

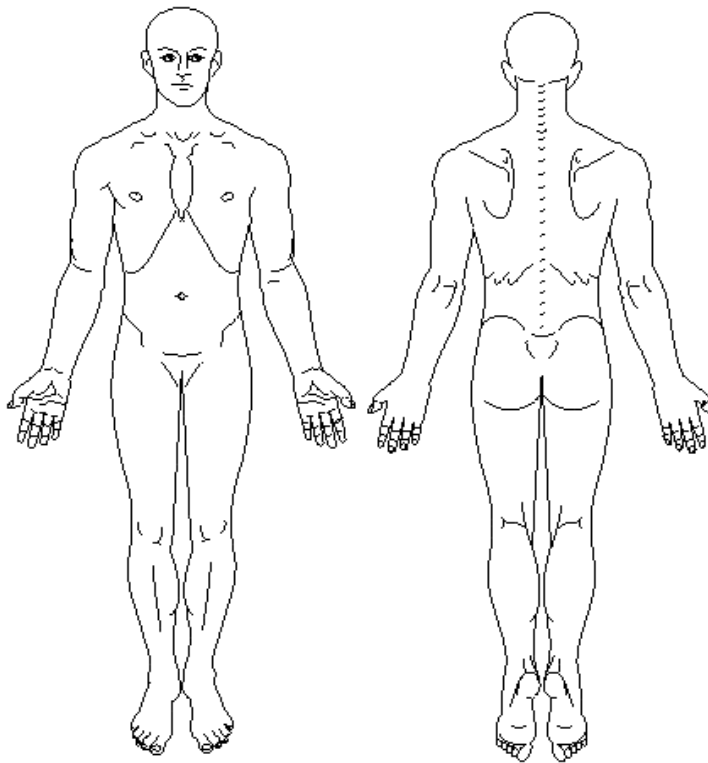
Patient's Name: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*You must answer\*\*:**

Is the injury for which you are being seen today related to a motor vehicle accident or worker-related injury? YES NO

Use the following drawing to indicate the location of your symptoms at the present time. Use the various symbols to describe the symptoms.

Sharp Pain ////	Achiness XXX	Burning !!!!	Pins & Needles 0000	Numbness ++++
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Instructions: rate your major area of pain on the 0-10 Pain Rating Scale below:

0	1	2	3	4	5	6	7	8	9	10
No pain		Weak	Moderate		Strong		Very Strong			Maximal Pain

Please rate your pain (0-10) at rest and with activity in the spaces provided:

With Activity \_\_\_\_\_

At Rest \_\_\_\_\_

## Background Information & Medical History Form

To ensure you receive a complete and thorough evaluation, please provide us with information regarding your health status found on this form. If you do not understand a question, leave the area blank and your therapist will assist you. Thank you!

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

**Are you currently:**  Working at your usual job with no restrictions.  Working at your usual job with restrictions.  
 Unable to work because of your condition since: \_\_\_\_\_  
 Unable to work due to other medical reasons.  Retired / Unemployed / Homemaker

**Have you ever had physical therapy for this condition?** YES NO When: \_\_\_\_\_

**Are you seeing:**  Medical Doctor  Dentist  Psychiatrist/Psychologist  
 Osteopath  Physical therapist  Chiropractor

If you have seen any of the above during the last three months, please describe reason (illness, medical conditions, injury, routine physical, etc.)  
 \_\_\_\_\_  
 \_\_\_\_\_

**Have you EVER been diagnosed as having any of the following conditions:**

Yes No Heart problems	Yes No Hearing loss/disorder	Yes No Circulation Problems
Yes No High blood pressure	Yes No Eye Disease	Yes No Osteoporosis
Yes No Stroke	Yes No Muscle disease/disorder	Yes No Cancer: If yes, what kind: _____
Yes No Rheumatoid Arthritis	Yes No Multiple Sclerosis	Yes No Past Pregnancy: Delivery (please circle): vaginal cesaria
Yes No Other Arthritic Problem	Yes No Diabetes	Yes No Currently Pregnant? _____ months
Yes No Epilepsy	Yes No Tuberculosis	Yes No Other: _____
Yes No Lung Disease	Yes No Hepatitis	
Yes No Emphysema/Bronchitis	Yes No Kidney Disease	
Yes No Asthma	Yes No Thyroid Problems	
Yes No Chemical Dependency	Yes No Depression	

**Please list any surgeries or other conditions for which you have been hospitalized, including dates and reasons.**

Date	SURGERY	REASON:
_____	_____	_____
_____	_____	_____

**Please describe any injuries for which you have been treated (fractures, dislocations, sprains/strains).**

Date	INJURY	Date	INJURY
_____	_____	_____	_____
_____	_____	_____	_____

**Has anyone in your immediate family (parents, brothers, sisters) ever been treated for the following?**

Yes No Diabetes	Yes No Epilepsy	Yes No Cancer
Yes No Heart disease	Yes No Chemical dependency	Yes No Headaches
Yes No Arthritis	Yes No Tuberculosis	Yes No Mental Illness
Yes No High blood pressure		

**Which of the following OVER-THE-COUNTER medications have you taken in the past week?**

Yes No Aspirin	Yes No Decongestants	Yes No Antihistamines
Yes No Advil/Motrin/Ibuprofen	Yes No Antacids	Yes No Vitamins/Mineral Supplements
Yes No Tylenol	Yes No Laxatives	Yes No Other: _____

**List all PRESCRIPTION medicines you are currently taking (pills, injections, and skin patches):**

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

**Medicine Allergies:** \_\_\_\_\_

**How much caffeine per day?** \_\_\_\_\_ **Cigarettes smoked per day?** \_\_\_\_\_ **Days a week you drink alcohol?** \_\_\_\_\_

**Have you recently noted:**

Yes No Weight loss/gain	Yes No Weakness	Yes No Menstrual Irregularities
Yes No Nausea/Vomiting	Yes No Fever/Chills/Sweats	Yes No Bladder Irregularities
Yes No Fatigue	Yes No Numbness or tingling	Yes No Rectal Bleeding

**Form reviewed with patient:** YES NO **Therapist signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

To ensure you receive a complete and thorough evaluation, please provide us with the additional information regarding your health status found on this form. If you do not understand a question, leave the area blank and your therapist will assist you. Thank you!

Name (Please Print): \_\_\_\_\_ Date: \_\_\_\_\_

Height (Feet and Inches); \_\_\_\_\_

Weight (Pounds): \_\_\_\_\_

<b>Office Use Only:</b>  <b>BMI:</b> _____
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List of all current medications with dosages:  
(Includes prescription, over-the-counter, herbals, and vitamin / mineral / dietary supplements):

Name of Medication (Vitamin / mineral / dietary supplement)	Dosage / Frequency
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	

**Initial Evaluation:**  
Form reviewed with patient: YES NO Therapist signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Re-Evaluation**  
Form reviewed with patient: YES NO Therapist signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Re-Evaluation:**  
Form reviewed with patient: YES NO Therapist signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Re-Evaluation:**  
Form reviewed with patient: YES NO Therapist signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Re-Evaluation:**  
Form reviewed with patient: YES NO Therapist signature: \_\_\_\_\_ Date: \_\_\_\_\_

\*\*\*\*\*IMPORTANT: PLEASE READ THIS CAREFULLY\*\*\*\*\*

**ASSIGNMENT OF INSURANCE BENEFITS**

I hereby authorize that the payment of authorized benefits be made directly to EPT for any services that are reimbursable by Medicare, Medicaid, or any third party sources.

**VALUABLES**

I hereby understand that EPT is not responsible for valuables or personal property brought to the facility.

**CONSENT OF TREATMENT**

I hereby consent to such treatment procedures and patient care which, in the judgment of my therapist and/or physician, may be considered necessary or advisable while I am a patient of EPT.

**GUARANTEE OF ACCOUNT**

In consideration of services rendered to me by EPT, I hereby guarantee payment for any and all services rendered to me in which are not covered or allowable by insurance, together with collection costs, including reasonable attorney fees. I understand that there may be a charge for supplies that are needed during my course of treatment that will not be covered by my insurance and for which I am financially responsible. I also understand that I may have a co-payment, co-insurance and/or deductible for which I am fully responsible for paying. Although EPT will inform me of my insurance coverage for physical therapy, **it is ultimately my responsibility to understand my insurance benefit limitations and payments.** I will immediately notify EPT of changes in my insurance coverage while receiving physical therapy.

**MEDICARE**

I hereby certify that the information given by me in applying for payment under title XVIII 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 intermediaries or carriers any such information needed for this or a related Medicare Claim. I request that the payment of authorized benefits be made on my behalf. I understand that I am responsible for any health insurance deductibles and co-insurance.

I, \_\_\_\_\_, by signing this document, acknowledge my consent to the above:  
(Print Name)

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

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

## Notice of Protected Health Information Practices

**This notice describes how Medical Information about you may be used and disclosed and how you can get access to this information.**

**PLEASE REVIEW IT CAREFULLY.**

### Purpose of Notice

Under the federal health care privacy regulations pertaining to the Health Insurance Portability and Accountability Act of 1996 set forth at 45 CFR § 160.101 et seq. (the "Privacy Regulations"), Excel Physical Therapy ("the Practice") is required to protect the privacy of your individually identifiable health information, which includes information about your health history, symptoms, test results, diagnoses, treatment, and claims and payment history. We are also required to provide you with this Notice of Protected Health Information Practices regarding our legal duties, policies and procedures to protect and maintain the privacy of your health information ("the Notice"). We will not use or disclose your health information except as provided for in this Notice. However, we reserve the right to change the terms of this Notice and make new notice provisions for all your health information that we maintain.

### Permitted Uses and Disclosures of Your Health Information

1. **Uses and Disclosures with Patient Consent:** Under the Privacy Regulations, after having made good faith efforts to obtain your acknowledgement of receipt of this Notice, we are permitted to use and disclose your health information for the following purposes:
  - a. **Treatment.** We are permitted to use your health information in the provision and coordination of your health care. We may disclose information contained in your medical record to your primary health care provider, consulting providers, and to other health care personnel who have a need for such information for your care and treatment. For example, your physical therapist may disclose your health information when consulting with a physician regarding your medical condition.
  - b. **Payment.** We are permitted to use your health information for the purposes of determining coverage, billing, claims management, medical data processing and reimbursement. This information may be released to an insurance company, third party payor or other authorized entities involved in the payment of your medical bill and may include copies or portions of your medical record which are necessary for payment of your account. For example, a bill sent to your insurance company may include information that identifies you, your diagnosis, and the procedures and supplies used in your treatment.
  - c. **Health Care Operations.** We are permitted to use and disclose your health information during the Practice's routine health care operations, including, but not limited to, quality assurance, utilization reviews, medical reviews, auditing, accreditation, certification, licensing or credentialing activities and for education purposes.
2. **Uses and Disclosures With Patient Authorization.** Under the Privacy Regulations, we can use and disclose your health information for purposes other than treatment, payment or health care operations with your written authorization. For example, with your authorization we can provide your name and medical condition to companies who might be able to provide you useful items or services. Under the Privacy Regulations, you may revoke your authorization; however, such revocation will not have any effect on uses or disclosures of your health information prior to our receipt of the revocation.
3. **Uses and Disclosures With Patient Opportunity to Verbally Agree or Object.** Under the Privacy Regulations, we are permitted to disclose your health information without your written consent or authorization to a family member, a close personal friend or any other person identified by you, if the information is directly relevant to that person's involvement in your care or treatment. You must be notified in advance of the use or disclosure and have the opportunity to verbally agree or object.
4. **Uses and Disclosures Without an Acknowledgement, Authorization or Opportunity to Verbally Agree or Object.** Under the Privacy Regulations, we are permitted to use or disclose your health information without your consent, authorization or the opportunity to verbally agree or object with regard to the following:
  - a. **Uses and Disclosures Required by Law.** We will disclose your health information when required to do so by law.
  - b. **Public Health Activities.** We may disclose your health information for public health reporting, reporting of communicable diseases and vital statistics and similar other circumstances.
  - c. **Abuse and Neglect.** We may disclose your health information if we have a reasonable belief of abuse, neglect or domestic violence.
  - d. **Regulatory Agencies.** We may disclose your health information to a health care oversight agency for activities authorized by law, including, but not limited to, licensure, certification, audits, investigations and inspections. These activities are necessary for the government and certain private health oversight agencies to monitor the health care system, government programs and compliance with civil rights.
  - e. **Judicial and Administrative Proceedings.** We may disclose health information in judicial and administrative proceedings, as well as in response to an order of a court, administrative tribunal, or in response to a subpoena, summons, warrant, discovery request or similar legal request.
  - f. **Law Enforcement Purposes.** We may disclose your health information to law enforcement officials when required to do so by law.
  - g. **Coroners, Medical Examiners, Funeral Directors.** We may disclose your health information to a coroner or medical examiner. This may be necessary, for example, to determine a cause of death. We may also disclose your health information to funeral directors, as necessary, to carry out their duties.

- h. **Research.** Under certain circumstances, we may disclose your health information to researchers when their clinical research study has been approved by an institutional review board that has reviewed the research proposal and provided that certain safeguards are in place to ensure the privacy and protection of your health information.
  - i. **Threats to Health and Safety.** We may use or disclose your health information if we believe, in good faith, the use or disclosure is necessary to prevent or lessen a serious or imminent threat to the health or safety of a person or the public.
  - j. **Military/Veterans.** If you are a member of the armed forces, we may disclose your health information as required by military command authorities.
  - k. **Workers' Compensation.** We may disclose your health information to the extent necessary to comply with laws relating to workers' compensation or other similar programs.
  - l. **Marketing.** We may use or disclose your health information to make a marketing communication to you, if such communication is conducted face-to-face, concerns products or services of nominal value, or identifies us as the communicating party and that we will receive remuneration for making the communication and, where required by the Privacy Regulations, instructions describing how you may verbally object to receiving future communications.
  - m. **Appointment Reminders.** We may use and disclose your health information to remind you of an appointment for treatment and medical care at our practice.
  - n. **Other Uses and Disclosures.** In addition to the reasons outlined above, we may use and disclose your health information for other purposes permitted by the Privacy Regulations.
5. **Uses and Disclosures to Business Associates.** With an acknowledgement or a proper authorization, we are permitted to disclose your health information to Business Associates and to allow Business Associates to receive your health information on our behalf. A Business Associate is defined under the Privacy Regulations as an individual or entity under contract with us to perform or assist us in a function or activity which requires the use of your health information. Examples of business associates include, but are not limited to, consultants, accountants, lawyers, medical transcriptionists and third party billing companies. We require all Business Associates to protect the confidentiality of your health information.

## **Patient Rights**

Although your medical record is our property, you have the following rights concerning your medical record and health information:

1. **Right to Request Restrictions on the Use and Disclosure of Your Health Information.** You have the right to request restrictions on the use and disclosure of your health information for treatment, payment and health care operations. However, we are not required to agree with such a request. If, however, we agree to the requested restriction, it is binding on us.
2. **Right to Inspect and Copy Your Health Information.** You have the right to inspect and copy your own health information upon request. However, we are not required to provide you access to all the health information that we maintain. For example, this right does not extend to psychotherapy notes, information compiled in reasonable anticipation of, or for use in, a civil, criminal or administrative proceeding, or subject to or exempt from Clinical Laboratory Improvements Amendments of 1988. Access may also be denied if disclosure would reasonably endanger you or another person.
3. **Right to Verbally Object.** You have the right to verbally object to certain disclosures that are routinely made for treatment, payment or healthcare operations or for other purposes without an Authorization. For example, we are required to give you an opportunity to object to the sharing of your health information with a person or family member accompanying you for treatment.
4. **Right to Seek an Amendment of Your Health Information.** You have the right to request an amendment of your health information. If we disagree with the requested amendment, we will permit you to include a statement in the record. Moreover, we will provide you with a written explanation of the reasons for the denial and the procedures for filing appropriate complaints and appeals.
5. **Right to an Accounting of Disclosure of Your Health Information.** You have the right to receive an accounting of disclosures made by us of your health information within six (6) years prior to the date of your request; provided, however that we need not provide an accounting for any information disclosed prior to April 14, 2003. The accounting will not include disclosures related to treatment, payment or health care operations, disclosures made to you, disclosures made pursuant to a validly executed authorization, disclosures permitted by the Privacy Regulations, disclosures to persons involved in your care, or disclosures that occurred prior to the April 14, 2003 compliance deadline under the Privacy Regulations. The accounting of disclosures shall include the date of each disclosure, name and address of the person or organization who received your health information, a brief description of the information disclosed, and the purpose for the disclosure.
6. **Right to Confidential Communications.** You have the right to receive confidential communications of your health information by alternative means or alternative locations. For example, you may request that we only contact you at work or by mail.
7. **Right to Revoke Your Authorization.** You have the right to revoke a validly executed authorization for the use or disclosure of your health information. However, such revocation will not have any effect on uses or disclosures prior to the receipt of the revocation.
8. **Right to Receive Copy of this Notice.** You have the right to receive a copy of this Notice.

## **Contact Information and How to Report a Privacy Rights Violation**

If you have questions and would like additional information regarding the uses and disclosures of your health information, you may contact the Compliance Officer at 215-629-1270. Moreover, the Practice has established an internal complaint process for reporting privacy rights violations. If you believe that your privacy rights have been violated, you may file a complaint with us or the Secretary of the Department of Health and Human Services at 200 Independence Avenue, S.W., Washington, D.C. 20201. To file a complaint with us, please contact Compliance Officer at 215-629-1270. All complaints must be submitted to the Practice in writing at 420 Bainbridge Street, First Floor, Philadelphia, PA 19115. There will be no retaliation for filing a complaint.

**Effective Date:** 4/14/03.

**Acknowledgement of Receipt of Privacy Notice**

**Purpose of this Acknowledgement**

This Acknowledgement, which allows the Practice to use and/or disclosure personally identifiable health information for treatment, payment or healthcare operations, is made pursuant to the requirements of 45 CFR §164.520(c)(2)(ii), part of the federal privacy regulations for the Health Insurance Privacy and Accountability Act of 1996 (the "Privacy Regulations").

**Please read the following information carefully:**

1. I understand and acknowledge that I am consenting to the use and/or disclosure of personally identifiable health information about me by Excel Physical Therapy (the "Practice") for the purposes of treating me, obtaining payment for treatment of me, and as necessary in order to carry out any healthcare operations that are permitted in the Privacy Regulations.
2. I am aware that the Practice maintains a Privacy Notice which sets forth the types of uses and disclosures that the Practice is permitted to make under the Privacy Regulations and sets forth in detail the way in which the Practice will make such use or disclosure. By signing this Acknowledgement, I understand and acknowledge that I have received a copy of the Privacy Notice.
3. I understand and acknowledge that in its Privacy Notice, the Practice has reserved the right to change its Privacy Notice as it sees fit from time to time. If I wish to obtain a revised Privacy Notice, I need to send a written request for a revised Privacy Notice to the office of the Practice at the following address:  
420 Bainbridge Street, First Floor, Philadelphia, PA 19115, Attention: Practice Compliance Director.
4. I understand and acknowledge that I have the right to request that the Practice restrict how my information is used or disclosed to carry out treatment, payment or healthcare operations. I understand and acknowledge that the Practice is not required to agree to restrictions requested by me, but if the Practice agrees to such a requested restriction it will be bound by that restriction until I notify it otherwise in writing.

I request the following restrictions be placed on the Practice's use and/or disclosure of my health information (leave blank if no restrictions): \_\_\_\_\_  
\_\_\_\_\_

I understand the foregoing provisions, and I wish to sign this Acknowledgement authorizing the use of my personally identifiable health information for the purposes of treatment, payment for treatment and healthcare operations.

**BY SIGNING THIS FORM, I ACKNOWLEDGE THAT I HAVE REVIEWED AN EXECUTED COPY OF THIS ACKNOWLEDGEMENT AND A COPY OF THE PRACTICE'S POLICY NOTICE AND AGREE TO THE PRACTICE'S USE AND DISCLOSURE OF MY PROTECTED HEALTH INFORMATION FOR TREATMENT, PAYMENT AND HEALTH CARE OPERATIONS.**

\_\_\_\_\_  
Signature of Patient or Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Patient's Name

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

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Personal Representative (if applicable)

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

**To Be Completed by the Practice**

The requested restrictions on the use and/or disclosure of the patient's health information set forth above are:

\_\_\_\_\_ Accepted      \_\_\_\_\_ Denied      \_\_\_\_\_ Not Applicable

\_\_\_\_\_ Other (explain) \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Practice Representative

\_\_\_\_\_  
Date