

Physical Therapy  
**PATIENT INFORMATION SHEET**

Last name \_\_\_\_\_ First \_\_\_\_\_ MI \_\_\_\_\_  
 DOB \_\_\_\_\_ SS# \_\_\_\_\_ Email \_\_\_\_\_  
 Street Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_  
 Emergency contact \_\_\_\_\_ Emergency Contact phone \_\_\_\_\_  
 Employer Name \_\_\_\_\_ Address \_\_\_\_\_  
 How did you learn about VitalEnergy? \_\_\_\_\_  
 Name of Insured if other than Patient \_\_\_\_\_ DOB \_\_\_\_\_

**DO NOT WRITE BELOW LINE**

**OFFICE USE ONLY**

Referring Doctor \_\_\_\_\_ Phone# \_\_\_\_\_  
 Clinic Name \_\_\_\_\_ Fax# \_\_\_\_\_  
 Address \_\_\_\_\_  
 Diagnosis/Code \_\_\_\_\_

Script Date \_\_\_\_\_ Eval Date \_\_\_\_\_ Onset Date \_\_\_\_\_

Primary Insurance \_\_\_\_\_ Effective Date \_\_\_\_\_ Date Verified \_\_\_\_\_

**In-Network**

Deductible \_\_\_\_\_  
 Ded Met Yes/No \_\_\_\_\_  
 Renew: Cal.yr / Group yr \_\_\_\_\_  
 OOP \_\_\_\_\_ Amt Met \_\_\_\_\_  
 Coinsurance \_\_\_\_\_ %  
 Copay \_\_\_\_\_

**Out-of-Network**

Deductible \_\_\_\_\_  
 Ded Met Yes/No \_\_\_\_\_  
 Renew: Cal.yr / Group yr \_\_\_\_\_  
 W/O No/ Full/ Partial \_\_\_\_\_  
 Applies to In-net Deduct: No/ Yes/ NA  
 Coinsurance \_\_\_\_\_ %  
 Send OON notification NO/Yes

Visit Limit (#/\$) \_\_\_\_\_ OT Only / PT Only / OT & PT Combined Renew: Cal yr / Group yr  
 Refer MD Script required No / Yes Will PT Eval/POC Suffice No / Yes / NA  
 Authorization Required No / Yes Pre-cert Phone# \_\_\_\_\_

Red Flag \_\_\_\_\_  
 Name \_\_\_\_\_ Benefits \_\_\_\_\_  
 Secondary Insurance \_\_\_\_\_ Pay \_\_\_\_\_  
 Name \_\_\_\_\_ Benefits \_\_\_\_\_  
 Medicare Supplemental \_\_\_\_\_ Pay \_\_\_\_\_

**Copay/Coinsurance \$ \_\_\_\_\_ Deductible to pay \$ \_\_\_\_\_ Visit Limit \_\_\_\_\_**

Initials:	Contact name:	Date:	Time:
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**VITAL ENERGY**  
Wellness and Rehab Center

**VITAL ENERGY OCCUPATIONAL THERAPY & WELLNESS CENTER'S FINANCIAL POLICY:**

We are dedicated to provide you with the best possible care available for your rehabilitative needs. We do our very best to try to control costs. We ask for your help with these efforts by showing up on time for your scheduled appointed time. **We also ask for a 24-hour notice before canceling or not showing up for an appointment. We reserve the right to bill you a \$40 fee before further services can be rendered for missed or canceled visits.**

**YOUR INSURANCE:**

We make every effort to review your insurance benefits with your insurance carrier and you to make you aware of your financial responsibility for your rehabilitation needs. However, some insurance plans are difficult for us to get a clear picture of your out of pocket costs. We have done our best to outline your individual plan below. Ultimately, it is your responsibility to understand your individual coverage and pay for services rendered. Unless other arrangements have been made in advance either by you or your health coverage carrier payment is due at the time of service.

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

Responsible Party (If other than patient) \_\_\_\_\_

Insurance Carrier(s) \_\_\_\_\_

Deductible \_\_\_\_\_ Amount Met \_\_\_\_\_

Insurance covers at \_\_\_\_\_ % Patient's Responsibility \_\_\_\_\_ %

Co-Pay/Visit Encounter Fee \_\_\_\_\_

Benefits and eligibility quoted today are based upon the information available at this time and are subject to coverage in effect at the time services are provided. This is not a guarantee of payment; contractual limitations and eligibility changes may result in denial of benefits. Ultimately, if your insurance denies payment for services rendered, you are responsible for the cost of said services rendered.

My benefits have been explained to me in full.

\_\_\_\_\_ Date \_\_\_\_\_  
Patient or Responsible Party's Signature

\_\_\_\_\_ Date \_\_\_\_\_  
Benefits were explained by

Revised 6/2011



**VITAL ENERGY**  
Wellness and Rehab Center

TO VITAL ENERGY OCCUPATIONAL THERAPY & WELLNESS CENTER PATIENTS:

All of us at Vital Energy Occupational Therapy & Wellness Center wish to thank you for choosing our clinic for your therapy needs. In order to better serve our patients, and to keep our charges to a minimum, we would like to advise you of our clinic policies as follows:

**YOUR INSURANCE:**

We make every effort to review your insurance benefits with your insurance carrier and you to make you aware of your financial responsibility for your rehabilitation needs. However, some insurance plans are difficult for us to get a clear picture of your out of pocket costs. We have done our best to outline your individual plan. Ultimately, it is your responsibility to understand your individual coverage and pay for services rendered. Unless other arrangements have been made in advance either by you or your health coverage carrier payment is due at the time of service.

1) **CO-PAYMENTS & DEDUCTIBLES MUST BE PAID AT TIME OF SERVICE.** Our contracts with various insurance companies require that we collect deductibles and patient co-pays at the time of service. We are in violation of our contract if we fail to do so. We verify your remaining deductibles and coverage with your insurance company at your first visit. The contracts require that we base our deductible charges and collect estimated co-pays based upon this information until we receive an Explanation of Benefit (EOB) and first payment from your insurance company (usually 4-6 wks after date of service). After we receive the first EOB, we adjust your deductible according to the information shown there. Your insurance policy dictates what **we must collect** at each visit.

**We accept credit cards, debit cards, cash or check.** Parents of students coming alone for treatments may make arrangements to pay weekly. We will make every effort to provide you with an agreeable payment plan, if needed; but if your account is turned over to a collection agency, you are responsible for an **additional 30% collection fee**. Because of lack of privacy, we ask that you **do not call the clinic to discuss financial issues.**

**2) CANCELLATION NOTICE: We require a minimum of 24 hrs. notice for cancellation or we reserve the right to charge \$40 for the missed appointment. If this is impossible, please be courteous and give us as much advance notice as possible to enable us to contact other patients who might need this time. Parents, please advise student patients of this policy and follow up to make sure that they keep appointments.**

Thank you once again for your patronage and cooperation with our policies.

\_\_\_\_\_ Date \_\_\_\_\_ Date \_\_\_\_\_  
Patient or Responsible Party  
Signature

\_\_\_\_\_ Witness

**Privacy Policy**

Any questions or concerns about privacy issues are to be directed to the Office Manager, Suzy Shay, or the privacy officer, Hima Dalal.

The subjective portion of evaluations will be performed in private. If other individuals are in the office, privacy may always be requested by the patient at any time and a private situation will be arranged.

While in the gym area, Vital Energy staff will be as discrete as possible with health information.

The file cabinet or the office will be locked when Vital Energy staff are away to protect medical records.

Prudent and careful judgment should be used during telephone conversations when non-staff persons are in the clinic to protect health information of patients.

Medical information of patients will be protected. Medical information will be released by a patient's written consent and/or in response to a court order. If physical abuse is suspected, medical information may be released to appropriate individuals by the privacy officer only.

Any patient at any time can request and receive a copy of their medical records. It may take 72 hours and there may be a charge for this service.

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I, \_\_\_\_\_, have read the above privacy policy of Vital Energy Therapy and agree to the policies therein.

\_\_\_\_\_  
Patient signature (or legal guardian)

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



**Release of Medical Information**

- I have had diagnostic tests or surgical procedures performed and grant my physician, \_\_\_\_\_, permission to release the following reports to Vital Energy Occupational Therapy & Wellness Center:

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

- I authorize Vital Energy Occupational Therapy & Wellness Center to release any medical information regarding this injury/condition to the following:
- My health insurance company
- Referring physician
- Work Comp carrier/employer if work comp injury
- \_\_\_\_\_
- \_\_\_\_\_

**Assignment of Benefits**

- I authorize Vital Energy Occupational Therapy & Wellness Center to file insurance on my behalf and accept assignment of my benefits to Vital Energy Occupational Therapy & Wellness Center.

**Privacy Policy**

- I have been made aware the privacy policy of Vital Energy Occupational Therapy & Wellness Center is posted and I may request a copy at any time.

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Relationship if other than patient** \_\_\_\_\_



**VITAL ENERGY**  
Wellness and Rehab Center

**MODEL RELEASE/INTERNAL USE ONLY**

By signing this Photo/Audio/Video Release Form, I hereby consent to have my photograph taken or be videotaped, filmed, or have my voice recorded by or on behalf of Vital Energy Occupational Therapy & Wellness Center for the general purposes of training and education, or for the promotion of Vital Energy personnel, facilities or activities or for information that is deemed newsworthy.

Specifically, I authorize Vital Energy Occupational Therapy & Wellness Center to publish the resulting images at will in brochures, newsletters, newspapers, and other printed matter or broadcast audio/video/film on television, radio, or for other uses.

\_\_\_\_\_  
SIGNATURE OF MODEL

**PLEASE PRINT:**

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

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

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

Telephone: \_\_\_\_\_

\_\_\_\_\_  
WITNESS

\_\_\_\_\_  
DATE

### Hydrotherapy Screening

Are you capable of swimming?	Yes	No
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Skin allergies	Yes	No		Respiratory infections	Yes	No
Sensitivity to chemicals	Yes	No		COPD	Yes	No
Open wounds	Yes	No		Unstable angina	Yes	No
Contagious skin conditions (I.e., Impetigo)	Yes	No		Uncontrolled diabetes	Yes	No
Rashes	Yes	No		Hypoglycemia	Yes	No
MRSA	Yes	No		Active seizures	Yes	No
Eczema	Yes	No		Incontinence	Yes	No
Psoriasis	Yes	No		Diarrhea	Yes	No
				Active joint inflammation	Yes	No
				Deep vein thrombosis	Yes	No
				Bladder infection	Yes	No
				Pacemaker	Yes	No

### Rules

- **Patients are not allowed in the pool without Vital Energy Staff present**
- **Patients with any kind of rash, skin irritation, sore, open wound may NOT use pool**
- **Please do not hang any heavy bags on hooks, please use the shelves**
- **Patients can bring their own beach towels, bar soap & shampoo**
- **Please wear shower/pool shoes in shower and pool areas**
- **No perfume, cologne, lotion or oils can be on skin**
- **All pool patients must shower before entering pool**
- **For female patients, no pool allowed during monthly cycle**

**I am a willingly participant in aquatic therapy and understand that Vital Energy Occupational Therapy & Wellness Center is not responsible for any adverse effects or harm caused in the Hydroworx pool area. I will follow all pool rules and safety guidelines per the policies and therapist.**

\_\_\_\_\_  
**Patient Signature (or Legal Guardian)**

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



# VITAL ENERGY

Wellness and Rehab Center

The purpose of this questionnaire is to help us understand your health status.  
 Please complete this form and your therapist will answer any questions during your exam.  
 This form is considered part of your medical record.

Patient Name \_\_\_\_\_ DOB \_\_\_\_\_  
 Today's Date \_\_\_\_\_

1) When was your last general health check up? \_\_\_\_\_

**Have you ever been told that you have:**

High Blood Pressure	Yes	No	
Heart Problems	Yes	No	
Lung Problems	Yes	No	
Kidney Problems	Yes	No	
Head Injury	Yes	No	
Stroke/Neurological Problems	Yes	No	
Liver Problems	Yes	No	
Thyroid Problems	Yes	No	
Blood Disorders	Yes	No	
Diabetes (High Blood Sugar)	Yes	No	
Hypoglycemia (Low Blood Sugar)	Yes	No	
Past fractures/dislocations	Yes	No	
Asthma	Yes	No	
Seizure	Yes	No	
Cancer	Yes	No	
Arthritis	Yes	No	
Shingles	Yes	No	
Ringing Ears	Yes	No	
Tuberculosis or Hepatitis	Yes	No	
Repeated Infections	Yes	No	
Depression	Yes	No	
Osteoporosis	Yes	No	
Circulation/Vascular Problems	Yes	No	
Ulcer/Stomach Problems	Yes	No	
<b>2) For Men Only</b>			
Prostate Disease	Yes	No	
<b>3) For Women Only</b>			
Pelvic Inflammatory Disease	Yes	No	
Endometriosis	Yes	No	
<b>4) Have You Recently Had:</b>			
Unexplained Weight Loss/Gain	Yes	No	
Loss of Appetite	Yes	No	

Unexplained Fever or Chills	Yes	No	
Unremitting Night Pain	Yes	No	
Joint Pain or Swelling	Yes	No	
Urinary or Bowel Problems	Yes	No	
Fatigue/Malaise/Tiredness	Yes	No	
Numbness or Tingling	Yes	No	
Weakness in Arms or Legs	Yes	No	
Recent Falls or Loss of Balance	Yes	No	
Coordination Problems	Yes	No	
Difficulty Walking	Yes	No	
Dizziness or Loss of Consciousness	Yes	No	
Chest Pain	Yes	No	
Heart Palpitations	Yes	No	
Shortness of Breath	Yes	No	
Difficulty Swallowing	Yes	No	
New Onset of Headaches	Yes	No	
Visual Problems	Yes	No	
Hearing Problems	Yes	No	
Hoarseness	Yes	No	
Cough	Yes	No	
5) Do You Smoke?	Yes	No	If yes, how many?      Packs/day How long have you smoked?
6) List any hospitalizations/surgeries			
7) List any other medical problems			
8) Any allergies?			
9) List your current medications			
10) Have you had a bone density test	Yes	No	If yes, when?
11) Reviewed by:			

**Treatment Authorization for Vital Energy Occupational Therapy & Wellness Center:**

I acknowledge I have answered the above information to the best of my knowledge. I voluntarily consent and agree to actively participate in such services as assessments, treatments, personal care, and therapeutic exercise on land or in water, as prescribed by the staff of Vital Energy Occupational Therapy & Wellness Center and will not hold them responsible for any adverse effect, harm, or side effects.

Signature \_\_\_\_\_

Date \_\_\_\_\_