

# PATIENT REGISTRATION

\*Please complete all fields.

Patient Name: \_\_\_\_\_ Nickname: \_\_\_\_\_ DOB: \_\_\_\_\_  M  F  
Last First Middle

Social Security # \_\_\_\_\_ If under 18, School \_\_\_\_\_ Grade \_\_\_\_\_

Has the patient had previous orthodontic treatment?  YES  NO If yes, by whom \_\_\_\_\_ and when \_\_\_\_\_

Has anyone else in your family sought orthodontic treatment in our office?  YES  NO If yes, name \_\_\_\_\_

CUSTODIAL PARENT/LEGAL GUARDIAN (OR SELF IF OVER 18)	SECONDARY RESPONSIBLE PARTY
Name: _____ Last First Middle	Name: _____ Last First Middle
Relationship to Patient _____	Relationship to Patient _____
Social Security #: _____ DOB _____	Social Security #: _____ DOB _____
Phone numbers: (H) _____ (C) _____ (W) _____	Phone numbers: (H) _____ (C) _____ (W) _____
Email address _____	Email address _____
Home Address: _____ _____	Home Address: _____ _____
City: _____ State: _____ Zip: _____	City: _____ State: _____ Zip: _____
Rent? <input type="checkbox"/> Own? <input type="checkbox"/> How long at this address? _____ Year(s)	Rent? <input type="checkbox"/> Own? <input type="checkbox"/> How long at this address? _____ Year(s)
Employer _____	Employer _____
Occupation _____ Years Employed _____	Occupation _____ Years Employed _____
Previous Address (If less than 3 years) : Street: _____	Previous Address (If less than 3 years) : Street: _____
City: _____ State: _____ Zip: _____	City: _____ State: _____ Zip: _____
Are Parents Divorced or Separated? <input type="checkbox"/> YES <input type="checkbox"/> NO	
Who has custody of the patient? <input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Joint	

## INSURANCE INFORMATION - \*Please give your insurance card to our Scheduling Coordinator so that we may obtain a copy.

Insured's Name \_\_\_\_\_

DOB \_\_\_\_\_ Insured's Social # \_\_\_\_\_

Insured's Employer/Group Name \_\_\_\_\_

Insurance Provider \_\_\_\_\_

Group # \_\_\_\_\_ ID Number \_\_\_\_\_

Insurance Co Address \_\_\_\_\_  
\_\_\_\_\_

PATIENT'S DENTAL HISTORY

Name of Dentist \_\_\_\_\_ Date of last dental checkup \_\_\_\_\_

What are your concerns about your smile? \_\_\_\_\_

Do you have any concerns about facial esthetics, such as, but not limited to, a retruded or crooked chin? YES NO

If Yes, please explain:

Would you like to be informed if corrective jaw surgery is necessary to achieve an ideal result? YES NO

Has the patient had any of the following?

Finger, thumb or lip habit YES NO How severe \_\_\_\_\_ How long \_\_\_\_\_ When (night only, etc.)

Periodontal disease YES NO If yes, who is treating the condition?

Traumatic injury to a tooth, teeth, jaws or face? YES NO Explain:

Clicking or pain in the jaw joint? YES NO Speech concerns or problems? YES NO

Limited opening or locking of the jaw? YES NO

PATIENT'S MEDICAL HISTORY

Physicians Name \_\_\_\_\_ Date of last physical \_\_\_\_\_

Patient's General Health: Good Fair Poor

Has the patient had any of the following?

Heart Murmur YES NO Does the patient require medication for dental appointments? YES NO

Rheumatic Fever YES NO

Diabetes YES NO

Heart Trouble YES NO

AIDS, Herpes or HIV YES NO

Emotion Problems YES NO

Explain \_\_\_\_\_

Is the patient taking any medication? YES NO

Please list: \_\_\_\_\_

Are there any allergies or drug sensitivities? YES NO

Please list: \_\_\_\_\_

AUTHORIZATION FOR RELEASE OF INFORMATION

I authorize the orthodontic offices of Wheelock & Johnson Orthodontics to release any information for \_\_\_\_\_ (Patient Name) regarding the dental history and/or treatment to any dentist, dental specialist, etc. for the purpose of verifying, evaluating or treating the aforementioned patient. I understand that, where appropriate, credit bureau reports may be obtained.

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

(Parent's signature, if minor)

HOW DID YOU HEAR ABOUT US?

Please take a moment to let us know how you heard about our office. Please check the main reason you selected our office. Thank you!

- checkbox Dentist, Family Member/sibling, Internet, Friends/co-workers, Advertisement, Building sign, Other - Please State

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# WHEELOCK & JOHNSON ORTHODONTICS

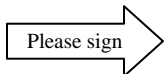
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## ACKNOWLEDGEMENT OF RECEIPT OF NOTICE OF PRIVACY PRACTICES

**\*\*You may refuse to sign this acknowledgement\*\***

I, \_\_\_\_\_, have received a copy of this office's notice of  
(Parent or guardian if patient is under 18 years of age)

privacy practices (see back) for \_\_\_\_\_.  
(Patient Name)



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

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### For Office Use Only

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We attempted to obtain written acknowledgement of receipt of our Notice of Privacy Practices, but acknowledgement could not be obtained because:

- Individual refused to sign
- Communication barriers prohibited obtaining the acknowledgement
- Parent/Guardian unavailable at appointments to sign
- An emergency situation prevented us from obtaining acknowledgement
- Other (Please Specify) \_\_\_\_\_

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# WHEELOCK & JOHNSON ORTHODONTICS

## NOTICE OF PRIVACY PRACTICES

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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. THE PRIVACY OF YOUR HEALTH INFORMATION IS IMPORTANT TO US.

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### OUR LEGAL DUTY

We are required by applicable federal and state law to maintain the privacy of your health information. We are also required to give you this Notice about our privacy practices, our legal duties, and your rights concerning your health information. We must follow the privacy practices that are described in this Notice while it is in effect. This Notice takes effect April 14, 2003, 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. We reserve the right to make the changes in our privacy practices and the new terms of our Notice effective for all health information that we maintain, including health information we created or received before we made the changes. Before we make a significant change in our privacy practices, we will change this Notice and make the new Notice available 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.

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### USES AND DISCLOSURES OF HEALTH INFORMATION

We use and disclose health information about you for treatment, payment and healthcare options. For example:

**Treatment:** We may use or disclose your health information to a physician or other healthcare provider providing treatment to you.

**Payment:** We may use or disclose your health information to obtain payment for services we provide to you.

**Healthcare Operations:** We may use or disclose your health information in connection with our healthcare operations.

Healthcare operations include quality assessment and improvement activities, reviewing the competence or qualifications of healthcare professionals, evaluating practitioner and provider performance, conducting training programs, accreditation, certification, licensing or credentialing activities.

**Your Authorization:** In addition to our use of your health information for treatment, payment or healthcare operations, you may give us written authorization to use your health information or to disclose it to anyone for any purpose. If you give us an authorization, you may revoke it in writing at any time. Your revocation will not affect any use or disclosures permitted by our authorization while it was in effect. Unless you give us a written authorization, we cannot use or disclose your health information for any reason except those described in this Notice.

**To Your Family and Friends:** We must disclose your health information to you, as described in the Patient Rights section of this Notice. We may disclose your health information to a family member, friend or other person to the extent necessary to help with your healthcare or with payment for your healthcare, but only if you agree that we may do so.

**Persons involved in care:** We may use or disclose health information to notify, or assist in the notification of (including identifying or location) a family member, your personal representative or another person responsible for your care, of your location, your general condition, or death. If you are present, then prior to use or disclosure of your health information, we will provide you with an opportunity to object to such uses or disclosures. In the event of your incapacity or emergency circumstances, we will disclose health information based on a determination using our professional judgment disclosing only health information that is directly relevant to the person's involvement in your healthcare. We will also use our professional judgment and our experience with common practice to make reasonable inferences of your best interest in allowing a person to pick up filled prescriptions, medical supplies, x-rays, or other similar forms of health information.

**Marketing Health-Related Services:** We will not use your health information for marketing communications without your written authorization.

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

**Abuse or Neglect:** We may use or disclose your health information to appropriate authorities if we reasonably believe that you are a possible victim of abuse, neglect, or domestic violence or the possible victim or other crimes. We may disclose your health information to the extent necessary to avert a serious threat to your health or safety or the health or safety of others.

**National Security:** We may disclose to military authorities the health information of Armed Forces personnel under certain circumstances. We may disclose to the 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 or protected health information of inmate or patient under certain circumstances.

**Appointment Reminders:** We may use or disclose your health information to provide you with appointment reminders, such as voicemail messages, emails, text messages, postcards, or letters.

### PATIENT RIGHTS

**Access:** You have the right to look at or get copies of your health information, with limited exceptions. You may request that we provide copies in a format other than photocopies. We will use the format you request unless we cannot practically do so. (You must make a request in writing to obtain access to your health information. You may obtain a form to request access by using the contact information listed at the end of this Notice. We will charge you a reasonable cost-based fee for expenses such as copies and staff time. You may also request access by sending us a letter to the address at the end of this Notice. If you request copies, we will charge you \$0.75 each page and \$20.00 per hour for staff time to locate and copy your health information, and postage if you want the copies mailed to you. If you request an alternative format, we will charge a cost-based fee for providing your health information in that format. If you prefer, we will prepare a summary or an explanation of your health information for a fee. Contact us using the information listed at the end of this Notice for a full explanation of our fee structure.)

**Disclosure Accounting:** You have the right to receive a list of instances in which we or our business associates disclosed your health information for purposes, other than treatment, payment, healthcare operations and certain other activities, for the last 6 years, but not before April 14, 2003. 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 these additional requests.

**Restriction:** You have the right to request that we place additional restrictions on our use or disclosure of your health information. We are not required to agree to these additional restrictions, but if we do, we will abide by our agreement (except in an emergency).

**Alternative Communication:** You have the right to request that we communicate with you about your health information by alternative means or to alternative locations. (You must make your request in writing.) Your request must specify the alternative means or location and provide satisfactory explanation how payments will be handled under the alternative means or location you request.

**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.

**Electronic Notice:** If you receive this Notice on our Web Site or by electronic means (e-mail), you are entitled to receive this Notice in written form.

### 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 Services 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 the U.S. Department of Health and Human Services.