Jonathan Heistein, MD
Patient Information

LEGAL NAME (LAST, FIRST, MI):_____

ADDRESS:_____CITY:_____ST:_____ZIP:_____

BIRTH DATE:_____ AGE:_____ SS#_____MARITAL STATUS: M S D W

HOME PHONE:_____ CELL PHONE:_____

WORK PHONE:_____ E-MAIL ADDRESS:_____

IF PATIENT IS MINOR:
NAME OF PARENT/GUARDIAN: _____ DOB: _____

EMPLOYER:_____ OCCUPATION:_____

PHARMACY NAME:_____ PHONE:_____

REFERRED BY:_____ REASON FOR VISIT:_____

PRIMARY CARE PHYSICIAN:_____ PH#:_____

PRIMARY CARE PHYSICIAN'S ADDRESS:_____

NAME OF PRIMARY INSURANCE:_____ POLICYHOLDER'S NAME:_____

POLICYHOLDER'S SS#:_____ POLICYHOLDER'S BIRTH DATE:_____

RELATIONSHIP TO PATIENT:_____ ID #:_____

POLICYHOLDER'S EMPLOYER:_____ GROUP #_____

NAME OF SECONDARY INSURANCE:_____POLICYHOLDER'S NAME:_____

POLICYHOLDER'S SS#:_____ POLICYHOLDER'S BIRTHDATE:_____

RELATIONSHIP TO PATIENT:_____ ID#:_____

POLICYHOLDER'S EMPLOYER:_____ GROUP #:_____

NAME OF TERTIARY INSURANCE:_____POLICYHOLDER'S NAME:_____

POLICYHOLDER'S SS#:_____ POLICYHOLDER'S BIRTHDATE:_____

RELATIONSHIP TO PATIENT:_____ ID#:_____

POLICYHOLDER'S EMPLOYER:_____ GROUP #:_____

Jonathan Heistein, MD
Medical Information Questionnaire

Patient Name:_____ **Date of Birth:**____/____/_____

Height:_____ **Weight:**_____

Have you ever been diagnosed with sleep apnea? □ No □ Yes

Do you use a CPAP or have you ever been advised to use a CPAP? □ No □ Yes

Do you or your family have any of the following medical problems? *(check if applicable)*

	Self	Family	Comments		Self	Family	Comments
HEART DISEASE				**ASTHMA**			
HEART MURMUR				**LUNG DISEASE**			
HIGH BLOOD PRESSURE				**KIDNEY DISEASE**			
CANCER (type?)				**LIVER DISEASE**			
DIABETES MELLITUS				**HEPATITIS**			
STROKE				**THYROID DISEASE**			
BLOOD CLOTS				**DEPRESSION**			
BLEEDING DISORDER				**OTHER**			

Previous Surgeries: *(please list any surgeries that you have had in the past)*

DATE & TYPE OF SURGERY	DATE & TYPE OF SURGERY

Previous Hospitalizations: *(please list any time that you were admitted to a hospital)*

DATE & REASON FOR HOSPITALIZATION	DATE & REASON FOR HOSPITALIZATION

Medications:

(include all prescription, over the counter, herbal, alternative medications and vitamins)

MEDICATION NAME	DOSE	TIMES PER DAY

Allergies:

(list all allergies including non-drug allergies)

MEDICATION ALLERGY	REACTION

Are you on a semaglutide? □ No □ Yes

Social History:

Do you smoke/chew tobacco/vape? □ No □ Yes How much:_____
Do you drink alcohol? □ No □ Yes How much:_____
Do you take recreational drugs? □ No □ Yes What used:_____
Are you employed? □ No □ Yes If yes, what do you do?:_____
Marital status? □ Single □ Married □ Divorced
Do you live alone? □ No □ Yes If no, with whom do you live?:_____

REVIEW OF SYSTEMS- Do you experience or have you ever experienced any of the following? *(If yes, please explain.)*

Fevers? □ No □ Yes_____
Weight change? □ No □ Yes_____
Dry eyes? □ No □ Yes_____
Trouble with your vision? □ No □ Yes_____
Chest pain? □ No □ Yes_____
Rapid heart beat? □ No □ Yes_____
Swollen feet/ankles? □ No □ Yes_____
Shortness of breath? □ No □ Yes_____
Easy bruising/bleeding? □ No □ Yes_____
Swollen lymph nodes? □ No □ Yes_____
Skin problems/rashes? □ No □ Yes_____
Problems with urination? □ No □ Yes_____
Joint or muscle pain/arthritis? □ No □ Yes_____
Headaches or migraines? □ No □ Yes_____
Constipation/diarrhea? □ No □ Yes_____
Indigestion or reflux? □ No □ Yes_____
Sinus problems/infections? □ No □ Yes_____
Numbness or paralysis? □ No □ Yes_____
Seizures? □ No □ Yes_____

This Section for WOMEN ONLY:

Age period began _____
Number of pregnancies _____
Date of last period _____
Date of last mammogram _____
Do you do self breast exams? □ No □ Yes_____
Have you ever had a breast lump? □ No □ Yes_____
Did you breast feed? □ No □ Yes_____
Any abnormal mammograms? □ No □ Yes_____

I VERIFY THAT THE ABOVE INFORMATION IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE.

Patient's Signature: (parent/guardian if minor)_____ **Date:**____/____/_____

Patient Photographic Authorization and Release

Please choose 1 option below:

1.) I consent for these photographs to be used in medical publishing's, including medical journals, textbooks, before & after photo book, website and electronic publications. I understand that the image may be seen by members of the general public, in addition, to scientists and medical researchers that regularly use these publications in their professional education. Although these photographs will be used without identifying information, such as my name, I understand that it is possible that someone may recognize me. I also agree for my image to be shown for teaching purposes and to be used for my medical record.

PATIENT SIGNATURE_____WITNESS: _____

2.) I agree for my image to be shown for teaching purposes **AND** to be used for my medical record, but **NOT** for medical publication.

PATIENT SIGNATURE_____ WITNESS: _____

3.) I agree to use my image for medical records **ONLY**.

PATIENT SIGNATURE_____WITNESS: _____

If patient is a minor, please complete the area below.

I have read the Authorization and Release. I am the parent, guardian or conservator of _____, a minor. I am authorized to sign this consent on his/her behalf and I grant this consent as a voluntary contribution in the interest of public education.

PARENT/GUARDIAN SIGNATURE_____ DATE _____

Notice To Patients of Financial Interest

During the course of treatment, you may be referred to Southlake Surgery Center, Baylor Scott & White Surgical Hospital, or Harris Methodist Southlake (now called Texas Health Resources) for your surgery. You are informed by this Notice that Jonathan Heistein, MD holds a financial interest (shareholder/owner) in these facilities. Investment in these facilities enables us to have a voice in the administration of policies of these facilities. It is your physician's belief that your medical needs will be best served in the most convenient and efficient way possible, and such referral is in no way being made with an intent to financially benefit the physician. You have the option, at your discretion, to use an alternative health care facility. You will not be treated differently for using another facility.

By signing below, you, or your legal representative, acknowledge that in accordance with Federal ASC Regulations (42 C.F.R 416.50(a)(ii)), this ownership disclosure is made in advance of the date of the procedure, and that you have decided to have the procedure performed at Southlake Surgery Center, Baylor Scott & White Surgical Hospital, or Harris Methodist Southlake (now called Texas Health Resources).

Please indicate your receipt of this Notice by your signature below.

_____ _____

Date Patient Signature

Patient Record of Disclosures

In general, the HIPAA privacy rule gives individuals the right to request a restriction on uses and disclosures of Protected Health Information (PHI). The individual is also provided the right to request confidential communications.

By completing this information, you acknowledge and agree that the office of Jonathan Heistein, MD, its affiliates, or vendors (including collection or billing companies), may contact you by telephone or text message to any telephonic number you have provided and any telephone number associated with your account, including wireless/mobile devices. I further agree that I may receive auto dialer/prerecorded messages from these parties.

This information shall remain in effect until revoked in writing.

I wish to be contacted in the following manner (check all that apply)

Home Telephone

- ☐ Okay to leave message with detailed information on voicemail
- ☐ Leave message with call-back number only

If you are not home, is there a person we may leave a detailed message with?

Name: _____ Relationship: _____

Work Telephone

- ☐ Okay to leave message with detailed information
- ☐ Leave message with call-back number only

Mobile Telephone

- ☐ It is okay to leave message with detailed information
- ☐ Leave message with call-back number only
- ☐ It is okay to receive text messages to my mobile device

Other Please indicate any other person and/or telephone number where you would like to receive phone calls (such as appointment reminders, lab results, or other information)

_____

Emergency Contact

Please list any family member or friend that we may inform about your medical condition if we are unable to reach you or in an emergency.

Name:_____ Relation:_____ Phone Number:_____

Name:_____ Relation:_____ Phone Number:_____

Future Correspondence

Would you like to receive future mailings, emails, and/or texts regarding upcoming events, new products or procedures, newsletters, etc.? ☐ Yes ☐ No

_____ _____

Patient Signature Date

Assignment of Benefits/Financial Responsibility

PLEASE READ

I hereby assign, transfer, and authorize all of my rights, title and interest to my medical reimbursement benefits under my insurance policy for services rendered. I authorize the release of medical information needed to determine these benefits, including medical, surgical, psychiatric and/or substance abuse (drug or alcohol) information. This authorization shall remain in effect until I give written notice revoking said authorization.

I understand and agree that, regardless of my insurance status, I am ultimately responsible for the balance of my account for any/all professional services rendered. I understand that I am still obligated to paid bills if not paid/covered/found medically necessary by my commercial/third party/government plan or insurance company. I understand that I am also responsible for any balances due above payments made by my insurance company.

I appoint Jonathan Heistein, MD, PA to act as my authorized representative in requesting an appeal from my insurance plan regarding its denial of services, authorizations, or denial of payment.

All charges are due at the time of service. If surgery is indicated, I am responsible for providing updated insurance information.

Signature:_____ Date:_____

Patient Consent for the Disclosure of Information

I have read the Notice of Privacy Practices and have had any questions answered by this office. I understand that I am entitled to receive a copy of this document, and by signing this form I consent to the following:

a) **Sharing information for purpose of treatment:** You will share my information with all members of my treatment team, both within this office and with other providers (personal and institutional) in order to provide me with quality care and the education/wellness programs specified in my insurance plan.
b) **Sharing of information for purposes of payment:** You will share all necessary information with my insurer(s), payer(s), governmental entities (such as Medicare, Medicaid, ect.) and their representatives involved in the billing process, including, but not limited to, claims representatives, data warehouses, and billing companies.
c) **Sharing of information for purposes of operations:** You will share all information necessary for ongoing operations of this office, including, but not limited to, the credentialing process, peer review, accreditation and compliance with all federal and state laws.

My consent is freely given. I understand that I may revoke this consent at any time if that revocation is in writing, but any disclosures given in reliance on this prior consent will be permissible.

_____ _____
Patient Signature (or guardian, if a minor) Date

_____
Witness

COVID-19 Risk Informed Consent

I, _____ (Name), understand that I am opting for treatment/procedure/surgery that may not be urgent and may not be medically necessary.

I also understand that the novel coronavirus, COVID-19, has been declared a worldwide pandemic by the World Health Organization. I further understand that COVID-19 is extremely contagious and is believed to spread by person-to-person contact; and, as a result, federal and state health agencies recommend social distancing. I recognize that Jonathan Heistein, MD and the staff within his office as well as the surgical facility are closely monitoring this situation and have put in place reasonable preventative measures aimed to reduce the spread of COVID-19. However, given the nature of the virus, I understand there is an inherent risk of becoming infected with COVID-19 by virtue of proceeding with this elective treatment/procedure/surgery. I hereby acknowledge and assume the risk of becoming infected with COVID-19 through this elective treatment/procedure/surgery, and I give my express permission for Jonathan Heistein, MD and the staff within his office and the surgical facility to proceed with the same.

I understand that, even if I have been tested for COVID and received a negative test result, the tests in some cases may fail to detect the virus or I may have contracted COVID after the test. I understand that, if I have a COVID-19 infection, and even if I do not have any symptoms for the same, proceeding with this elective treatment/procedure/surgery can lead to a higher chance of complication and death.

I understand that possible exposure to COVID-19 before/during/after my treatment/procedure/surgery may result in the following: a positive COVID-19 diagnosis, extended quarantine/self-isolation, additional tests, hospitalization that may require medical therapy, Intensive Care treatment, possible need for intubation/ventilator support, short-term or long-term intubation, other potential complications, and the risk of death. In addition, after my elective treatment/procedure/surgery, I may need additional care that may require me to go an emergency room, hospital, or other care facility.

I understand that COVID-19 may cause additional risks, some or many of which may not currently be known at this time, in addition to the risk described herein, as well as those risks for the treatment/procedure/surgery itself.

I have been given the option to defer my treatment/procedure/surgery to a later date. However, I understand all the potential risks, including but not limited to the potential short-term and long-term complications related to COVID-19, and I would like to proceed with my desired treatment/procedure/surgery.

I UNDERSTAND THE EXPLANATION AND HAVE NO MORE QUESTIONS AND CONSENT TO THE PROCEDURE.

_____ _____
Patient or Person Authorized to Sign for Patient Date

_____ _____
Witness Date