Texas Heart & Vascular Institute

NEW PATIENT PACKET

Patient Information

FIRST NAME	MI	LAST NAME	DATE OF BIRTH

ADDRESS

CITY	STATE	ZIP

RESIDENCE TYPE
❑ Private Residence ❑ Nursing Home (Not a SNF) ❑ Skilled Nursing Facility or Hospice)

SEX	SSN #
❑ Male ❑ Female ❑ Transgender	

MARITAL STATUS
❑ Single ❑ Divorced ❑ Married ❑ Partnered ❑ Widowed ❑ Legally Separated ❑ Other

ETHNICITY
❑ Caucasian ❑ African-American ❑ Asian/Pacific-Islander ❑ Hispanic ❑ Other

EMPLOYMENT STATUS
❑ Full-Time ❑ Part-Time ❑ Not Employed ❑ Full-Time Student

EMPLOYER *(IF APPLICABLE)*	OCCUPATION

HOME PHONE	CELL PHONE[1]	WORK PHONE

PREFERRED PHONE NUMBER
❑ Home ❑ Cell ❑ Work

WHAT PHONE NUMBER(S) MAY WE LEAVE PERSONAL/MEDICAL INFORMATION ON?
❑ Home ❑ Cell

EMAIL

[1] I Understand that a cellular phone is not a secure and private line.

Insurance Coverage

It is very important that you bring your photo identification card and insurance card(s) on the day of your appointment. Please remember that it is your responsibility to obtain a referral from your primary care physician (if your insurance requires it).

Primary	Secondary ❑ I do not have secondary coverage
CARRIER	CARRIER
ID#	ID#
GROUP#	GROUP#
NAME OF INSURED	NAME OF INSURED
INSURED'S DATE OF BIRTH	INSURED'S DATE OF BIRTH
RELATIONSHIP TO INSURED ❑ Self ❑ Spouse ❑ Other *(Please Specify)*	RELATIONSHIP TO INSURED ❑ Self ❑ Spouse ❑ Other *(Please Specify)*

Note: If your insurance requires a referral for specialist care, please ensure you obtain and confirm that we've received the referral from your Primary Care Physician (PCP) before your appointment. Failure to secure the referral may result in appointment rescheduling and possible charges: $25.00 for a missed office visit or $75.00 for a missed procedure. If you have questions or need assistance with the referral, please contact us.

Texas Heart & Vascular Institute

NEW PATIENT PACKET

Name: _____ Date of Birth: _____ Date Completed: _____

Emergency Contacts

Please check a box below indicating whether or not you would like to have the selected contact(s) added as an authorized HIPAA contact.

Primary	Secondary
NAME	NAME
HOME/CELL PHONE	HOME/CELL PHONE
WORK PHONE	WORK PHONE
RELATIONSHIP ❑ Spouse ❑ Partner ❑ Sibling ❑ Parent ❑ Child ❑ Friend ❑ Other *(Please Specify)*	RELATIONSHIP ❑ Spouse ❑ Partner ❑ Sibling ❑ Parent ❑ Child ❑ Friend ❑ Other *(Please Specify)*
HIPAA AUTHORIZATION Do you authorize the disclosure of your protected health information (PHI) to the person listed above as your Primary Emergency Contact? ❑ Yes ❑ No	HIPAA AUTHORIZATION Do you authorize the disclosure of your protected health information (PHI) to the person listed above as your Secondary Emergency Contact? ❑ Yes ❑ No

Primary Care Provider

NAME	PHONE

Referring Provider

NAME	PHONE

How did you hear about us?

❑ Physician/Provider Referral ❑ Family or Friend ❑ Website or Search Engine ❑ Other

Pharmacies

Primary		Secondary	
NAME		NAME	
ADDRESS		ADDRESS	
CITY	ZIP	CITY	ZIP
PHONE		PHONE	
FAX		FAX	
TYPE ❑ Local ❑ Mail-Order ❑ Specialty		TYPE ❑ Local ❑ Mail-Order ❑ Specialty	

Texas Heart & Vascular Institute

ACKNOWLEDGEMENT FORM

Name: _____ Date of Birth: _____ Date Completed: _____

Physicians

Karthik Anand, MD
Keith.A.Vasenius, D.O., F.A.C.O.I

Office Location
1001, 12th Ave., Suite #132
Fort Worth, Texas - 76104
Phone: (817) 877-4105
Fax: (817) 348-9797

By signing my name below, I:

- Authorize:
  - The release of any medical and/or other information necessary to process my claims.
  - Payment of medical benefits to my treating physician or supplier for services rendered by Texas Heart and Vascular Institute.

- **Have read and agree to all of the above policies and understand that my failure to comply with any of these policies may result in discharge from Texas Heart and Vascular Institute.**

x _____

Patient/Guardian Signature

_____

Date

Texas Heart & Vascular Institute Website Link
https://texashvi.com/

Name: _____ Date of Birth: _____

INTAKE QUESTIONNAIRE

Please check the appropriate boxes below.

What is your smoking status?
- ❑ Nonsmoker
- ❑ Former Smoker
- ❑ Unknown if Ever Smoked
- ❑ Smoker, Current Status Unknown
- ❑ Current Every Day Smoker
- ❑ Current Some Day Smoker
- ❑ Light Tobacco Smoker
- ❑ Heavy Tobacco Smoker

Have you ever been exposed to HIV?
- ❑ Yes
- ❑ No
- ❑ Unknown

Within the past 12 months, did you have a drink containing alcohol?
- ❑ Yes
- ❑ No

Within the past 12 months, have you fallen?
- ❑ Yes
- ❑ No

Do you have an Advanced Care Plan/Surrogate Decision Maker?
- ❑ Yes
- ❑ No
- ❑ N/A

Name: _____ Date of Birth: _____ Date Completed: _____

Reason for Visit Today

Past Medical History (e.g. diabetes, high blood pressure, cancer, TB)

Surgery and Hospitalization History

PLEASE LIST ALL SURGERIES, HOSPITALIZATIONS, AND MAJOR INJURIES	DATE(S) MONTH/YEAR)

Previous Testing
Have you had any previous imaging or diagnostic tests including MRI, CT, Echo? Please lists tests and where this was performed.

Family History
List any major illnesses in your family, including parents, grandparents, siblings, or children, (e.g. diabetes, hypertension, multiple sclerosis, etc…)

Allergies
List any allergies you have to medications

Texas Heart & Vascular Institute

MEDICATION LOG

Name: ____________________ Date of Birth: ________________ Date Completed: ______________

List all medications (prescribed or over the counter/herbal supplements) that you are currently taking:

MEDICATION	START DATE	DOSE/FREQUENCY	PRESCRIBING PHYSICIAN	COMMENTS

AUTHORIZATION TO DISCLOSE PROTECTED HEALTH INFORMATION

Developed for Texas Health & Safety Code § 181.154(d)
effective June 2013

Please read this entire form before signing and complete all the sections that apply to your decisions relating to the disclosure of protected health information. Covered entities as that term is defined by HIPAA and Texas Health & Safety Code § 181.001 must obtain a signed authorization from the individual or the individual's legally authorized representative to electronically disclose that individual's protected health information. Authorization is not required for disclosures related to treatment, payment, health care operations, performing certain insurance functions, or as may be otherwise authorized by law. **Covered entities may use this form or any other form that complies with HIPAA, the Texas Medical Privacy Act, and other applicable laws.** Individuals cannot be denied treatment based on a failure to sign this authorization form, and a refusal to sign this form will not affect the payment, enrollment, or eligibility for benefits.

NAME OF PATIENT OR INDIVIDUAL

_____
Last First Middle

OTHER NAME(S) USED _____

DATE OF BIRTH Month _____ Day _____ Year _____

ADDRESS _____

_____

CITY _____ **STATE** _____ **ZIP** _____

PHONE (_____)_____ **ALT. PHONE** (_____)_____

EMAIL ADDRESS (Optional): _____

I AUTHORIZE THE FOLLOWING TO DISCLOSE THE INDIVIDUAL'S PROTECTED HEALTH INFORMATION:

Person/Organization Name _____
Address _____
City _____ State _____ Zip Code _____
Phone (_____)_____ Fax (_____)_____

WHO CAN RECEIVE AND USE THE HEALTH INFORMATION?

Person/Organization Name Texas Heart and Vasular Institute
Address 1001, 12th Ave., Suite #132,
City Fort Worth State Texas Zip Code 76104
Phone (817) 877-4105 Fax (817) 348-9797

REASON FOR DISCLOSURE
(Choose only one option below)

- ☐ Treatment/Continuing Medical Care
- ☐ Personal Use
- ☐ Billing or Claims
- ☐ Insurance
- ☐ Legal Purposes
- ☐ Disability Determination
- ☐ School
- ☐ Employment
- ☐ Other _____

WHAT INFORMATION CAN BE DISCLOSED? Complete the following by indicating those items that you want disclosed. The signature of a minor patient is required for the release of some of these items. If all health information is to be released, then check only the first box.

- ☐ **All health information**
- ☐ Physician's Orders
- ☐ Progress Notes
- ☐ Pathology Reports
- ☐ History/Physical Exam
- ☐ Patient Allergies
- ☐ Discharge Summary
- ☐ Billing Information
- ☐ Past/Present Medications
- ☐ Operation Reports
- ☐ Diagnostic Test Reports
- ☐ Radiology Reports & Images
- ☐ Lab Results
- ☐ Consultation Reports
- ☐ EKG/Cardiology Reports
- ☐ Other_____

Your initials are required to release the following information:

_____Mental Health Records (excluding psychotherapy notes)
_____Drug, Alcohol, or Substance Abuse Records
_____Genetic Information (including Genetic Test Results)
_____ HIV/AIDS Test Results/Treatment

EFFECTIVE TIME PERIOD. This authorization is valid until the earlier of the occurrence of the death of the individual; the individual reaching the age of majority; or permission is withdrawn; or the following specific date (optional): Month _____ Day _____ Year _____

RIGHT TO REVOKE: I understand that I can withdraw my permission at any time by giving written notice stating my intent to revoke this authorization to the person or organization named under "WHO CAN RECEIVE AND USE THE HEALTH INFORMATION." I understand that prior actions taken in reliance on this authorization by entities that had permission to access my health information will not be affected.

SIGNATURE AUTHORIZATION: I have read this form and agree to the uses and disclosures of the information as described. I understand that refusing to sign this form does not stop disclosure of health information that has occurred prior to revocation or that is otherwise permitted by law without my specific authorization or permission, including disclosures to covered entities as provided by Texas Health & Safety Code § 181.154(c) and/or 45 C.F.R. § 164.502(a)(1). I understand that information disclosed pursuant to this authorization may be subject to re-disclosure by the recipient and may no longer be protected by federal or state privacy laws.

SIGNATURE X_____ _____
Signature of Individual or Individual's Legally Authorized Representative **DATE**

Printed Name of Legally Authorized Representative (if applicable): _____
If representative, specify relationship to the individual: ☐ Parent of minor ☐ Guardian ☐ Other _____

A minor individual's signature is required for the release of certain types of information, including for example, the release of information related to certain types of reproductive care, sexually transmitted diseases, and drug, alcohol or substance abuse, and mental health treatment (See, e.g., Tex. Fam. Code § 32.003).

SIGNATURE X_____ _____
Signature of Minor Individual **DATE**

IMPORTANT INFORMATION ABOUT THE AUTHORIZATION TO DISCLOSE PROTECTED HEALTH INFORMATION

Developed for Texas Health & Safety Code § 181.154(d)
effective June 2013

The Attorney General of Texas has adopted a standard Authorization to Disclose Protected Health Information in accordance with Texas Health & Safety Code § 181.154(d). This form is intended for use in complying with the requirements of the Health Insurance Portability and Accountability Act and Privacy Standards (HIPAA) and the Texas Medical Privacy Act (Texas Health & Safety Code, Chapter 181). **Covered Entities may use this form or any other form that complies with HIPAA, the Texas Medical Privacy Act, and other applicable laws.**

Covered entities, as that term is defined by HIPAA and Texas Health & Safety Code § 181.001, must obtain a signed authorization from the individual or the individual's legally authorized representative to electronically disclose that individual's protected health information. Authorization is not required for disclosures related to treatment, payment, health care operations, performing certain insurance functions, or as may be otherwise authorized by law. (Tex. Health & Safety Code §§ 181.154(b),(c), § 241.153; 45 C.F.R. §§ 164.502(a)(1); 164.506, and 164.508).

The authorization provided by use of the form means that the organization, entity or person authorized can disclose, communicate, or send the named individual's protected health information to the organization, entity or person identified on the form, including through the use of any electronic means.

Definitions - In the form, the terms "treatment," "healthcare operations," "psychotherapy notes," and "protected health information" are as defined in HIPAA (45 CFR 164.501). "Legally authorized representative" as used in the form includes any person authorized to act on behalf of another individual. (Tex. Occ. Code § 151.002(6); Tex. Health & Safety Code §§ 166.164, 241.151; and Tex. Probate Code § 3(aa)).

Health Information to be Released - If "All Health Information" is selected for release, health information includes, but is not limited to, all records and other information regarding health history, treatment, hospitalization, tests, and outpatient care, and also educational records that may contain health information. As indicated on the form, specific authorization is required for the release of information about certain sensitive conditions, including:

- Mental health records (excluding "psychotherapy notes" as defined in HIPAA at 45 CFR 164.501).
- Drug, alcohol, or substance abuse records.
- Records or tests relating to HIV/AIDS.
- Genetic (inherited) diseases or tests (except as may be prohibited by 45 C.F.R. § 164.502).

Note on Release of Health Records - This form is not required for the permissible disclosure of an individual's protected health information to the individual or the individual's legally authorized representative. (45 C.F.R. §§ 164.502(a)(1)(i), 164.524; Tex. Health & Safety Code § 181.102). If requesting a copy of the individual's health records with this form, state and federal law allows such access, unless such access is determined by the physician or mental health provider to be harmful to the individual's physical, mental or emotional health. (Tex. Health & Safety Code §§ 181.102, 611.0045(b); Tex. Occ. Code § 159.006(a); 45 C.F.R. § 164.502(a)(1)). If a healthcare provider is specified in the "Who Can Receive and Use The Health Information" section of this form, then permission to receive protected health information also includes physicians, other health care providers (such as nurses and medical staff) who are involved in the individual's medical care at that entity's facility or that person's office, and health care providers who are covering or on call for the specified person or organization, and staff members or agents (such as business associates or qualified services organizations) who carry out activities and purposes permitted by law for that specified covered entity or person. If a covered entity other than a healthcare provider is specified, then permission to receive protected health information also includes that organization's staff or agents and subcontractors who carry out activities and purposes permitted by this form for that organization. Individuals may be entitled to restrict certain disclosures of protected health information related to services paid for in full by the individual (45 C.F.R. § 164.522(a)(1)(vi)).

Authorizations for Sale or Marketing Purposes - If this authorization is being made for sale or marketing purposes and the covered entity will receive direct or indirect remuneration from a third party in connection with the use or disclosure of the individual's information for marketing, the authorization must clearly indicate to the individual that such remuneration is involved. (Tex. Health & Safety Code §181.152, .153; 45 C.F.R. § 164.508(a)(3), (4)).

Limitations of this form - This authorization form shall not be used for the disclosure of any health information as it relates to: (1) health benefits plan enrollment and/or related enrollment determinations (45 C.F.R. § 164.508(b)(4)(ii), .508(c)(2)(ii); (2) psychotherapy notes (45 C.F.R. § 164.508(b)(3)(ii); or for research purposes (45 C.F.R. § 164.508(b)(3)(i)). **Use of this form does not exempt any entity from compliance with applicable federal or state laws or regulations regarding access, use or disclosure of health information or other sensitive personal information (e.g., 42 CFR Part 2, restricting use of information pertaining to drug/alcohol abuse and treatment), and does not entitle an entity or its employees, agents or assigns to any limitation of liability for acts or omissions in connection with the access, use, or disclosure of health information obtained through use of the form.**

Charges - Some covered entities may charge a retrieval/processing fee and for copies of medical records. (Tex. Health & Safety Code § 241.154).

Right to Receive Copy - The individual and/or the individual's legally authorized representative has a right to receive a copy of this authorization.