

Thank you for choosing Newport Orthopedic Institute. Our office looks forward to serving you.

Prior to your appointment

- Please complete the attached New Patient paperwork. Be sure to read the Financial Policy, Notice of Privacy Practices, and Patient Policies prior to completing the acknowledgement.
- You will receive an automated text message the 48 hours prior to your appointment reminding you of your appointment time and to check in.
- If for any reason you are unable to keep your confirmed appointment, please call our office to reschedule your visit to suit your needs.
- Note our telephone hours are 7:00am 6:00pm M-F, someone will be happy to assist you by calling (949) 722-7038.
- Visit NOI's web-site at <u>www.NewportOrtho.com</u> to become more familiar with our office and visit.

The day of your appointment

- There are additional steps to the registration process that must be completed at the office on your first visit, so please be sure to arrive 30-minutes early with your completed paperwork so that you can make your appointment time.
- Bring your insurance card(s) or a legible copy and a photo ID. If for any reason you do not have a copy of your insurance card, please contact your insurance carrier prior to your arrival and bring proof of eligibility to your appointment.
- Means for satisfying the co-payment required by your insurance company or unmet deductible.

Thanks again for choosing Newport Orthopedic Institute!







Newport Orthopedic Institute

22 Corporate Plaza Drive Newport Beach, CA 92660 (949) 722-7038

PATIENT INFORMATION						
NAME (Last, First Middle)		SS#		BIRTHDATE	SEX	
LOCAL ADDRESS		CITY, STATE, ZIP				
HOME PHONE	DAY PHONE	1	EMAIL ADDR	ESS		
PRIMARY PHYSICIAN	REFERRING PHYSICIAN		REFERRAL S	OURCE		
PRIMARY INSURANCE INFORMATION NAME OF INSURANCE COMPANY			POLICY #			
ADDRESS OF INSURANCE COMPANY			GROUP #			
CITY, STATE, ZIP			PHONE #			
NAME OF INSURED PARTY (MAIN SUBSC	CRIBER)		RELATIONS	HIP TO PATIENT		
ADDRESS OF INSURED PARTY		CITY, STATE	, ZIP			
DATE OF BIRTH OF INSURED PARTY	SS # OF INSURED PARTY		PHONE # OF	INSURED PARTY		
SECONDARY INSURANCE INF	ORMATION (If Appli	cable)				
NAME OF INSURANCE COMPANY			POLICY #			
ADDRESS OF INSURANCE COMPANY			GROUP #			
CITY, STATE, ZIP			PHONE #			
NAME OF INSURED PARTY (MAIN SUBSCRIBER)			RELATIONS	HIP TO PATIENT		
ADDRESS OF INSURED PARTY		CITY, STATE	I , ZIP			
DATE OF BIRTH OF INSURED PARTY	SS # OF INSURED PARTY	1	PHONE # OF	INSURED PARTY		
EMERGENCY CONTACT						
NAME			PHONE #			
RELATIONSHIP TO PATIENT			SECONDARY	PHONE #		

I hereby authorize and consent to examination and treatment as deemed necessary by physicians of Newport Orthopedic Institute. I authorize release of information to my insurance carrier should it be necessary. I hereby assign all medical and/or surgical benefits, including major medical benefits to which I am entitled, including Medicare, private insurance and other health plans to Newport Orthopedic Institute. This assignment will remain in effect until revoked by me in writing. A photocopy of this agreement is to be considered as valid as the original. I further authorize the release of all information necessary to secure payment. the undersigned agrees to pay any costs incurred by Newport Orthopedic Institute in the collection of amounts due including, but not limited to, reasonable attorney's fees.

SIGNATURE OF PATIENT/GUARDIAN



FINANCIAL POLICY

Newport Orthopedic Institute (NOI) is committed to providing you the best medical care. In order to achieve this goal, you must have a clear understanding of our financial policy, which is important in order to sustain a professional relationship.

As a patient entering our practice, we will require identifying information, including a current Driver's License or State ID Card, and insurance ID cards.

Payment Methods: NOI Accepts Cash, Checks, Visa, MasterCard, and American and Discover.

Uninsured or Self-Pay Patients: Estimated Payment is due in full at the time of service.

Insurance Billing: It is your responsibility to know your benefits both in and out of network and how they will apply to your treatment by the doctor. NOI will follow the insurance contract guidelines for billing and collections. Please verify if NOI is a preferred provider with your insurance plan prior to receiving services. HMO & EPO Patients: You are responsible for obtaining authorization and approval for treatment with your Medical Group or PCP prior to treatment.

HMO & EPO Patients: You are responsible for obtaining authorization and approval for treatment with your Medical Group or PCP prior to treatment. You will be fully responsible for all charges incurred if you receive treatment without obtaining authorization and/or prior approval.

Eligibility: NextGen is a new system NOI has adopted to verify real-time eligibility with your insurance **and its use is required at each visit**. In addition to eligibility, the system is designed to improve transparency around costs of care. It does so by providing NOI patients estimates of patient responsibility based on information received through integration (gateway) with your insurance company and the day's charges.

Co-Pay, Deductible and Share of Cost: Nextgen will also be used to **collect patient responsibility.** co-pays at the time of visit, as well as share of cost and deductibles at the time of claim processing.



No Show/ Cancellation Policy: When you schedule an appointment with Newport Orthopedic Institute, we set aside enough time to provide you with the highest quality of care. Should you need to cancel or reschedule an appointment, please contact our office as soon as possible, and no later than 24 hours prior to your scheduled appointment. This gives us time to schedule other patients who may be waiting for an appointment.

- Any patient who fails to show or cancels/reschedules an appointment and has not contacted our office with at least **24 business hours' notice** will be considered a No Show and charged a \$50.00 fee for an office visit and \$150.00 fee for an procedure.
- Any patient who fails to show or cancels/reschedules their surgery and had not contacted our office with at least **7 days** prior will be considered a No Show and charged a \$150.00 fee.
- Repeated missed appointments may result in our practice deciding to terminate its relationship with the patient

Insurance Information:

Narrow Networks: Blue Cross and Others: The insurance industry is changing and there are many narrow networks being developed. NOI has a long history of being an in-Network provider, but recent developments with BLUE CROSS Individual and Family Plans have restricted our participation with



this insurance. Group Blue Cross PPO is still in network but others may not be! If you are concerned about our network status, please contact your insurance plan for verification prior to your appointment.

Covered California: NOI is participating in Covered California through Blue Shield, Health Net, & United Healthcare.

Surgery Deposits: Deposits are due in full prior to the scheduled procedure. Deposit amounts vary based on your share of costs and include any unpaid deductible or co-insurance. NOI charges only for professional services provided by your physician. You will receive separate billing from the facility where your procedure is performed, the anesthesiologists, and other assistants that your surgeon may require.

Durable Medical Equipment (DME): DME is provided as ordered by your physician. Your insurance will be billed in accordance to your insurance coverage guidelines; however, you will be responsible for any unmet deductible and co-insurance rates. Some DME products are not covered by insurance, in which case, you will be notified of the item and its cost. DME is intended for single patient use only and is not subject to returns.

Forms: There is a \$25.00 fee for any form that requires a doctor's signature. This includes non-government disability forms, travel cancellation, employer forms, and any other miscellaneous requests or forms. This is not payable by insurance and must be paid upon request.

Medical Records: All medical records requests are now done through the patient portal. Please inquire with a front desk receptionist or medical assistant to get signed up.

Referrals for Physician & Ancillary Services: When being referred to an outside organization as part of your care (i.e., Physical Therapy, MRI, DME Providers, Physicians, etc.), NOI does not verify if these organizations are preferred providers with your insurance plan. Please verify this directly with your insurance company prior to obtaining services.

If you choose to seek care at a non-preferred/non-participating provider for ancillary services, you may be responsible for higher copayments and costs in excess of your insurance company's allowable



amounts, up to the non-preferred provider's total billed charges. Patients accept the financial responsibility for any additional cost for service when obtaining services from a non-preferred/non-participating provider regardless of being referred by Newport Orthopedic Institute. For assistance locating a preferred provider for ancillary services, you may contact your insurance company directly.

Returned Checks: A \$25.00 fee will be charged for any returned checks. We will be unable to accept your check for any services thereafter.

Outside Collections and Payment Plans: If unable to make payment in full, contact the billing department immediately to make payment arrangements. If the account is referred for collections, you will be responsible for the balance of your account plus a collection agency charge of 25% of the balance and reasonable attorney's fees. If your account becomes delinquent or is referred for collections, your provider and/or any collection agent of your provider has authorization to obtain your credit report to assist them in the collection of your bill.



NOTICE OF PRIVACY PRACTICES

We understand that medical information about you and your health is personal. As the custodians of the information in your medical record, we are committed to protecting the privacy of your information as required by law, professional accreditation standards and our internal policies and procedures.

The Notice of Privacy Practices explains your rights, our legal duties and our privacy practices. It also describes how medical information about you may be used and disclosed and how you can get access to this information. The policy in its entirety can be requested from the receptionist or found on our website. Please review it carefully. For your convenience the following is a summary of the information discussed in the notice.

- Our Pledge
- Your Personal Information
- Our Privacy Practices
- How We May Use or Share Your Information for:
 - Treatment
 - Payment
 - Health Care Operations
 - Notifications and Special Circumstance and the Law
 - Research and Marketing
 - Your Written Permission
- Other Restrictions
- Your Rights
- Changes

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• Questions or Complaints

Your agreement only acknowledges that we have made available for your review a paper copy of our Notice of Privacy Practices and have retained a copy of this acknowledgement as required by law.

Health Information Exchange: This practice is participating in the Hoag Health Information Exchange (HIE), and electronic system through which it and other participating healthcare providers can share patient information according to nationally recognized standards and in compliance with federal and stat law, which protects your privacy. Through HIE, your participating providers will be able to access information about you that is necessary for your treatment, unless you choose to have your information withheld from the HIE by personally opting out from participation

If you choose to opt out of the HIE (that is, if you feel that your medical information should not be shared through the HIE), we will continue to use your medical information in accordance with the Notice of Privacy Practices and the law, but will not make it available to others through the HIE. To opt out of the HIE, please contact the Hoag Director of Health Information Exchange in writing at One Hoag Drive, Newport Beach, CA 92663, or by telephone at 949-764-8722.

NEWPORT ORTHOPEDIC INSTITUTE Patient Policies

PRESCRIPTION REFILL POLICY

The patient is responsible for knowing when medication(s) will need to be refilled. The specific protocol is outlined below. All patients are requested to execute acknowledgement that they have read the protocol and agree with its requirements.

- It is the policy of Newport Orthopedic Institute that medications will only be refilled between 8:00am to 3:30pm, Monday Friday.
- No prescription refills will be given on Saturday, Sunday or holidays.
- At least 48 72 business hours are needed to process a refill request.
- Early refills will not be authorized.
- Medications or prescriptions will not be replaced if lost or misplaced.
- If your physician is not in the office, or is unavailable, you may have to wait until he/she returns for medication refills to be authorized.
- Non-controlled/non-narcotic prescriptions require a follow up appointment every 3-6 months.
- Controlled-substances/narcotic prescriptions require a follow up appointment every 30-90 days.
- Prescriptions may be picked up between 8:30am 12:00pm and 1pm 5pm. Our office is closed for lunch from 12pm 1pm.
- When picking up a prescription for a controlled substance, you may be asked to provide a valid form of picture identification.

The physicians of Newport Orthopedic Institute do not routinely prescribe narcotics on a long-term basis, nor do we administer narcotics by injection at any of our office locations. Individuals who are seeking "pain killers" for chronic use will be advised to make an appointment with a pain management or primary care physician.

MEDICATION ACKNOWLEDGEMENT OF DRIVING IMPAIRMENT

(Not applicable for patients under 16 years of age)

While you are under the care of your Physician, you may be prescribed medication that could impair your ability to operate a motor vehicle, heavy machinery or equipment.

Please refrain from operating a motor vehicle under the influence of prescribed medications that impair judgment. Arrange for proper transportation and use the proper precautions when taking prescribed medications. If you have any questions, please ask your Physician or your pharmacist.



DME ACKNOWLEDGMENT OF DRIVING IMPAIRMENT

(Not applicable for patients under 16 years of age)

While under the care of your Physician, you may be fitted into Durable Medical Equipment, or DME (Cain, Walking Boots, Shoulder Slings, etc.). While the DME is to be utilized to protect or support your condition, by wearing the DME, it may impair your ability to operate automotive vehicles.

You might not be able to operate a vehicle safely due to the use of your DME, please arrange for proper transportation and use the proper precautions. If you have any questions regarding this matter, please ask your Physician.

DIAGNOSTIC TESTING RESULTS

While under the care of a Physician/Provider with NOI, you may be sent to have diagnostic testing performed (MRI, CT-scan, bone scan, lab work). It is the patient's responsibility to return to the office to receive the results of any diagnostic testing. Most testing is completed at an outside facility. It is the patient's responsibility to obtain the results of all tests in addition to ensuring all outside results are sent to the Physician's office prior to the follow up appointment. Reports may be faxed to (949) 630-4903. NOI is able to directly access testing performed at some Hoag Facilities as well as Newport Imaging Center.



ORTHOPEDIC OPIOID PAIN MANAGEMENT AGREEMENT

In the course of your treatment, your provider may prescribe a controlled substance, which is a type of medication that is regulated by State and/or the Federal Government. By accepting the prescription, you are agreeing to follow the Orthopedic Opioid Pain Management Agreement. The purpose of the Agreement is to prevent misunderstandings about certain medications and to help you and your provider comply with the laws regarding controlled pharmaceuticals.

I, the patient, understand that I have the following responsibilities:

- I am aware that there is a risk of addiction to opioid/narcotic pain medications. I have honestly informed my physician of the complete history of my opioid past.
- I will take the medications only at the dose, frequency and route as prescribed, which includes by mouth, IV, injection or as specified by my physician. I will not increase or change medications or their frequency without the approval of my provider.
- I understand that while I am under the care of my physician at Newport Orthopedic Institute and as part of the coordination of my care, I will disclose and discuss all Opioid prescription medications that I am taking from other physicians.
- I will inform my provider of all other medications that I am taking.
- I will protect my opioid/narcotic pain prescriptions and medications. I will keep them out of the reach of children/pets and will place them in a secure location to prevent theft. I understand that lost and/or destroyed medications will not be replaced.
- I will not share, sell or trade my opioid/narcotic pain medications with anyone. I understand this is a violation of federal and state law.

I understand that my provider at Newport Orthopedic Institute will comply with the State of California guidelines and periodically check the DEA database to ensure compliance.



By signing	below, you are acknowledging that you have received, read, and agree to Newport Orthopedic Institute's:
	Financial Policy (attached)
_	I have read the Financial Policy. I understand and agree to this Financial Policy.
Initials	_
	Notice of Privacy Practices (attached)
	I hereby acknowledge the receipt of the Notice of Privacy Practices. A personal
Initials	copy of the Privacy Practices will be available per my request.
	No Show Policy (attached)
	I hereby acknowledge the receipt of the Notice of Privacy Practices. A personal
Initials	copy of the Privacy Practices will be available per my request.
	Prescription Refill Policy (attached)
	I have read the Prescription Refill Policy. I understand and agree to this
Initials	Prescription Refill Policy.
	Medications Acknowledgement of Driving Impairment (attached)
	I have read and understand the Medications Acknowledgment of Driving
Initials	Impairment. (Not applicable for patients under 16 years of age)
	DME Acknowledgement of Driving Impairment (attached)
	I have read and understand the DME Acknowledgment of Driving Impairment.
Initials	(Not applicable for patients under 16 years of age)
	Acknowledgement of Diagnostic Testing Results (attached)
	I have read and understand the Diagnostic Testing Results.
Initials	
	Acknowledgement of Orthopedic Opioid Pain Management Agreement (attached)
	I have read and understand the Orthopedic Opioid Pain Management Agreement.
Initials	

Signature of Patient or Responsible Party

Printed Name

Date

Use or Disclosure of Personal Health Information Authorization

I authorize the release of my patient health information to the following personal contacts (Spouse, Child, Assistant, etc.). I understand it is my responsibility to notify NOI of any changes in the information below.

Name Phone #:	Relationship	 Appointment Information Treatment Information Billing Information
Name Phone #:	Relationship	 Appointment Information Treatment Information Billing Information

I understand that, as set forth in the facility's Privacy Notice, I have the right to revoke this authorization, in writing, at any time by sending written notification to: Privacy Officer Newport Orthopedic Institute, 22 Corporate Plaza Dr., Newport Beach, CA 92660



Dear Patient,

Legislation has recently been enacted that requires healthcare facilities to adopt an Electronic Medical Records system and utilize the system to report specific data. The following questions are to fulfill this requirement.

Newport Orthopedic Institute would like to assure you that your answers to these questions will have absolutely no impact on your care. You may opt to not answer any question by checking or writing "Decline to Answer."

RACE

ETHNICITY

🗌 African American	Hispanic origin
🗌 American Indian or Alaskan Native	🗌 Not Hispanic origin
Asian	Decline to Answer
Hispanic	
Pacific Islander	
U White	
Other	
Decline to Answer	

Primary Language

Thank you,

Newport Orthopedic Institute

Patient Health History

me:				Date	of Birth	/ /	Ade.
LAST	FIRST	MIDDLE INIT	ΓIAL	MAIDEN	MO	// NTH DAY YE	, (go EAR
:: □⊔F □⊔M Height:	Weight:	Primary Lang	juage:		_Do you n	eed an inte	rpreter?
ferred here by (check one)	🗆 Self 🛛 Famil	ly 🛛 Friend 🖵 D	octor 🛛 🗘	Other Health Profes	sional		
ne of person making referral:							
mary Care Physician:							
ve you had a recent medical e	valuation by one o	of these doctors?		_Name of Doctor:			
st Medical History							
he past 4 weeks, have you ha	d a cough, cold, s	sore throat or bron	chitis that	required treatment?			
you now or have you ever had	d any of the follov	ving? (If yes, chec	k box)				
Cancer Type:	□ Ar	nemia	🗆 Jau	ndice	Epilepsy	/	
Goiter	🗆 Er	nphysema	🗆 Pne	eumonia	Rheuma	atic fever	
Cataracts	□ He	eart Problems	□ HIV	/AIDS	Colitis		
Nervous Breakdown	🗆 Le	eukemia	□ Gla	ucoma	Psoriasi	S	
Bad Headaches	🗆 Di	abetes	□ Astł	nma	□ Arthritis		
Kidney Disease		omach Ulcers	□ Stro	ke	Childhood Arthritis		
District District Description							
	e had that are not	already noted		in, vitamins, laxatives,	calcium and c	other suppleme	ents)
any other conditions you have	e had that are not dications you are tal	already noted	ms as aspir	in, vitamins, laxatives,			
t any other conditions you have rrent Medications (List any med Drug Allergies: Yes	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives,	Please ch	eck: Helpe	d?
any other conditions you have rent Medications (List any med Drug Allergies: Yes Type of Reaction:	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch A Lot	eck: Helpe Some	d? Not At Al
any other conditions you have rent Medications (List any med Drug Allergies: Yes Type of Reaction:	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch A Lot	Some	d? Not At Al
any other conditions you have rent Medications (List any me Drug Allergies: Yes Type of Reaction:	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch A Lot	Some	d? Not At Al
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rrent Medications (List any medications Trug Allergies: Yes	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch A Lot	Some	d? Not At Al
any other conditions you have rent Medications (List any me Drug Allergies: Yes Type of Reaction:	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch	Some	d? Not At Al
any other conditions you have rent Medications (List any med Drug Allergies: Yes Type of Reaction:	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch	eck: Helpe	d? Not At Al
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t any other conditions you have rrent Medications (List any med Drug Allergies: Yes Type of Reaction:	e had that are not dications you are tal	king. Include such ite To What?	ms as aspir	in, vitamins, laxatives, How long have you taken this	Please ch	Some	d? Not At Al

List All Surgeries	Year	Reason
1.		
2.		
3.		
4.		
5.		

Social and Family History

Have you ever smoked? Yes No Quantity/Amount:	If quit, how long ago?
Do you drink alcohol? □ Yes □ No number per week	Has anyone ever told you to cut down on your drinking? Yes No

Do you use recreational drugs, such as marijuana, cocaine, meth? DYes DNo If yes, please list____

Do you know of any blood relative who has or had any of the following? (Check and indicate relationship)

Cancer	□ Heart Disease	Rheumatoid Arthritis	□ Tuberculosis
Type □ Leukemia	□ High Blood pressure	Osteoarthritis	□ Diabetes
Stroke	□ Bleeding tendency	□ Asthma	□ Goiter
	□ Alcoholism	_ □ Psoriasis	_ Autoimmune Disease

SYSTEMS REVIEW

As you review the following list, please check any of those problems, which have significantly affected you.

CONSTITUTIONAL	GASTROINTESTINAL	INTEGUMENTARY (SKIN AND/OR BREAST)
Recent weight gain	Nausea	Easy bruising
amount	Vomiting of blood or coffee ground material	Redness
Recent weight loss	Stomach pain relieved by food or milk	□ Rash
amount	Blood in stools	□ Hives
Fatigue	Jaundice	Hair loss
Weakness	Persistent diarrhea	Tightness
Fever	Black stools	Nodules/bumps
Eyes	Heartburn	Color changes of hands or feet in the cold
Loss of Vision	Increasing constipation	NEUROLOGIČAL SYSTEM
Double or blurred Vision		
Itching eyes		
	GENITOURINARY	□ Night sweats
EARS-NOSE-MOUTH-THROAT	Difficult Urination	Sensitivity or pain of hands and/or feet
 Bleeding gums Ringing in ears 	Pain or burning on urination	 Memory loss Fainting
Loss of hearing	Rash/ulcers	Muscle spasm
	Blood in urine	Loss of consciousness
Runny nose	Pus in urine	HEMATOLOGIC/LYMPHATIC
□ Sores in mouth	Cloudy, "smoky" urine	□ Transfusion? When
Loss of taste	Discharge from penis/vagina	Swollen glands
Dryness of mouth	 Getting up at night to pass urine Sexual difficulties 	Tender glands
Frequent sore throats	Vaginal dryness	
Difficulty in swallowing		Bleeding tendency
	RESPIRATORY	PSYCHIATRIC
 Pain in chest Heart murmurs 	Shortness of breath	
 Irregular heart beat 	Difficulty in breathing at night	Excessive worries
Ū	Wheezing (asthma)	Easily losing temper
Sudden changes in heart beat	Swollen legs or feet	
High blood pressure	Cough	Depression
MUSCULOSKELETAL	Coughing up blood	Difficulty falling asleep
Morning stiffness Lasting how long?		Difficulty staying asleep
Joint pain		
Muscle weakness		Excessive thirst ALLERGIC/IMMUNOLOGIC
Muscle tenderness		Frequent sneezing
Joint swelling List joints affected in the last 6 mos.		Increased susceptibility to infection
	Dete Deviews d	
Patient's Name	Date Reviewed:	Physician Initials

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