



## NEW PATIENT INFORMATION

Name: \_\_\_\_\_ Gender: ☐ Male ☐ Female Last 4 of SS # \_\_\_\_\_

Date Of Birth:       Place of Birth: \_\_\_\_\_  
D D M M Y Y

Address: \_\_\_\_\_

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

Phone Number: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Email: \_\_\_\_\_

What is the best way to contact you? \_\_\_\_\_

Marital Status: ☐ Single ☐ Married ☐ Widowed ☐ Divorced Other: \_\_\_\_\_

Ethnicity: ☐ Hispanic or Latino  
☐ Not Hispanic or Latino  
☐ Unknown  
☐ Declined to specify

Race: ☐ Asian  
☐ Black or African American  
☐ Native American Indian or Alaskan  
☐ Native Hawaiian  
☐ Other Pacific Islander  
☐ White

Preferred Language: \_\_\_\_\_

Would you like to have a translator free of charge provided during your office visits: ☐ Yes ☐ No

Religion: \_\_\_\_\_

Do you have an advanced directive? ☐ Living Will ☐ CPR Directive  
☐ Medical Durable Power of Attorney ☐ MOST Form  
☐ Do Not Resuscitate ☐ Other



## EMERGENCY CONTACT INFORMATION

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

Address: \_\_\_\_\_

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

Phone Number: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## MEDICAL CARE

Primary Care Physician: \_\_\_\_\_ Phone #: \_\_\_\_\_

Referring Physician: \_\_\_\_\_ Phone #: \_\_\_\_\_

## EMPLOYMENT

Are you retired? ☐ Yes ☐ No (if yes please skip to insurance information)

Employer's Name: \_\_\_\_\_ Occupation: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

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

Spouse Employer's Name: \_\_\_\_\_ Occupation: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

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

## INSURANCE INFORMATION

Please bring the most updated insurance card(s) to your visit.

Primary Insurance: \_\_\_\_\_

Address: \_\_\_\_\_

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

Policy Holder Name: \_\_\_\_\_ Policy Holder DOB: \_\_\_\_\_

Policy Holder SSN: \_\_\_\_\_ Insurance ID #: \_\_\_\_\_ Group #: \_\_\_\_\_



**Reason for your visit:** \_\_\_\_\_

**Medications:** *Please bring a list of CURRENT medication to your visit; include name, dose, and frequency of medication (please include any over the counter medications).*

**Allergies and reactions:**

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

**Pharmacy:** \_\_\_\_\_

**Pharmacy Address:** \_\_\_\_\_

**Pharmacy Phone #:** \_\_\_\_\_

## LIFESTYLE

**Diet:**

<input type="checkbox"/> Well Balance	<input type="checkbox"/> Weight Loss/Fad
<input type="checkbox"/> Vegetarian	<input type="checkbox"/> Excessive Fat/Calories
<input type="checkbox"/> Diabetic	

**Do you consume caffeinated products?** ☐ Yes ☐ No

Type: \_\_\_\_\_ Amount: \_\_\_\_\_

**Do you consume alcohol?** ☐ Never ☐ Former ☐ Current (former and current fill in information below)

Type: \_\_\_\_\_ Amount: \_\_\_\_\_

Frequency: \_\_\_\_\_ Year Quit: \_\_\_\_\_

**Do you exercise regularly?** ☐ Yes ☐ No

Type: \_\_\_\_\_ Frequency: \_\_\_\_\_

**Do you use tobacco?** ☐ Never ☐ Former ☐ Current (former and current fill in information below)

Type: \_\_\_\_\_ Packs/day: \_\_\_\_\_ Years Used: \_\_\_\_\_

Age started: \_\_\_\_\_ Age stopped: \_\_\_\_\_

Ever try to quit? ☐ Yes ☐ No Years quit: \_\_\_\_\_ Reason for Relapse: \_\_\_\_\_

**Are you exposed to passive smoke (second-hand)?** ☐ Yes ☐ No



**Have you used illicit drugs?** ☐ Never ☐ Former ☐ Current (former and current fill in information below)

Type: \_\_\_\_\_ Amount: \_\_\_\_\_

Frequency: \_\_\_\_\_ Year Quit: \_\_\_\_\_

**Family History of Heart Disease?** ☐ Yes ☐ No (If yes, complete the information below.)

Relationship: \_\_\_\_\_ Age: \_\_\_\_\_ Type of Heart Disease: \_\_\_\_\_

Age of Death? \_\_\_\_\_ Cause of Death? \_\_\_\_\_

Relationship: \_\_\_\_\_ Age: \_\_\_\_\_ Type of Heart Disease: \_\_\_\_\_

Age of Death? \_\_\_\_\_ Cause of Death? \_\_\_\_\_

Relationship: \_\_\_\_\_ Age: \_\_\_\_\_ Type of Heart Disease: \_\_\_\_\_

Age of Death? \_\_\_\_\_ Cause of Death? \_\_\_\_\_

**Have you had any of the following Cardiac Studies?**

(circle below)

Echo or Stress Echo	Yes	No	When:	Where:
Nuclear Cardiac Study	Yes	No	When:	Where:
Calcium Score	Yes	No	When:	Where:

*If you have a copy of any past medical history and/or test result(s) please bring them to your appointment or drop off at our office prior to your appointment.*

*Please list any recent hospitalizations and/or surgery and ALL cardiac procedures:*

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

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

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

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

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



**Have you ever had any of the following?**

(circle below)

Abnormal EKG	Yes	No	When:
Aneurysm	Yes	No	When:
Aortic Valve Replacement	Yes	No	When:
Asthma	Yes	No	When:
Atrial Fibrillation (A-fib)	Yes	No	When:
Cancer	Yes	No	When:
Clotting Disorder	Yes	No	When:
Congenital Heart Disease	Yes	No	When:
COPD	Yes	No	When:
Coronary Artery Disease (CAD)	Yes	No	When:
Deep Vein Thrombosis (DVT)	Yes	No	When:
Diabetes Mellitus (DM)	Yes	No	When:
Heart Failure	Yes	No	When:
Heart Murmur	Yes	No	When:
Heart Valve Problem	Yes	No	When:
Hyperlipidemia (High Cholesterol)	Yes	No	When:
Hypertension (High Blood Pressure)	Yes	No	When:
Kidney Disease	Yes	No	When:
Mitral Valve Disease	Yes	No	When:
Myocardial Infarction (Heart Attack)	Yes	No	When:
Pulmonary Embolism (PE)	Yes	No	When:
Sleep Apnea	Yes	No	When:
Stroke (CVA/TIA)	Yes	No	When:



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

Dear Patient,

Colorado Springs Cardiology is committed to protecting your privacy and the confidentiality of your medical records. In confirming our position, we comply with the Health Insurance Portability and Accessibility Act of 1996 (HIPAA) as well as the Health Information Technology for Economic and Clinical Health Act of 2009 (HITECH ACT).

Copies of our Notice of Privacy Practices are available for your review upon your request. Portions of the Act require that we verify and confirm who we are communicating with when discussing your care. Please help us by providing the following information:

**Patient Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_  
(Please Print)

**Phone:** (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

HIPAA/HITECH grants us permission to share information with your other healthcare providers and to you the patient.

This form, however, is not an Authorization to Release Protected Health Information (PHI); it is a form that identifies individuals you, the patient allow us to share your PHI with. By signing below, you specifically exclude anyone you did not list. This includes all communications, including but not limited to statements, phone conversations, electronic data, progress reports, lab results and prescription refills. This permission remains in effect until you, or authorized people (power of attorney) alter or revoke in writing.

Please list those who we have permission to communicate your PHI with:

Name	Phone Number	Relationship

May we leave a recorded message on the phone numbers you provided? ☐ Yes ☐ No

May we take your picture to help identify you in your electronic chart? ☐ Yes ☐ No

By signing below, you agree that you are aware of Colorado Springs Cardiology privacy policies and that the Notice of Privacy Practices is available upon request.

**Patient Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_



## FINANCIAL POLICY

**Patient Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_

Welcome to Colorado Springs Cardiology! Thank you for choosing us to provide your care and services. We would like to inform you of our payment policies. We accept cash, credit cards and personal checks for payment. Be aware that you may often receive two different bills when testing occurs, one from the doctor that reads the test, and one from the performing facility.

**No Insurance/Non-Contracted Insurance:** If you have no insurance, we expect payment for your visit at the time of service. Non-contracted insurance will be billed if appropriate insurance information is given, however, some payment will be expected at the time of service. Please ensure we are listed as a contracted provider under your plan by calling your insurance company. We can't guarantee that we are contracted with your plan due to new policies being created by your insurance. The cost to see a provider for self-pay or non-contracted providers is between \$135 - \$200 with the cash discount. If testing is done, there are additional charges. We request that you visit with the Financial Department prior to your appointment to discuss payment. They can be reached at 719-445-7550.

**Referral/Authorizations:** If your insurance requires an authorization/referral to be seen by a specialist it will have to be obtained from your Primary Care Provider prior to your appointment. **It is your responsibility in obtaining this referral from your Primary Care Provider.**

**Medicare:** Our doctors are participating providers for the Medicare Part B program. If you have a secondary or supplemental plan, we will submit claims after payment from Medicare; however, we must have a copy of your card and the appropriate information.

**Medicare Advantage Plans:** We participate with most Medicare HMOs and Advantage Plans. You may be required to have a referral for your services. Please be sure there is one on file when you visit. All co-pays must be paid at the time of service.

**Medicaid and Medicaid HMO:** We do participate with the Medicaid program. *You must provide us with a copy of Your Medicaid card indicating that you are eligible for Medicaid at the time of service.* Should services be

rendered, and you are no longer eligible for Medicaid coverage, you will be responsible for payment. All co-pays must be paid on the day of service.

**Commercial Insurance (HMO, PPO, EPO, and POS):** If you have insurance we are contracted with, we submit your insurance claims for you, if you supply us with the necessary information. You are still responsible for payment of your co-payment at the time of service and any amounts not covered by your insurance, including deductible and coinsurance. If your coverage is denied for any reason, you are responsible for payment.

**Auto and Workers Compensation:** We will bill your auto or workers compensation for your auto or work related injury. We will need the claim number, the name of your insurance, the name and phone number of your adjuster. If your carrier determines it is not work related, we will then bill you directly or your health insurance.

**Colorado Indigent Care Program:** As you know when you were approved for CICP, you were told this is a financial assistance program based on income and only covers outpatient or inpatient hospital services; this is not an insurance plan. Your office visit today is not covered by this program. However, we will be glad to see you with a cash payment up front. You will be required to show a current CICP card. We expect payment at the time of service and will allow for a cash discount at that time of service unless other arrangements were made with our Financial Dept. prior to the appointment.

**Tricare/Tricare for Life:** We accept all Tricare plans. However, they may require an authorization for every appointment. Please be sure there is one on file when you visit. Tricare for Life is a secondary plan and no authorization is required.

*Please read and sign on back*



## FINANCIAL POLICY

(continued)

**Ancillary Services:** We try to arrange for labs, radiology, and any other testing to be provided at a facility which participates with your insurance. However, with the constantly changing insurance contracts and plans we are not always aware of changes made to these participation lists. ***As the insured, please notify us of any concerns as it is your insurance and your responsibility to know what facilities your insurance participates with to lower your costs.***

**Missed Appointments:** When we schedule your appointment, this is your time that has been reserved for you. We cannot fill that space if you do not notify us in advance of your inability to make the appointment. We request a 24-hour notice.

**Physician Assistants and Nurse Practitioners:** Please understand that a physician is often on call for emergent situations and may be pulled away from the clinic unexpectedly. We don't want this to happen, but when dealing with someone's heart it goes with the territory. If your physician has to leave unexpectedly, or is not available for the next appointment time you need, we may ask you to see one of the PA's or NP's that work directly with your doctor. All information received during your office visit is sent directly to your physician for review. This information is sent immediately after your visit. The NP or PA may even call the physician directly for consultation and additional information. You can be assured that your physician is looking and is aware of what is going on with you personally. We have hired the top of their class PA's and NP's. They are familiar with cardiac medications, tests and symptoms and are capable of answering or getting the answer to all of your questions.

**Assignment of Benefits and Authorization to Release information:** I hereby assign my Medicare and/or any other insurance benefits to which I am entitled. I authorize and direct my insurance carrier(s) including private insurance, and other health/medical plan to issue payment check(s) directly to Colorado Springs Cardiology for services rendered to me or my dependents regardless of my insurance benefits, if any.

I authorize Colorado Springs Cardiology to furnish and/or release any information necessary to insurance carrier(s) concerning my illness or treatment to process my insurance claims and a photocopy of my signature can be used to process my insurance claim(s) for the period of a lifetime. This order will remain in effect until revoked in writing.

I have requested medical services from Colorado Springs Cardiology on behalf of my dependents or I and I understand that by making this request, I become fully responsible for any and all charges incurred in the course of treatment authorized. I further understand that fees are due and payable on the date that services are rendered and agree to pay all charges incurred immediately upon presentation of the appropriate statement. A photocopy of this assignment is to be considered as valid as the original.

In the event my account becomes delinquent, I will be responsible not only for the charges incurred but also any costs involved in collection of my account. These include but are not to be limited to interest charges, re-billing fees, court costs, attorney fees, and collection costs. Insurance coverage is a matter between me and my insurance company. **I am ultimately responsible for the payment of my account.**

- Please be aware that any calls regarding your amount due at the time of service are an estimate only. Once your insurance receives the claim they will determine the final patient responsibility per your benefit plan.

- Should your provider complete any in-office diagnostic testing on the same day as your office visit, you could be subject to an additional copay/coinsurance/deductible according to your benefit plan.

**I understand my responsibility for payment to Colorado Springs Cardiology.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name (Responsible Party over 18 years old)

\_\_\_\_\_  
Date