



**GENERAL INFORMATION** Date: \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_

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

Phone Numbers: *Please mark \* next to the best phone number(s)*

Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_ An email address is necessary for us to schedule appointments using the confidential online scheduling system.

Would you like to receive my e-newsletter (every 4-6 weeks)?  Y  N

Gender: \_\_\_\_\_ Marital Status: \_\_\_\_\_ Number of Children: \_\_\_\_\_

Occupation: \_\_\_\_\_ Health Insurance Co.: \_\_\_\_\_

How did you hear about us? \_\_\_\_\_ May we send a thank you card:  Y  N

**EMERGENCY CONTACT:**

Name: \_\_\_\_\_ Ph: \_\_\_\_\_ Relationship: \_\_\_\_\_

**PHYSICIANS**

Primary Physician: \_\_\_\_\_ Ph: \_\_\_\_\_

If applicable: OB/Gyn: \_\_\_\_\_ Ph: \_\_\_\_\_

Reproductive Endocrinologist: \_\_\_\_\_ Ph: \_\_\_\_\_

Other specialist: \_\_\_\_\_ Ph: \_\_\_\_\_

**CANCELLATION POLICY & FINANCIAL AGREEMENT**

Please arrive on time for your appointments. If you are more than 15 minutes late, you may not be able to be seen and will be billed for your reserved treatment time. Please give at least **24 hours notice to avoid a late cancellation charge of full treatment fee.** Insurance companies do not pay for missed appointments and insurance patients will be charged \$95 for late or missed appointments.

I understand that payment is due at the time of service. I agree to the above terms and authorize my practitioner to bill my credit card for amounts unpaid by insurance or as otherwise specified above. We will never charge this number without giving you prior notice.  
*Visa and Master Card accepted.*

Card No. \_\_\_\_\_ Exp date: \_\_\_\_\_ VIN # (on back): \_\_\_\_\_

Billing address (if different than personal address above):

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zipcode: \_\_\_\_\_

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Patient Signature Date

## Health History

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

**Please list 5 major health concerns in order of importance to you:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Family History	Self	Father	Mother	Sibling(s)	Children
Arthritis					
Asthma					
Cancer					
Allergies					
Heart trouble					
High blood pressure					
Stroke					
Diabetes					

**If your complaint is pain related, please answer the questions below:**

*Rate the following on a scale of 0 to 10 (0 being none and 10 being the maximum possible):*

Pain intensity right now \_\_\_\_\_

Usual pain intensity experienced over the past week \_\_\_\_\_

Amount that the pain interfered with daily activities \_\_\_\_\_

### Frequency of Pain

- Continuous
- Several Times / Day
- Once / Day
- Three times / week
- Once / week

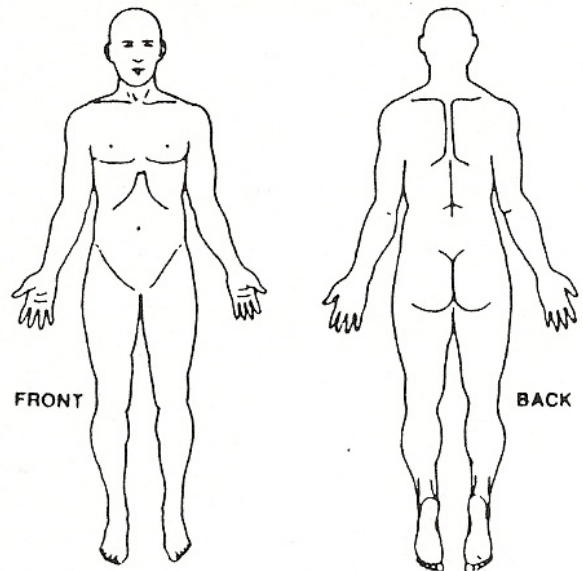
### Duration of Pain

- Seconds
- Minutes
- Hours
- Days
- Continuous

### Description of Pain (Check all that apply)

- Throbbing
- Gnawing
- Tender
- Cramping
- Hot
- Cold
- Dull
- Burning
- Heavy
- Aching
- Stabbing

**PLEASE MARK YOUR AREAS OF PAIN**





**Surgeries & Hospitalizations**

Description	Date	Comments

**Medications & Supplements**

Please list all prescription medications and supplements you use. Include those that you only use occasionally. Remember inhalers, eye drops, nose sprays, topical creams, and vitamins.

**MEDICATIONS**

Prescription Name	Purpose	How Long	Dose	How Often

**SUPPLEMENTS**

Supplement Name	Purpose	How Long	Dose	How Often

**Current /  
Recent Past LIVER / GALLBLADDER**

<input type="checkbox"/>	<input type="checkbox"/>	Depression / Stress
<input type="checkbox"/>	<input type="checkbox"/>	Headaches / Migraines
<input type="checkbox"/>	<input type="checkbox"/>	Red / Dry / Itchy Eyes
<input type="checkbox"/>	<input type="checkbox"/>	Visual Problems / Blurred Vision
<input type="checkbox"/>	<input type="checkbox"/>	Dizziness
<input type="checkbox"/>	<input type="checkbox"/>	Gall Stones
<input type="checkbox"/>	<input type="checkbox"/>	Feeling of Lump in Throat
<input type="checkbox"/>	<input type="checkbox"/>	Clenching of Teeth at Night
<input type="checkbox"/>	<input type="checkbox"/>	Muscle Cramping / Twitching
<input type="checkbox"/>	<input type="checkbox"/>	Neck/Shoulder Pain / Tightness
<input type="checkbox"/>	<input type="checkbox"/>	Joint Pain
<input type="checkbox"/>	<input type="checkbox"/>	Poor Circulation
<input type="checkbox"/>	<input type="checkbox"/>	Soft / Brittle Nails
<input type="checkbox"/>	<input type="checkbox"/>	Bad Taste
<input type="checkbox"/>	<input type="checkbox"/>	Bad Breath
<input type="checkbox"/>	<input type="checkbox"/>	Do you crave: Sour
<input type="checkbox"/>	<input type="checkbox"/>	Irritability / Anger

**KIDNEY / URINARY BLADDER**

<input type="checkbox"/>	<input type="checkbox"/>	Urinary Problems
<input type="checkbox"/>	<input type="checkbox"/>	Bladder Infection
<input type="checkbox"/>	<input type="checkbox"/>	Dropped Bladder
<input type="checkbox"/>	<input type="checkbox"/>	Incontinence
<input type="checkbox"/>	<input type="checkbox"/>	Lack of Bladder Control
<input type="checkbox"/>	<input type="checkbox"/>	Weakness / Pain in Low Back
<input type="checkbox"/>	<input type="checkbox"/>	Decreased Bone Density
<input type="checkbox"/>	<input type="checkbox"/>	Feel Cold Easily
<input type="checkbox"/>	<input type="checkbox"/>	Cold Hands / Feet
<input type="checkbox"/>	<input type="checkbox"/>	Low Sex Drive / Libido
<input type="checkbox"/>	<input type="checkbox"/>	Excess Sex Drive / Libido
<input type="checkbox"/>	<input type="checkbox"/>	Poor Memory
<input type="checkbox"/>	<input type="checkbox"/>	Loss of Hair / Grey Hair
<input type="checkbox"/>	<input type="checkbox"/>	Hearing Problems
<input type="checkbox"/>	<input type="checkbox"/>	Cavities
<input type="checkbox"/>	<input type="checkbox"/>	Hot Flashes / Night Sweats
<input type="checkbox"/>	<input type="checkbox"/>	Do you crave: Salt
<input type="checkbox"/>	<input type="checkbox"/>	Fear

**HEART / SMALL INTESTINE**

<input type="checkbox"/>	<input type="checkbox"/>	Heart Palpitations
<input type="checkbox"/>	<input type="checkbox"/>	Chest Pain
<input type="checkbox"/>	<input type="checkbox"/>	High Blood Pressure
<input type="checkbox"/>	<input type="checkbox"/>	Low Blood Pressure
<input type="checkbox"/>	<input type="checkbox"/>	Insomnia / Sleep Problems
<input type="checkbox"/>	<input type="checkbox"/>	Vivid Dreams
<input type="checkbox"/>	<input type="checkbox"/>	Easily Startled
<input type="checkbox"/>	<input type="checkbox"/>	Do you crave: Bitter
<input type="checkbox"/>	<input type="checkbox"/>	Restlessness / Agitation

**Current /  
Recent Past LUNG / LARGE INTESTINE**

<input type="checkbox"/>	<input type="checkbox"/>	Bloody Cough
<input type="checkbox"/>	<input type="checkbox"/>	Dry Cough
<input type="checkbox"/>	<input type="checkbox"/>	Cough with Sputum
<input type="checkbox"/>	<input type="checkbox"/>	Nasal Discharge – Color: <input type="checkbox"/> White <input type="checkbox"/> Yellow <input type="checkbox"/> Green
<input type="checkbox"/>	<input type="checkbox"/>	Post Nasal Drip
<input type="checkbox"/>	<input type="checkbox"/>	Sinus Infection / Congestion
<input type="checkbox"/>	<input type="checkbox"/>	Itchy, Red or Painful Throat
<input type="checkbox"/>	<input type="checkbox"/>	Dry Mouth / Throat / Nose
<input type="checkbox"/>	<input type="checkbox"/>	Skin Rashes / Hives
<input type="checkbox"/>	<input type="checkbox"/>	Snoring
<input type="checkbox"/>	<input type="checkbox"/>	Shortness of Breath
<input type="checkbox"/>	<input type="checkbox"/>	Allergies / Asthma
<input type="checkbox"/>	<input type="checkbox"/>	Low Resistance to Illness
<input type="checkbox"/>	<input type="checkbox"/>	Sneezing
<input type="checkbox"/>	<input type="checkbox"/>	Mild Fever Comes & Goes
<input type="checkbox"/>	<input type="checkbox"/>	Smoke Cigarettes
<input type="checkbox"/>	<input type="checkbox"/>	Emphysema
<input type="checkbox"/>	<input type="checkbox"/>	Bronchitis
<input type="checkbox"/>	<input type="checkbox"/>	Black or Bloody Stools
<input type="checkbox"/>	<input type="checkbox"/>	Constipation
<input type="checkbox"/>	<input type="checkbox"/>	IBS
<input type="checkbox"/>	<input type="checkbox"/>	Diarrhea
<input type="checkbox"/>	<input type="checkbox"/>	Colitis / Spastic Colon
<input type="checkbox"/>	<input type="checkbox"/>	Do you crave: Pungent
<input type="checkbox"/>	<input type="checkbox"/>	Grief / Sadness

**SPLEEN / STOMACH**

<input type="checkbox"/>	<input type="checkbox"/>	Body Heaviness
<input type="checkbox"/>	<input type="checkbox"/>	Hard to get up in the Morning
<input type="checkbox"/>	<input type="checkbox"/>	Muscles Often Feel Tired
		Energy Level: 1-10 (low to high)
<input type="checkbox"/>	<input type="checkbox"/>	Edema <input type="checkbox"/> Hands <input type="checkbox"/> Feet
<input type="checkbox"/>	<input type="checkbox"/>	Easily Bruising / Bleeding
<input type="checkbox"/>	<input type="checkbox"/>	Bad Breath
<input type="checkbox"/>	<input type="checkbox"/>	Nausea / Vomiting
<input type="checkbox"/>	<input type="checkbox"/>	Gas / Belching
<input type="checkbox"/>	<input type="checkbox"/>	Hemorrhoids
<input type="checkbox"/>	<input type="checkbox"/>	Diarrhea
<input type="checkbox"/>	<input type="checkbox"/>	Constipation
<input type="checkbox"/>	<input type="checkbox"/>	Abdominal Pain
<input type="checkbox"/>	<input type="checkbox"/>	Indigestion / Heartburn
<input type="checkbox"/>	<input type="checkbox"/>	Brain Foggy
<input type="checkbox"/>	<input type="checkbox"/>	Tendency to Gain Weight
<input type="checkbox"/>	<input type="checkbox"/>	Do you crave: Sweet
<input type="checkbox"/>	<input type="checkbox"/>	Over-thinking / Worry



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WWW.BALANCERESTORED.COM

## PATIENT/PRACTITIONER ACKNOWLEDGEMENT

I hereby acknowledge that I am working with the practitioner identified below as an independent practitioner at Balance Restored – Center for Integrative Medicine, and therefore limit any dispute and/or liability that may arise with regard to my care at Balance Restored to said practitioner, and release and discharge any other independent practitioner at Balance Restored, as well as Balance Restored – Center for Integrative Medicine, from any such liability or obligation.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Acupuncturist

\_\_\_\_\_  
Date



### **Notice of Privacy Practices**

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

\_\_\_\_\_, an independent practitioner at Balance Restored – Center for Integrative Medicine, understands the importance of privacy and is committed to maintaining the confidentiality of your medical information. This Notice of Privacy Practices is required by law to inform you of how your health information will be protected, how the Practice may use or disclose your protected health information (PHI) to carry out treatment, payment, or healthcare operations (TPO), and for other purposes that are permitted or required by law. It also describes your rights to access and control your protected health information. Protected health information is information about you, including demographic information, that may identify you and that relates to your past, present, or future physical or mental health or condition and related healthcare services.

#### **A. How this Practitioner May Use or Disclose Your Protected Health Information**

This Practitioner may collect health information about you and stores it in a chart and/or on a computer. This is your medical record. The medical record is the property of the Practitioner, but the information in the record belongs to you. The sections below outline the purposes for which the law permits the practitioner to use or disclose your health information.

1. **Treatment:** I use medical information about you to provide your medical care. I disclose medical information to our employees, associates, and others who are involved in providing the care you need. For example, I may share or disclose your protected health information with other practitioners or other healthcare providers to provide, coordinate, or manage your healthcare and any related services. You will be requested to sign an Authorization to Release Medical Information should this occur.

2. **Payment:** Your protected health information will be used, as needed, to obtain payment for your healthcare services. For example, I would need to give your health plan the information it requires before it will pay me. I may also disclose information to other healthcare providers to assist them in obtaining payment for services they have provided to you.

3. **Healthcare Operations:** I may use or disclose your protected health information, as needed, to operate my practice. For example, I may use and disclose this information to review and improve the quality of care I provide. I may use and disclose this information as necessary for medical reviews, legal services, and audits, including fraud and abuse detection and compliance programs and business planning and management. I may also share your medical information with my “business associates,” such as billing service, or others that may perform administrative services for me. I will have a written contract with each of these business associates that contains terms required of them to protect the confidentiality of your medical information. Although federal law does not protect health information that is disclosed to someone other than another healthcare provider, health plan, or healthcare clearinghouse, under California law, all recipients of healthcare information are prohibited from re-disclosing it, except as specifically required or permitted by law. I may also share your information with other healthcare providers, healthcare clearinghouses, or health plans that have a relationship with you, when they request this information to help them with their quality assessment and improvement activities; efforts to improve health or reduce healthcare costs; review of competence, qualifications, and performance of healthcare professionals; training programs; accreditation, certification or licensing activities; or healthcare fraud and abuse detection and compliance efforts.

4. **Appointment Reminders, Follow-up and Sign in Sheets:** In addition, I may use a sign-in sheet at the registration desk where you will be asked to sign your name and indicate your physician. I may also call you by name in the waiting room when your physician is ready to see you. I may use or disclose your protected health information, as necessary, to contact you to remind you of your appointment by email or telephone, or by messages left on an answering machine, voice mail, or with the person who answers your telephone.



5. Marketing: I may contact you regarding case management or care coordination, to give information about our services, or to direct or recommend other treatments or health-related benefits and services that may be of interest to you. I may periodically send a postal mail or email card, letter, notice, or other written information or small gift to the address provided by you.

6. Required by Law: Under the law, I must make disclosures to you and when required by the Secretary of the Department of Health and Human Services to investigate or determine my compliance with the requirements of Section 164.500. I may use or disclose your protected health information in the following situations without your authorization. These situations include: Required By Law, Public Health issues as required by law, Communicable Diseases, Health Oversight, Abuse or Neglect, Food and Drug Administration requirements, Legal Proceedings, Law Enforcement, Coroners, Funeral Directors, Organ Donation, Research, Criminal Activity, Military Activity and National Security, Workers' Compensation, Inmates, Required Uses and Disclosures. Additionally, I may disclose your protected health information, without a written Consent from you, in the following instances:

a. De-identified Information – Information that does not identify you and, even without your name, cannot be used to identify you.

b. Personal Representative – To a person who, under applicable law, has the authority to represent you in making decisions related to your healthcare.

c. Emergency Situations – For the purpose of obtaining or rendering emergency treatment to you provided that I attempt to obtain your Consent as soon as possible, or to a public or private entity authorized by law or by its charter to assist in disaster relief efforts for the purpose of coordinating your care with such entities in an emergency situation.

d. Communication Barriers – If, due to substantial communication barriers or inability to communicate, I have been unable to obtain your Consent and the Practice determines, in the exercise of its professional judgment, that your Consent to receive treatment is clearly inferred from the circumstances.

7. Workers' Compensation: I may disclose your health information as necessary to comply with Workers' Compensation laws. For example, to the extent your care is covered by Workers' Compensation, I will make periodic reports to your employer about your condition. I am also required by law to report cases of occupational injury or occupational illness to the employer or workers' compensation insurer.

8. Change of Ownership: In the event that my practice is sold or merged with another organization, your health information or record will become the property of the new owner, although you will maintain the right to request that copies of your health information be transferred to another doctor or medical group.

9. Research: I may disclose your health information to researchers in conducting research for which your written authorization is not required as approved by an Institutional Review Board or privacy board, in compliance with governing law.

#### **B. When This Medical Practice May Not Use or Disclose Your Health Information**

Except as described in this Notice of Privacy Practices, this medical practice will not use or disclose health information that identifies you without your written authorization. Other permitted and required uses and disclosures will be made only with your consent, authorization, or opportunity to object unless required by law. You may revoke this authorization, at any time, in writing, except to the extent that your physician or the physician's practice has taken an action in reliance on the use or disclosure indicated in the authorization. I am unable to take back any disclosure I have already made with your permission.

#### **C. Your Health Information Rights**

1. Right to Inspect and Copy: You have the right to inspect and copy your protected health information, with limited exception. To access your medical information, you must submit a written request detailing the specific information to which you want access and whether you want to inspect it or obtain a copy of it. I will charge a reasonable fee, as allowed by California law. If the file is large, I may require the use of a copy service for this purpose. You will pay the cost of this service. I may deny your request under limited circumstances; however, you may request a review of our denial. Under federal law, however, you may not inspect or copy the following records: psychotherapy notes; information compiled in reasonable anticipation of, or use in, a civil, criminal, or administrative action or



proceeding; and protected health information that is subject to law that prohibits access to protected health information.

2. Right to Amend or Supplement: You have the right to request that I amend your health information that you believe is incorrect or incomplete. You must make a request to amend in writing and include the reasons you believe the information is inaccurate or incomplete. I am not required to change your health information, and, if denied, I will provide you with information about this medical practice's denial and how you can disagree with the denial. If I deny your request for amendment, you have the right to request that we add to your record a statement of up to 250 words concerning any statement or item you believe to be incomplete or incorrect. I may prepare a rebuttal to your statement and will provide you with a copy of any such rebuttal.

3. Right to Request Special Privacy Protections: You have the right to request certain restrictions of your protected health information. Your written request must state the specific restriction requested and to whom you want the restriction to apply. You may also request that any part of your protected health information not be disclosed to family members or friends who may be involved in your care or for notification purposes as described in this Notice of Privacy Practices. I reserve the right to accept or reject your request and will notify you of my decision. If your physician believes it is in your best interest to permit use and disclosure of your protected health information, your protected health information will not be restricted. You then have the right to use another healthcare professional.

4. Right to Request Confidential Communication: You have the right to request that you receive confidential communication or your health information from me in a specific way or to a specific location. For example, you may ask that I send information to a particular e-mail account or to your work address. I will comply with all reasonable requests submitted in writing which specify how or where you wish to receive communication.

5. Right to an Accounting of Disclosure: You have the right to receive an accounting of certain disclosures I have made, if any, of your protected health information except as is not required by law, or pursuant to your written authorization, or for disclosures provided to you.

6. You have the right to obtain a paper copy of this Notice of Privacy Practices upon request.

#### **D. Changes to this Notice of Privacy Practices**

I reserve the right to change the terms of this notice and will inform you in person or by mail of any changes. You then have the right to object or withdraw as provided in this notice. Until such amendment is made, I am required by law to comply with this Notice. After an amendment is made, the revised Notice of Privacy Practices will apply to all protected health information that I maintain, regardless of when it was created or received. I will keep a copy of the current Notice posted in our reception area.

#### **E. Complaints**

Please direct any complaints about this Notice of Privacy Practices or how this practice handles your health information to me as Privacy Officer. If you are not satisfied with the manner in which I handle a complaint, you may submit a formal complaint to:

Secretary of Health and Human Services - Office of Civil Rights  
Hubert H. Humphrey Bldg.  
200 Independence Avenue, S.W. - Room 509F HHH Building  
Washington, DC 20201

You will not be penalized for filing a complaint.



## Summary and Acknowledgement of Receipt of Notice of Privacy Practices

1. \_\_\_\_\_ (“Practitioner”), an independent practitioner at Balance Restored – Center for Integrative Medicine’s Privacy Notice has been provided to me prior to my signing this Consent. The Privacy Notice includes a complete description of the uses and/or disclosures of my protected health information (“PHI”) necessary for the Practice to provide treatment to me, to obtain payment for that treatment, and to carry out its healthcare operations. The Practice explained to me that the Privacy Notice would be available to me at any future appointment and at my request at any other time.
2. The Practitioner reserves the right to change privacy practices that are described in the Privacy Notice.
3. I understand, and consent to, the following communication that may be used by the Practitioner: a) a card, letter, or other written information mailed to me at the address provided by me; and b) telephoning and leaving a message on my answering machine, voice mail, or with the individual answering the phone; and c) sending an electronic mail to the address provided by me.
4. The Practitioner may maintain a directory of and sign-in log for individuals seeking care and treatment in the office. This information may be seen by, and is accessible to, others who are seeking care or services in the Practitioner’s offices.
5. The Practitioner may use and/or disclose my PHI to treat me and obtain payment for that treatment, and as necessary for the Practitioner to conduct his/her specific healthcare operations.
6. I understand that I have a right to request that the Practitioner restrict how my PHI is used and/or disclosed to carry out treatment, payment, and/or healthcare operations. However, the Practitioner is not required to agree to any restrictions that I have requested. If the Practitioner agrees to a requested restriction, then the restriction is binding on the Practitioner.
7. I understand that this Consent is valid for seven years. I further understand that I have the right to revoke this Consent, in writing, at any time for all future transactions, with the understanding that any such revocation shall not apply to the extent that the Practitioner has already taken action in reliance on this consent.
8. I understand that if I do not sign this Consent evidencing my consent to the uses and disclosures described to me above and contained in the Privacy Notice, then the Practitioner will not treat me. I understand that if I revoke this consent at any time, the Practitioner has the right to refuse to treat me.

I acknowledge that I have received a copy of the Practitioner’s Notice of Privacy Practices. I further acknowledge that a copy of the current notice is posted in the reception area, and that I will be offered a copy of any amended Notice of Privacy Practices at each appointment.

I am required by law to maintain the privacy of, and provide individuals with this notice of our legal duties and privacy practices with respect to protected health information. If you have any objections to this form, please ask to speak with me. Signature below is acknowledgement that you have received this Notice of Privacy Practice and that you have read and understand the foregoing notice, Notice of Privacy Practices, and all of your questions have been answered to your full satisfaction in a way that you can understand.

\_\_\_\_\_  
Name (Printed)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Signature: Patient or Legal Representative (Attorney, Guardian, Parent)