

**NEW PATIENT DEMOGRAPHICS FORM**

Referred By \_\_\_\_\_ Dr Patient Internet Mail Other. Date \_\_\_\_\_

Last Name \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mobile Phone \_\_\_\_\_ Home Phone \_\_\_\_\_ SS# \_\_\_\_\_

Alias \_\_\_\_\_ Date of Birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Age \_\_\_\_ Sex \_\_\_\_ Marital Status: S M W D Sep

Email \_\_\_\_\_ Primary Care Physician \_\_\_\_\_

Pharmacy: Name \_\_\_\_\_ Address \_\_\_\_\_

Pharmacy: Phone# \_\_\_\_\_ Fax# \_\_\_\_\_

Emergency Contact Name \_\_\_\_\_ Phone# \_\_\_\_\_ Relationship \_\_\_\_\_

Race: White Black Asian Am Indian/Alaska Native Native Hawaiian Pacific Islander Other \_\_\_\_\_

Ethnicity: Non-Hispanic Hispanic Language: English Spanish French/Creole Other \_\_\_\_\_

Primary Insurance \_\_\_\_\_ ID# \_\_\_\_\_ Group# \_\_\_\_\_

Secondary Ins \_\_\_\_\_ ID# \_\_\_\_\_ Group# \_\_\_\_\_

Ins Responsible Party name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Phone \_\_\_\_\_

Accident? Yes No Type: Auto Work Comp Slip/Fall Other \_\_\_\_\_ Date of Injury \_\_\_\_\_

Any person who knowingly and with intent to injure, defraud, or deceive any employer or employee, insurance company, or self-insured program, or files a statement of claim containing any false or misleading information, commits insurance fraud and is punishable as provided in Florida Statute 817.234

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

**New Patient Medical Intake Form**

Patients name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Date \_\_\_\_\_

**PRESENT PROBLEM**

 Chief Complaint \_\_\_\_\_  
 Onset (when complaint began) \_\_\_\_\_  
 What makes better/worse? \_\_\_\_\_  
 Quality (dull, sharp, achy, etc.) \_\_\_\_\_  
 Region/Radiation (location) \_\_\_\_\_  
 Severity (1-10, worst being 10) \_\_\_\_\_  
 Timing (morning, after exercise, winter, etc.) \_\_\_\_\_  
 Associated symptoms (headache, tingling, etc.) \_\_\_\_\_  
 Studies pertinent to complaint (MRI, CT, Xray, etc.) \_\_\_\_\_  
 Prior therapies tried for complaint (PT, acupuncture, injections, etc.) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**HISTORY**

 Current Medications & dosages \_\_\_\_\_  
 \_\_\_\_\_  
 Allergies (reactions to meds, foods, etc.) \_\_\_\_\_  
 Prior surgeries and hospitalizations (for any complaint) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

 Alcohol use: Never, Yes: # \_\_\_ per Week Month, Type: Beer Wine Liquor  
 Tobacco use: Never, Yes: # \_\_\_ per Day Week, Type: Cigarettes Cigars Dip/Chew  
 Former : Quit date \_\_\_\_\_, Years of use \_\_\_\_\_.

Family History:	Living	Age	Conditions (circle cause of death if applicable)
Father:	Yes No	___	_____
Mother:	Yes No	___	_____
Brothers:	Yes No	___	_____
Sisters:	Yes No	___	_____
GrandF:	Yes No	___	_____
GrandM:	Yes No	___	_____

 Past Medical History (chicken pox, heart dz, liver dz, kidney dz, cancer, glaucoma, rheumatic fever, etc.) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

To the best of my knowledge, the questions on this form have been accurately answered. I understand that providing incorrect information can be dangerous to my health. It is my responsibility to inform the Doctor's office of changes in my medical status. I authorize the health care staff to perform the necessary services I need.

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

**NEW PATIENT REVIEW OF SYSTEMS FORM**

Patient name \_\_\_\_\_

Date \_\_\_\_\_

Please check positive all symptoms that apply to you and check negative all symptoms that definitely do not apply. If you do not recognize a term then please leave it blank.

We are aware that the list is very long but it will only be filled out on the first visit and it helps us give you the best care possible. Thank you.

**General**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fatigue
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Night Sweats
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Weight Gain > 10lbs.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Weight loss >10lbs - unintentional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Weight Loss >10lbs - Intentional

**Skin**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	New Lesions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rash
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Change in Wart/Mole

**HEENT**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Head Injury
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Eye Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Visual Disturbances
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hearing Loss
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ringing in the Ears
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Seasonal Allergies
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sinus issues

**Respiratory**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	New cough
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chronic Cough
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wheezing
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shortness of breath
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Difficulty Breathing on Exertion
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Difficulty breathing lying down

**Breast**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Breast Mass
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Breast Pain

**Male Genitourinary**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Blood in Urine
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hesitancy
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Flank Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Excessive Urination at Night
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Painful Urination

**Female Genitourinary**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Urinary Complaints
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Flank Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Urgency
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Frequency
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Menstrual Irregularities
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Painful Urination

**Cardiovascular**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chest Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Murmur
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Palpitations / Irregular heart beats
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fainting / Blacking Out
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Swelling of Extremities
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Varicose veins

**Gastrointestinal**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abdominal Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abdominal Mass
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Change in stool
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Change in Bowel Habits
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Constipation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Diarrhea
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Heartburn
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Nausea / Vomiting

**Musculoskeletal**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Back Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Neck Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Arm Weakness
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Leg Weakness
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Joint Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Joint Redness
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Joint Stiffness
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Joint Swelling
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Muscle Pain
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Muscle Weakness
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Muscle Twitch
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Muscle spasms
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Calf pain / Cramps

**Neurological**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Headaches
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Migraines >15 days per month
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unusual Sensation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Numbness / Tingling
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Focal Neurological Symptoms
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Trouble walking
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vertigo
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Weakness

**Psychiatric**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anxiety
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Depression
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Insomnia
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Feels safe at home
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hallucinations
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Suicidal Planning

**Endocrine**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cold Intolerance
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Excessive Sweating
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Excessive Thirst
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Excessive Urination
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Thyroid Problems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perimenopausal

**Hematology**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anemia
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Blood Clots
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Enlarged Lymph Nodes
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abnormal Bleeding
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Easy bruising



Glenn S. Chapman III, DO  
Tia Bowden, ARNP

SIGNATURE ON FILE

Medicare/Medicaid – Patient certification of lifetime authorization to release information and payment requests.

I certify that the information given by me in applying for payment under title XVIII and/or XIX of the Social Security Act is correct. I authorize any holder of medical or other information about me to release to the Social Security Administration or its intermediary carriers, any information needed for this or a related Medicare or Medicaid claim. I request that payment of authorized benefits be made on my behalf. I assign benefits payable for the physician(s) services. I understand that I am responsible for my health insurance deductibles and co-insurances.

Patient name(print)\_\_\_\_\_Signature\_\_\_\_\_.

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_.

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**Medigap – Beneficiary Signature Authorization**

I request that payment of authorized Medigap benefits be made on my behalf to Surfside Medical Center for services furnished me by Glenn S Chapman III, DO/ Tia Bowden, ARNP. I authorize any holder of medical information about me to release to \_\_\_\_\_ (insurance company) any information needed to determine these benefits payable for related services.

Patient name(print)\_\_\_\_\_Signature\_\_\_\_\_.

HIC (Medicare) number\_\_\_\_\_Medigap number\_\_\_\_\_.



Glenn S. Chapman III, DO

Tia Bowden, ARNP

### FINANCIAL POLICY

**Purpose:** This form allows Surfside Non-Surgical Orthopedics, P.A. to treat you, bill your insurance, share information with other health care offices or facilities, and to collect on your account.

**Insurances:** Our office participates in Medicare and many managed care companies including Auto insurances and Workers Comp. As a courtesy we will bill all insurances. However, co-payments, co-insurances, deductibles, and non-covered services are the responsibility of the patient/guarantor and expected at the time of service. Any amounts not paid at the time of service are subject to administrative fees as outlined below. Incorrect insurance information provided or changes in policies will be the patient's responsibility.

**Authorization:** I authorize treatment by the providers of Surfside Medical Center I authorize the release of any information requested by insurance companies or liable third parties and I assign all benefits or injury benefits to Surfside Medical Center. If the correct insurance is not provided then the patient acknowledges full responsibility for the bill.

**Privacy:** I acknowledge that I received or read a copy of the Notice of Privacy Practices in either digital or paper format.

**Our Fees:**

Returned check fee	\$30.00
Forms (ex: FMLA, handicap tags, disability, etc.)	\$15.00-35.00
Appointment cancellation with less than 24 hours' notice	\$50.00
Appointment no-shows	\$50.00
Co-pay, deductible's, non-covered services not paid at time of service	\$10.00

**Financial Policy:** I hereby understand the financial policy of Surfside Medical Center. I guarantee payment of all charges incurred for the account of the below patient. I further agree to pay all reasonable attorney's fee, collection agencies fee, curt costs and any other collection related fees incurred on my account. I also understand that my employer may be contacted to verify employment status.

**Special Needs:** There are times when making a payment can be a financial hardship. It may be necessary to set up a payment plan for a patient who cannot comply with our financial policy. If you are in need of special payment arrangements, please advise staff prior to receiving treatment. Co-pays are exempt as required by law and your insurance company. You are required to notify us if this is a Worker's Comp or accident to avoid additional financial costs. If you are not covered by any insurance, let us know you are a self-pay and ask about our same day discounts.

Patient/Guardian name(print) \_\_\_\_\_ Signature \_\_\_\_\_.

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_.

Relationship to Patient \_\_\_\_\_.



Glenn S. Chapman III, DO  
Tia Bowden, ARNP

**RELEASE OF INFORMATION**

I hereby authorize this provider to: furnish an insurer, an insurer's intermediary, the patient's other medical providers, and the patient's attorney via mail, fax, or email, with any and all information that may be contained in the medical records; to obtain insurance coverage information (declaration sheet & policy of insurance) in writing and telephonically from the insurer; request from any insurer all explanation of benefits (EOBs) for all providers and non-redacted PIP payout sheets; obtain any written and verbal statements the patient or anyone else provided to the insurer; obtain copies of the entire claim file and all medical records, including but not limited to, documents, reports, scans, notes, bills, opinions, X-rays, IMEs, and MRIs, from any other medical provider or any insurer. The provider is permitted to produce my medical records to its attorney in connection with any pending lawsuits. The insurer is directed to keep the patient's medical records from this provider private and confidential. The insurer is not authorized to provide these medical records to anyone without the patient's and the provider's prior express written permission.

Patient name(print)\_\_\_\_\_. Date of Birth:\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_.

Patient/Guardian Signature\_\_\_\_\_. Relationship to Patient\_\_\_\_\_.

Date:\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_.



Glenn S. Chapman III, DO  
Tia Bowden, ARNP

## **NOTICE OF PRIVACY PRACTICES - HIPAA**

THIS NOTICE DESCRIBES HOW INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

At Surfside Medical Center ("SMC"), we are committed to treating and using protected health information ("PHI") about you responsibly. This Notice of Privacy Practices ("Notice") describes the personal information we collect, and how and when we use or disclose that information. It also describes your rights as they relate to your PHI. This Notice has been updated in accordance with the HIPAA Omnibus Rule and is effective March 1, 2013. It applies to all PHI as defined by federal regulations.

### **Understanding Your Health Record/Information**

Each time you visit SMC; a record of your visit is made. Typically, this record contains your symptoms, examination and test results, diagnoses, treatment, and a plan for future care or treatment. This information may be used or disclosed to:

- Plan your care and treatment.
- Communicate with other providers who contribute to your care.
- Serve as a legal document.
- Receive payment from you, your plan, or your health insurer.
- Assess and continually work to improve the care we render and the outcomes we achieve.
- Comply with state and federal laws that require us to disclose your health information.

Understanding what is in your record and how your health information is used helps you to: ensure its accuracy, better understand who, what, when, where, and why others may access your health information, and make more informed decisions when authorizing disclosure to others.

### **Your Health Information Rights**

Although your health record is the physical property of SMC, the information belongs to you. You have the right to request to:

- Access, inspect and copy your health record. We maintain an electronic medical record ("EMR"), you have the right to access your EMR in a machine readable electronic format and to direct us to send a machine readable copy directly to a third party. SMC will charge you a reasonable cost-based fee for the cost of supplies and labor of copying.
- Amend your health record which you believe is not correct or complete. SMC is not required to agree to the amendment if SMC did not create the information or if it is correct or complete.
- Obtain an accounting of disclosures of your health information.
- Communications of your health information by alternative means (e.g. e-mail) or at alternative locations (e.g. post office box).
- Place a restriction to certain uses and disclosures of your information. In most cases SMC is not required to agree to these additional restrictions, but if SMC does SMC will abide by the agreement (except in certain circumstances where disclosure is required or permitted, such as an emergency, for public health activities, or when disclosure is required by

law). SMC must comply with a request to restrict the disclosure of PHI to a health plan for purposes of carrying out payment or health care operations if the PHI pertains solely to a health care item or service for which we have been paid out of pocket in full.

- Revoke your authorization to use or disclose health information except to the extent that action has already been taken.
- Obtain a copy of your health care information in paper or a machine readable electronic format.

### **Our Responsibilities**

SMC is required to:

- Maintain the privacy of your health information.
- Provide you with this Notice as to our legal duties and privacy practices with respect to information we collect and maintain about you.
- Abide by the terms of the Notice currently in effect
- Notify you in writing if we are unable to agree to a requested restriction.
- Accommodate reasonable requests you may have to communicate health information by alternative means or at alternative locations.
- Notify you in writing of a breach where your unsecured PHI has been accessed, acquired, used or disclosed to an unauthorized person. "Unsecured PHI" refers to PHI that is not secured through the use of technologies or methodologies that render the PHI unusable, unreadable, or indecipherable to unauthorized individuals.

We reserve the right to change our practices and to make the new provisions effective for all PHI we maintain. Should our information practices change, such revised Notices will be made available to you.

We will not use or disclose your health information without your written authorization, except as described in this Notice.

### **For More Information or to Report a Problem**

If have questions and would like additional information, you may contact the SMC Privacy Officer at:

Surfside Medical Center  
4600 N. Ocean Blvd.  
Boynton Beach, FL 33435  
Telephone: (561) 330-4300  
[www.surfsidemedicalcenter.com](http://www.surfsidemedicalcenter.com)

If you believe your privacy rights have been violated, you can file a written complaint with SMC Privacy Officer or with the Office for Civil Rights, U.S. Department of Health and Human Services. Upon request, the Privacy Office will provide you with the address. There will be no retaliation for filing a complaint with either the Privacy Officer or the Office for Civil Rights.

**Treatment:** Information obtained by a nurse, physician, or other member of your health care team will be recorded in your medical record and used to determine the course of treatment that should work best for you. To promote quality care, SMC operates an EMR. This is an electronic system that keeps health information about you. SMC may also provide a subsequent healthcare provider with health information about you (e.g., copies of various reports) that should assist him or her in treating you in the future. SMC may also disclose health information about you to, and obtain your health information from, electronic health information networks in which community healthcare providers may participate to facilitate the provision of care to patients such as yourself.

SMC may use a prescription hub which provides electronic access to your medication history. This will assist SMC health care providers in understanding what other medications may have been prescribed for you by other providers.

**Payment:** A bill may be sent to you or a third-party payer. The information on or accompanying the bill may include information that identifies you, diagnosis, procedures, and supplies used.

**Health Care Operations:** We may use information in your health record to assess the care and outcomes in your case and others like it. This information will then be used in an effort to continually improve the quality and effectiveness of the health care and service we provide.



**Business Associates:** We may contract with third parties to provide services on our behalf and disclose your health information to our business associate so that they can perform the job we've asked them to do. We require the business associate to appropriately safeguard your information.

**Notification:** We may use or disclose information to notify or assist in notifying a family member, personal representative, or another person responsible for your care, your location, and general condition.

**Communication from Offices:** We may call your home or other designated location and leave a message on voice mail, in person, or by text, in reference to any items that assist SMC in carrying out Treatment, Payment and Health Care Operations, such as appointment reminders, insurance items and any call pertaining to your clinical care. We may mail to your home or other designated location any items that assist SMC in carrying out Treatment, Payment and Health Care Operations, such as appointment reminders, patient satisfaction surveys and patient statements.

**Communication with Family/Personal Friends:** Health professionals, using their best judgment, may disclose to a family member, other relative, close personal friend or any other person you identify, health information relevant to that person's involvement in your care or payment related to your care. When a family member(s) or a friend(s) accompany the patient into the exam room, it is considered implied consent that a disclosure of the patient medical data is acceptable.

**Open treatment areas:** Sometimes patient care is provided in an open treatment area. While special care is taken to maintain patient privacy, others may overhear some patient information while receiving treatment. Should you be uncomfortable with this, please bring this to the attention of our Privacy Officer.

**To Avert a Serious Threat to Health or Safety:** We may use your health information or share it with others when necessary to prevent a serious threat to your health or safety, or the health or safety of another person or the public.

**Research:** We may disclose information to researchers when their research has been approved by an institutional review board that has reviewed the research proposal and established protocols to ensure the privacy of your PHI. Even without that special approval, we may permit researchers to look at PHI to help them prepare for research, for example, to allow them to identify patients who may be included in their research project, as long as they do not remove, or take a copy of, any PHI. We may use and disclose a limited data set that does not contain specific readily identifiable information about you for research. But we will only disclose the limited data set if we enter into a data use agreement with the recipient who must agree to (1) use the data set only for the purposes for which it was provided, (2) ensure the security of the data, and (3) not identify the information or use it to contact any individual.

**Coroners, Medical Examiners and Funeral Director:** In the unfortunate event of your death, we may disclose your health information to a coroner or medical examiner. This may be necessary, for example, to determine the cause of death. We may also release this information to funeral directors as necessary to carry out their duties.

**Deceased Individuals:** In the unfortunate event of your death, we are permitted to disclose your PHI to your personal representative and your family members and others who were involved in the care or payment for your care prior to your death, unless inconsistent with any prior expressed preference that you provided to us. PHI excludes any information regarding a person who has been deceased for more than 50 years.

**Organ Procurement Organizations:** Consistent with applicable law, we may disclose health information to organ procurement organizations, federally funded registries, or other entities engaged in the procurement, banking, or transplantation of organs for the purpose of tissue donation and transplant.

**Marketing:** We may contact you by mail, e-mail or text to provide information about treatment alternatives or other health-related benefits and services that may be of interest to you. However, we must obtain your prior written authorization for any marketing of products and services that are funded by third parties. You have the right to opt-out by notifying us in writing.

**Fund Raising:** We may contact you as part of a fund-raising effort. We may also disclose certain elements of your PHI, such as your name, address, phone number and dates you received treatment or services at SMC, to a business associate or a foundation related to SMC so that they may contact you to raise money for SMC. If you do not wish to receive further fundraising communications, you should follow the instructions written on each communication that informs you how to be removed from any fundraising lists. You will not receive any fundraising communications from us after we receive your request to opt out, unless we have already prepared a communication prior to receiving notice of your election to opt out.

**Sale of your PHI:** SMC may not “sell” your PHI (i.e., disclose such PHI in exchange for remuneration) to a third party without your written authorization that acknowledges the remuneration unless such an exchange meets a regulatory exception.

**Health Oversight Activities:** We may release your health information to government agencies authorized to conduct audits, investigations, and inspections of our facility. These government agencies monitor the operation of the health care system, government benefit programs, such as Medicare and Medicaid, and compliance with government regulatory programs and civil rights laws.

**Food and Drug Administration (FDA):** We may disclose to the FDA health information relative to adverse events with respect to food, supplements, product and product defects, or post marketing surveillance information to enable product recalls, repairs, or replacement.

**Public Health:** As required by law, we may disclose your health information to public health or legal authorities charged with preventing or controlling disease, injury, or disability.

**Workers Compensation:** We may disclose health information to the extent authorized by and to the extent necessary to comply with laws relating to workers compensation or other similar programs established by law.

**Law Enforcement:** We may disclose health information for law enforcement purposes as required by law.

**Inmates and Correctional Institutions:** If you are an inmate or you are detained by a law enforcement officer, we may disclose your health information to the prison officers or law enforcement officers if necessary to provide you with health care, or to maintain safety at the place where you are confined.

**Lawsuits and Disputes:** We may disclose your health information if we are ordered to do so by a court that is handling a lawsuit or other dispute. We may also disclose your information in response to a subpoena, discovery request, or other lawful request by someone else involved in the dispute, but only if efforts have been made to tell you about the request or to obtain a court order protecting the information from further disclosure.

**As Required by Law:** We may use or disclose your health information if we are required by law to do so.

**Acknowledgment of Receipt of Notice**

*I acknowledge that I have had the opportunity to review a copy of SMC Notice of Privacy Practices ("Notice"). I understand that I am responsible to read this Notice and notify SMC, in writing, of any request for restrictions in the use or disclosure of my PHI. I understand SMC has the right to revise this Notice at any time and will post a copy of the current Notice in the office in a visible location at all times and on their website at [www.jaxspine.com](http://www.jaxspine.com). SMC will provide me with a copy of its most recent Notice upon my request.*

**Please sign and return a copy of this Notice to SMC.**

Patient Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Patient Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name(s) of others authorized to discuss or request medical information:

Name: \_\_\_\_\_

Name: \_\_\_\_\_



**Surfside Medical Center**

Glenn S. Chapman III, DO

Tia Bowden, ARNP

Patient name: \_\_\_\_\_ DOB: \_\_\_\_\_

**PAIN MANAGEMENT AGREEMENT:**

Pain Management Agreement between \_\_\_\_\_ (patient name) and Dr. Glenn S. Chapman III, D.O.

The purpose of this Agreement is to prevent misunderstandings about certain medicines the patient will be taking for pain management. This is to help both the patient and their provider comply with the law regarding controlled medications. This agreement relates to my use of controlled substance for chronic pain prescribed by a physician at the Medical Center. I have been informed and understand the policies regarding the use of controlled substance that are followed by the staff at Surfside Medical Center. I understand that I will be provided controlled substance while actively participating in this program only if I adhere to the following conditions:

1. I understand that my provider and I will work together to find the most appropriate treatment for my chronic pain. I understand the goals of treatment are not to completely eliminate pain but to control my pain in order to improve my ability to function. Chronic Opioid therapy is only ONE part of my overall pain management plan.
2. I understand that my provider and I will continually evaluate the effect of opioids on achieving the treatment goals and make changes as needed. I agree to take the medication at the DOSE and **FREQUENCY** prescribed by my provider. I agree not to increase the dose of opioids on my own and understand that doing so may lead to the discontinuation of opioid therapy.
3. I will attend all appointments, treatments and consultations as requested by my providers. I will attend all pain appointments and follow pain management recommendations. I understand that failure to keep appointments may lead to discontinuation of treatment.
4. I will tell my providers about the level and description of my pain, the effect of the pain on my daily life and how well the medicine is helping to relieve my pain.
5. I recognize that my chronic pain represents a complex problem, which may benefit from physical therapy, psychotherapy, behavioral medicine, and other pain control strategies. I agree to cooperate and actively participate in all aspects of the pain management program to maximize functioning and improve coping with my condition. If treatment for my condition is available, I agree I will not refuse the treatment just so the opioids will be continued. I understand that I have the right to refuse any procedure, but that does not mean that my provider must continue to prescribe narcotic or opioids medications.
6. The risks and benefits of taking opioid medications have been explained to me. I understand them. Opioids can cloud judgments and affect reflexes and motor skills. The patient will not participate in activities that would endanger themselves or others while using these medications.
7. I agree I will not use any illegal controlled substances, including marijuana, cocaine, Heroin, etc. I agree I will not use any prescription medications obtained illegally, or obtain them from friends or relatives.
8. I agree I will not abuse alcohol. If my provider advises, I will not use any alcohol.
9. I agree I will not share, sell or trade my medication with anyone.
10. I agree to protect my pain medicine from loss or theft. Lost or stolen medicines will not be replaced. I will report stolen medication to the police and to my provider and will produce a police report of this event.
11. I agree I will not attempt to obtain any opioid medicines from another doctor or provider without informing the Surfside Non-Surgical Orthopedics doctor first. I agree to have my opioid prescriptions filled only at \_\_\_\_\_ (Pharmacy).
12. I agree that refills of my prescriptions for pain will be made only at the time of an office visit or during regular office hours. No routine refills will be available during evenings, after 4 pm, or on weekend, holidays, or through the emergency

Surfside Medical Center Pain Management Agreement – page 2

room. Medications will not be mailed or refilled without being seen at monthly pain clinic appointment (if patient is receiving his opioids from the pain clinic).

13. I am responsible for keeping track of the amount of medications left and to plan ahead for arranging the refill of my prescriptions in a timely manner so I will not run out of medications.

14. I agree to bring in all unused pain medicine when requested.

15. I will submit urine for drug testing if requested by my provider to determine my compliance with their program of pain control.

16. I authorize the Surfside Medical Center to cooperate fully with any official, including the state's Board of Pharmacy, in the investigation of any possible misuse, sale, or other diversion of my pain medicine.

17. I will accept generic brands of my prescription medications.

18. I understand that I may become tolerant to, addicted to or have complications from the opioid medications. If this occurs, the medication may be changed or tapered and other methods of pain control may be used. If necessary, I will permit referral to addiction specialists.

19. If it appears to the physician that there are no demonstrable benefits to my daily function or quality of life from the controlled substance, I will agree to gradually taper my medication as directed by the prescribing physician.

20. I understand that if I violate any of the above conditions, my provider may choose to stop writing opioids prescribed for me. Discontinuation of the medications will be coordinated by the provider and may require specialist referrals.

21. I understand that if I am verbally or physically abusive to any staff member or engage in any illegal activity such as altering a prescription, that the incident may be reported to other physicians, local medical facilities pharmacies and other authorities such as the local police department, drug enforcement Agency, etc. as deemed appropriate for the institution.

22. Understanding that suddenly stopping some pain medicines can cause problems such as: withdrawal symptoms, heart attack, stroke, seizures, permanent damage, disability or death.

*All of my questions and concerns regarding treatment have been adequately answered.*

**Medication Refill information:**

1. Advance notice of 5-7 business days is required for all **non-opioids** refills of the prescriptions.

2. Requests for scheduled refills for **non-opioids** must be telephoned to the pharmacy only during regular office hours Monday-Friday (8:30 am – 4:00 pm). Refills will not be made at night, on holidays, or on weekends. Most controlled substance cannot be telephoned in to the pharmacy.

3. I will be given a (30) thirty days supply each month.

4. All hard copies of the opioids prescriptions must be hand delivered to the pharmacy by myself or Eprescribed.

- **This agreement will supersede all other agreements**
- By signing below I indicate that I understand AND agree to ALL the terms of the above agreement. I have received a Copy of this for my own records.

Patient(print)\_\_\_\_\_ Signature\_\_\_\_\_

Witness(print)\_\_\_\_\_ Signature\_\_\_\_\_

Provider(print)\_ Glenn S. Chapman III, DO/Tia Bowden, ARNP Signature\_\_\_\_\_

Date\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

Patient Name: \_\_\_\_\_ Identification Number: \_\_\_\_\_

## Advance Beneficiary Notice of Noncoverage (ABN)

**NOTE:** If Medicare doesn't pay for the procedures indicated below, you may have to pay. Medicare does not pay for everything, even some care that you or your health care provider have good reason to think you need. We expect Medicare may not pay for the procedures below.

Procedures	Reason Medicare May not Pay	Cost
1. US/estim, Neuro re-ed, Kinetic activities, Thera exercise	1. Medicare does not cover services provided by LMT/MA	1. \$45.00
2. Nerve Blocks	2. Medical necessity guidelines/utilization (MNG/U)	2. \$130.00
3. Facet injections	3. (MNG/U)	3. \$320.00
4. Trigger point injections	4. (MNG/U)	4. \$65.00
5. Joint injections	5. (MNG/U)	5. \$80.00
6. Platelet tissue grafting (PRP)	6. (MNG/U)	6. \$750.00
7. Euflexxa 20mg	7. (MNG/U)	7. \$160.00
8. Synvisc 16mg	8. (MNG/U)	8. \$210.00
9. Botox (100 units)	9. (MNG/U)	9. \$500.00

### WHAT YOU NEED TO DO NOW:

- Read this notice, so you can make an informed decision about your care.
- Ask us any questions that you may have after you finish reading.
- Choose an option below about whether to receive the laboratory test(s) listed above.

**Note:** If you choose Option 1 or 2, we may help you to use any other insurance that you might have, but Medicare cannot require us to do this.

### OPTIONS: Check only one box. We cannot choose a box for you.

- OPTION 1.** I want the laboratory test(s) indicated above. You may ask to be paid now, but I also want Medicare billed for an official decision on payment, which is sent to me on a Medicare Summary Notice (MSN). I understand that if Medicare doesn't pay, I am responsible for payment, but **I can appeal to Medicare** by following the directions on the MSN. If Medicare does pay, you will refund any payments I made to you, less co-pays or deductibles.
- OPTION 2.** I want the laboratory test(s) listed above, but do not bill Medicare. You may ask to be paid now as I am responsible for payment. **I cannot appeal if Medicare is not billed.**
- OPTION 3.** I don't want the laboratory test(s) listed above. I understand with this choice I am **not** responsible for payment, and **I cannot appeal to see if Medicare would pay.**

### Additional Information:

**This notice gives our opinion, not an official Medicare decision.** If you have other questions on this notice or Medicare billing, call **1-800-MEDICARE** (1-800-633-4227/TTY: 1-877-486-2048). Signing below means that you have received and understand this notice. You also receive a copy.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-0566. The time required to complete this information collection is estimated to average 7 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Baltimore, Maryland 21244-1850.



## HIPAA AUTHORIZATION FOR USE OR DISCLOSURE OF HEALTH INFORMATION

I. This form is for use when such authorization is required and complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) Privacy Standards.

Patient's Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

II. I authorize Surfside Non-Surgical Orthopedics to use or disclose the following:

- All of my medical-related information.
- My medical-related information from \_\_\_\_\_ to \_\_\_\_\_.
- Other:

IV. The reason for this authorization is:

- General Purpose at my request.
- Other:

### VI. ACKNOWLEDGMENT OF RIGHTS.

I understand that I have the right to revoke this authorization, in writing and at any time, except where uses or disclosures have already been made based upon my original permission. I might not be able to revoke this authorization if its purpose was to obtain insurance.

I understand that uses and disclosures already made based upon my original permission cannot be taken back.

I understand that it is possible that Medical Records and information used or disclosed with my permission may be re-disclosed by a recipient and no longer protected by the HIPAA Privacy Standards. I understand that treatment by any party may not be conditioned upon my signing of this authorization (unless treatment is sought only to create Medical Records for a third party or to take part in a research study) and that I may have the right to refuse to sign this authorization.

I will receive a copy of this authorization after I have signed it. A copy of this authorization is as valid as the original.

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_



**ADDITIONAL CONSENT FOR CERTAIN CONDITIONS**

I. SENSITIVE INFORMATION. This medical record may contain information about physical or sexual abuse, alcoholism, drug abuse, sexually transmitted diseases, abortion, or mental health treatment. Separate consent must be given before this information can be released.

- I consent to have the above information released.
- I do not consent to have the above information released.

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Patient: \_\_\_\_\_

II. This medical record may contain information concerning HIV testing and/or AIDS diagnosis or treatment. Separate consent must be given to have this information released.

- I consent to have the above information released.
- I do not consent to have the above information released.

Signature of Patient: \_\_\_\_\_ Date: \_\_\_\_\_

Surfside Non-Surgical Orthopedics  
4600 N. Ocean Blvd. Suite 101  
Boynton Beach, FL. 33435  
(P)561-330-4300, (f)561-330-4514