

# PATIENT INTERVIEW FORM

## PATIENT INFORMATION

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

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

### Race

- ☐ White/Caucasian
 ☐ Black or African American
 ☐ Asian
 ☐ Hispanic or Latino
 ☐ American Indian or Alaska Native
- ☐ Native Hawaiian or Other Pacific Islander
 ☐ Mixed
 ☐ Other
 ☐ Unknown
 ☐ Patient declines to provide information

### Ethnicity

- ☐ Hispanic or Latino
 ☐ Not Hispanic or Latino
 ☐ Patient declines to provide information

### Gender

- ☐ Male
 ☐ Female
 ☐ Other

### Preferred Language

- ☐ English
 ☐ French
 ☐ Portuguese
 ☐ Spanish
 ☐ Creole
 ☐ Other: \_\_\_\_\_

## PHARMACY

Name: \_\_\_\_\_ Phone Number \_\_\_\_\_

## CURRENT MEDICATIONS

☐ None

| Name  | Dose  | How Taken? |
|-------|-------|------------|
| _____ | _____ | _____      |
| _____ | _____ | _____      |
| _____ | _____ | _____      |
| _____ | _____ | _____      |

## PAST OR PRESENT MEDICAL CONDITIONS

- ☐ None
- |                                             |                                                   |                                                 |                                              |                                                                 |
|---------------------------------------------|---------------------------------------------------|-------------------------------------------------|----------------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> AICD/Pacemaker     | <input type="checkbox"/> Anemia                   | <input type="checkbox"/> Arthritis              | <input type="checkbox"/> Asthma              | <input type="checkbox"/> Autoimmune Disease                     |
| <input type="checkbox"/> Bleeding Problems  | <input type="checkbox"/> Cancer - Colon           | <input type="checkbox"/> Cancer - Other         | <input type="checkbox"/> Celiac Disease      | <input type="checkbox"/> Chest Pain                             |
| <input type="checkbox"/> Cirrhosis of Liver | <input type="checkbox"/> Colon Polyps             | <input type="checkbox"/> Crohn's Disease        | <input type="checkbox"/> Depression          | <input type="checkbox"/> Diabetes                               |
| <input type="checkbox"/> Diverticulitis     | <input type="checkbox"/> Fatty Liver              | <input type="checkbox"/> Fibromyalgia           | <input type="checkbox"/> Gallbladder Disease | <input type="checkbox"/> Gastroesophageal Reflux Disease (GERD) |
| <input type="checkbox"/> Glaucoma           | <input type="checkbox"/> Heart Disease            | <input type="checkbox"/> Hepatitis              | <input type="checkbox"/> High Blood Pressure | <input type="checkbox"/> High Cholesterol                       |
| <input type="checkbox"/> HIV/AIDS           | <input type="checkbox"/> Irritable Bowel Syndrome | <input type="checkbox"/> Kidney Disease/Failure | <input type="checkbox"/> Lactose Intolerance | <input type="checkbox"/> Liver Disease                          |
| <input type="checkbox"/> Lung Disease       | <input type="checkbox"/> Multiple Sclerosis       | <input type="checkbox"/> Neurologic Disorders   | <input type="checkbox"/> Pancreatitis        | <input type="checkbox"/> Prostate Enlargement                   |
| <input type="checkbox"/> Sleep Apnea        | <input type="checkbox"/> Stomach / Duodenal Ulcer | <input type="checkbox"/> Stroke                 | <input type="checkbox"/> TB (Tuberculosis)   | <input type="checkbox"/> Thyroid Disease                        |
| <input type="checkbox"/> Ulcerative Colitis | <input type="checkbox"/> Other _____              |                                                 |                                              |                                                                 |

## ALLERGIES

- ☐ Patient has no known allergies
- |                                       |                                               |                                |                                                            |                                       |
|---------------------------------------|-----------------------------------------------|--------------------------------|------------------------------------------------------------|---------------------------------------|
| <input type="checkbox"/> Aspirin      | <input type="checkbox"/> Codeine Sulfate      | <input type="checkbox"/> Eggs  | <input type="checkbox"/> Iodine/Iodine-Containing Products | <input type="checkbox"/> Morphine     |
| <input type="checkbox"/> Penicillin's | <input type="checkbox"/> Sulfa (Sulfonamides) | <input type="checkbox"/> Latex | <input type="checkbox"/> Soy                               | <input type="checkbox"/> Other: _____ |

## DIAGNOSTIC STUDIES / TESTS

- ☐ None
- |                                                     |                                                           |                                                     |                                                        |                                                     |
|-----------------------------------------------------|-----------------------------------------------------------|-----------------------------------------------------|--------------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Colonoscopy<br>When: _____ | <input type="checkbox"/> EGD<br>When: _____               | <input type="checkbox"/> ERCP<br>When: _____        | <input type="checkbox"/> Liver Biopsy<br>When: _____   | <input type="checkbox"/> Enteroscopy<br>When: _____ |
| <input type="checkbox"/> EUS<br>When: _____         | <input type="checkbox"/> Capsule Endoscopy<br>When: _____ | <input type="checkbox"/> Stress Test<br>When: _____ | <input type="checkbox"/> Echocardiogram<br>When: _____ |                                                     |

## PREVIOUS PROCEDURES

- ☐ None
- |                                                                      |                                                                 |                                                              |                                                             |                                                            |
|----------------------------------------------------------------------|-----------------------------------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------|------------------------------------------------------------|
| <input type="checkbox"/> Abdominoplasty<br>Tummy Tuck<br>When: _____ | <input type="checkbox"/> Appendectomy<br>When: _____            | <input type="checkbox"/> Bariatric Surgery<br>When: _____    | <input type="checkbox"/> Breast<br>When: _____              | <input type="checkbox"/> Bladder Surgery<br>When: _____    |
| <input type="checkbox"/> Coronary Bypass Surgery<br>When: _____      | <input type="checkbox"/> Breast<br>When: _____                  | <input type="checkbox"/> C-Section<br>When: _____            | <input type="checkbox"/> Colon Resection<br>When: _____     | <input type="checkbox"/> Colostomy<br>When: _____          |
| <input type="checkbox"/> Hysterectomy Surgery<br>When: _____         | <input type="checkbox"/> Colon Resection<br>When: _____         | <input type="checkbox"/> Hiatal Hernia Repair<br>When: _____ | <input type="checkbox"/> Gallbladder Surgery<br>When: _____ | <input type="checkbox"/> Hemorrhoid Surgery<br>When: _____ |
| <input type="checkbox"/> Stomach<br>When: _____                      | <input type="checkbox"/> Inguinal Hernia Repair<br>When: _____  | <input type="checkbox"/> Ovary Surgery<br>When: _____        | <input type="checkbox"/> Prostate<br>When: _____            |                                                            |
| <input type="checkbox"/> Thyroid<br>When: _____                      | <input type="checkbox"/> Umbilical Hernia Repair<br>When: _____ | <input type="checkbox"/> Other _____                         |                                                             |                                                            |

☐ No knowledge of family history

## SOCIAL HISTORY

Occupation: \_\_\_\_\_ Number of Children: \_\_\_\_\_

☐ Single      ☐ Married      ☐ Divorced      ☐ Separated      ☐ Widowed

## None

| Type                                           | Quantity |
|------------------------------------------------|----------|
| <input type="checkbox"/> Rarely                |          |
| <input type="checkbox"/> Less than 2 days/week |          |
| <input type="checkbox"/> More than 2 days/     |          |
| <input type="checkbox"/> week I quit using     |          |

Smoking Status ☐ Current daily smoker ☐ Current weekly smoker ☐ Former smoker ☐ Never smoker  
☐ Smoker, current status unknown ☐ Unknown if ever smoked

| Type                                     | Started | Quit | Quantity | Frequency |
|------------------------------------------|---------|------|----------|-----------|
| <input type="checkbox"/> Cigarettes      |         |      |          |           |
| <input type="checkbox"/> Cigar           |         |      |          |           |
| <input type="checkbox"/> Chewing Tobacco |         |      |          |           |
| <input type="checkbox"/> Pipe            |         |      |          |           |

☐ None

Type

☐ I have never used recreational drugs

☐ I have used recreational drugs in the past

☐ I am currently using recreational drugs

☐ I have been treated for substance abuse

## REVIEW OF SYSTEMS

### CONSTITUTIONAL

☐ None

Yes No

- ☐ ☐ fatigue  
☐ ☐ fever  
☐ ☐ weight loss

### RESPIRATORY

☐ None

Yes No

- ☐ ☐ cough  
☐ ☐ shortness of breath

### CARDIOVASCULAR

☐ None

Yes No

- ☐ ☐ chest pain  
☐ ☐ palpitations

### GASTROINTESTINAL

☐ None

Yes No

- ☐ ☐ gas  
☐ ☐ heartburn  
☐ ☐ nausea  
☐ ☐ vomiting  
☐ ☐ trouble swallowing  
☐ ☐ abdominal pain  
☐ ☐ change in bowel habits  
☐ ☐ constipation  
☐ ☐ diarrhea  
☐ ☐ soiling/incontinence  
☐ ☐ rectal bleeding  
☐ ☐ rectal pain  
☐ ☐ hemorrhoids  
☐ ☐ jaundice

### HEMATOLOGIC/LYMPHATIC

☐ None

Yes No

- ☐ ☐ easy bruising/bleeding

### GENITOURINARY

☐ None

Yes No

- ☐ ☐ dark urine

### MUSCULOSKELETAL

☐ None

Yes No

- ☐ ☐ joint pain

### INTEGUMENTARY

☐ None

Yes No

- ☐ ☐ rash

### NEUROLOGICAL

☐ None

Yes No

- ☐ ☐ headaches

### PSYCHIATRIC

☐ None

Yes No

- ☐ ☐ anxiety/depression  
☐ ☐ memory loss/confusion

## IMMUNIZATIONS

☐ None

☐ Flu

When: \_\_\_\_\_

☐ Hepatitis A

When: \_\_\_\_\_

☐ Hepatitis B

When: \_\_\_\_\_

☐ Pneumonia

When: \_\_\_\_\_

☐ HPV

When: \_\_\_\_\_

☐ Shingles

When: \_\_\_\_\_

☐ Tetanus

When: \_\_\_\_\_

☐ Other:

When: \_\_\_\_\_

## Financial Policy

### Gastro Health – Alabama

*Below are the Financial Policies of Gastro Health Holdco, LLC, and its subsidiaries and affiliates\* (hereinafter referred to collectively as Gastro Health); All references of policies throughout this document shall apply equally to all subsidiaries and affiliates of Gastro Health Holdco, LLC, its physicians and services, which will be referred to collectively as "Gastro Health" herein.*

#### **INSURANCE INFORMATION**

Your health insurance is a contract between you and your insurer. Any charges not paid by your insurer for any reason are your responsibility. **It is your responsibility to understand your insurance benefits, including plan limitations, the difference between screening or preventative care benefits versus diagnostic procedure benefits and the need for referrals or pre-authorizations.** We will make every effort to verify your benefits, identify your financial liabilities and pre-authorizations prior to your appointment on your behalf; however, this is not a guarantee of payment. We will bill your insurance for all services we provide; however, **we require you to pay any portion of your financial liability for care**, including/not limited to co-pays, deductibles or co-insurance, **prior to the service.** Certain services performed by our office, for your benefit, may not be covered by your insurance plan(s). Gastro Health suggests you contact your insurance carrier to verify your benefits and understand any non-covered services as these will be your financial responsibility. Please note if you obtain a policy from the Affordable Care Act marketplace, and are issued a subsidy, but fail to pay your premium during the grace period, your care will be entirely your financial responsibility. CERTAIN INSURANCES OR EMPLOYERS MAY HAVE A NARROW NETWORK THAT EXCLUDES YOUR PHYSICIAN. IF OUR SERVICES ARE DEEMED OUT OF NETWORK AND YOUR BENEFIT PLAN HAS NO OUT OF NETWORK BENEFITS, IT IS THE PATIENT'S RESPONSIBILITY TO PAY FOR THE SERVICES IN FULL. PLEASE CONSULT WITH YOUR PLAN IN ADVANCE OF YOUR VISIT.

#### **ADMINISTRATIVE FEES**

I understand that there is a \$35 charge for returned checks for any reason. Failure to remedy the returned check may result in legal action. I understand that missed or cancelled office visit appointments with less than 24 hours' notice will result in a fee of \$50. I understand that missed or cancelled procedure appointments with less than 72 hours' notice will result in a fee of \$75. Our fee for completing forms is \$25. There is a charge for copying medical records in accordance with state laws.

#### **Consent to Receive Text Messages from Gastro Health**

PATIENT/LEGAL GUARDIAN CONSENT: I give Gastro Health and its staff and patient notification service permission to contact me via my cellular device for automated phone calls and SMS text messages. I understand that emergency notifications are excluded from this permission and will be sent as normal. I understand that message/data rates may apply to messages sent through Gastro Health to my mobile phone. I understand that I am under no obligation to authorize Gastro Health to send you text messages as part of this program. By signing, I certify that I am the owner of this cellular device and its user contract.

Additionally, by signing below, I understand and accept the financial policies of Gastro Health. I authorize the use of my credit card for outstanding balances only after my insurance has processed my claim but not more than six (6) months after my visit. I give Gastro Health permission to apply payments to any balances amongst its locations. I understand that I am ultimately financially responsible for the services I receive from Gastro Health. Should I neglect to meet my financial responsibility, I understand that I may be charged additional fees incurred in the collection process, including from third party collection agencies.

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

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

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

\*"Affiliate" means any other entity or person that directly or indirectly, through one or more intermediaries, controls, is controlled by, or is under common control with, the first entity. The term "control" (including the terms "controlled by" and "under common control with") means the direct or indirect power to direct or cause the direction of the management and policies of an entity, whether through the ownership of voting securities, by contract or otherwise/ownership of more than 50% of the voting securities of such entity

07.14.2023



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PATIENT INFORMED CONSENT FOR TREATMENT AND NOTICE OF PRIVACY PRACTICES ACKNOWLEDGEMENT

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**GENERAL TREATMENT CONSENT:** The undersigned has voluntarily presented for medical care and consents to such medical care and treatment including any diagnostic procedures and tests that the physician(s), his or her associates, assistants and other healthcare providers determine to be necessary or appropriate for the purpose of diagnosis. Procedures or exams may include, but are not limited to anoscopy, breath tests, capsule endoscopy, fibroscan, hemorrhoid banding, ultrasound, and rectal exam. The undersigned understands that the nature of, intended purpose, potential risks/complications, and alternatives for each procedure or treatment will be explained to him/her beforehand. The undersigned understands and acknowledges that no warranty or guaranty has been or will be made as to the result or cure of treatment.

**USE OF DE-IDENTIFIED DATA:** We may use de-identified data derived from your protected health information (PHI) to train, validate, monitor, or improve AI algorithms used in treatment-planning tools. Any such use will comply with applicable privacy and security laws, and no identifiable information will be used without your authorization.

**NOTICE OF PRIVACY PRACTICES ACKNOWLEDGEMENT:** The undersigned understands he/she has a right to review the Provider's Notice of Privacy Practices prior to signing this document and acknowledges that the Provider's Notice of Privacy Practices has been made available to him/her. The Notice of Privacy Practices for the Provider is also provided in the waiting room.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Patient or Personal Representative

\_\_\_\_\_  
Description of Personal Representative's Authority

## AUTHORIZATION TO DISCLOSE PROTECTED HEALTH INFORMATION AND FINANCIAL CONSENT

**WHO CAN RECEIVE AND USE THE HEALTH INFORMATION?** May we disclose your protected health information to your: spouse, adult children, siblings, attorney, Life Insurance Company or other entity? If yes, please write their name, contact information and relationship to you.

Person/Organization Name \_\_\_\_\_  
 Relationship \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

Person/Organization Name \_\_\_\_\_  
 Relationship \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

**WHAT INFORMATION CAN BE DISCLOSED?** Complete the following by indicating those items that you want disclosed. The signature of a minor patient is required for the release of some of these items. If all health information is to be released, then check only the first box.

- |                                                        |                                               |                                                  |                                              |
|--------------------------------------------------------|-----------------------------------------------|--------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> <b>All Health Information</b> | <input type="checkbox"/> Physician's Orders   | <input type="checkbox"/> Progress Notes          | <input type="checkbox"/> Billing Information |
| <input type="checkbox"/> History/Physical Exam         | <input type="checkbox"/> Patient Allergies    | <input type="checkbox"/> Discharge Summary       | <input type="checkbox"/> Radiology Reports   |
| <input type="checkbox"/> Past/Present Medications      | <input type="checkbox"/> Operative Reports    | <input type="checkbox"/> Diagnostic Test Reports | <input type="checkbox"/> Imaging Films       |
| <input type="checkbox"/> Lab Results                   | <input type="checkbox"/> Consultation Reports | <input type="checkbox"/> Pathology Reports       | <input type="checkbox"/> Other _____         |

**Your initials are required to release the following information:**

\_\_\_\_\_ Mental Health Records (Excluding psychotherapy notes) \_\_\_\_\_ Genetic Information (Including Genetic Test Results)  
 \_\_\_\_\_ Drug, Alcohol, or Substance Abuse Records \_\_\_\_\_ HIV/AIDS Test Results/Treatment

**EFFECTIVE TIME PERIOD:** This authorization is valid until the earlier of the occurrence of the death of the individual; the individual reaching the age of majority; or permission is withdrawn; or the following specific date (optional):

Month \_\_\_\_ Day \_\_\_\_ Year \_\_\_\_

**RIGHT TO REVOKE:** I understand that I can withdraw my permission at any time by giving written notice stating my intent to revoke this authorization to the person or organization named under "WHO CAN RECEIVE AND USE THE HEALTH INFORMATION." I understand that prior actions taken in reliance on this authorization by entities that had permission to access my health information will not be affected. If I revoke this Authorization, I must send a written request to: **GASTRO HEALTH HOLDCO, LLC 9500 S. Dadeland Blvd., Suite 200, Miami, FL 33156 ATTN: Privacy Officer.** I understand that the revocation will not apply to information that has already been released in reliance on this Authorization and to my insurance company when the law provides my insurer with the right to contest a claim under my policy.

**MOBILE PHONE COMMUNICATION CONSENT:** By signing this document, you consent to your mobile phone number to be used to communicate with you by text or voice through an automated or pre-recorded message to provide you with information related to your healthcare, account or bills for healthcare services, and information related to additional healthcare services that may be of interest to you. You are not required to provide us with your mobile phone number for these purposes.

If you have not provided Gastro Health with your mobile phone number, you may provide it here: (\_\_\_\_) \_\_\_\_ - \_\_\_\_.

**INSURANCE INFORMATION:** Your health insurance is a contract between you and your insurer. Any charges not paid by your insurer for any reason are your responsibility. It is your responsibility to understand your insurance benefits, including plan limitations, the difference between screening or preventative care benefits versus diagnostic procedure benefits and the need for referrals or pre-authorizations. We will make every effort to verify your benefits, identify your financial liabilities and pre-authorizations prior to your appointment on your behalf; however, this is not a guarantee of payment. We will bill your insurance for all services we provide; however, we require you to pay any portion of your financial liability for care, including/not limited to co-pays, deductibles or co-insurance, prior to the service. Certain services performed by our office, for your benefit, may not be covered by your insurance plan(s). Gastro Health Holdco, LLC, suggests you contact your insurance carrier to verify your benefits and understand any non-covered services as these will be your financial responsibility. Please note if you obtain a policy from the Affordable Care Act marketplace, and are issued a subsidy, but fail to pay your premium during the grace period, your care will be entirely your financial responsibility. CERTAIN INSURANCES OR EMPLOYERS MAY HAVE A NARROW NETWORK THAT EXCLUDES YOUR PHYSICIAN. IF OUR SERVICES ARE DEEMED OUT OF NETWORK AND YOUR BENEFIT PLAN HAS NO OUT OF NETWORK BENEFITS, IT IS THE PATIENT'S RESPONSIBILITY TO PAY FOR THE SERVICES IN FULL. PLEASE CONSULT WITH YOUR PLAN IN ADVANCE OF YOUR VISIT.

**ADMINISTRATIVE FEES:** I understand that there is a charge for returned checks for any reason (check with your office's staff for specific fees charged). Failure to remedy the returned check may result in legal action. I understand that missed appointments or appointments cancelled with less than 24 hours' notice, for office visits, and 72 hours for procedures, may result in a fee of in accordance with the applicable office or facility policies. Additionally, there may be a fee charged for completing forms (check with your office's staff for specific fees charged) and copying medical records in accordance with State laws.

**PAYMENT:** Gastro Health Holdco, LLC, is committed to reducing waste and inefficiency and making our billing process as simple as possible. We run payments through a secure, HIPAA and PCI-compliant merchant services application. The security of your private information is our priority. For your protection, only the last 4 digits of your card will show in the system. We will process your payment automatically, sending you a receipt via email (if we have one on file). Your ability to dispute your insurance company's charges will not be compromised. Patient's without insurance will need to make payment in full on the day of the visit.

**OPEN BALANCES:** You may have outstanding balances for more than one location within the practice. We reserve the right to collect on balances for any subsidiary of Gastro Health Holdco, LLC. Note: Credit card payments are only accepted in our offices or through our website and will not be processed if mailed to our central billing office. Patients who fail to adhere to our financial policies may be sent to collections, incur additional costs up to 25% of the balance and be terminated from our practice. Identified balances on account may be refunded only during the final week of the month.

**PATIENT'S RELEASE STATEMENT:** *By signing below, I understand and accept the financial policies of Gastro Health Holdco, LLC. I authorize the use of my credit card for outstanding balances only after my insurance has processed my claim but not more than six (6) months after my visit. I give Gastro Health Holdco, LLC permission to apply payments to any balances amongst its locations. I understand that I am ultimately financially responsible for the services I receive from Gastro Health Holdco, LLC. Should I neglect to meet my financial responsibility, I understand that I may be charged additional fees incurred in the collection process, including from third party collection agencies.*

**SIGNATURE AUTHORIZATION:** I have read this form and agree to the use and disclosure of the information as described. I understand that refusing to sign this form does not stop disclosure of health information that has occurred prior to revocation or that is otherwise permitted by law without my specific authorization or permission, including disclosures to covered entities as provided by 45 C.F.R. § 164.502(a)(1). I understand that information disclosed pursuant to this authorization may be subject to redisclosure by the recipient and may no longer be protected by federal or state privacy laws.

**SIGNATURE X** \_\_\_\_\_

Signature of Individual or Individual's Legally Authorized Representative

\_\_\_\_\_  
DATE

Printed Name of Legally Authorized Representative (if applicable): \_\_\_\_\_

If representative, specify relationship to the individual: ☐ Parent of Minor ☐ Guardian ☐ Other \_\_\_\_\_

**SIGNATURE X** \_\_\_\_\_

Signature of Minor Individual

\_\_\_\_\_  
DATE