



ANDREW L. CLAVENNA, M.D.
THE CARRELL CLINIC
9301 N. Central Expressway #500
Dallas, TX 75231
Phone 214-220-2468 Fax 214-720-1982
www.wbccarrellclinic.com

WELCOME

Thank you for choosing the Carrell Clinic to take care of your medical treatment. Completing the enclosed new patient information packet prior to your appointment will help make the registration process more efficient. For your convenience, you can securely email or fax your completed paperwork to wbccmedrecords@wbcarrellclinic.com or 469-232-9738.

Please bring the following to your appointment:

- Driver's license or Photo Identification
- Insurance cards
- Any previous diagnostic testing such as x-rays, MRI, CT scans, EMG/Nerve Conduction Studies and/or previous operative reports and operative images. Please provide both images and written report where applicable. Please bring these items with you to the appointment. **DO NOT MAIL OR DROP THEM OFF.**
- It is the insured's responsibility to obtain any necessary information or referral from their insurance company before the appointment including any out of network benefits.

At the time of service you will be required to pay your co-pay or a percentage of your unpaid deductible. Contact your insurance company if you are unsure of these amounts.

If you have any questions or concerns, please do not hesitate to contact the clinic.

Thank You,

The Carrell Clinic Staff



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Financial Disclosure

This letter is to inform you of my financial relationship with Globus Medical, Inc. and Clariance, Inc. Globus and Clariance are companies that develop and sell medical devices used in spinal surgery. My investment interest in Globus and Clariance is based on my personal belief that Globus and Clariance produce excellent products. My investment interest in Globus and Clariance has absolutely no bearing on my decisions about the appropriate treatment for my patients, including my decisions regarding your care. However, in the interest of full disclosure, I want you to know about my relationship with Globus and Clariance, and give you the opportunity to ask me any questions you may have about that relationship and/or decision to use Globus and Clariance products.

Please let me or my coordinator, Lupe Couch know if you have any additional questions about my relationship with Globus and Clariance and we can schedule additional time to discuss your questions.

Physician Ownership Disclosure Notice

Texas law requires physicians and other health care providers to make certain disclosures to a patient at the time of initial contact and at the time of the referral when they refer a patient to another health care provider or facility from which the physician will receive remuneration.

During the course of your treatment, Andrew Clavenna, M.D. (the "Physician") may refer you, or named patient for whom you are a legal representative, to Phoenix IOM, LLC, Premier IOM, LLC, and/or Vital IOM, LLC, for the provision or intraoperative neuro-monitoring services. The Physician has a financial interest in these companies and will, directly or indirectly, receive remuneration based on the Physician's ownership interest in these companies.

By signing this, you have read and understood the above financial disclosure and the Physician Ownership Disclosure Notice.

Print Patient Name

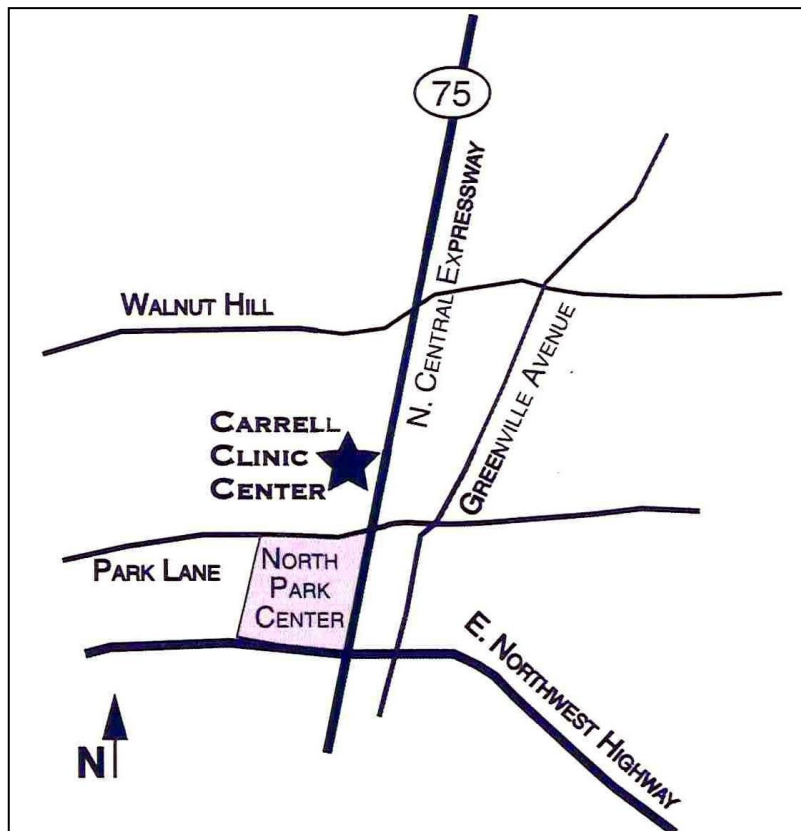
Signature of Patient/Parent/Legal Representative

Date



THE CARRELL CLINIC
9301 N. CENTRAL EXPRESSWAY #500
DALLAS, TX 75231
PHONE 214-220-2468
FAX 469-232-9738
WWW.WBCARRELLCLINIC.COM

Location



Directions

Heading South on 75 North Central Expressway:

Exit Walnut Hill Lane, go through Walnut Hill intersection, stay on south bound service road for 0.3 miles turn right into parking lot of the five story white building.

Heading North on 75 North Central Expressway:

Exit Walnut Hill, U-turn, go on south bound service road for 0.3 miles turn right into parking lot of the five story white building.

The Carrell Clinic - Hours of Operation

Monday – Friday 8:30am – 5:30pm

THE CARRELL CLINIC

PHYSICIAN YOU ARE SEEING TODAY: _____

PREFERRED PHARMACY: _____ PHAR.ADDRESS: _____ PHAR. PHONE#: _____

PATIENTS LAST NAME: _____ FIRST NAME: _____ MIDDLE INITIAL: _____

PREFERRED NAME: _____ MAIDEN NAME: _____

DATE OF BIRTH: _____ SEX: M F SOCIAL SECURITY #: _____

OPTIONAL PATIENT INFORMATION (PLEASE CIRCLE YOUR SELECTION)**RACE:** AMER.INDIAN ALASKA NATIVE WHITE NAT HAWAIIAN PACIFIC ISLANDER AFRICAN AMER. ASIAN OTHER
DECLINE**ETHNICITY:** NOT HISPANIC/ LATINO HISPANIC/ LATINO DECLINEPRIMARY LANGUAGE: ARABIC CHINESE ENGLISH FILIPINO FRENCH GERMAN GREEK HINDI ITALIAN JAPANESE
KOREAN POLISH PORTUGUESE RUSSIAN SPANISH VIETNAMESE DECLINED OTHER N/A

MARITAL STATUS: S M D W DRIVERS LICENSE STATE AND #: _____

STREET ADDRESS: _____

ZIP: _____ CITY: _____ STATE: _____ COUNTY: _____ COUNTRY: _____

***EMPLOYER:** _____ **OCCUPATION:** _____

PHONE: HOME: _____ WORK: _____ CELL: _____ PREFERRED : _____

FAX: _____ PAGER: _____ EMAIL: _____

PREFERRED COMMUNICATION: DECLINE EMAIL FAX MAIL PATIENT PORTAL CELL PHONE HOME PHONE WORK PHONE TEXT

***EMERGENCY CONTACT:** _____ **PHONE NUMBER:** _____**FINANCIALLY RESPONSIBLE PARTY**

LAST NAME: _____ FIRST NAME: _____ MIDDLE INITIAL: _____

DATE OF BIRTH: _____ SOCIAL SECURITY #: _____ RELATION TO PATIENT: _____

ADDRESS IF DIFFERENT FROM PATIENT: STREET: _____

CITY: _____ STATE: _____ ZIP: _____

INSURANCE INFORMATION (MUST HAVE INSURED DOB FOR CLAIM TO BE FILED)**PRIMARY INSURANCE NAME:** _____

POLICY NUMBER: _____ GROUP NUMBER: _____

INSURED NAME: _____ INSURED'S DOB: _____

ADDRESS: _____ CITY/STATE/ZIP: _____

SECONDARY INSURANCE NAME: _____

POLICY NUMBER: _____ GROUP NUMBER: _____

INSURED NAME: _____ INSURED'S DOB: _____

ADDRESS: _____ CITY/STATE/ZIP: _____

REFERRING PHYSICIAN: LAST NAME: _____ FIRST NAME: _____

ADDRESS: _____ CITY/STATE/ZIP: _____

PRIMARY CARE PHYSICIAN: LAST NAME: _____ FIRST NAME: _____

ADDRESS: _____ CITY/STATE/ZIP: _____

REASON FOR VISIT (BODY PART):** _____ **RIGHT /LEFT** ***DATE OF INJURY:** _____WAS THIS AN ACCIDENT:** Y N **ON THE JOB:** Y N **MOTOR VEHICLE ACCIDENT:** Y N **DATE:** _____**RELEASE OF INFORMATION AND ASSIGNMENT OF INSURANCE BENEFITS**

I hereby authorize W.B. Carrell clinic to furnish medical and billing information to my referring physician, other providers of medical services, my insurance provider(s), and/or my spouse or guardian as necessary to facilitate my medical care or to recover expenses for services rendered by health care providers of the clinic. I understand that I have the right to specify, in writing that my private health information be restricted from dissemination to any or all of the above.

I hereby assign any and all insurance benefits to the clinic to pay my obligation for medical and/or surgical expenses. I understand that I am responsible for any charges which may be denied or excluded by my insurance prover(s), expect those charges which are excluded based on a managed care contract between the insurance company and the clinic. I understand that I am financially responsible for all charges not covered by an insurance company.

PRINT PATIENT NAME: _____

SIGNATURE: _____

DATE: _____

HEALTH HISTORY FORM

NAME _____ DOB: _____ DATE: _____

The purpose of this form is to gather your health history. Please be as thorough as possible:

Past Medical History

- | | | |
|---|---|--|
| <input type="checkbox"/> *NO MEDICAL PROBLEMS | | |
| <input type="checkbox"/> Alzheimer's disease | <input type="checkbox"/> Deafness | <input type="checkbox"/> Mitral Valve Prolapse |
| <input type="checkbox"/> Anemia | <input type="checkbox"/> Depressive Disorder | <input type="checkbox"/> Musculoskeletal Deformities, Congenital |
| <input type="checkbox"/> Angina | <input type="checkbox"/> Diabetes Mellitus, Type I | <input type="checkbox"/> Neuropathy |
| <input type="checkbox"/> Anxiety Disorder | <input type="checkbox"/> Diabetes Mellitus, Type II | <input type="checkbox"/> Organ Transplant Type: _____ |
| <input type="checkbox"/> Asthma (daily medication) | <input type="checkbox"/> Diabetic Neuropathy | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Atrial Fibrillation | <input type="checkbox"/> Emphysema | <input type="checkbox"/> Pacemaker |
| <input type="checkbox"/> Blindness | <input type="checkbox"/> Epilepsy | <input type="checkbox"/> Panic Disorder |
| <input type="checkbox"/> Blood Clots/DVT | <input type="checkbox"/> Esophageal Reflux | <input type="checkbox"/> Parkinson's Disease |
| <input type="checkbox"/> Blood Transfusion | <input type="checkbox"/> Gallbladder Disease | <input type="checkbox"/> Pneumonia |
| <input type="checkbox"/> Bronchitis | <input type="checkbox"/> Glaucoma | <input type="checkbox"/> Prostate Disease |
| <input type="checkbox"/> Cancer | <input type="checkbox"/> Gout (unsp) | <input type="checkbox"/> Pulmonary Disease |
| <input type="checkbox"/> Cellulitis | <input type="checkbox"/> Hay Fever | <input type="checkbox"/> Rheumatoid Arthritis |
| <input type="checkbox"/> Cerebral Palsy | <input type="checkbox"/> Head Injury | <input type="checkbox"/> Seizure |
| <input type="checkbox"/> Chronic Obstructive Pulmonary Disease (COPD) | <input type="checkbox"/> Heart Attack | <input type="checkbox"/> Sickle-Cell Trait |
| <input type="checkbox"/> Cirrhosis | <input type="checkbox"/> Heart Murmur (MI) | <input type="checkbox"/> Sleep Apnea |
| <input type="checkbox"/> Claustrophobia | <input type="checkbox"/> Hepatitis Type _____ | <input type="checkbox"/> Stroke |
| <input type="checkbox"/> Clotting Disorder | <input type="checkbox"/> Hypertension (HBP) | <input type="checkbox"/> Thrombophlebitis (TPB) |
| <input type="checkbox"/> Coagulation Defect | <input type="checkbox"/> HIV/AIDS | <input type="checkbox"/> Thyroid Disease |
| <input type="checkbox"/> Colitis | <input type="checkbox"/> Irregular Heart Beat | <input type="checkbox"/> Tuberculosis |
| <input type="checkbox"/> Concussion | <input type="checkbox"/> Kidney Disease, Chronic | <input type="checkbox"/> Ulcerative Colitis |
| <input type="checkbox"/> Congestive Heart Failure | <input type="checkbox"/> Kidney Stones | <input type="checkbox"/> Ulcers |
| <input type="checkbox"/> CVA (Cerebral Vascular Accident/stroke) | <input type="checkbox"/> Migraines | <input type="checkbox"/> Urinary Tract Infection |

Past Orthopedic Medical History

- | | | |
|---|--|---|
| <input type="checkbox"/> NO PAST ORTHOPEDICAL MEDICAL PROBLEM | | |
| <input type="checkbox"/> Adhesive Capsulitis | <input type="checkbox"/> Osteoarthritis | <input type="checkbox"/> Pain- Joint |
| <input type="checkbox"/> Bursitis | <input type="checkbox"/> Osteopenia | <input type="checkbox"/> Pain- Knee |
| <input type="checkbox"/> Carpal Tunnel Syndrome | <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Pain- Leg/Calf |
| <input type="checkbox"/> Contusion | <input type="checkbox"/> Osteoporosis | <input type="checkbox"/> Pain- Limb |
| <input type="checkbox"/> Dislocation | <input type="checkbox"/> Pain- Ankle/Foot | <input type="checkbox"/> Pain- Neck |
| <input type="checkbox"/> Fibromyalgia | <input type="checkbox"/> Pain- Back | <input type="checkbox"/> Pain- Shoulder |
| <input type="checkbox"/> Fracture where _____ | <input type="checkbox"/> Pain- Chronic | <input type="checkbox"/> Pain- Wrist |
| <input type="checkbox"/> Ganglion | <input type="checkbox"/> Pain- Elbow/Upper Arm | <input type="checkbox"/> Pain- Scoliosis |
| <input type="checkbox"/> Herniated Disc | <input type="checkbox"/> Pain- Forearm | <input type="checkbox"/> Reflex Sympathetic Dystrophy |
| <input type="checkbox"/> Multiple Sclerosis | <input type="checkbox"/> Pain- Hand/Fingers | <input type="checkbox"/> Sprain |
| <input type="checkbox"/> Myopathy | <input type="checkbox"/> Pain- Hip/Thigh | <input type="checkbox"/> Swelling |

Family Medical History

Please answer as accurately as possible

- | | |
|--|---|
| <input type="checkbox"/> Family History Unknown | <input type="checkbox"/> Family History of Hypertension (HBP) |
| <input type="checkbox"/> No Pertinent Family History | <input type="checkbox"/> Family History of Leukemia |
| <input type="checkbox"/> Family History of Arthritis | <input type="checkbox"/> Family History of Lung Disease |
| <input type="checkbox"/> Family History of Bleeding Disorder | <input type="checkbox"/> Family History of Malignant Hyperthermia |
| <input type="checkbox"/> Family History of Cancer | <input type="checkbox"/> Family History of Musculoskeletal Diseases |

HEALTH HISTORY FORM

NAME _____ DOB: _____ DATE: _____

- | | |
|---|---|
| <input type="checkbox"/> Family History of Diabetes | <input type="checkbox"/> Family History of Reaction to Anesthesia |
| <input type="checkbox"/> Family History of Heart Attack | <input type="checkbox"/> Family History of Stroke |
| <input type="checkbox"/> NONE | <input type="checkbox"/> Family History of Ulcerative Colitis |
| <input type="checkbox"/> Other _____ | |

Past Surgical History

Please Complete as accurately as possible

☐ NO PAST SURGERIES

- | | | | | | |
|--|-------------------------------|--------------------------------|---|-------------------------------|--------------------------------|
| <input type="checkbox"/> Ankle Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Hip Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Appendectomy | | | <input type="checkbox"/> Hysterectomy | | |
| <input type="checkbox"/> Arm Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Knee Replacement Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Back Surgery | | | <input type="checkbox"/> Knee Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Breast Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Lung Surgery | | |
| <input type="checkbox"/> Calf Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Neck Surgery | | |
| <input type="checkbox"/> Carpal Tunnel Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Neuro Surgery | | |
| <input type="checkbox"/> Clavicle Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Reproductive Surgery | | |
| <input type="checkbox"/> Colon Surgery | | | <input type="checkbox"/> Shoulder Replacement Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Ear/Nose/Throat Surgery | | | <input type="checkbox"/> Shoulder Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Elbow Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Skin Surgery | | |
| <input type="checkbox"/> Eye Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Spine Surgery | | |
| <input type="checkbox"/> Finger Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Stomach Surgery | | |
| <input type="checkbox"/> Foot Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Thigh Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Gallbladder Surgery | | | <input type="checkbox"/> Thyroid Surgery | | |
| <input type="checkbox"/> Hand Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Toe (S) Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Head Surgery | | | <input type="checkbox"/> Tonsillectomy | | |
| <input type="checkbox"/> Heart Surgery | | | <input type="checkbox"/> Urology Surgery | | |
| <input type="checkbox"/> Hernia Repair | | | <input type="checkbox"/> Vascular Surgery | | |
| <input type="checkbox"/> Hip Replacement Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right | <input type="checkbox"/> Wrist Surgery | <input type="checkbox"/> Left | <input type="checkbox"/> Right |
| <input type="checkbox"/> Other: Explain _____ | | | | | |

Social History

Substance Use

- ☐ Alcohol Amt _____ How long _____
- ☐ Illegal Substance Use
- ☐ Prescription Drug Abuse
- ☐ Tobacco Amt _____ How long _____
- ☐ NONE

Exercise

- ☐ Active but no Formal Exercise
- ☐ Heavy (4 or more times weekly)
- ☐ Minimal (Once or less a week)
- ☐ Moderate (1-3 times weekly)
- ☐ Sedentary
- ☐ NONE

Education Level

- ☐ Elementary
- ☐ High School
- ☐ College
- ☐ Graduate School

Marital Status

- ☐ Common Law Marriage
- ☐ Divorced
- ☐ Married
- ☐ Separated
- ☐ Single
- ☐ Widowed
- ☐ Other _____

Work Status

- ☐ Disable
- ☐ Homemaker
- ☐ On Leave
- ☐ Retired
- ☐ Student
- ☐ Unemployed
- ☐ Working Full Time Occupation _____
- ☐ Working Part Time Occupation _____
- ☐ Other _____

MEDICATION LIST



Review of Systems

Pt. Name:

Date of Birth:

Constitutional:

- ☐ Fever ☐ Chills ☐ Nausea ☐ None of these

Eyes:

- ☐ Changes in Vision ☐ Blurred Vision ☐ Blindness ☐ None of these

HENT:

- ☐ Hearing loss/Changes ☐ Vertigo ☐ Difficulty Swallowing ☐ None of these

Cardiovascular:

- ☐ Chest Pain ☐ Irregular Heartbeat ☐ Edema ☐ None of these

Respiratory:

- ☐ Shortness of Breath ☐ Sleep Apnea ☐ Chronic Cough ☐ None of these

Gastrointestinal:

- ☐ Bowel Changes or Problems ☐ Abdominal Pain ☐ Heart Burn ☐ None of these

Genitourinary:

- ☐ Difficulty Voiding ☐ Urgency ☐ Frequency ☐ None of these

Integument:

- ☐ Pigmentation Changes ☐ Rash ☐ Itching ☐ None of these

Neurological:

- ☐ Headaches ☐ Tremors ☐ Speech Difficulties
☐ Tingling or numbness ☐ Change in Gait/Balance ☐ Seizures ☐ None of these

Musculoskeletal:

- ☐ Joint Pain ☐ Joint Swelling ☐ Joint Stiffness
☐ Leg Pain when walking ☐ Muscle Pain ☐ Muscular Weakness ☐ None of these

Endocrine:

- ☐ Weight Loss ☐ Weight Gain ☐ Loss of Hair ☐ None of these

Psychiatric:

- ☐ Anxiety ☐ Depression ☐ Feeling Confused ☐ None of these

Heme-Lymph:

- ☐ Easy Bleeding ☐ Easy Bruising ☐ Lymph Node enlargement or tenderness ☐ None of these

Allergic-Immunologic:

- ☐ Frequent Illness ☐ Sinus Allergy Symptoms ☐ Allergic Dermatitis ☐ Frequent Illness ☐ None of these

The Carrell Clinic

9301 N. Central Expressway Suite 400 • (P) 214-220-2468 • (F) 469-232-9738

Patient Consent to Treatment- I, knowing that I am suffering from a condition requiring diagnostic, medical or surgical treatment, do hereby voluntarily consent to such procedures and care and to such diagnostic, medical and/or office-based surgical treatment under the general and specific instructions of the physicians of The Carrell Clinic, their assistants or their designee as is necessary in their judgment.

Disclosure of Physician's Ownerships Interest North Central Surgical Center- Due to your physician's concern over improving the quality of healthcare and reducing cost of medical procedures. Along with a number of other physicians, he has invested in North Central Surgical Center located at 9301 N. Central Expressway, Dallas TX 75231. After meeting with physician, if surgery is necessary, your physician may schedule your surgery at NCSC. Your physician's ownership interest in NCSC means that your physicians may benefit from choosing to perform surgical procedures at NCSC. Because of this, your physician hereby advises you that you have the right to choose to be treated at a different facility, should you desire, and he will make such arrangement, if possible. North Central Surgical Center is a separate legal entity from W.B. Carrell Memorial Clinic. You will receive a separate billing from each entity.

Medication Policy- The following guidelines are intended for your safety and meeting your medication needs in an efficient manner.

- Take medication only as prescribed
- We do not prescribe long term medications, patients requiring long term pain medication will be referred to a pain management specialist.

Refills

- Call your pharmacy directly for medication refills
- Instruct pharmacy to fax all request to 214-750-1982
- Choose only one pharmacy for all of your medications
- Allow three business days for medication refills
- Early refills will not be honored for any reason

To protect your health: Notify our office of all medication changes by other physicians, as this can be potentially dangerous situation. Lost, stolen, or misplaced medications are replaced only with a clinic visit.

Formulary Benefits Data Consent Form- Formulary Benefits data are maintained for health insurance providers by organizations known as Pharmacy Benefits Managers (PBM). PBM's are third-party administrators of prescription drug programs whose primary responsibility are processing and paying prescriptions drug claims. They also develop and maintain formularies, which are list of dispensable drugs covered by a particular drug benefit plan. We may need access to your data as maintained by PBM's to know what medications have been prescribed to you in the past, and to know which drugs are covered by your insurance plan. This consent will enable W.B. Carrell Clinic to:

- Determine the pharmacy benefits and drug copays for a patient's health plan.
- Check whether a prescribed medication is covered (in formulary) under a patient's plan.
- Display therapeutic alternatives with a preference rank (if available) within drug class for non-formulary medications.
- Determine if a patient's health plan allows electronic prescribing to Mail Order pharmacies, and if so, e-prescribe to these pharmacies.
- Download a historic list of all medications prescribed for a patient by another provider.

Patient Name (printed)

Date of Birth

Patient/Guardian Signature

Date



The Carrell Clinic

9301 N. Central Expressway, Suite 500
Dallas, Texas 75231
214-220-2468

Patient Authorization for use and Disclosure of Protected Health Information

I authorize W.B. Carrell Clinic to disclose certain protected health information (PHI) about me to (EX: Wife, doctor, children, etc...). Please list name, number and their relationship.

First and Last Name	Phone Number	Relationship
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

This authorization allows The Carrell Clinic to discuss **my treatment** and **care** for (pick one)

- ☐ Any and All conditions
- ☐ Only the specific condition listed: _____

This Authorization will expire on: _____ (expiration date or defined event)

- ☐ No expiration

I understand that I have the right to revoke this authorization at any given time, to the extent that W.B. Carrell Clinic has not taken action on it, by putting the revocation in writing and signing and dating.

Patient's Name

Date

Patient's Date of Birth

Patient's/ Authorized signature

Relationship to patient (if minor)



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DALLAS, TX 75231
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FAX 469-232-9738
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Financial Policy

We are dedicated to providing the best possible care to you and regard your understanding of our financial policies an essential element of your care and treatment. The Carrell Clinic financial policy is intended to clarify these issues.

- Please present your insurance card at each appointment along with photo identification.
- Your insurance policy is a contract between you and your insurance company. If you did not follow your insurance plan's terms, they may not pay for all or part of your care, and you may not qualify for any managed care discounts. If your insurance company does not pay within 60 days of the date of service, you may be expected to pay the balance in full.
- Self-pay patients: Payment is due at the time service is rendered unless other arrangements have been made in advance. For your convenience, we accept cash, check (in state only), VISA, Master Card, Discover and American Express. You may also pay your bill on-line at www.wbcarrellclinic.com
- Responsibilities for payments who are minor children, whose parents are divorced, rest with the parent who seeks the treatment (This parent is the guarantor). Any court ordered responsibility judgment must be determined between the individuals involved, without the inclusion of The Carrell Clinic.
- We will bill participating insurance companies as a courtesy to you. We do require that payment of deductible, co-pays and co-insurance be paid at the time of service.
- We do not bill third party insurance companies such as: Auto or Liability Insurance; therefore, payment is expected in full at the time of service. However, we will provide you with the necessary paperwork and forms to help you submit your claim to the appropriate insurance carrier.
- Some orthopedic supplies are not covered by your insurance; These must be paid at the time of service
- Patients with an outstanding balance 60 days or more overdue must make payment arrangements prior to scheduling appointments.
- Appointment Cancellations within 24 hours of the scheduled time may result in a \$45.00 charge.
- Returned checks for any reason will result in a \$35.00 charge to your account.
- The Carrell Clinic Billing Coordinators are available to help you with your billing questions Monday through Friday between 8:30am and 5:00pm by calling 214-220-2468.

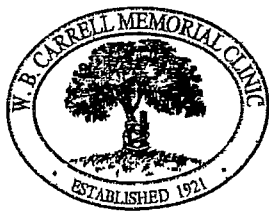
I / we assign to Medical Staff Physician, and Health care providers, and authorized direct payment to Facility(s) all insurance benefits or Medicare benefits which may be entitled. This assignment includes, but is not limited to, major medical and disability insurance proceeds and benefits accruing under any settlement, structured or otherwise, or awarded in judgment for personal injuries caused by a third party. I / we agree to pay Facility (s) for any and all charges not paid pursuant to this assignment.

I have read and understand The Carrell Clinic Financial Policy and agree to abide by its guidelines.

Print Patient Name

Signature of Patient / Parent / Legal Representative

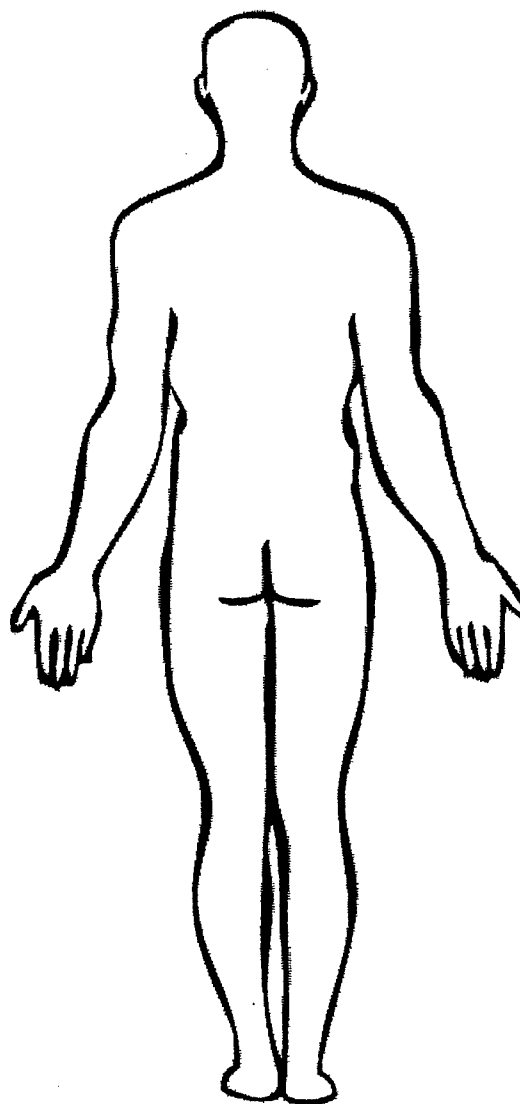
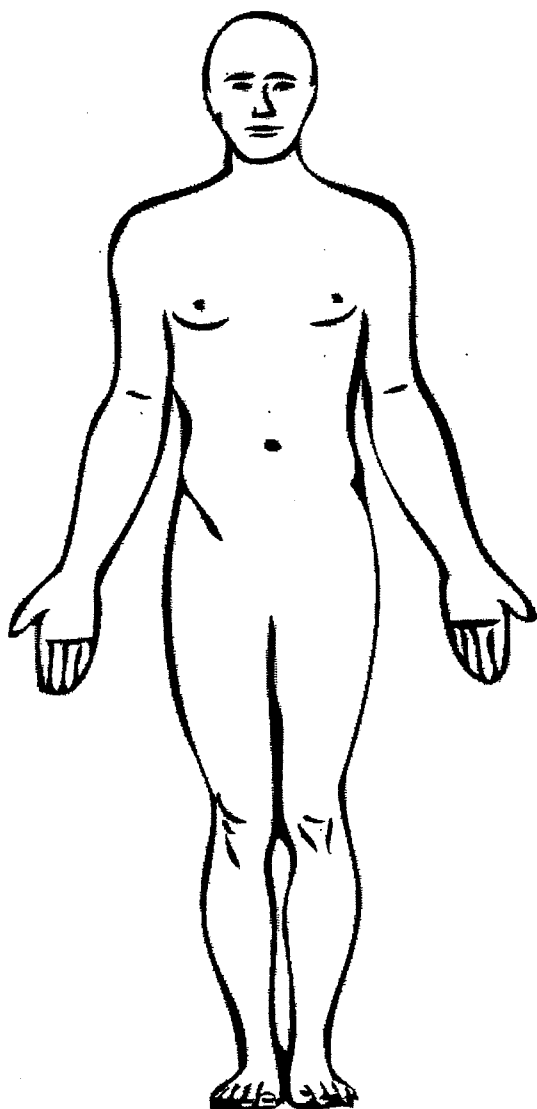
Date _____



MEDICAL HISTORY QUESTIONNAIRE

Pain drawing: Draw the location of your pain on the body outlines.

Please mark on the above drawing where you feel the following sensations:



□ □ □
Ache

○ ○ ○ ○
Numbness

====
Tingling

XXX
Burning

/////
Stabbing

PPP
Pain

Pain scale: On a scale of 0 to 10 with 0 being no pain and 10 being Intolerable pain, circle the number that indicates your pain level.

0 1 2 3 4 5 6 7 8 9 10

Patient's initials _____ Date _____/_____/_____
Provider's initials _____ Date _____/_____/_____



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HIPAA Privacy Practice

This notice describes how health information about you may be used and disclosed and how you can get access to this information. Please review it carefully.

If you have any questions about this notice, please contact The Carrell Clinic at (214) 220-2468.

OUR PLEDGE REGARDING HEALTH INFORMATION

We understand that health information about you and your health care is personal. We are committed to protecting health information about you. We create a record of the care and services you receive from us. We need this record to provide you with quality care and to comply with certain legal requirements. This notice applies to all of the records of your care generated by this health care practice, whether made by your personal doctor or others working in this office. This notice will tell you about the ways in which we may use and disclose health information about you. We also describe your rights to the health information we keep about you, and describe certain obligations we have regarding the use and disclosure of your health information.

We are required by law to:

- Make sure that health information that identifies you is kept private.
- Give you this notice of our legal duties and privacy practices with respect to health information about you.
- Follow the terms of the notice that is currently in effect.

HOW WE MAY USE AND DISCLOSE HEALTH INFORMATION ABOUT YOU

The following categories describe different ways that we use and disclose health information.

For each category of uses or disclosures we will explain what we mean and try to give some examples. Not every use or disclosure in a category will be listed. However, all of the ways we are permitted to use and disclose information will fall within one of the categories.

For Treatment: We may use health information about you to provide you with health care treatment or services. We may disclose health information about you to doctors, nurses, technicians, health students, or other personnel who are involved in taking care of you. They may work at our offices, at the hospital if you are hospitalized under our supervision, or at another doctor's office, lab, pharmacy, or other health care provider to whom we may refer you for consultation, to take x-rays, to perform lab tests, to have prescriptions filled, or for other treatment purposes. For example, a doctor treating you for a broken leg may need to know if you have diabetes because diabetes may slow the healing process. In addition, the doctor may need to tell the dietitian at the hospital if you have diabetes so that we can arrange for appropriate meals. We may also disclose health information about you to an entity assisting in a disaster relief effort so that your family can be notified about your condition, status, and location.

For Payment: We may use and disclose health information about you so that the treatment and services you receive from us may be billed to and payment collected from you, an insurance company, or a third party. For example, we may need to give your health plan information about your office visit so your health plan will pay us or reimburse you for the visit. We may also tell your health plan about a treatment you are going to receive to obtain prior approval or to determine whether your plan will cover the treatment.

For Health Care Operations: We may use and disclose health information about you for operations of our health care practice. These uses and disclosures are necessary to run our practice and make sure that all of our patients receive quality care. For example, we may use health information to review our treatment and services and to evaluate the performance of our staff in caring for you. We may also combine health information about many patients to decide what additional services we should offer, what services are not needed, whether certain new treatments are effective, or to compare how we are doing with others and to see where we can make improvements.

As Required By Law: We will disclose health information about you when required to do so by federal, state, or local law.

To Avert a Serious Threat to Health or Safety: We may use and disclose health information about you when necessary to prevent a serious threat to your health and safety or the health and safety of the public or another person. Any disclosure, however, would only be to someone able to help prevent the threat.

Military and Veterans: If you are a member of the armed forces or separated/ discharged from military services, we may release health information about you as required by military command authorities or the Department of Veterans Affairs as may be applicable. We may also release health information about foreign military personnel to the appropriate foreign military authorities.

Workers' Compensation: We may release health information about you for workers' compensation or similar programs. These programs provide benefits for work-related injuries or illness.

Public Health Risks: We may disclose health information about you for public health activities.

- These activities generally include the following:
- To prevent or control disease, injury or disability.
- To report child abuse or neglect.
- To report reactions to medications or problems with products.
- To notify the appropriate government authority if we believe a patient has been the victim of abuse, neglect, or domestic violence. We will only make this disclosure if you agree or when required or authorized by law.

Health Oversight Activities: We may disclose health information to a health oversight agency for activities authorized by law. These oversight activities include, for example, audits, investigations, inspections, and licensure. These activities are necessary for the government to monitor the health care system, government programs, and compliance with civil rights laws.

Lawsuits and Disputes: If you are involved in a lawsuit or a dispute, we may disclose health information about you in response to a court or administrative order. We may also disclose health information about you in response to a subpoena, discovery request, or other lawful process by someone else involved in the dispute, but only if efforts have been made to tell you about the request or to obtain an order protecting the information requested.

Law Enforcement: We may release health information if asked to do so by a law enforcement official:

- In response to a court order, subpoena, warrant, summons or similar process
- To identify or locate a suspect, fugitive, material witness, or missing person
- About the victim of a crime if, under certain limited circumstances, we are unable to obtain the person's agreement
- About a death we believe may be the result of criminal conduct
- About criminal conduct at our facility
- In emergency circumstances to report a crime; the location of the crime or victims; or the identity, description, or location of the person who committed the crime.

YOUR RIGHTS REGARDING HEALTH INFORMATION ABOUT YOU

You have the following rights regarding health information we maintain about you:

Right to Inspect and Copy: You have the right to inspect and copy health information that may be used to make decisions about your care. Usually, this includes health and billing records.

To inspect and copy health information that may be used to make decisions about you, you must submit your request in writing. If you request a copy of the information, we may charge a fee for the costs of copying, mailing, or other supplies and services associated with your request.

We may deny your request to inspect and copy in certain very limited circumstances. If you are denied access to health information, you may request that the denial be reviewed. Another licensed health care professional chosen by our practice will review your request and the denial.

The person conducting the review will not be the person who denied your request. We will comply with the outcome of the review.

Right to Amend: If you feel that health information we have about you is incorrect or incomplete, you may ask us to amend the information. You have the right to request an amendment for as long as we keep the information. To request an amendment, your request must be made in writing and must be contained on one page of paper legibly handwritten or typed in at least 10-point font size. In addition, you must provide a reason that supports your request for an amendment.

We may deny your request for an amendment if it is not in writing or does not include a reason to support the request. In addition, we may deny your request if you ask us to amend information that:

- Was not created by us, unless the person or entity that created the information is no longer available to make the amendment
- Is not part of the health information kept by or for our practice
- Is not part of the information, which you would be permitted to inspect and copy
- Is accurate and complete

Any amendment we make to your health information will be disclosed to those with whom we disclose information as previously specified.

Right to an Accounting of Disclosures: You have the right to request a list accounting for any disclosures of your health information we have made, except for uses and disclosures for treatment, payment, and health care operations, as previously described.

To request this list of disclosures, you must submit your request in writing. Your request must state a time period, which may not be longer than six years and may not include dates before April 14, 2003. The first list you request within a 12-month period will be free. For additional lists, we may charge you for the costs of providing the list. We will notify you of the cost involved and you may choose to withdraw or modify your request at that time before any costs are incurred. We will mail you a list of disclosures in paper form within 30 days of your request, or notify you if we are unable to supply the list within that time period and by what date we can supply the list; but this date will not exceed a total of 60 days from the date you made the request.

Right to Request Restrictions: You have the right to request a restriction or limitation on the health information we use or disclose about YOU for treatment, payment, or health care operations. You also have the right to request a limit on the health information we disclose about you to someone who is involved in your care or the payment for your care, such as a family member or friend. For example, you could ask that we restrict a specified nurse from use of your information, or that we not disclose information to your spouse about a surgery you had.

We are not required to agree to your request for restrictions if it is not feasible for us to ensure our compliance or believe it will negatively impact the care we may provide you. If we do agree, we will comply with your request unless the information is needed to provide you emergency treatment. To request a restriction, you must make your request in writing. In your request, you must tell us what information you want to limit and to whom you want the limits to apply; for example, use of any information by a specified nurse, or disclosure of specified surgery to your spouse.

Right to Request Confidential Communications: You have the right to request that we communicate with you about health matters in a certain way or at a certain location. For example, you can ask that we only contact you at work or by mail to a post office box.

To request confidential communications, you must make your request in writing. We will not ask you the reason for your request. We will accommodate all reasonable requests. Your request must specify how or where you wish to be contacted.

Right to a Paper Copy of This Notice: You have the right to obtain a paper copy of this notice at any time. To obtain a copy, please request it from the front office staff.

You may also obtain a copy of this notice at our Web site, www.wbcarrellclinic.com. Even if you have received a notice electronically, you still retain the right to receive a paper copy upon request.

If the first service delivery is delivered electronically, other than by telephone, we provide electronic notice in the same medium, automatically and contemporaneously in response to a first request for service.

CHANGES TO THIS NOTICE

We reserve the right to change this notice. We reserve the right to make the revised or changed notice effective for health information we already have about you as well as any information we receive in the future. We will post a copy of the current notice in our facility. The notice will contain on the first page, in the top right-hand corner, the effective date. In addition, each time you register for treatment or health care services, we will offer you a copy of the current notice in effect.

COMPLAINTS

If you believe your privacy rights have been violated, you may file a complaint with us or with the Secretary of the Department of Health and Human Services. To file a complaint with us, contact The Carrell Clinic. All complaints must be submitted in writing. You will not be penalized for filing a complaint.

OTHER USES OF HEALTH INFORMATION

Other uses and disclosures of health information not covered by this notice or the laws that apply to us will be made only with your written permission. If you provide us permission to use or disclose health information about you, you may revoke that permission, in writing, at any time. If you revoke your permission, we will no longer use or disclose health information about you for the reasons covered by your written authorization. You understand that we are unable to take back any disclosures we have already made with your permission, and that we are required to retain our records of the care that we provided to you.

ACKNOWLEDGEMENT OF RECEIPT OF THIS NOTICE

I have read and understand the above HIPAA Privacy Practice. If you choose, or are not able to sign, a staff member will sign their name, date.

THIS ACKNOWLEDGEMENT WILL BE PLACED IN YOUR RECORD

Print Patient Name

Signature of Patient / Parent / Legal Representative

Date



DISCRIMINATION IS AGAINST THE LAW

W.B. Carrell Memorial Clinic (WBCC) complies with applicable Federal civil rights laws and does not discriminate on the basis of race, national origin, age, disability, or sex. WBCC does not exclude people or treat them differently because of race, national origin, age, disability, or sex.

WBCC provides free aids and services to people with disabilities to communicate effectively with us, such as qualified sign language interpreters.

WBCC provides free language services to people whose primary language is not English, such as information written in other languages.

Language services are available at the front desk at all of our locations.

If you believe that WBCC has failed to provide these services or discriminated in another way on the basis of race, national origin, age, disability, or sex, you can file a grievance with:

- Attention: WBCC's Compliance Officer
- Mailing Address: 9301 N. Central Expressway, Tower I, Suite 400, Dallas, TX 75231
- Fax: (214) 720-1982
- Email: compliance@carrellclinic.com

You can file a grievance in person or by mail, fax, or email. If you need help filing a grievance, WBCC's Compliance Officer is available to help you.

You can also file a civil rights complaint with the U. S. Department of Health and Human Services, Office for Civil Rights, electronically through the Office for Civil Rights Complaint Portal, available at <https://ocrportal.hhs.gov/portal/lobby.jsf>, or by mail or phone at: U. S. Department of Health and Human Services, 200 Independence Avenue SW, Room 509F, HHH Building, Washington, D.C., 20201. Phone 1-800-368-1019. (TDD) 1-800-537-7697.

Complaint forms are available at <https://www.hhs.gov/ocr/office/file/index.html>.

Translation Guide

	Language	Notice
1	English	Language assistance services are available at the front desk at all of our locations.
2	Spanish Español	Servicios de asistencia lingüística están disponibles en la recepción en todas nuestras localidades.
3	Vietnamese Tiếng Việt	Dịch vụ hỗ trợ ngôn ngữ có sẵn tại quầy lễ tân ở tất cả các địa điểm của chúng tôi.
4	Chinese 中文 Zhōngwén	语言协助服务，可于我们所有位置的前台。 Yǔyán xiézhù fúwù, kě yú wǒmen suǒyǒu wèizhì de qiántái.
5	Korean 한국어 Hangug-eo	언어 지원 서비스는 우리의 모든 위치에서 프론트 데스크에서 사용할 수 있습니다. Eon-eo jiwon seobiseuneun uliui modeun wichieseo peulonteu deseukeuseo sayonghal su issseubnida.
6	Arabic العربية Alearabia	تشتمل الخدمات على خدمات المساعدة اللغوية في مكتب الاستقبال في جميع مواقعنا. Tashtamil alkhadamat ealaa khadamat almusaeadat allughawiat fi maktab alaistiqbal fi jmye mawaqieina.
7	Urdu اردو	زبان کی مدد کی خدمات ہمارے مقامات میں سے سب پر سامنے میز پر دستیاب ہیں۔
8	Tagalog (Filipino)	Serbisyong tulong sa wika ay magagamit sa front desk sa lahat ng aming mga lokasyon.
9	French Français	Services d'assistance linguistique sont disponibles à la réception à tous nos sites.
10	Hindi हिंदी Hindee	भाषा सहायता सेवाओं हमारे स्थानों के सभी पर सामने मेज़ पर उपलब्ध हैं। Bhaasha sahaayata sevaon hamaare sthaanon ke sabhee par saamane mez par upalabdh hain.
11	Persian (Farsi) فارسی	خدمات کمک زبان در میز جلو در همه مکان های ما در دسترس هستند.
12	German Deutsche	Sprachassistenzen sind an der Rezeption an allen Standorten zur Verfügung.
13	Gujarati ગુજરાતી Gujarātī	ભાષા સહાય સેવાઓ અમારા સ્થાનોનો બધા ખાતે ફ્રન્ટ ડેસ્ક પર ઉપલબ્ધ છે. Bhāṣā sahāya sēvā'ō amārā sthānōnō badhā khātē phranṭa ḍeska para upalabdha chē.
14	Russian Русский Russkiy	Переводческие услуги предоставляются на стойке регистрации на всех наших местах. Perevodcheskiye uslugi predostavlyayutsya na stoyke registratsii na vsex nashikh mestakh.
15	Japanese 日本語 Nihongo	言語支援サービスは、当社のすべての場所で、フロントデスクでご利用いただけます。 Gengo shien sābisu wa, tōsha no subete no basho de, furonto desuku de go riyō itadakemasu.
16	Laotian ລາວ Lav	ການບໍລິການການຊ່ວຍເຫຼືອພາສາແມ່ນມີຢູ່ໃນຫນ້າທີ່ຕ້ອນຮັບຢູ່ໃນທັງຫມົດຂອງສະຖານທີ່ຂອງພວກເຮົາ. Kanbolikan kansuanyheu phasa aemnmi yunai na thitonhab yunai thangmod khong sathanthi khongphuakhao.

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