

Child New Patient Medical Background Information

PATIENT INFORMATION

Patient Name: _____ Pronouns: _____ Date of Birth ____/____/____

Parent or Guardian's Name: _____

Chief Complaint or Concern:

MEDICATIONS (including prescription and over the counter)

- | | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

Does your child have any allergies to any medications? ☐ Yes ☐ No

If yes – please list:

PAST SURGICAL HISTORY

- | | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

Has your child ever had your tonsils and/or adenoids surgically removed? ☐ Yes ☐ No

ALLERGY HISTORY

☐ None Known ☐ Yes, to: 1. _____ 3. _____
2. _____ 4. _____

Pets: ☐ No ☐ Yes How many? _____ What type of pet? _____

Do any pets sleep in your child's bedroom? ☐ No ☐ Yes

Which pets? _____

FAMILY HISTORY

Do you have a family history of any of the following medical illnesses? (Check if "yes" to all that apply):

- | | | |
|-----------------------------------------------------------|---------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> High blood pressure/hypertension | <input type="checkbox"/> Diabetes | <input type="checkbox"/> Chronic insomnia |
| <input type="checkbox"/> Heart disease | <input type="checkbox"/> Overweight/obesity | <input type="checkbox"/> Restless legs syndrome |
| <input type="checkbox"/> Stroke | <input type="checkbox"/> Snoring | <input type="checkbox"/> Multiple sclerosis |
| <input type="checkbox"/> Congestive heart failure | <input type="checkbox"/> Sleep apnea | <input type="checkbox"/> Sleep walking |
| <input type="checkbox"/> Depression | <input type="checkbox"/> Anxiety | |

REVIEW OF SYMPTOMS

Constitutional:

- | | |
|-------------------|----------------------------------------------------------|
| Loss of Appetite: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Fever: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Fatigue: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Weight Gain: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Weight Loss: | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Respiratory:

- | | |
|--------------------------|----------------------------------------------------------|
| Cough: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Asthma: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Wheezing: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Poor Exercise Tolerance: | <input type="checkbox"/> Yes <input type="checkbox"/> No |

REVIEW OF SYMPTOMS

Gastrointestinal:

Heartburn/Indigestion: ☐ Yes ☐ No

Black or Bloody Stools: Diarrhea: ☐ Yes ☐ No

Nausea/Vomiting: ☐ Yes ☐ No

Jaundice: ☐ Yes ☐ No

Abdominal Pain ☐ Yes ☐ No

Allergy/Immunology:

Nasal allergies/Hay fever/

Nasal Congestion: ☐ Yes ☐ No

Sneezing: ☐ Yes ☐ No

Runny Nose: ☐ Yes ☐ No

Itchy Eyes or Nose: ☐ Yes ☐ No

Hives: ☐ Yes ☐ No

Eyes:

Blurry Vision: ☐ Yes ☐ No

Double Vision: ☐ Yes ☐ No

Vision Loss : ☐ Yes ☐ No

Genitourinary:

Frequent Urination ☐ Yes ☐ No

Difficulty Urinating: ☐ Yes ☐ No

Blood in Urine: ☐ Yes ☐ No

Musculoskeletal:

Stiff/Sore Joints: ☐ Yes ☐ No

Muscle Pain: ☐ Yes ☐ No

Red or Swollen Joints: ☐ Yes ☐ No

Temporomandibular Joint

(TMJ) pain/jaw discomfort: ☐ Yes ☐ No

Ears/Nose/Throat/Mouth:

Hearing Loss: ☐ Yes ☐ No

Sore Throat: ☐ Yes ☐ No

Sinus Congestion: ☐ Yes ☐ No

Hoarseness: ☐ Yes ☐ No

Tubes in Ears: ☐ Yes ☐ No

REVIEW OF SYMPTOMS

Cardiac:

Palpitations: ☐ Yes ☐ No
Chest Pain: ☐ Yes ☐ No
Daytime Shortness of Breath: ☐ Yes ☐ No
Nighttime Shortness of Breath: ☐ Yes ☐ No
Ankle Swelling: ☐ Yes ☐ No
Hypertension/High Blood Pressure ☐ Yes ☐ No

Skin:

Unusual Moles: ☐ Yes ☐ No
Rash: ☐ Yes ☐ No
Dryness: ☐ Yes ☐ No

Endocrine:

Heat Intolerance ☐ Yes ☐ No
Cold Intolerance: ☐ Yes ☐ No
Excessive Thirst: ☐ Yes ☐ No
Constipation: ☐ Yes ☐ No

Neurologic:

Weakness: ☐ Yes ☐ No
Seizures: ☐ Yes ☐ No
Involuntary Tongue Biting: ☐ Yes ☐ No
Passing Out: ☐ Yes ☐ No
Dizziness: ☐ Yes ☐ No
Headaches: ☐ Yes ☐ No
Numbness: ☐ Yes ☐ No

Psychiatric:

Excessive Stress: ☐ Yes ☐ No
Memory Loss: ☐ Yes ☐ No
Hallucinations: ☐ Yes ☐ No
Nervousness or Anxiety: ☐ Yes ☐ No
Depressed Mood: ☐ Yes ☐ No
Memory Loss: ☐ Yes ☐ No

Was your child breast fed? ☐ Yes ☐ No

If your child was breast fed – for how long? _____

Was your child ☐ Full Term ☐ Premature

If Premature – at how many weeks was your child delivered? _____

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS INFORMATION



EVOLUTION DENTAL

New Patient Registration

Patient Name: _____ Date of Birth: ____/____/____

Address: _____ City/State/Zip: _____

Phone Number: _____ *Cell / Home* Drivers License: _____

Pronouns: _____ Legal Sex (on insurance forms): M / F / X

Email Address: _____

Preferred Pharmacy: _____

Phone Number: _____ Main Cross Streets: _____

Emergency Contact Name: _____

Relationship to patient: _____ Phone Number: _____

Guarantor Information - If Different From Patient

Name: _____ Relationship to patient: _____

Address: _____ City/State/Zip: _____

Phone Number: _____ *Cell / Home* Pronouns: _____

Email Address: _____ Date of Birth: ____/____/____

- ☐ Please check this box if you give us, Evolution Dental staff and team, permission to discuss your treatment and financial arrangements with this person. Signature of patient: _____



EVOLUTION DENTAL

Insurance Information

Primary Insurance Company Name: _____

Policy Holder Name: _____ Date of Birth: ____/____/____

Address: _____ City/State/Zip: _____

Phone Number: _____ Cell / Home Relationship to Patient: _____

ID#: _____ Group #: _____ Effective Date: ____/____/____

Secondary Insurance Company Name: _____

Policy Holder Name: _____ Date of Birth: ____/____/____

Address: _____ City/State/Zip: _____

Phone Number: _____ Cell / Home Relationship to Patient: _____

ID#: _____ Group #: _____ Effective Date: ____/____/____

Evolution Dental does not accept assignment of benefits. This means that all insurance benefits / payouts / reimbursements will be sent directly to the insured. We will do our best to work on your behalf to obtain your full benefit for our services. Despite doing thorough research prior to sending claims to the insurance company the ultimate insurance coverage amounts cannot be known until the insurance company issues their final payment towards those services.

*****Payment in full is due at the time services are rendered*****

Patient Signature: _____ Date: ____/____/____

Children and Adolescents

Sleep, Breathing & Habit Questionnaire

Patient's Name: _____ Age: _____ Date: _____

Please indicate if your child experiences or has experienced any of the symptoms below by using this scale to measure the severity of these symptoms.

0 - No Occurrence 1 - Occurs Rarely 2 - Occurs 2 to 4 times per week 3 - Occurs 5 to 7 times per week

- | | |
|--------------------------------------------------------|--------------------------------------------------------------------------|
| 1. _____ Snoring | 15. _____ Headaches |
| 2. _____ Interrupted snoring where breathing stops | 16. _____ Frequent throat infections |
| 3. _____ Labored, difficult or loud breathing at night | 17. _____ Seasonal allergies |
| 4. _____ Gasping for air while sleeping | 18. _____ Ear infections or history of ear infections |
| 5. _____ Mouth breathes while sleeping | 19. _____ Short attention span |
| 6. _____ Mouth breathes during the day | 20. _____ Trouble Focusing |
| 7. _____ Restless sleep | 21. _____ Difficulty listening/often interrupts |
| 8. _____ Grinds teeth while sleeping | 22. _____ Hyperactive |
| 9. _____ Talks in sleep | 23. _____ ADD/ADHD |
| 10. _____ Excessive sweating while sleeping | 24. _____ Sensory issues |
| 11. _____ Wakes up at night | 25. _____ Struggles in math at school |
| 12. _____ Wets the bed (currently) | 26. _____ Struggles in reading at school |
| 13. _____ History of bedwetting | 27. _____ Speech issues * |
| 14. _____ Feels sleepy and/or irritable during the day | 28. _____ Avoidance behavior towards food or
or certain types of food |

***Speech Questionnaire - to be filled out only if #27 was indicated above**

Please check all that apply to your child

- | | |
|----------------------------------------------------------|--------------------------------------------------------------------------|
| _____ Is it difficult to understand your child's speech? | _____ Gets frustrated when people can't understand speech? |
| _____ Difficult to understand over the phone? | _____ Speech sounds abnormal? |
| _____ Nasal speech? | _____ Sometimes omits consonants? |
| _____ Hoarseness? | _____ Uses M, N, NG instead of P, V, S, Z sounds? |
| _____ Others have difficulty understanding speech? | _____ Liquids and/or solids get into nasal area when eating or drinking? |



EVOLUTION DENTAL

Financial Policy & Agreement

Payment Options & Financial Arrangements

We recognize that patients have differing needs when it comes to fulfilling financial obligations. We accept the following payment methods for payment in full: **American Express, Discover, Mastercard, Visa, HSA/FSA, cash, and check.** A **\$45 fee** will be assessed for any returned checks.

Layaway plans, payment plans, and third-party financing may be available for qualifying treatment plans pending credit approval. **All payment arrangements must be made at the time of treatment acceptance.**

Insurance Billing

Evolution Dental is an **out-of-network provider with all medical insurance plans.** We do not accept insurance assignment, meaning we are not paid directly by health insurance and we cannot anticipate the dollar amount that will be paid by insurance following a claim submitted on behalf of a patient. For this reason, **full payment must be arranged between the patient (or guarantor) and Evolution Dental at the time of service.**

As a courtesy, when appropriate, we will submit insurance claims on your behalf for out-of-network benefits within the timely filing window. While we will work with you to help maximize available benefits, **we are not a financial institution and cannot guarantee insurance participation in the cost of your care.**

Insurance payments are to be made **directly to the patient**, not to our office.

In some cases, we may be **in-network with your dental insurance plan.** If applicable, we will review your treatment plan against your policy and adjust upfront costs accordingly. **Patients remain ultimately responsible for payment in full** if insurance fails to pay the anticipated amount for any reason.

New Patient Booking Fee

A booking fee is required for all new patients at the time of scheduling and will be applied toward the first appointment.

- **\$250** for a 90-minute new patient consultation
- **\$150** for all other first-visit appointments

Booking fees may be transferred or refunded **only if our office receives notice to cancel or reschedule during business hours at least two (2) business days in advance**, in accordance with the section below on rescheduling, cancellations, and missed appointments.

Appointment Rescheduling, Cancellation & Missed Appointments

Because our practice operates with a single operator, **each appointment time is reserved exclusively for the scheduled patient**. Missed or late-cancelled appointments cannot be filled on short notice and directly impact our ability to care for other patients.

Notice Requirements

A minimum of **two (2) business days (48 hours)** notice is required to cancel or reschedule an appointment. Cancellations received at least two business days in advance **will not incur a fee**.

Cancellation notices are considered received **only during business hours**, which are **Monday–Thursday, 8:00 AM–5:00 PM**. Messages left outside of business hours (evenings, weekends, or holidays) will be processed on the next business day.

Missed (No-Show) Appointment Fees:

- **\$250** for new patient consultations
- **\$150 per hour** for all other appointments (rounded to the nearest hour)

Late Cancellation Fees (less than two business days' notice):

- **\$250 late cancellation fee** for new patient consultations
- **\$100 late cancellation fee** for all other appointments

All fees must be paid **prior to rescheduling**. Repeated late cancellations or no-shows may result in placement on a **last-minute-only scheduling list** and/or a requirement to **pay in full at the time of booking**. Please note that insurance companies do **not** cover missed appointment or cancellation fees.

Special exceptions may be considered on a **case-by-case basis** for sudden illness or family emergencies. We appreciate your help in keeping our small team healthy by staying home if you are ill.

Refund Policy

The availability and amount of any refund depend on multiple factors, including but not limited to: amounts paid, amounts owed, costs already incurred by our office, and insurance claims that have been submitted or processed. Custom treatments may include non-refundable laboratory fees. Doctor chair time already utilized is non-refundable. Refunds are reviewed **on a**

case-by-case basis and are issued **once per month**. To be eligible for any refund, a patient must **formally discontinue the treatment in question** prior to a refund being considered.

Acknowledgment

A signed copy of this document is required prior to the first appointment. By signing below and scheduling an appointment with our office, you acknowledge you have read, understand, and agree to each of the above terms of the Financial Policy.

Patient Name

Patient Signature

Date

Please complete the section below only if the financial guarantor (party responsible for payment) is other than the patient and/or if the patient is under the age of 18.

Guarantor Name

Guarantor Signature

Date



Consent for Photography or Video Release

At Evolution Dental, we prefer to document all services and treatments performed. New patient exams start with a series of photographs. This baseline record provides a useful reference point throughout your treatment. We also take before and after photos and provide those to you if desired so that you may have a record of your own progress. At times we may wish to share these photos with other providers for additional review for the purpose of ensuring that our patients receive the best possible care and experience the best treatment outcomes. You are not required to sign this release form.

I, the patient/guardian (the "Releasor"), grant permission and consent to the listed Provider (the "Releasee") for use of the photograph(s) or video content taken during any of the office visits for presentation under any legal condition including but not limited to: illustration, educational purposes, educational web content, and as part of the normal course of operations of the practice such as in coordination with a laboratory or supporting organization who may provide clinical guidance or resources to aid the Provider in treatment management.

Consent is granted for the following (please check one):

- ☐ Both intra-oral (inside the mouth) and extra-oral (face / body / external) images
- ☐ Intra-oral only
- ☐ Extra-oral only
- ☐ **I do not consent**

This authorization and release shall also apply to the benefit of the legal representatives and licensees of Dr. Russell Teasdale and Evolution Dental.

- ☐ I am over the age of eighteen
- ☐ I have read and fully understand the terms of this release.

Releasor Name : _____
Patient or Guardian **Name**

Releasor Signature: _____
Patient or Guardian **Signature**

Date: _____



**ACKNOWLEDGEMENT OF RECEIPT OF
NOTICE OF PRIVACY PRACTICES**

“You May Refuse to Sign This Acknowledgement”

I _____ (printed name) have been informed of the
Notice of Privacy Practices for Evolution Dental.

Signature

Date

FOR OFFICE USE ONLY

We attempted to obtain written acknowledgement of receipt of our Notice of Privacy Practices, but acknowledgement could not be obtained because:

- ☐ Individual refused to sign
- ☐ Communications barriers prohibited obtaining the acknowledgment
- ☐ An emergency situation prevented us from obtaining acknowledgement
- ☐ Other (Please Specify)

NOTICE OF PRIVACY PRACTICES

THIS NOTICE DESCRIBES HOW HEALTH AND MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY. THE PRIVACY OF YOUR HEALTH AND MEDICAL INFORMATION IS IMPORTANT TO US.

OUR RESPONSIBILITIES

We at Evolution Dental, P.C. understand that medical information about you and your health is personal. Applicable federal and state law requires us to maintain the privacy of your health information. We are also required to give you this Notice about our privacy practices, our legal duties, and your rights concerning your health information. We must follow the privacy practices that are described in this Notice while it is in effect. This Notice takes effect 03/21/23, and will remain in effect until we replace it. We will let you know promptly if a breach occurs that may have compromised the privacy or security of your information. We reserve the right to change our privacy practices and the terms of this Notice at any time, provided such changes are permitted by applicable law. We reserve the right to make the changes in our privacy practices and the new terms of our Notice effective for all health information that we maintain, including health information we created or received before we made the changes. Before we make a significant change in our privacy practices, we will change this Notice and make the new Notice available upon request. You may request a copy of our Notice at any time. For more information about our privacy practices, or for additional copies of this Notice, please contact us using the information listed at the end of this Notice.

USES AND DISCLOSURES OF HEALTH INFORMATION

We may use and disclose health information about you for treatment, payment, and healthcare operations. For example:

To Treat You: We can use or disclose your health information to a physician or other healthcare provider providing treatment to you.

Billing and Payment For Services: We can use and disclose your health information to obtain payment for services we provide to you.

Healthcare Operations: We can use and disclose your health information in connection with our healthcare operations which include quality assessment and improvement activities, reviewing the competence or qualifications of healthcare professionals, evaluating practitioner and provider performance, conducting training programs, accreditation, certification, licensing or credentialing activities.

Your Authorization: In addition to our use of your health information for treatment, payment or healthcare operations, you may give us written authorization to use your health information or to disclose it to anyone for any purpose. If you give us an authorization, you may revoke it in writing at any time; your revocation will not affect any use or disclosures permitted by your authorization while it was in effect. Unless you give us a written authorization, we cannot use or disclose your health information for any reason except those described in this Notice.

To Your Family and Friends: We must disclose your health information to you as described in the Patient Rights section of this Notice. We may disclose your health information to a family member, friend or another person to the extent necessary to help with your healthcare or with payment for your healthcare, but only if you agree that we may do so.

Persons Involved In Care: We may use or disclose health information to notify, or assist in the notification of (including identifying or locating) a family member, your personal representative or another person responsible for your care, of your location, your general condition, or death. If you are present, then prior to use or disclosure of

your health information, we will provide you with an opportunity to object to such uses or disclosures. In the event of your incapacity or emergency circumstances, we will disclose health information based on a determination using our professional judgment disclosing only health information that is directly relevant to the person's involvement in your healthcare. We will also use our professional judgment and our experience with common practice to make reasonable inferences of your best interest in allowing a person to pick up filled prescriptions, medical supplies, X-rays, or other similar forms of health information.

Marketing Health-Related Services: We will not use your health information for marketing purposes without your written permission.

Required by Law: We may use or disclose your health information when we are required to do so by state or federal law, including with the Department of Health and Human Services if it wants to see that we are complying with federal privacy law.

Abuse or Neglect: We may disclose your health information to appropriate authorities if we reasonably believe that you are a possible victim of abuse, neglect, or domestic violence or the possible victim of other crimes. We may disclose your health information to the extent necessary to avert a serious threat to your health or safety or the health or safety of others.

National Security: We may disclose to military authorities the health information of Armed Forces personnel under certain circumstances. We may disclose to authorized federal officials health information required for lawful intelligence, counterintelligence, and other national security activities. We may disclose to correctional institution or law enforcement official having lawful custody of protected health information of inmate or patient under certain circumstances.

Respond to organ and tissue donation requests: We can share health information about you with organ procurement organizations.

Work with a medical examiner or funeral director: We can share health information with a coroner, medical examiner, or funeral director when an individual dies.

Address workers' compensation, law enforcement, and other government requests: We can use or share health information about you:

- For workers' compensation claims
- For law enforcement purposes or with a law enforcement official
- With health oversight agencies for activities authorized by law
- For special government functions such as military, national security, and presidential protective services

Respond to lawsuits and legal actions: We can share health information about you in response to a court or administrative order, or in response to a subpoena.

Appointment Reminders: We may use or disclose your health information to provide you with appointment reminders (such as voicemail messages, postcards, text messages or letters).

PATIENT RIGHTS

Access: You have the right to look at or get copies of your health information, with limited exceptions. You may request that we provide copies in a format other than photocopies. We will use the format you request unless we cannot practicably do so. (You must make a request in writing to obtain access to your health information. You may obtain a form to request access by using the contact information listed at the end of this Notice. We will charge you a reasonable cost-based fee for expenses such as copies, mailing, and staff time. You may also request access by sending us a letter to the address at the end of this Notice. If you request an alternative format, we will charge a cost-based fee for providing your health information in that format. If you prefer, we will prepare a summary or an explanation of your health information for a fee. Contact us using the information listed at the end of this Notice for a full explanation of our fee structure.)

Disclosure Accounting: You have the right to receive a list of instances in which we or our business associates disclosed your health information for purposes, other than treatment, payment, healthcare operations and certain other activities, for the last 6 years, but not before April 14, 2003. If you request this accounting more than once in a 12-month period, we may charge you a reasonable, cost-based fee for responding to these additional requests.

Restriction: You have the right to request that we place additional restrictions on our use or disclosure of your health information. We are not required to agree to these additional restrictions, but if we do, we will abide by our agreement (except in an emergency).

Alternative Communication: You have the right to request that we communicate with you about your health information by alternative means or at alternative locations. (You must make your request in writing.) Your request must specify the alternative means or location, and provide satisfactory explanation how payments will be handled under the alternative means or location you request.

Amendment: You have the right to request that we amend your health information. (Your request must be in writing, and it must explain why the information should be amended.) We may deny your request under certain circumstances.

Records Transfer: If a healthcare practice where your health information records reside is sold or merges with another practice or organization, your records will be transferred to the new owner. However, you may request that copies of your health information be transferred to another practice.

Electronic Notice: If you receive this Notice on our Web site or by electronic mail (e-mail), you are entitled to receive this Notice in written form.

QUESTIONS AND COMPLAINTS

If you want more information about our privacy practices or have questions or concerns, please contact us.

If you are concerned that we may have violated your privacy rights, or you disagree with a decision we made about access to your health information or in response to a request you made to amend or restrict the use or disclosure of your health information or to have us communicate with you by alternative means or at alternative locations, you may complain to us using the contact information listed at the end of this Notice. You also may submit a written complaint to the U.S. Department of Health and Human Services by sending a letter to 200 Independence Avenue, S.W., Washington, D.C. 20201, calling 1-877-696-6775, or visiting www.hhs.gov/ocr/privacy/hipaa/complaints/.

We support your right to the privacy of your health information. We will not retaliate in any way if you choose to file a complaint with us or with the U.S. Department of Health and Human Services.

Privacy Officer: Claire Frazier

Telephone: (503)974-3829

E-mail: hello@evolutiondentalpdx.com

Address: 1316 SW 13th Ave Suite B

Zip Code: 97201

State: Oregon

City: Portland