



INTEGRATIVE FAMILY MEDICINE

330 Mallory Station Rd., Suite B3

Franklin, TN 37067

Phone: 615-944-3530 Fax: 615-550.2641

PATIENT INSTRUCTIONS FOR PAPERWORK

Thank you so much for trusting your care to Integrative Family Medicine. Attached are the new patient forms. Please complete all forms entirely and return them by email, mail, fax, or drop them by the office. After we have received them, we will contact you to schedule your first visit.

Email: info@daniwilliamson.com

Fax: 615-550-2641

Please provide the following documents and information prior to your appointment:

- 1. Copy of front and back of insurance card**
- 2. Recent lab results and recent medical records**
- 3. Typed medical history (if you do not have your medical records)**
- 4. List of symptoms you are currently experiencing (p. 2, include additional pages if needed)**
- 5. List of ALL supplements and medications with dosage you are taking (p. 2)**
- 6. If you are using bio-identical hormones, please bring actual prescription to the appointment**

Providing this information will allow you and Dani to optimize your appointment time to develop your personalized care plan, rather than rebuilding all your health information.

Please be prepared to spend about 2.5 hours during your initial visit and 30 – 45 minutes for follow up visits.

Please call or email us with any questions or concerns.

We look forward to seeing you soon!



PATIENT INFORMATION

Patient Name: _____ DOB: _____

Address: _____

City, State, Zip: _____

Cell Phone #: _____ Home #: _____ Work #: _____

Email Address: _____

Sex: M / F Marital Status: S / M / D / W

Employer Name: _____ Employer Status: FT/PT/Retired/ N/A

EMERGENCY CONTACT

Contact Name: _____ Phone #: _____

Relationship to Patient: _____

RESPONSIBLE PARTY (IF NOT PATIENT)

Name: _____ DOB: _____

Phone #: _____ Relationship to Patient: _____

Billing Address: _____ City, State, Zip: _____

INSURANCE INFORMATION

Primary Cardholder Name: _____ DOB: _____

Insurance Company Name: _____

Member ID: _____ Group/Policy #: _____

OTHER INFORMATION

Pharmacy Name: _____ Address: _____

Pharmacy #: _____ Pharmacy FAX: _____

Patient Name: _____ D.O.B. _____

MEDICAL HISTORY / ACTIVE PROBLEM – *Make a list & include date of onset (What brings you to see Dani?)*

ALLERGIES

All PRESCRIPTIONS and SUPPLEMENTS

NAME **Strength, frequency, route**

SURGICAL HISTORY

Date **What was done / Reason**

Do you have Breast Implants? YES or NO Date of surgery: _____

FAMILY MEDICAL HISTORY

This is a particularly important area of information to Dani and the way she practices, please fill it out to the best of your ability. ***INCLUDE: age (or age of death), living/deceased, any health issues, cause of death***

Father: _____

Mother: _____

Sibling (brother or sister): _____

Sibling (brother or sister): _____

Sibling (brother or sister): _____

Maternal Grandfather: _____

Maternal Grandmother: _____

Paternal Grandfather: _____

Paternal Grandmother: _____

SOCIAL HISTORY

Occupation: _____

Stress level: _____ Marital Status: _____

Exercise (what type/frequency/duration): _____

Caffeine (how many cups/amount per day): _____

Alcohol: YES or NO Amount per week?: _____

Smoking: YES or NO How many years? _____ How much per day? _____

Recent travel outside the US?: _____

Primary Care Provider: _____ Phone #: _____

Other provider/specialist: _____ Phone #: _____

Other: _____ Phone #: _____

OBGYN: _____ Phone #: _____

Date of last PAP smear: _____ Date of last mammogram: _____

Please provide any other information you think is pertinent to your health and/or history:

REVIEW OF SYSTEMS (within the last 2 weeks)

Constitutional

weight loss Yes No
 weight gain Yes No
 loss of appetite Yes No
 fever Yes No
 fatigue Yes No

ENT/Respiratory

congestion Yes No
 cough Yes No
 nose bleeds Yes No
 hearing loss Yes No
 change in voice Yes No
 sore throat Yes No
 ringing in ears Yes No
 sinus pain Yes No
 shortness of breath Yes No
 wheezing Yes No

Cardiology

decreased exercise tolerance Yes No
 murmurs Yes No
 palpitations Yes No
 high blood pressure Yes No
 chest pain Yes No
 swelling Yes No
 varicose veins Yes No
 poor circulation Yes No

Gastroenterology

blood in stool Yes No
 diarrhea Yes No
 vomiting Yes No
 constipation Yes No
 nausea Yes No
 difficulty swallowing Yes No
 abdominal pain Yes No
 change in bowel habits Yes No
 heartburn Yes No

Musculoskeletal

joint stiffness Yes No
 joint pain Yes No
 joint swelling Yes No
 sciatica Yes No
 fracture Yes No
 wrist pain/tingling Yes No
 knee pain Yes No
 back pain Yes No

Dermatology

rash Yes No
 change in size/shape of moles Yes No
 lumps Yes No
 dry or sensitive skin Yes No
 acne Yes No

Genitourinary Male

difficulty urinating Yes No
 frequent nighttime urination Yes No
 hernia Yes No
 undescended testicle Yes No
 blood in urine Yes No
 penile discharge Yes No
 genital sore/ulcer Yes No

Genitourinary Female

irregular periods Yes No
 painful periods Yes No
 heavy periods Yes No
 pelvic pain Yes No
 painful urination Yes No
 increased urinary frequency Yes No
 blood in urine Yes No
 vaginal discharge Yes No
 genital sore/ulcer Yes No

Ophthalmology

diminished vision Yes No
 eye irritation or discharge Yes No
 blurring of vision Yes No
 spots in vision Yes No
 sudden vision loss Yes No

Hematology/Lymphatic

easy bleeding/bruising Yes No
 swollen lymph nodes Yes No

Endocrinology

excessive sweating Yes No
 excessive thirst Yes No
 excessive urination Yes No
 cold intolerance Yes No
 heat intolerance/hot flashes Yes No

Psychology

depression Yes No
 anxiety/panic Yes No
 sleep disturbances/insomnia Yes No
 irritability Yes No
 mood swings Yes No
 mental, physical or sexual abuse Yes No
 excessive energy Yes No
 trouble staying on task Yes No

Neurology

weakness Yes No
 numbness/tingling Yes No
 headache Yes No
 dizziness Yes No
 balance problem Yes No
 memory loss Yes No



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AUTHORIZATION FOR RELEASE OF MEDICAL RECORDS

Patient Name (please print): _____

Date of Birth: _____ Phone #: _____

Address: _____

I, the undersigned, authorize you to furnish a copy of my medical records to:

_____ Integrative Family Medicine or to _____

We are requesting medical records for the patient named above to be sent TO/ FROM the medical provider named below:

Provider Name: _____

Specialty: _____

Address: _____

City, State and Zip: _____

Phone Number: _____ Fax number: _____

I acknowledge and hereby consent to such, that the released information may contain alcohol, drug abuse, psychiatric, HIV testing, HIV results, or AIDS information. I, the undersigned, have read the above and authorized the staff of the specified facility named to disclose such information as herein contained. I understand that this consent may be withdrawn by me at any time except to the extent that action has been taken in reliance upon it. I understand that re-disclosure of this information to a party other than the one designated above is forbidden without additional authorization on my part. This facility is released and discharged of any liability and the undersigned will hold the facility harmless for complying with this "Authorization for Release of Medical Information". This order will remain in effect until revoked by me in writing.

Signed: _____ Date: _____

Relationship to Patient if not self: _____

PLEASE RETURN A COPY OF THIS FORM WITH RECORDS



CLINIC FINANCIAL POLICY

Thank you for choosing us as a healthcare provider. We are committed to providing you with the best possible medical care at the lowest possible cost. Please understand that payment of your bill is part of your treatment. The following is our Financial Policy that we require you to read and sign.

In order to achieve the practice goals of providing the finest medical care at the lowest possible cost, we need your assistance and understanding of our payment policy:

Full payment for professional services is due at time of service. We accept cash, checks (with ID) or Visa/MasterCard/Discover/AmEx, Health Savings and Flexible Spending accounts. There will be a charge of \$50 for returned checks and future checks will not be accepted.

The first visit, a 90-minute appointment, with Dani is \$600. Follow up visits, including phone consults, cost \$200 and are 30 minutes. We do not take insurance, but we can provide a receipt for your visit if you want to file for benefits yourself. (Integrative Family Medicine is out of network for every insurance since we are a direct-pay practice, so check your Out-of-Network benefits to see what they are.) Dani typically orders laboratory and/or specialized testing as a part of our comprehensive and follow up evaluations.

***Initial here [_____]** Lab coverage is based on insurance. Labs are not included in the cost of our visits. IFM has no control over what your labs cost, and you are free to decline any lab that Dani has ordered at any time. Payments for these tests are also due in accordance with your insurance lab billing. Please check with your insurance prior to your lab draw regarding preferred lab and required deductibles and co-insurance you will be responsible to pay. Quest Diagnostics has a draw station in our office for your convenience, but Quest is a separate business from IFM. Quest Diagnostics will file lab costs with your insurance, and they will bill you the balance that is owed.

In order to keep our fees to a minimum, payment is required at the time of service. For unaccompanied minors, non-emergency treatment will be denied unless charges have been preauthorized to a credit card or payment by cash or check.

We require a credit card number at the time of booking, and we will keep this number on file. This information is stored in a password protected computer and would only be charged in the event of a No-Show or late cancellation with less than 24 hour notice.

***Initial here [_____]** **Please give us 24 hour notice in advance if you cannot keep your appointment for any reason. There is a \$100 No-Show/late cancellation fee for follow-ups and \$300 No-show/late cancellation fee for new patient visits. This policy will be enforced.**

Signature of Patient or Responsible Party

Date

Signature of Administrator/Practice Manager

Date

ADVANCE BENEFICIARY NOTICE (ABN)

NOTE: You must make a choice about receiving these laboratory tests, procedures and/or purchasing supplements.

By signing this acknowledgement, you understand there are procedure, laboratory tests and supplements which may not be paid for by your health insurance companies, and if you chose to receive them, you will be responsible for payment for these procedures, supplements and any additional testing.

Danielle Williamson, NP cares for patients with acute and chronic ailments utilizing a bio-medical approach that is an integration of both traditional medicine and validated complimentary techniques and treatment strategies. As a result, some of the tests utilize labs that are out of network for your health plan; and some procedures and certainly none of the supplements are covered by your plan. We expect that your Health Insurance Provider will not pay for the laboratory test(s), procedures or the supplements that are described below.

Your Health Insurance Provider may or may not pay for:

- Precision Point Diagnostics- Food Sensitivity
- ZRT Saliva Testing for Hormones and Adrenals
- Max Gen
- Spectracell Nutrient Testing
- Galleri Cancer Screening

You may submit the costs of any lab tests to your insurance company. We will provide you with the documentation to help you do this. However, the insurance company may pay a fraction of your expenses, or none at all. You cannot file for the cost of supplements purchased or for certain procedures that are listed (if applicable). These procedures include but are not limited to the administration of IV vitamin/minerals and/or the injections of vitamins. These procedures must be paid for at the time of your office visit.

() Option 1. YES. If I choose to receive these items or services.

I understand that I am responsible for payment of these services directly to service provider. The service provider may be able to file your insurance, but Integrative Family Medicine will not participate in that billing process and is not responsible for non-covered services. I understand I will work directly with service provider to resolve any billing disputes. I also understand that any supplements purchased are not covered by insurance and I agree not to file a claim for medical reimbursement.

() Option 2. NO. I have decided not to receive these items or services.

*PLEASE CHOOSE ONE OPTION AND CHECK IT ACCORDINGLY. SIGN & DATE

Signature of patient or person acting on patient's behalf

Date

NOTE: Your health information will be kept confidential. Any information that we collect about you on this form will be kept confidential in our offices. If a claim is submitted to your Health Insurance Provider, your health information on this form may be shared with your Health Insurance Provider. Your health information which your Health Insurance Provider sees will be kept confidential by your Health Insurance Provider.

HIPAA NOTICE OF PRIVACY 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.

This Notice of Privacy Practices is NOT an authorization. This Notice of Privacy Practices describes how we, our Business Associates and their subcontractors, may use and disclose your protected health information (PHI) to carry out treatment, payment or health care 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 condition and related health care services.

USES AND DISCLOSURES OF PROTECTED HEALTH INFORMATION

Your protected health information may be used and disclosed by your physician, our office staff and others outside of our office that are involved in your care and treatment for the purpose of providing health care services to you, to pay your health care bills, to support the operation of the physician's practice, and any other use required by law.

Treatment: We will use and disclose your protected health information to provide, coordinate, or manage your health care and any related services. This includes the coordination or management of your health care with a third party. For example, your protected health information may be provided to a physician to whom you have been referred to ensure that the physician has the necessary information to diagnose or treat you.

Payment: Your protected health information will be used, as needed, to obtain payment for your health care services. For example, obtaining approval for a hospital stay may require that your relevant protected health information be disclosed to the health plan to obtain approval for the hospital admission.

Healthcare Operations: We may use or disclose, as-needed, your protected health information in order to support the business activities of your physician's practice. These activities include, but are not limited to, quality assessment, employee review, training of medical students, licensing, fundraising, and conducting or arranging for other business activities. For example, we may disclose your protected health information to medical school students that see patients at our office. In addition, we may use a sign-in sheet at the registration desk where you will be asked to sign your name and indicate your physician. We may also call you by name in the waiting room when your physician is ready to see you. We may use or disclose your protected health information, as necessary, to contact you to remind you of your appointment, and inform you about treatment alternatives or other health-related benefits and services that may be of interest to you. If we use or disclose your protected health information for fundraising activities, we will provide you the choice to opt out of those activities. You may also choose to opt back in.

We may use or disclose your protected health information in the following situations without your authorization. These situations include: as 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, and other required uses and disclosures. Under the law, we must make disclosures to you upon your request. Under the law, we must also disclose your protected health information when required by the Secretary of the Department of Health and Human Services to investigate or determine our compliance with the requirements under Section 164.500.

Provided By HCSI

USES AND DISCLOSURES THAT REQUIRE YOUR AUTHORIZATION

Other Permitted and Required Uses and Disclosures will be made only with your consent, authorization or opportunity to object unless required by law. Without your authorization, we are expressly prohibited to use or disclose your protected health information for marketing purposes. We may not sell your protected health information without your authorization. We may not use or disclose most psychotherapy notes contained in your protected health information. We will not use or disclose any of your protected health information that contains genetic information that will be used for underwriting purposes.

You may revoke the 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.

YOUR RIGHTS

The following are statements of your rights with respect to your protected health information.

You have the right to inspect and copy your protected health information (fees may apply) – Pursuant to your written request, you have the right to inspect or copy your protected health information whether in paper or electronic format. Under federal law, however, you may not inspect or copy the following records: Psychotherapy notes, information compiled in reasonable anticipation of, or used in, a civil, criminal, or administrative action or proceeding, protected health information restricted by law, information that is related to medical research in which you have agreed to participate, information whose disclosure may result in harm or injury to you or to another person, or information that was obtained under a promise of confidentiality.

You have the right to request a restriction of your protected health information – this means you may ask us not to use or disclose any part of your protected health information for the purposes of treatment, payment or healthcare operations. 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. Your request must state the specific restriction requested and to whom you want the restriction to apply. Your physician is not required to agree to your requested restriction except if you request that the physician not disclose protected health information to your health plan with respect to healthcare for which you have paid in full out of pocket.

You have the right to request to receive confidential communications – you have the right to request confidential communication from us by alternative means or at an alternative location. You have the right to obtain a paper copy of this notice from us, upon request, even if you have agreed to accept this notice alternatively i.e. electronically.

You have the right to request an amendment to your protected health information – if we deny your request for amendment, you have the right to file a statement of disagreement with us and we may prepare a rebuttal to your statement and will provide you with a copy of any such rebuttal.

You have the right to receive an accounting of certain disclosures – You have the right to receive an accounting of disclosures, paper or electronic, except for disclosures: pursuant to an authorization, for purposes of treatment, payment, healthcare operations; required by law, that occurred prior to April 14, 2003, or six years prior to the date of the request.

You have the right to receive notice of a breach – we will notify you if your unsecured protected health information has been breached.

You have the right to obtain a paper copy of this notice from us even if you have agreed to receive the notice electronically. We reserve the right to change the terms of this notice and we will notify you of such changes on the following appointment. We will also make available copies of our new notice if you wish to obtain one.

COMPLAINTS

You may complain to us or to the Secretary of Health and Human Services if you believe your privacy rights have been violated by us. You may file a complaint with us by notifying our Compliance Officer of your complaint. We will not retaliate against you for filing a complaint.

HIPAA COMPLIANCE OFFICER: Dani Williamson

Phone: 615-944-3530

Email: dani@daniwilliamson.com

We are 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. We are also required to abide by the terms of the notice currently in effect. If you have any questions in reference to this form, please ask to speak with our HIPAA Compliance Officer in person or by phone at our main phone number. Please sign the accompanying "Acknowledgment" form. Please note that by signing the Acknowledgment form you are only acknowledging that you have received or been given the opportunity to receive a copy of our Notice of Privacy Practices.

Provided By HCSI

ACKNOWLEDGEMENT OF OUR NOTICE OF PRIVACY PRACTICES

I hereby acknowledge that I have received or have been given the opportunity to receive a copy of INTEGRATIVE FAMILY MEDICINE Notice of Privacy Practices. By signing below I am "only" giving acknowledgement that I have received or have had the opportunity to receive the Notice of our Privacy Practices.

Print Name

Signature

Date



How did you hear about us?

Who can we thank for your referral? Doctor Patient Pharmacy Social Media Other

Name: _____

RECOGNITION OF INFORMATION AND ACCURACY

*Initials _____

*Please initial that you have received the information and that you have submitted to us the correct and accurate information above to the best of your knowledge.

*Initials _____

*I am the patient or the legal guardian or representative of the patient. "I", "my" in this document refers to me as the patient or legal guardian or representative of the patient. I hereby authorize the assignment of benefits (payments) directly to Integrative Family Medicine for all my insurance claims related to services received. I agree to pay any and all charges that exceed, or are not covered by my insurance. I understand that co-pays, deductibles and non-covered services are due at the time of service. If the account is in default and turned over for collection, I acknowledge that I will be responsible for all reasonable costs associated with collection. I authorize the release of any medical information necessary for the purpose of processing claims with my insurance company.
I permit a copy of this authorization to be used in place of the original.

*Initials _____

*I have received a copy of the HIPAA Notice of Privacy Practices.

Signature of Responsible Party

Date

Signature of Witness

Date

Medical Information Release Form
(HIPAA Release Form)

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

Release of Information

I authorize the release of information including the diagnosis, records; examination rendered to me and claims information. This information may be released to:

Spouse _____

Child(ren) _____

Other _____

Information is not to be released to anyone.

This ***Release of Information*** will remain in effect until terminated by me in writing.

Messages

Please call: my home my work my cell Number: _____

If unable to reach me:

you may leave a detailed message

please leave a message asking me to return your call

The best time to reach me is (day) _____ between
(time) _____

Signed: _____ Date: ____/____/____

Witness: _____ Date: ____/____/____

Name : _____

Adverse Childhood Experience (ACE) Questionnaire

Finding your ACE Score ra hbr 10 24 06

While you were growing up, during your first 18 years of life:

1. Did a parent or other adult in the household **often** ...
Swear at you, insult you, put you down, or humiliate you?
or
Act in a way that made you afraid that you might be physically hurt?
Yes No If yes enter 1 _____
2. Did a parent or other adult in the household **often** ...
Push, grab, slap, or throw something at you?
or
Ever hit you so hard that you had marks or were injured?
Yes No If yes enter 1 _____
3. Did an adult or person at least 5 years older than you **ever** ...
Touch or fondle you or have you touch their body in a sexual way?
or
Try to or actually have oral, anal, or vaginal sex with you?
Yes No If yes enter 1 _____
4. Did you **often** feel that ...
No one in your family loved you or thought you were important or special?
or
Your family didn't look out for each other, feel close to each other, or support each other?
Yes No If yes enter 1 _____
5. Did you **often** feel that ...
You didn't have enough to eat, had to wear dirty clothes, and had no one to protect you?
or
Your parents were too drunk or high to take care of you or take you to the doctor if you needed it?
Yes No If yes enter 1 _____
6. Were your parents **ever** separated or divorced?
Yes No If yes enter 1 _____
7. Was your mother or stepmother:
Often pushed, grabbed, slapped, or had something thrown at her?
or
Sometimes or often kicked, bitten, hit with a fist, or hit with something hard?
or
Ever repeatedly hit over at least a few minutes or threatened with a gun or knife?
Yes No If yes enter 1 _____
8. Did you live with anyone who was a problem drinker or alcoholic or who used street drugs?
Yes No If yes enter 1 _____
9. Was a household member depressed or mentally ill or did a household member attempt suicide?
Yes No If yes enter 1 _____
10. Did a household member go to prison?
Yes No If yes enter 1 _____

Now add up your "Yes" answers: _____ This is your ACE Score

Insurance and Labs

If you have Samaritan, Medi-Share, Medicaid or you do not have insurance, please sign up for Ulta Labs **before your appointment with Dani**.

Ulta Labs is a self-serve, prepaid lab service. You will need to create an account with them so you can order the labs that Dani has requested for your appointment.

To sign up for your Ulta account, please follow the steps below:

1. Go to: <https://www.ultalabtests.com/>
2. In the upper right corner click on Login
3. Scroll to New Patient
4. Complete the required information and select create account at the bottom

***You are now set!!!!**

As a reminder, we do not have access to your Ulta account. When you have your labs drawn you will have to forward the results to us here at the office.

Please follow the steps below to send us your results as soon as they have all resulted.

Thank you!

Steps for Ulta Results:

1. Log in to account
2. Click on **My Results**
3. In upper right corner of results, you will see the Download button. Click that
4. Save file
5. Email file to nurse@daniwilliamson.com