



# Welcome

## PATIENT INFORMATION

**PATIENT'S NAME:** \_\_\_\_\_ Nickname: \_\_\_\_\_  
Last First Middle  
Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_ Male / Female  
Address: \_\_\_\_\_  
Street City Zip  
Email Address: \_\_\_\_\_  
Daytime #: \_\_\_\_\_ Cell / Home / Work Evening #: \_\_\_\_\_ Cell / Home / Work  
Dentist Name: \_\_\_\_\_ Orthodontic Concerns: \_\_\_\_\_  
Who may we thank for referring you to our office? \_\_\_\_\_  
Office Location Preference?: ☐ East Vancouver ☐ West Vancouver  
If patient is a minor, give parents or legal guardian's name: \_\_\_\_\_  
School: \_\_\_\_\_ Grade: \_\_\_\_\_  
Siblings: \_\_\_\_\_

## RESPONSIBLE PARTY INFORMATION

**Self/Father/Mother** Name: \_\_\_\_\_ SS#: \_\_\_\_\_  
Address: \_\_\_\_\_ How Long? \_\_\_\_\_  
Street City Zip  
Email Address: \_\_\_\_\_  
Daytime #: \_\_\_\_\_ Cell / Home / Work Evening #: \_\_\_\_\_ Cell / Home / Work  
Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_ How Long? \_\_\_\_\_  
**Spouse/Father/Mother** Name: \_\_\_\_\_ SS #: \_\_\_\_\_  
Address: \_\_\_\_\_ How Long? \_\_\_\_\_  
Street City Zip  
Email Address: \_\_\_\_\_  
Daytime #: \_\_\_\_\_ Cell / Home / Work Evening #: \_\_\_\_\_ Cell / Home / Work  
Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_ How Long? \_\_\_\_\_

I understand that, when financing, credit bureau reports may be obtained. Signed \_\_\_\_\_

## DENTAL INSURANCE INFORMATION

**Policy Holder's Name:** \_\_\_\_\_ Birthdate: \_\_\_\_\_ Employer: \_\_\_\_\_  
Primary Ins. Company: \_\_\_\_\_ Ins. Billing Address: \_\_\_\_\_  
Group #: \_\_\_\_\_ Ins. ID#: \_\_\_\_\_ Ins. Co Phone # ( ) \_\_\_\_\_  
**Policy Holder's Name:** \_\_\_\_\_ Birthdate: \_\_\_\_\_ Employer: \_\_\_\_\_  
Secondary Ins. Company: \_\_\_\_\_ Ins. Billing Address: \_\_\_\_\_  
Group #: \_\_\_\_\_ Ins. ID#: \_\_\_\_\_ Ins. Co Phone # ( ) \_\_\_\_\_

I authorize the release of information to my insurance company and Brown-Saito Orthodontics to bill and receive direct payment for services.  
Signed \_\_\_\_\_



# PATIENT MEDICAL HISTORY

For the following questions please mark YES or NO.  
Your answers are for our records only and are considered confidential.  
Please let us know if there are any changes in the future.

Patient Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Today's Date: \_\_\_\_\_

## MEDICAL INFORMATION

Primary Medical Doctor: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Kaiser # \_\_\_\_\_

Office Location: \_\_\_\_\_  
Date of last visit: \_\_\_\_\_

### NOW OR IN THE PAST, HAS PATIENT HAD:

yes no Allergies to medications? Ibuprofen, Acetaminophen?  
Other? \_\_\_\_\_  
yes no Allergies to latex, metal, other: \_\_\_\_\_  
yes no Prosthetic joint or other replacement? When? \_\_\_\_\_  
Which Joint? \_\_\_\_\_  
yes no Has a physician recommended that patient take  
antibiotics prior to his/her dental treatment?  
yes no Use tobacco (chew, smoke, snuff)? packs/day? \_\_\_\_\_  
yes no Taking any prescription or non-prescription medication,  
nutritional supplements, or herbal medicines?  
Medication: \_\_\_\_\_ Taken For: \_\_\_\_\_  
Medication: \_\_\_\_\_ Taken For: \_\_\_\_\_  
Medication: \_\_\_\_\_ Taken For: \_\_\_\_\_  
yes no History of Major illness? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
yes no Operations or Accidents? \_\_\_\_\_  
When? \_\_\_\_\_

yes no Osteoporosis? Bone density issues? Taking medications  
for bone density or may have to in the future?  
What drug? \_\_\_\_\_  
When started? \_\_\_\_\_  
Circle: Arthritis Anemia Asthma/Hay fever  
Bone Disorders Diabetes Dizziness/Fainting  
Aids/HIV Positive Hepatitis Herpes  
Nervous Disorders Pneumonia Liver Disorder  
High Blood Pressure Kidney Disorder Tumor/Cancer  
Rheumatic Fever Tuberculosis Epilepsy  
Heart Problems Heart Murmur Gastrointestinal

yes no Any other conditions you feel we should know about?  
\_\_\_\_\_

### WOMEN ONLY:

yes no Has menstruation begun? When? \_\_\_\_\_  
yes no Pregnant now?

## DENTAL INFORMATION

What would you like to change about your smile?  
\_\_\_\_\_  
\_\_\_\_\_  
Circle: Would you like to wear braces? or Invisalign?  
yes no Do you floss? \_\_\_\_\_ Times per day? \_\_\_\_\_  
yes no Do you brush your teeth? \_\_\_\_\_ Times per day? \_\_\_\_\_  
yes no Bleeding gums, bad taste or mouth odor?  
yes no Difficulty in chewing or jaw clenching, clicking, or locking?

yes no Tooth grinding or clenching?  
yes no Injuries to face, mouth, teeth or chin? (circle)  
yes no Do you gag easily?  
yes no Are your teeth sensitive?  
yes no Have you had problems with previous dental treatments?  
yes no Are you apprehensive about dental treatment?  
yes no Play a musical instrument? \_\_\_\_\_  
yes no Play a sport? \_\_\_\_\_

Signature Parent/Patient: \_\_\_\_\_

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

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

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

## UPDATES OR CHANGES

Date	Comments/Updated	Signature	Staff Initial
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

*Brown-Saito Orthodontics*

East Vancouver 300 SE 120th Avenue \* West Vancouver 3600 Main Street  
360-256-7220

www.brownorthodontics.com



## Acknowledgement of Receipt of Notice of Privacy Practices And Photo Permission

\_\_\_\_\_  
Patient Name

1. A copy of Brown-Saito Orthodontics office's policy on confidentiality of personal health information was made available to me.
2. I agree to permit this patient's likeness or personal image, either by images or video representing and depicting the treatment provided or name, to be displayed in Brown-Saito's office, photo albums, website, advertising, promotional or educational materials, and/or social media. I relinquish all rights to any image obtained during the course of my treatment and will not be paid for the use of my images. I understand that Brown-Saito Orthodontics will make all reasonable efforts to safeguard my privacy as required by applicable law. I may advise you in writing if my wishes change at any time.

☐ Yes, I agree;    ☐ No, I don't agree, please don't use images.

\_\_\_\_\_  
Signature of Parent/Guardian or Patient if Adult

\_\_\_\_\_  
Relationship to Patient

\_\_\_\_\_  
Date







## **Notice of Privacy Practices**

THIS NOTICE DESCRIBES HOW HEALTH INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

### **OUR LEGAL DUTY**

We are required by law to maintain the privacy of protected health information, to provide individuals with notice of our legal duties and privacy practices with respect to protected health information, and to notify affected individuals following a breach of unsecured protected health information. We must follow the privacy practices that are described in this Notice while it is in effect. This Notice takes effect 9/23/2013, and will remain in effect until we replace it.

We reserve the right to change our privacy practices and the terms of this Notice at any time, provided such changes are permitted by applicable law, and to make new Notice provisions effective for all protected health information that we maintain. When we make a significant change in our privacy practices, we will change this Notice and post the new Notice clearly and prominently at our practice location, and we will provide copies of the new Notice upon request.

You may request a copy of our Notice at any time. For more information about our privacy practices, or for additional copies of this Notice, please contact us using the information listed at the end of this Notice.

### **HOW WE MAY USE AND DISCLOSE HEALTH INFORMATION ABOUT YOU**

We may use and disclose your health information for different purposes, including treatment, payment, and health care operations. For each of these categories, we have provided a description and an example. Some information, such as HIV-related information, genetic information, alcohol and/or substance abuse records, and mental health records may be entitled to special confidentiality protections under applicable state or federal law. We will abide by these special protections as they pertain to applicable cases involving these types of records.

**Treatment.** We may use and disclose your health information for your treatment. For example, we may disclose your health information to a specialist providing treatment to you.

**Payment.** We may use and disclose your health information to obtain reimbursement for the treatment and services you receive from us or another entity involved with your care. Payment activities include billing, collections, claims management, and determinations of eligibility and coverage to obtain payment from you, an insurance company, or another third party. For example, we may send claims to your dental health plan containing certain health information.

**Healthcare Operations.** We may use and disclose your health information in connection with our healthcare operations. For example, healthcare operations include quality assessment and improvement activities, conducting training programs, and licensing activities.

**Individuals Involved in Your Care or Payment for Your Care.** We may disclose your health information to your family or friends or any other individual identified by you when they are involved in your care or in the payment for your care. Additionally, we may disclose information about you to a patient representative. If a person has the authority by law to make health care decisions for you, we will treat that patient representative the same way we would treat you with respect to your health information.

**Disaster Relief.** We may use or disclose your health information to assist in disaster relief efforts.

**Required by Law.** We may use or disclose your health information when we are required to do so by law.

**Public Health Activities.** We may disclose your health information for public health activities, including disclosures to:

- Prevent or control disease, injury or disability;
- Report child abuse or neglect;
- Report reactions to medications or problems with products or devices;
- Notify a person of a recall, repair, or replacement of products or devices;
- Notify a person who may have been exposed to a disease or condition; or
- Notify the appropriate government authority if we believe a patient has been the victim of abuse, neglect, or domestic violence.

**National Security.** We may disclose to military authorities the health information of Armed Forces personnel under certain circumstances. We may disclose to authorized federal officials health information required for lawful intelligence, counterintelligence, and other national security activities. We may disclose to correctional institution or law enforcement official having lawful custody the protected health information of an inmate or patient.

**Secretary of HHS.** We will disclose your health information to the Secretary of the U.S. Department of Health and Human Services when required to investigate or determine compliance with HIPAA.

**Worker's Compensation.** We may disclose your PHI to the extent authorized by and to the extent necessary to comply with laws relating to worker's compensation or other similar programs established by law.

**Law Enforcement.** We may disclose your PHI for law enforcement purposes as permitted by HIPAA, as required by law, or in response to a subpoena or court order.

**Health Oversight Activities.** We may disclose your PHI to an oversight agency for activities authorized by law. These oversight activities include audits, investigations, inspections, and credentialing, as necessary for licensure and for the government to monitor the health care system, government programs, and compliance with civil rights laws.



**Judicial and Administrative Proceedings.** If you are involved in a lawsuit or a dispute, we may disclose your PHI in response to a court or administrative order. We may also disclose health information about you in response to a subpoena, discovery request, or other lawful process instituted by someone else involved in the dispute, but only if efforts have been made, either by the requesting party or us, to tell you about the request or to obtain an order protecting the information requested.

**Research.** We may disclose your PHI to researchers when their research has been approved by an institutional review board or privacy board that has reviewed the research proposal and established protocols to ensure the privacy of your information.

**Coroners, Medical Examiners, and Funeral Directors.** We may release your PHI to a coroner or medical examiner. This may be necessary, for example, to identify a deceased person or determine the cause of death. We may also disclose PHI to funeral directors consistent with applicable law to enable them to carry out their duties.

**Fundraising.** We may contact you to provide you with information about our sponsored activities, including fundraising programs, as permitted by applicable law. If you do not wish to receive such information from us, you may opt out of receiving the communications.

#### **Other Uses and Disclosures of PHI**

Your authorization is required, with a few exceptions, for disclosure of psychotherapy notes, use or disclosure of PHI for marketing, and for the sale of PHI. We will also obtain your written authorization before using or disclosing your PHI for purposes other than those provided for in this Notice (or as otherwise permitted or required by law). You may revoke an authorization in writing at any time. Upon receipt of the written revocation, we will stop using or disclosing your PHI, except to the extent that we have already taken action in reliance on the authorization.

We customarily post pictures on our bulletin board; taken the day the patient has their orthodontic appliances placed ("arrival picture") and removed ("departure picture"). These pictures may also be posted on our website or Facebook. We also display announcements, acknowledgements, and media information throughout the office and on our website or Facebook. We run contests that our patients can participate in. We feature pictures of our winners on our bulletin boards, website, Facebook and/or in our reception area photo albums. Your contest entry will be considered permission for posting of the winner's picture. In addition, our informed consent policy covers the use of orthodontic records, including photographs made in the process of examinations, treatment, and retention, for purposes of professional consultations with other practitioners and patients with similar diagnoses, research, education, or publication in professional journals. **Please advise us in writing if at any time your wishes change.**

#### **Your Health Information Rights**

**Access.** You have the right to look at or get copies of your health information, with limited exceptions. You must make the request in writing. You may obtain a form to request access by using the contact information listed at the end of this Notice. You may also request access by sending us a letter to the address at the end of this Notice. If you request information that we maintain on paper, we may provide photocopies. If you request information that we maintain electronically, you have the right to an electronic copy. We will use the form and format you request if readily producible. We will charge you a reasonable cost-based fee for the cost of supplies and labor of copying, and for postage if you want copies mailed to you. Contact us using the information listed

at the end of this Notice for an explanation of our fee structure. If you are denied a request for access, you have the right to have the denial reviewed in accordance with the requirements of applicable law.

**Disclosure Accounting.** With the exception of certain disclosures, you have the right to receive an accounting of disclosures of your health information in accordance with applicable laws and regulations. To request an accounting of disclosures of your health information, you must submit your request in writing to the Privacy Official. If you request this accounting more than once in a 12-month period, we may charge you a reasonable, cost-based fee for responding to the additional requests.

**Right to Request a Restriction.** You have the right to request additional restrictions on our use or disclosure of your PHI by submitting a written request to the Privacy Official. Your written request must include (1) what information you want to limit, (2) whether you want to limit our use, disclosure or both, and (3) to whom you want the limits to apply. We are not required to agree to your request except in the case where the disclosure is to a health plan for purposes of carrying out payment or health care operations, and the information pertains solely to a health care item or service for which you, or a person on your behalf (other than the health plan), has paid our practice in full.

**Alternative Communication.** You have the right to request that we communicate with you about your health information by alternative means or at alternative locations. You must make your request in writing. Your request must specify the alternative means or location, and provide satisfactory explanation of how payments will be handled under the alternative means or location you request. We will accommodate all reasonable requests. However, if we are unable to contact you using the ways or locations you have requested, we may contact you using the information we have.

**Amendment.** You have the right to request that we amend your health information. Your request must be in writing, and it must explain why the information should be amended. We may deny your request under certain circumstances. If we agree to your request, we will amend your record(s) and notify you of such. If we deny your request for an amendment, we will provide you with a written explanation of why we denied it and explain your rights.

**Right to Notification of a Breach.** You will receive notifications of breaches of your unsecured protected health information as required by law.

**Electronic Notice.** You may receive a paper copy of this Notice upon request, even if you have agreed to receive this Notice electronically on our Web site or by electronic mail (e-mail).

#### **Questions and Complaints**

If you want more information about our privacy practices or have questions or concerns, please contact us.

If you are concerned that we may have violated your privacy rights, or if you disagree with a decision we made about access to your health information or in response to a request you made to amend or restrict the use or disclosure of your health information or to have us communicate with you by alternative means or at alternative locations, you may complain to us using the contact information listed at the end of this Notice. You also may submit a written complaint to the U.S. Department of Health and Human Services. We will provide you with the address to file your complaint with the U.S. Department of Health and Human Service upon request

We support your right to the privacy of your health information. We will not retaliate in any way if you choose to file a complaint with us or with the U.S. Department of Health and Human Services.

**Our Privacy Official: Kathy MacLearn**  
**300 SE 120<sup>th</sup> Ave Suite. 900 Vancouver, WA 98683**  
**Telephone: 360-256-7220 Fax: 360-253-2907**  
**E-mail: [Kathy@brownorthodontics.com](mailto:Kathy@brownorthodontics.com)**