

DR. KEVIN J. MCGRATH

DR. PATRICIA K. MONGE-MEBERG

DR. JUNE B. DAFFEH

CHRISTINA M. SLAVIN, RN, MSN, CS-FNP

SHEILA A. BRANSON, ACNP-BC

Dear Valued Patient,

We would like to welcome you to Bay Internists, Inc. We are pleased that you have chosen our office to provide you with all of your medical needs.

Enclosed is a New Patient Packet. This includes a **Demographic Sheet; Written Acknowledgement Form** (Notice of Privacy Practice is located in our office and you may sign this form the day of your appointment); **Consent to HIV testing; Record Release Authorization; Financial Policy and Portal Authorization Form**. Please review, sign and date these forms.

We ask that if you are taking any medications to please bring them with you to your appointment so that the physician may note your chart and refill any medications at that time.

Please bring your insurance card(s) and photo identification to each visit.

All co-payments are due at the time of service. For your convenience, we accept Visa/MasterCard, cash, or checks.

If you have any questions, please feel free to contact our office Monday-Friday 8:30am – 4:30pm at (804) 435-3103. Again, we would like to thank you for selecting Bay Internists, Inc. We look forward to serving you.

Sincerely,

Jennifer Hodges
Office Manager

| DEMOGRAPHIC INFORMATION | | |
|---|---|---------------------|
| Name: | | Date of Birth: |
| Social Security #: | Legal Gender: <input type="checkbox"/> M <input type="checkbox"/> F | Preferred Pronouns: |
| Physical Address: City, State, Zip: | | |
| Mailing Address: City, State, Zip: | | |
| Home Phone: | | Cell Phone: |
| E-mail Address: | | |
| Marital Status: <input type="checkbox"/> Married/Partnered <input type="checkbox"/> Single <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Separated | | |
| Employer: | | Work Phone: |
| Preferred Contact Method: <input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone <input type="checkbox"/> E-mail | | |
| Race: <input type="checkbox"/> American Indian / Alaskan Native <input type="checkbox"/> White <input type="checkbox"/> Asian <input type="checkbox"/> Other Race <input type="checkbox"/> Black / African American <input type="checkbox"/> Decline to answer <input type="checkbox"/> Native Hawaiian / Other Pacific Islander | | |
| Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Non-Hispanic or Latino <input type="checkbox"/> Declined to answer | | |
| Emergency Contact Name: | | |
| Emergency Contact Phone Number: | | |
| Emergency Contact Relationship: | | |
| Preferred Pharmacy: | | |
| How did you hear about us? | | |
| INSURANCE INFORMATION | | |
| Primary Insurance Company: | | |
| Policy Holder: | | Relationship: |
| Policy Holder's Date of Birth: | | Policy Number: |
| Group Number: | | Copay Amount: |
| Secondary Insurance Company: | | |
| Policy Holder: | | Relationship: |
| Policy Holder's Date of Birth: | | Policy Number: |
| Group Number: | | Copay Amount: |

Signature: _____

Date: _____

NOTICE OF PRIVACY PRACTICES ACKNOWLEDGMENT FORM HIPAA AUTHORIZATION FORM

Our Notice of Privacy Practices provides information about how we may use and disclose medical information about you. As provided in our notice, the terms of our notice may change. If we change our notice, you may request a revised copy.

- + I, _____ have been provided a copy of the Bay Internists Inc. Notice of Privacy Practices.
- + I have had an opportunity to read the Notice of Privacy Practices.
- + I understand that I may ask questions if I do not understand any information contained in the Notice of Privacy Practices.
- + I authorize my doctor to speak with the following regarding my health status:

| <u>NAME</u> | <u>RELATIONSHIP</u> | <u>PHONE</u> |
|-------------|---------------------|--------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

 Patient's Signature

 Date

 Authorized Representative of Patient / Relationship

NOTICE OF DEEMED CONSENT TO HIV BLOOD TESTING

A law was enacted in Virginia in 1989 which authorizes health care providers to test their patients for HIV antibodies when the health care provider is exposed to the body of fluids of a patient in a manner which may transmit human immunodeficiency virus (HIV). Pursuant to this law, in the event of an exposure, you will be deemed to have consented to such testing, and the release of the test results to the health care provider who may have been exposed. However, you would be informed before your blood is tested for HIV antibodies, the testing would be explained to you and you would be given the opportunity to ask questions you might have.

I have read and understand the above "Notice if Deemed Consent to HIV Blood Testing."

Date

Patient Signature

Patient Name (Printed)

FINANCIAL POLICY

The following are our conditions of registration as well as our policies with respect to the billing and collections of your account. By signing below, you are agreeing to be bound by these terms.

- + **Basic Financial Policy:** Payment is due and payable at the time of service is provided unless other arrangements have been made.
- + **For Patients with Insurance:** All co-payments and deductibles are due at the time of service. We may bill insurance carriers for you if we have a current contract with your carrier. Given that the agreement with your insurance carrier is a private one, we do not routinely research why an insurance carrier has not paid or why it paid less than anticipated for care. If an insurance carrier has not paid within 60 days of billing, our fees are due and payable in full from you. We will call your insurance to verify coverage and eligibility.
- + **For Patients with Medicare:** All co-payments and deductibles are due and payable at the time of service. We will bill Medicare for you. We may also bill secondary insurance carriers for you.
- + **Non-Covered Services:** Any care not paid for by your existing insurance coverage will require payment in full at the time services are provided or immediately upon notice of insurance claim denial.
- + **Returned Checks:** In addition to the face value of the check, for each check returned to us by your bank, you will be assessed a “bank returned check fee” equal to the amount charged to us by our bank, plus a \$35 processing fee.
- + **Missed Appointments:** In fairness to other patients and the doctor, we require at least 24 hours’ notice to cancel an appointment. We reserve the right to charge you \$25 for each appointment that was missed or not canceled within 24 hours’ notice.
- + **Unpaid Balances:** Charges reflected on billing statements are agreed to be correct and reasonable unless disputed in writing within (30) days of the billing date. If your unpaid balance is turned over to an attorney or collection agency for collection, you agree to pay all costs associated with collection, to include attorney fees equal to 33.33% of the unpaid balance.

MEDICARE PATIENTS: SIGNATURE ON FILE. I request and authorize payments of Medicare benefits be made to Bay Internists, Inc. for any services furnished me by the listed provider/supplier. I authorize any holder of medical information about me to release to the Centers for Medicare and Medicaid Service and its agents any information needed to adjudicate these benefits for services. I understand my signature requests that payment be made and authorizes release of all information necessary to adjudicate the claim. If “other health insurance” is indicated in Item 9 of the CMS-1500 form or elsewhere on other approved claim forms or electronically submitted claims, my signature authorizes the release of all information to the insurer or agency that is necessary to adjudicate the claim. In Medicare assigned cases, the provider or supplier agrees to accept the charge determination of the Medicare carrier as the full charge, and that I am responsible for the deductible, coinsurance, and any noncovered services.

ASSIGNMENT OF INSURANCE BENEFITS

I hereby assign all medical and/or surgical benefits, to include major medical benefits to which I am entitled, private insurance, and any other health plans to, Bay internists, Inc. This assignment will remain in effect until revoked by me in writing. I understand I remain financially responsible for all charges whether or not the charges are paid by said insurance to the extent permitted by law. I hereby authorize said assignee to release all information necessary to adjudicate all claims and secure payment for services rendered.

I have read, understood, and agree to be bound by the terms of this financial policy.

Patient Name: _____ D/O/B: _____

Signature: _____ Date: _____

AUTHORIZATION FOR RELEASE OF HEALTH INFORMATION

I, _____

Physical Street: _____

D/O/B: _____

City, State, Zip: _____

SSN: _____

Home Phone: _____

Previous Name: _____

Authorize and request from:

Provider/Hospital: _____

Address: _____

Phone: _____

Fax: _____

Release the following information

Complete medical record

Only the following records or types of health information (including any dates)

To:

Bay Internists, Inc.

Provider: _____

PO Box 1599

107 DMV Drive

Kilmarnock, VA 22482

Phone: (804) 435-3103

Fax: (804) 435-6695

Signature: _____

Date: _____

Relationship if Representative: _____

Witness Signature: _____

**AUTHORIZATION TO USE OR DISCLOSE PROTECTED HEALTH
INFORMATION (PHI) VIA ELECTRONIC MEDIA**

(Please Print)

Patient Name: _____ Chart # _____
E-mail Address: _____ Date of Birth: _____
Patient's Provider: _____

By signing this form, I authorize Bay Internists, Inc. to communicate via personal, secured access Patient Portal with me for my medical care and treatment. Bay Internists, Inc. will provide notices via your personal e-mail. That information can be found in your Patient Portal. No personal health information is transmitted via or into your personal e-mail. I understand that the following types of protected health information may be used, disclosed, and retained by health care providers of Bay Internists, Inc. as a result of the communications:

- + My personal health information;
- + Electronic display of radiological images (x-rays)
- + Laboratory test results
- + Pathology reports
- + Other diagnostic test results

Patients and/or personal representatives who want to communicate with their health care providers by clinic Portal should consider all of the following issues before signing this Authorization.

- + Portal communication is a convenience and not appropriate for emergencies or time-sensitive issues.
- + Portal message received at Bay Internists, Inc. can be forwarded, printed and/or read, stored by Bay Internists, Inc. staff members.
- + We advise caution when communicating highly sensitive or personal information via Portal messages (i.e. HIV status, mental illness, chemical dependency, and worker compensation issues.)
- + Clinically relevant messages and responses will be documented in the medical record.
- + Bay Internists, Inc. will not be liable for information lost or misdirected due to technical errors or failures.
- + Bay Internists, Inc., does not own or have any interest in Portal website. E-MDS Portal is a secure conduit in which communication with our database is managed.

I understand that I have the right to revoke this Authorization at any time. If I want to revoke this Authorization, I must do so in writing, and address it to Bay Internists, Inc. I understand that if I revoke this Authorization, it will not apply to any information already released as a result of this Authorization.

I understand that I may refuse to sign this Authorization. I also understand that Bay Internists, Inc. cannot deny or refuse to provide treatment, payment, or medical records if I refuse to sign this Authorization.

I have read and understand the information in this authorization form.

Signature

Date

PATIENT HISTORY FORM- MALE

Name: _____ D/O/B: _____ Today's Date: _____

What brings you here today? _____

Primary Physician: _____

Preferred Pharmacy Name: _____ Phone: _____

CURRENT MEDICATIONS: None

Instructions: Please list all medications, including strength and dosing instructions.

| | | |
|--|---|--|
| Multi-vitamin <input type="checkbox"/> | Omega 3/fish oil <input type="checkbox"/> | Aspirin <input type="checkbox"/> |
| Calcium <input type="checkbox"/> | Vitamin D <input type="checkbox"/> | Other vitamins or herbs <input type="checkbox"/> _____ |

ALLERGIES: No known drug allergy

| | | |
|-------------------------------------|---------------------------------|--------------------------------------|
| Penicillin <input type="checkbox"/> | Sulfa <input type="checkbox"/> | Codeine <input type="checkbox"/> |
| Latex <input type="checkbox"/> | Iodine <input type="checkbox"/> | Other <input type="checkbox"/> _____ |

SURGICAL HISTORY: None

Instructions: Please indicate the year when surgery was done.

| | |
|-------------------------|----------------------------------|
| Vasectomy _____ | Gall Bladder _____ |
| Laparoscopy _____ | Blood Transfusion _____ |
| Cryosurgery/laser _____ | Breast surgery/or biopsies _____ |
| Appendectomy _____ | Other surgeries _____ |
| Colonoscopy _____ | |

Have you ever received a blood transfusion? Yes No

Have you had a blood test for Hepatitis C? Yes No (Recommendation is for all 'baby boomers' be screened)

Have you had a blood test for HIV? Yes No (Recommendation is for anyone who desires be screened)

PAST MEDICAL HISTORY/GENITOURINARY HISTORY/CURRENT PROVIDERS/

PREVENTATIVE HEALTH MAINTENANCE: No known medical problems

| | | |
|--|---|--|
| Heart disease <input type="checkbox"/> | Autoimmune (lupus, MS, etc.) <input type="checkbox"/> | Arthritis <input type="checkbox"/> |
| Stroke <input type="checkbox"/> | Bleeding disorder/anemia <input type="checkbox"/> | Osteopenia/Osteoporosis <input type="checkbox"/> |
| Blood clots in legs/lungs <input type="checkbox"/> | Kidney disease/stones <input type="checkbox"/> | Migraine headaches <input type="checkbox"/> |
| High cholesterol <input type="checkbox"/> | Bowel disease/IBS <input type="checkbox"/> | Depression/Anxiety <input type="checkbox"/> |
| High blood pressure <input type="checkbox"/> | GERD <input type="checkbox"/> | Alcohol/Drug abuse <input type="checkbox"/> |
| Asthma <input type="checkbox"/> | Gallstones <input type="checkbox"/> | Gout <input type="checkbox"/> |
| Lung/TB <input type="checkbox"/> | Hepatitis <input type="checkbox"/> | Cancer (type) _____ <input type="checkbox"/> |
| Diabetes <input type="checkbox"/> | Neurologic Issues <input type="checkbox"/> | |
| Thyroid issues <input type="checkbox"/> | COPD/Emphysema <input type="checkbox"/> | |

PATIENT HISTORY FORM- MALE (CONTINUED)

Name: _____ D/O/B: _____ Today's Date: _____

GENITOURINARY HISTORY:

Date of last prostate exam _____ Normal? Yes No
 Date of last PSA blood test _____ Normal? Yes No
 Date of last DEXA-bone density _____ Normal? Yes No
 Location of last DEXA-bone density _____

Have you ever had any of the following (check yes if applicable)

| | | | | | |
|-------------------|--------------------------|--|--------------------------|-----------------|--------------------------|
| Genital herpes | <input type="checkbox"/> | Current pain with intercourse | <input type="checkbox"/> | Concern with | |
| Genital warts/HPV | <input type="checkbox"/> | Current penile discharge or odor | <input type="checkbox"/> | sexual function | <input type="checkbox"/> |
| Chlamydia | <input type="checkbox"/> | Frequent yeast or bacterial infections | <input type="checkbox"/> | Breast lump | <input type="checkbox"/> |
| Gonorrhea | <input type="checkbox"/> | Frequent urinary infections | <input type="checkbox"/> | Breast pain | <input type="checkbox"/> |

What is your current method of contraception?

No need Condoms Vasectomy

HEALTH MAINTENANCE

| | | |
|--|----------------|-------------|
| Date of last eye exam _____ | Provider _____ | Phone _____ |
| Date of last dental exam _____ | Provider _____ | Phone _____ |
| Date of last skin/dermatology exam _____ | Provider _____ | Phone _____ |

VACCINATION HISTORY

| | | |
|--|---------------|-------|
| 1. Tetanus vaccination | Date Received | _____ |
| 2. Whooping cough/pertussis vaccination (Adacel) | Date Received | _____ |
| 3. Pneumonia vaccination (Pneumovax) | Date Received | _____ |
| 4. Prevnar vaccination (the "new" pneumonia vaccine) | Date Received | _____ |
| 5. Shingles vaccination (Zostavax) | Date Received | _____ |
| 6. Hepatitis A vaccination | Date Received | _____ |
| 7. Hepatitis B vaccination | Date Received | _____ |
| 8. Other vaccination _____ | Date Received | _____ |

CURRENT PROVIDERS

| | |
|----------------|-----------|
| Physician Name | Specialty |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

FAMILY HEALTH HISTORY:

Instructions: Please mark if there is a family history of the illnesses following, indicate their relationship to you (i.e. M - mother, F - father, B - brother, S - sister, MGM - maternal grandmother, PGM - paternal grandmother).

Name: _____ D/O/B: _____ Today's Date: _____

| | | | |
|---------------------------|-------|---|-------|
| Alcoholism | _____ | Glaucoma and/or macular degeneration | _____ |
| Alzheimer/ dementia | _____ | Heart Disease | _____ |
| Anemia | _____ | High blood pressure | _____ |
| Asthma | _____ | High cholesterol | _____ |
| Birth defects | _____ | Hip Fracture | _____ |
| Blood clots in legs/lungs | _____ | Osteoporosis | _____ |
| Depression/Anxiety | _____ | Stroke | _____ |
| Diabetes | _____ | Thyroid disease | _____ |
| Digestive problems | _____ | Other | _____ |

**CURRENT AGE OR
AGE AT DEATH**

CAUSE OF DEATH

LIVING

| | | | | |
|---------|------------------------------|-----------------------------|-------|-------|
| Mother | Yes <input type="checkbox"/> | No <input type="checkbox"/> | _____ | _____ |
| Father | Yes <input type="checkbox"/> | No <input type="checkbox"/> | _____ | _____ |
| Sister | Yes <input type="checkbox"/> | No <input type="checkbox"/> | _____ | _____ |
| Brother | Yes <input type="checkbox"/> | No <input type="checkbox"/> | _____ | _____ |

SOCIAL HISTORY:

Tobacco use Yes (packs/day) _____ No Formerly (year quit/# of years) _____

Alcohol use Yes (type/quantity/day) _____ No Formerly (year quit) _____

Caffeine use Yes (cups/day) _____ No

Exercise Yes (days/week) _____ No

Education High school College Graduate Professional

Working Retired Employed Previous/Current Employer _____ Not Working

Birth Place _____ Religion _____

Military _____

Travel _____

Who else lives at home? _____

| | | |
|--|------------------------------|-----------------------------|
| Do you have a smoke detector in your home? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have a propane gas stove/fireplace or use propane? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| If so, do you have a carbon monoxide detector? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you feel safe? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Can you talk to your spouse openly and honestly without reprimand or disagreement? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have a medical power of attorney? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have a living will/advanced medical directive? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have a Do Not Resuscitate Order (DNR)? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Other | _____ | |

CANCER FAMILY HISTORY QUESTIONNAIRE

| PERSONAL INFORMATION | | |
|---|----------------------|------------|
| Patient Name: _____ | Date of Birth: _____ | Age: _____ |
| Gender (M/F): <input type="checkbox"/> Today's Date (MM/DD/YY): _____ Health Care Provider: _____ | | |

Instructions: This is a screening tool for cancers that run in families. Please mark (Y) for those that apply to YOU and/or YOUR FAMILY. Next to each statement, please list the relationship(s) to you and age of diagnosis for each cancer in your family. You and the following close blood relatives should be considered: You, Parents, Brothers, Sisters, Sons, Daughters, Aunts, Uncles, Nephews, nieces, Half-Siblings, First-Cousins, Grandparents, Grandchildren, Great-Grandparents and Great-Grandchildren.

| YOU and YOUR FAMILY'S CANCER HISTORY (Please be as thorough and accurate as possible) | | | | | | | | |
|---|---|---|-----------------------------|------------------|---------------------------------|------------------|---------------------------------|------------------|
| | CANCER | YOU AGE OF Diagnosis | PARENTS/ SIBLINGS/ CHILDREN | AGE OF Diagnosis | RELATIVES on your MOTHER'S SIDE | AGE OF Diagnosis | RELATIVES on your FATHER'S SIDE | AGE OF Diagnosis |
| <input type="checkbox"/> Y <input type="checkbox"/> N | EXAMPLE: BREAST CANCER | 45 | — | — | Aunt Cousin | 45 61 | Grandmother | 53 |
| <input type="checkbox"/> Y <input type="checkbox"/> N | BREAST CANCER | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | OVARIAN CANCER (Peritoneal/Fallopian Tube) | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | UTERINE/ENDOMETRIAL CANCER | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | COLON/RECTAL CANCER | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | 10 or more LIFETIME COLON POLYPS (Specify #) | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | OTHER CANCER(S) (Specify cancer type) | Among others, consider the following cancers: Melanoma, Pancreatic, Stomach/Gastric, Brain, Kidney, Bladder, Small bowel, Sarcoma, Thyroid | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | Are you of Ashkenazi Jewish descent? | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | Are you concerned about your personal and/or family history of cancer? | | | | | | | |
| <input type="checkbox"/> Y <input type="checkbox"/> N | Have you or anyone in your family had genetic testing for a hereditary cancer syndrome? (Please explain/include a copy of result if possible) | | | | | | | |

HEREDITARY CANCER RED FLAGS (To be completed with your healthcare provider- Check all that apply)

| Your PERSONAL History – Red Flags | Your FAMILY History – Red Flags |
|---|--|
| Hereditary Breast and Ovarian Cancer Syndrome Breast cancer diagnosed at age 50 or younger Ovarian cancer at any age Two primary occurrences of breast cancer Male breast cancer Triple Negative Breast Cancer Pancreatic cancer with a breast or ovarian cancer Ashkenazi Jewish ancestry with an HBOC associated cancer* Lynch Syndrome** (see cancer list below) Colorectal cancer under age 50 Endometrial/uterine cancer under age 50 MSI High histology*** before age 60 Abnormal MSI/IHC tumor test result (colon/rectal/endometrial/uterine) Two or more Lynch syndrome cancers** at any age YOU and one or more relatives with a Lynch syndrome cancer** | Hereditary Breast and Ovarian Cancer Syndrome Close relative with breast cancer less than age 50 Close relative with ovarian cancer at any age Two or more breast cancer occurrences, in one relative or in two or more relatives on the same side of the family, one under age 50 A male relative with breast cancer Combination of breast, ovarian, and/or pancreatic cancer on the same side of the family Three or more relatives with breast cancer at any age A previously identified BRCA1 or BRCA2 mutation in the family Lynch Syndrome** (see cancer list below) Two or more relatives with a Lynch syndrome cancer**, one before the age of 50 Three or more relatives with a Lynch syndrome cancer** at any age A previously identified Lynch syndrome mutation in the family |

*HBOC associated cancer includes: Breast, ovarian, and pancreatic cancer

**Lynch syndrome cancer includes: Colon, endometrial/uterine, gastric/stomach, ovarian, ureter/renal pelvis, biliary tract, small bowel, pancreas, brain and sebaceous adenomas

***MSI High histology includes: Mucinous, signet ring, tumor infiltrating lymphocytes, crohn's-like lymphocytic reaction histology, or medullary growth pattern