

# NEW PATIENT INTAKE FORM

Thank you for taking the time to complete the following information which will help me assess your health needs. All information is confidential.

## GENERAL INFORMATION

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_

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

PHONE NUMBERS (PLEASE MARK \* NEXT TO BEST NUMBER)

Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Email Address: \_\_\_\_\_  
(email is required for any patient using insurance for services)

Would you like to receive our e-newsletter with supportive health information (only once per season)? YES NO

Marital Status: \_\_\_\_\_ # of children: \_\_\_\_\_ their ages: \_\_\_\_\_

Your Educational level: \_\_\_\_\_ Occupation: \_\_\_\_\_ hrs per week: \_\_\_\_\_

Employer & commute time: \_\_\_\_\_ Health Insurance Co: \_\_\_\_\_

How did you hear about us?: \_\_\_\_\_ If via person, name: \_\_\_\_\_

May we send a thank you card?: YES NO

## EMERGENCY CARD

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

UNDER 18 --- RESPONSIBLE PARTY INFORMATION

Name: \_\_\_\_\_ Relationship to Patient: \_\_\_\_\_

HEALTHCARE PROVIDERS - PLEASE LIST THOSE YOU WORK WITH

- Physicians: GP/Primary Care \_\_\_\_\_ seeking one? YES NO
- OB-GYN: \_\_\_\_\_ seeking one? YES NO
- Specialist (describe): \_\_\_\_\_ seeking one? YES NO
- Chiropractor: \_\_\_\_\_ seeking one? YES NO
- Massage Therapist: \_\_\_\_\_ seeking one? YES NO
- Physical Therapist: \_\_\_\_\_ seeking one? YES NO
- Psychotherapist: \_\_\_\_\_ seeking one? YES NO
- Personal Trainer: \_\_\_\_\_ seeking one? YES NO
- Midwife: \_\_\_\_\_ seeking one? YES NO
- Other: \_\_\_\_\_ seeking one? YES NO

May I contact these providers to ensure coordination of your care? YES NO

Previous experience with acupuncture? YES NO With whom and results \_\_\_\_\_

## HEALTH HISTORY

Please list your major health concerns in order of importance to you:

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Check those that apply to your past medical history

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Adverse reaction to medical treatment | <input type="checkbox"/> Hepatitis/Liver disease | <input type="checkbox"/> Rheumatic fever      |
| <input type="checkbox"/> Alcoholism                            | <input type="checkbox"/> Herpes                  | <input type="checkbox"/> Sciatica             |
| <input type="checkbox"/> Allergies                             | <input type="checkbox"/> High blood pressure     | <input type="checkbox"/> Scarlet fever        |
| <input type="checkbox"/> Arthritis or rheumatism               | <input type="checkbox"/> HIV/AIDS                | <input type="checkbox"/> Seizures/Epilepsy    |
| <input type="checkbox"/> Asthma                                | <input type="checkbox"/> Immune disorder         | <input type="checkbox"/> Sinus infections     |
| <input type="checkbox"/> Attempted suicide                     | <input type="checkbox"/> Joint replacement       | <input type="checkbox"/> Skin disease         |
| <input type="checkbox"/> Birth Trauma                          | <input type="checkbox"/> Kidney disorder         | <input type="checkbox"/> Special diet         |
| <input type="checkbox"/> Bleeding disorder                     | <input type="checkbox"/> Low blood pressure      | <input type="checkbox"/> Stroke               |
| <input type="checkbox"/> Blood disease                         | <input type="checkbox"/> Lyme's disease          | <input type="checkbox"/> Substance abuse      |
| <input type="checkbox"/> Cancer or tumor                       | <input type="checkbox"/> Lymph nodes removed     | <input type="checkbox"/> Thyroid disease      |
| <input type="checkbox"/> Diabetes                              | <input type="checkbox"/> Mental illness          | <input type="checkbox"/> Tuberculosis         |
| <input type="checkbox"/> Emphysema                             | <input type="checkbox"/> Multiple Sclerosis      | <input type="checkbox"/> Ulcer                |
| <input type="checkbox"/> Eating disorder                       | <input type="checkbox"/> Pacemaker               | <input type="checkbox"/> Venereal Disease/STD |
| <input type="checkbox"/> Fibromyalgia                          | <input type="checkbox"/> Polio                   | <input type="checkbox"/> Other _____          |
| <input type="checkbox"/> Heart disease                         | <input type="checkbox"/> Rheumatic arthritis     |   |

List any serious diseases, injuries, surgeries, or hospitalizations you have had and the year they occurred:

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Please indicate approximate dates and briefly describe the nature of any traumatic experiences you have had (e.g. divorce, injury, family death, bankruptcy, etc).

Date ___/___/___	Event _____	Date ___/___/___	Event _____
Date ___/___/___	Event _____	Date ___/___/___	Event _____
Date ___/___/___	Event _____	Date ___/___/___	Event _____

Family History (List any family physical or mental illnesses and age of death):

Mother \_\_\_\_\_

Father \_\_\_\_\_

Grandparents \_\_\_\_\_

Siblings \_\_\_\_\_

Children \_\_\_\_\_

Medications, Herbs, Supplements (List those you are currently taking):

Name _____	Reason _____	How long and Dose _____
Name _____	Reason _____	How long and Dose _____
Name _____	Reason _____	How long and Dose _____
Name _____	Reason _____	How long and Dose _____
Name _____	Reason _____	How long and Dose _____
Name _____	Reason _____	How long and Dose _____

## LIFESTYLE HABITS

Describe your typical daily diet:

Breakfast: \_\_\_\_\_ Lunch: \_\_\_\_\_  
 Dinner: \_\_\_\_\_ Snacks: \_\_\_\_\_  
 Special diet: \_\_\_\_\_ 3 worst foods you eat: \_\_\_\_\_

## DO YOU:

Average 6-8 hours sleep?	YES	NO
Have a supportive relationship?	YES	NO
Have a history of abuse?	YES	NO
Enjoy your work?	YES	NO
Take vacations?	YES	NO
Spend time outside?	YES	NO
Exercise?	YES	NO
Watch TV?	YES	NO
Read Books?	YES	NO
Computer games/browsing?	YES	NO
Spiritual/religious practice?	YES	NO
Smoke cigarettes?	YES	NO
Smoke cigarettes in the past?	YES	NO
Eat out often?	YES	NO
Drink coffee?	YES	NO
Drink tea?	YES	NO
Drink soft drinks?	YES	NO
Use sugar?	YES	NO
Drink alcohol?	YES	NO
Use recreational drugs?	YES	NO
Have an addiction?	YES	NO
Been outside the U.S. in past 12 months?	YES	NO

What is the major source of joy in your life?  
 \_\_\_\_\_  
 \_\_\_\_\_

What is the major source of stress in your life?  
 \_\_\_\_\_  
 \_\_\_\_\_

Describe Exercise: \_\_\_\_\_  
 How many hours weekly \_\_\_\_\_  
 How many hours weekly \_\_\_\_\_  
 How many hours weekly \_\_\_\_\_

Describe: \_\_\_\_\_  
 How many packs? \_\_\_\_\_  
 How many years? \_\_\_\_\_  
 How many meals a week? \_\_\_\_\_  
 How many cups a day? \_\_\_\_\_  
 How many cups a day? \_\_\_\_\_  
 How many a day? \_\_\_\_\_  
 How much? \_\_\_\_\_  
 How many drinks a week? \_\_\_\_\_  
 What and how often? \_\_\_\_\_  
 To what and how long? \_\_\_\_\_  
 Where? \_\_\_\_\_  
 \_\_\_\_\_

What are your goals for your health?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please circle your level of commitment to correcting your health issues? 1 2 3 4 5 6 7 8 9 10  
 (10 = highest level)

## TESTS AND IMMUNIZATIONS

Please list the date of your most recent visit:

Chest X-ray _____	Sigmoidoscopy _____	EKG _____	Stool Blood Test _____
Mammogram _____	TB Skin Test _____	Pap Smear _____	Complete Physical _____
GI Series _____	Flu Shot _____	Pneumonia Shot _____	Other _____

Please mark the appropriate squares in the following list of symptoms.  
 If you have had a symptom in the PAST and do not have it now, check the box like this:   
 If you are having the symptom CURRENTLY, fill in the box like this:

### Liver/Gallbladder

- Depression / Stress
- Headaches / Migraines
- Red / Dry / Itchy Eyes
- Visual Problems / Blurred Vision
- Dizziness
- Gall Stones
- Feeling of Lump in Throat
- Clenching Teeth at Night
- Muscle Cramping / Twitching
- Neck/Shoulder Pain / Tightness
- Seizures/Tremors
- Poor Circulation
- Soft/Brittle Nails
- Bitter Taste in Mouth
- PMS/Menstrual Problems
- Tendonitis
- Pain Below Ribcage
- Do you crave: Sour
- Tend to be Irritable / Angry

### Heart/Small Intestine

- Heart Palpitations
- Rapid or Irregular Heartbeat
- Chest Pain
- High Blood Pressure
- Low Blood Pressure
- Insomnia / Sleep Problems
- Vivid Dreams / Nightmares
- Easily Startled
- Dark Urine
- Red Complexion
- Do you crave: Bitter
- Anxiety / Nervous or Restless

### Spleen/Stomach

- Body Heaviness
- Hard to get up in Morning
- Muscles Often Feel Tired
- \_\_\_ Energy Level: 1-10 (low to high)
- Edema ( Hands  Feet)
- Easily Bruising / Bleeding
- Bad Breath
- Sweetish Taste in Mouth
- Lack of Taste
- Excess or Low Appetite (circle which)
- Excess or Lack of Thirst (circle which)
- Nausea / Vomiting
- Gas / Belching
- Hemorrhoids
- Organ Prolapse (i.e. uterus)
- Chronic Loose Stools
- Abdominal Pain

### Indigestion / Heartburn

- Brain Foggy
- Mouth Ulcers
- Tendency to Gain Weight
- Do you crave: Sweet
- Over-thinking / Worry

### Lung/Large Intestine

- Bloody Cough
- Dry Cough
- Chronic Cough
- Cough with Sputum
- Nasal Discharge
  - White  Yellow  Green
- Post Nasal Drip
- Sinus Infection / Congestion
- Itchy, Red, or Painful Throat
- Dry Mouth / Nose / Throat
- Skin Rashes / Hives
- Snoring
- Shortness of Breath
- Allergies / Asthma
- Low Immunity
- Catch Colds Easily
- Bronchitis
- Black or Bloody Stools
- Constipation
- IBS
- Diarrhea
- Colitis / Spastic Colon
- Do you crave: Pungent / Spicy
- Grief / Sadness

### Kidney/Urinary Bladder

- Urinary Problems (i.e. night-time) \_\_\_\_\_
- Bladder Infection
- Incontinence
- Weakness / Pain in Low Back
- Osteoporosis
- Feel Cold or Hot Easily (circle which)
- Cold Hands / Feet
- Low or Excess Sex Drive (circle which)
- Dark Circles under Eyes
- Thyroid Problems \_\_\_\_\_
- Poor Memory
- Hair Loss / Grey Hair
- Hearing Problems / Tinnitus
- Cavities
- Hot Flashes / Night Sweats
- Impotence or Premature Ejaculation (circle which)
- Do you crave: Salt
- Fear

The following are specific policies that will govern our work together:

## CANCELLATION POLICY

In the event that you must cancel an appointment, please give us the courtesy of as much notice as you can, but at least 24 hours notice. You will be charged a fee of \$25 if you do not show up for your appt or cancel your appt with less than 24 hours. We will try to reschedule your appointment for the same week so you don't miss your treatment.

## LATE POLICY

If you are going to be late, please call and let us know and we will wait until the time we agree upon. If you do not give notice, we will wait 15 minutes beyond the start time of your appointment. If you have not arrived by then your appointment will be cancelled and you will be responsible for the full payment of the session.

## PHONE CALLS AND EMAILS

You may phone or email us when necessary and we will respond as soon as possible, or within 24 hours. We are generally unavailable on weekends. Except for emergencies, phone calls and email contacts with our doctors and licensed practitioners are limited to 5-10 minutes of our time. All contacts that require beyond 10 minutes of our time are considered session work and will be billed a flat rate of \$40.

## CONFIDENTIALITY AND PRIVACY PRACTICES

As a health care provider, we are required by law to maintain and protect the confidentiality of your health information. You must give us written consent to waive this confidentiality. Exceptions to this rule are strictly limited to defined situations that include emergency care, quality assurance activities, public health, research, law enforcement activities, obtaining payment from third-party payers, and in consultation with other healthcare professionals. Any other disclosures for the purposes of treatment, payment or practice operations will be made only after obtaining your consent. Your rights to privacy regarding your protected health information:

- You may request restrictions on your disclosures.
- You may inspect and receive copies of your records within 30 days with a request.
- You may request to view changes to your records.

Please note that we may contact you for appointment reminders, birthdays & seasonal greetings, announcements and to inform you about our practice and its staff. A more complete description of our privacy practices can be requested.

## FEES

It is our policy that you pay the entire session fee or co-pay/coinsurance at the time of each session. If you would like to arrange another payment option, please discuss it with us.

## WE ARE PARTNERS IN YOUR HEALTHCARE

Your participation in your healing process is crucial. Our goal is to get you well as soon as possible, which requires that you apply our health recommendations and comply with our treatment plan.

## AGREEMENT

*I have read and understood the clinic's policies. I agree to the all of the above treatment terms and conditions.*

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

I, the undersigned, understand that methods of treatment used in this practice may include, but are not limited to, acupuncture, herbal medicine, moxibustion, cupping, electrical stimulation, medical qigong, massage, gua sha, heat therapy, ear seeds, dietary advice, qigong exercise prescriptions, and lifestyle counseling.

I understand that these therapies are safe methods of treatment. As with all medical procedures, they involve potential but unlikely risks. Such uncommon risks include temporary bruising, swelling, bleeding, numbness and tingling, and soreness at the needling site that may last a few days. Very, very unusual risks of acupuncture include dizziness, fainting, nerve damage, or pneumothorax. Infection is possible but highly unlikely (we've never witnessed this), as the clinic uses alcohol, sterile disposable needles, and a safe and clean environment. A burn is a possible but extremely rare side effect of moxibustion. Temporary bruising (not painful) or redness lasting a few days is a common side effect of cupping and gua sha. I fully understand that there is no implied or stated guarantee of the success or effectiveness of a specific treatment or series of treatments. I also understand that certain social habits and medications may decrease the beneficial effects of Chinese medical treatment. These include the use and abuse of alcohol, pain killers, steroids, narcotics, tobacco, anti-depressants, and illegal drugs.

Acupuncture is a natural medicine that works with the body's ability to heal itself, but is not a substitute for conventional medical diagnosis and treatment. The results of acupuncture are not always felt immediately, especially with chronic conditions. Regular treatment and completing the prescribed treatment plan are what give acupuncture and herbs the best results.

I will notify the acupuncturist should I become pregnant or if I am in the process of trying to get pregnant. I understand that herbal and nutritional supplements recommended to me by my acupuncturist are safe in the recommended doses. Large doses of herbs taken without my practitioner's recommendation may be toxic, and some herbs are inappropriate during pregnancy. Some possible but rare side effects of herbs are nausea, gas, stomachache, vomiting, headache, diarrhea, and hives. I understand that I must stop taking any herbs and notify my acupuncturist if I experience any discomfort or adverse reactions.

I understand that I can discuss risks and benefits further with my practitioner before signing if I so choose. However, I do not expect my practitioner to be able to anticipate and explain all possible risks and complications of treatment. I rely on the practitioner to exercise her judgment in my best interest during the course of treatment, based upon the facts then known.

In signing this form, I acknowledge any inherent risks, and give my consent for treatment, payment and healthcare operations received, incurred or carried out at this practice. I also certify that I have informed my acupuncturist of all known physical, mental and medical conditions and medications, and I will keep her updated on any changes.

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