any Reason  |
| <input type="checkbox"/> Asthma                         | <input type="checkbox"/> Kidney Problems              |
| <input type="checkbox"/> Blood Transfusion              | <input type="checkbox"/> Liver Disease                |
| <input type="checkbox"/> Cancer/Chemotherapy            | <input type="checkbox"/> Low Blood Pressure           |
| <input type="checkbox"/> Colitis                        | <input type="checkbox"/> Mitral Valve Prolapse        |
| <input type="checkbox"/> Congenital Heart Defect        | <input type="checkbox"/> Pacemaker                    |
| <input type="checkbox"/> Diabetes                       | <input type="checkbox"/> Psychiatric Problems         |
| <input type="checkbox"/> Difficulty Breathing           | <input type="checkbox"/> Radiation Treatment          |
| <input type="checkbox"/> Emphysema                      | <input type="checkbox"/> Rheumatic / Scarlet Fever    |
| <input type="checkbox"/> Epilepsy                       | <input type="checkbox"/> Seizures                     |
| <input type="checkbox"/> Fainting Spells                | <input type="checkbox"/> Shingles                     |
| <input type="checkbox"/> Frequent Headaches             | <input type="checkbox"/> Sickle Cell Disease / Traits |
| <input type="checkbox"/> Glaucoma                       | <input type="checkbox"/> Sinus Problems               |
| <input type="checkbox"/> Hay Fever                      | <input type="checkbox"/> Stroke                       |
| <input type="checkbox"/> Heart Attack                   | <input type="checkbox"/> Thyroid Problems             |
| <input type="checkbox"/> Heart Murmur                   | <input type="checkbox"/> Tuberculosis (TB)            |
| <input type="checkbox"/> Heart Surgery                  | <input type="checkbox"/> Ulcers                       |
| <input type="checkbox"/> Hemophilia                     | <input type="checkbox"/> Venereal Disease             |

Please list any serious medical condition(s) that you have ever had:

\_\_\_\_\_

Are you allergic to any of the following?

- |   |                                       |                                       |
|---|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> Aspirin            | <input type="checkbox"/> Erythromycin | <input type="checkbox"/> Metals       |
| <input type="checkbox"/> Codeine            | <input type="checkbox"/> Jewelry      | <input type="checkbox"/> Penicillin   |
| <input type="checkbox"/> Dental Anesthetics | <input type="checkbox"/> Latex        | <input type="checkbox"/> Tetracycline |

Please list any other drugs/materials that you are allergic to:

\_\_\_\_\_

## DENTAL HISTORY

Why have you come to the dentist today?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you require antibiotics before dental treatment?  Yes  No

Are you currently in pain?  Yes  No Do your gums ever bleed?  Yes  No

Have you ever had a serious / difficult problem associated with any previous dental work?  Yes  No

Do you now or have you ever experienced pain / discomfort in your jaw joint (TMJ / TMD)?  Yes  No

Your current dental health is:  Good  Fair  Poor

Do you like your smile?  Yes  No

Would you like whiter teeth?  Yes  No Fresher breath?  Yes  No

How many times a week do you floss? \_\_\_\_\_ a day do you brush?

Type of bristles?  Soft  Medium  Hard

Do you smoke or use tobacco in any other form?  Yes  No

I understand that the information that I have given today is correct to the best of my knowledge. I also understand that this information will be held in the strictest confidence and it is my responsibility to inform this office of any changes in my medical status.

I authorize the dental staff to perform any necessary dental services that I may need during diagnosis and treatment with my informed consent.

\_\_\_\_\_ Date

Signature

**Payment is due in full at the time of treatment unless prior arrangements have been approved.**

I understand that I am responsible for payment of services rendered and also responsible for paying any copayment and deductibles that my insurance does not cover.

\_\_\_\_\_ Signature

\_\_\_\_\_ Date

Our office is HIPAA Compliant and committed to meeting or exceeding the standards of infection control mandated by OSHA, the CDC and the ADA.

## INTERNAL USE

I verbally reviewed the medical / dental information above with the patient named herein. Initials: \_\_\_\_\_ Date: \_\_\_\_\_

Doctor's Comments: \_\_\_\_\_

\_\_\_\_\_

## FINANCIAL AGREEMENT

Welcome to our practice. We appreciate that you have chosen us for your oral care and will strive to meet your treatment needs promptly and efficiently.

Full payment is expected at time of service. We offer several payment options:

- Cash, checks, and major credit cards are accepted
- Extended payment plans up to 6 months may be arranged with prior approval
- Care Credit is also available and accepted

### Dental Insurance

Your insurance coverage may or may not include benefits for various treatments. Benefits are dictated by the terms of your or your employer's contract with the insurance carrier. Plans vary enormously even within the same company in levels of reimbursement, excluded services, deductibles, maximum annual or lifetime benefits, and terms of payment. Few insurance plans cover all fees. Many provide partial coverage. Some specifically exclude some or all periodontal services, orthodontics, occlusal guards, and/or implants.

Regardless of coverage, the patient, not the insurance company, is ultimately responsible for fees incurred in this office.

My staff will assist you in submitting the necessary forms for insurance reimbursement. We usually file a pre-estimate, and the insurance company generally requires X-rays, periodontal charting, intra-oral photos, and a detailed treatment plan. Completed treatment forms are typically submitted after your Estimate of Benefits has been returned to us and treatment has been performed. Questions regarding the terms of your coverage or delays in payment should be directed to your insurance carrier by you or your employee benefits administrator.

NOTE: For all surgical cases, a 50% deposit is required when your appointment is made. (Surgical cases include but are not restricted to extractions, bone grafting, and implants). Balance is due at the time of the surgical procedure unless other financial arrangements have been made. For all orthodontic cases, such as invisalign, there is a deposit required to start treatment.

*I understand that I am personally responsible for all fees incurred in this office.*

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

*I authorize the release of all medical information necessary to process my claims and I authorize the release of this same information, when appropriate, to other providers rendering medical/dental care.*

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