Intake & Verification

Progress Physical Therapy, LLC/Progress Rehabilitation Network, LLC ("Progress")

DATE OF EVAL: _____ PT: _____ TO#: _____

PATIENT NAME _____ **DOB**__ _____SS_____ **SEX:** M / F

MAILING ADDRESS_____ **CITY** _____ **STATE** _____ **ZIP** _____

PRIMARY PHONE _____ Cell / Home **REMINDER** ☐Call ☐Text ☐None Secondary Phone**:** _____ Cell / Home

EMAIL _____ **WOULD YOU LIKE TO RECEIVE ELECTRONIC STATEMENTS?** ☐ Yes ☐ No

REASON FOR VISIT_____**INJURY RELATED TO** ☐Work ☐Auto ☐N/A

REFERRING PROVIDER _____ **PRIMARY PROVIDER**_____

EMERGENCY CONTACT_____ **PHONE** _____ **RELATIONSHIP**_____

MEDICARE ONLY- Have you had Home Care in the past 60 days? Y / N Agency Name: _____

PRIMARY INSURANCE_____ **ID** _____**GROUP #** _____

Policy Holder_____ **Relationship**_____ **DOB**_____

SECONDARY INSURANCE_____ **ID** _____**GROUP #** _____

Policy Holder_____ **Relationship**_____ **DOB**_____

WC/AUTO CARRIER_____ **CLAIM #** _____**INJURY DATE / STATE** _____

ADJUSTER NAME_____ **PHONE**_____ **FAX**_____

CASE MANAGER_____ **PHONE**_____ **FAX**_____

Billing Address _____ Claim Open? Y / N

Auth or U/R Required? Y / N U /R PHONE _____ U/R Fax _____

Medical Bill Status _____ Body Part(s) Involved/Injury _____

Comments _____

By signing below, I acknowledge that all of the above information is true and accurate. IF at any time any of this information changes, I am aware that I must inform the facility immediately to avoid unnecessary patient balances.

Patient/Guardian Signature: _____ **Date:** _____

INSURANCE VERIFICATION

PRIMARY INSURANCE VERIFICATION

Effective Date _____ **Calendar/Contract Year** _____ **Copay** _____ **Co-Insurance** _____

Deductible _____ **Deductible Met** _____ **OOPMAX** _____ **OOPMAX MET** _____

Visit Limit _____ **Visits Used** _____ **Auth? Y / N** _____ **PCP Referral? Y / N**

PT Eval within 180 days? Y / N Comments _____

Insurance Representative Name _____ **Call Reference Number** _____ **Date Called** _____ **Staff Initials** _____

SECONDARY INSURANCE VERIFICATION

Effective Date _____ **Calendar/Contract Year** _____ **Copay** _____ **Co-Insurance** _____

Deductible _____ **Deductible Met** _____ **OOPMAX** _____ **OOPMAX MET** _____

Visit Limit _____ **Visits Used** _____ **Auth? Y / N** _____ **PCP Referral? Y / N**

PT Eval within 180 days? Y / N Comments _____

Insurance Representative Name _____ **Call Reference Number** _____ **Date Called** _____ **Staff Initials** _____

*****OFFICE STAFF USE ONLY*****

Intake Registration Completed By: _____ **Date:** _____

Front desk representative will check each task below once completed.

Copies of all insurance cards (front and back) and photo ID ☐ **RX (if direct access, form given)** ☐ **Patient Intake Form (filled out/signed/dated)** ☐

Medical History Form ☐ **VOB Form/Consent & Financial Policy** ☐ **Paper Chart Scanned into TO** ☐

Receipt of Privacy Notice ☐ **Cancellation Policy** ☐

Verification of Benefits (VOB) Progress Physical Therapy, LLC/Progress Rehabilitation Network, LLC

Patient Name:_____ **DOB:** _____

We have_____ **as your primary insurance and**_____ **as your secondary insurance.**
Has anything changed since we verified that? YES / NO

As a courtesy, we have verified your insurance coverage and benefits. However, per your insurance company, benefits quoted are not a guarantee of payment.

	Primary Insurance		Secondary Insurance	
BENEFIT YEAR/EFFECTIVE DATE: period when benefits are available.				
COPAY: fixed amount due at each visit.				
DEDUCTIBLE: amount you must pay before your insurance company will begin paying.	**Individual** **Total:** **Met:**	**Family** **Total:** **Met:**	**Individual** **Total:** **Met:**	**Family** **Total:** **Met:**
DEDUCTIBLE DEPOSIT: deposit collected each visit toward your deductible.				
CO-INSURANCE: percentage of covered healthcare cost that you pay.				
OUT OF POCKET MAXIMUM: maximum you pay during your plan benefit year.	**Individual** **Total:** **Met:**	**Family** **Total:** **Met:**	**Individual** **Total:** **Met**	**Family** **Total:** **Met:**
VISIT OR DOLLAR LIMIT: amount of visits or dollar amount covered within your benefit year.	**Total:**	**Used:**	**Total:**	**Used:**
COMMENTS:				

FINANCIAL POLICY STATEMENT

- You are required, and you hereby agree, to pay at time of service any required co-payments and deductibles, as well as charges not covered by insurance, outstanding balances, and delinquent accounts.
- Once your claims have been processed by your insurance company, the allowed balance assigned to patient responsibility is due in full.
- **Automatic Payment- When paying by credit card, I understand that the credit card processor, WayStar, Inc. stores my credit card information securely. I hereby authorize this credit card for current balances and final payment once all claims have been processed. If at any time, I want to revoke this authorization, I need to inform the facility in writing.**
- If Workers Compensation or Auto benefits deny/exhaust, remaining bills are sent to your health insurance or to the patient/guarantor.
- If you receive any payments made directly from your insurance, you hereby agree to promptly remit the same amount to "Progress".
- If you pay by check, and your check is dishonored or returned for any reason, we will expect payment in full plus a returned check fee of $50 within 30 days of the returned check.
- I agree that if I fail to make any of the payments in a timely manner, I will be responsible for all costs of collecting monies owed for thirty-three percent (33%) of the total indebtedness incurred by "Progress" which includes but is not limited to collection agency fees, court costs and attorney's fees.
- I hereby assign medical benefits to include major medical benefits to which I am entitled for these services including Medicare, Medigap, Medicaid, private insurance and third party payers to "Progress".

Patient/Guardian Signature_____ **Printed Name**_____ **Date**_____

MINORS ONLY- Guarantor Name_____ **Phone** _____

Address_____ City/ST/Zip _____

I acknowledge that by signing this document I understand the information and have received a copy of this form.

Medical History Questionnaire

Dba Progress Physical Therapy, LLC/Progress Rehabilitation Network, LLC ("Progress")

Patient Name _____ **Subscriber ID #** _____ **DOB** _____

Are you currently working? ☐ Yes ☐ No ☐ Retired **If Yes, what is your occupation?** _____

Why did you select our facility? ☐ Medical Provider Referral ☐ Returning Patient ☐ Family/Friend ☐ Web/Internet ☐ Workshop/Discovery Visit ☐ Newsletter ☐ Other _____

Describe your current problem and how it began _____

Onset or Surgery Date _____

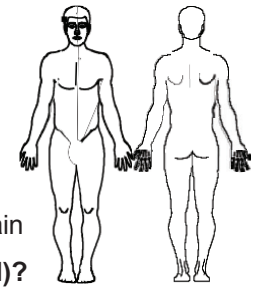
List any diagnostics/tests you have had due to your *current* condition_____

How often are your symptoms present throughout the day?

☐ Constantly (76-100% of the day) ☐ Frequently (51%-75% of the day)

☐ Occasionally (26%-50% of the day) ☐ Intermittently (0%-25% of the day)

Indicate below where you have pain or other symptoms



Describe the nature of your pain ☐ Sharp ☐ Dull Ache ☐ Numbness ☐ Shooting ☐ Burning ☐Tingling

How is your condition changing? ☐Getting Better ☐ Not Changing ☐ Getting Worse

Today's pain level: No Pain **<** 0------1------2------3------4------5------6------7------8------9------10 **>** Unbearable Pain

In the past week, how much has your pain interfered with your daily activities (work, social, household)?

No interference **<** 0------1------2------3------4------5------6------7------8------9------10 **>** Unable to carry out daily activities

Check all that apply ☐ Pain unrelieved by rest ☐ Pain at night ☐ Dizziness/Fainting ☐ Recent Infection/Fever ☐ Fall with or without injury ☐ Pregnant/ # weeks _____

In general, how is your overall health? ☐ Excellent ☐ Very Good ☐ Good ☐Fair ☐ Poor

Who have you seen for your *current* problem before today? ☐ No-One ☐ Doctor ☐ Chiropractor ☐ Physical Therapist ☐ Acupuncturist ☐ Occupational Therapist ☐ Other: _____

>>>If you are a returning patient, your therapist will review your previous medical history with you. Be sure to discuss all changes in your medical condition with them <<<

CONSENT FOR CARE AND TREATMENT

I, the undersigned, give my consent for "Progress" to furnish medical care and treatment considered necessary and proper in diagnosing or treating patient's physical condition.

PRIVACY NOTICE/ HIPAA

A copy of our Privacy Notice was given to you, which describes how your personal medical information will be used or disclosed. PLEASE REVIEW IT CAREFULLY.

HIPAA allows us to speak with family and friends involved in your care. Is there anyone specific you would like us to list by name? _____

Is there anyone that you do **NOT** want us to speak with? _____

CANCELLATION - Kindly provide at least **24-hours** notice if you are unable to keep an appointment so that we may offer that time to another patient. Missed appointment fees may apply if proper notice is not provided.

Patient/Guardian Signature _____ **Date** _____

Printed Name _____ **PT Initial/date** _____

Medical History Questionnaire

Dba Progress Physical Therapy, LLC/Progress Rehabilitation Network, LLC ("Progress")

FAMILY HISTORY

Please check if anyone in your immediate family (parents, brothers, sisters) have ever been treated for any of the following:

- ☐ Diabetes
- ☐ Heart Disease
- ☐ Kidney Disease
- ☐ Chemical Dependency (i.e. Alcoholism)
- ☐ Ehlers-Danlos Syndrome
- ☐ Other
- ☐ Cancer
- ☐ Inflammatory Arthritis (Rheumatoid, Ankylosing)
- ☐ Stroke
- ☐ Depression
- ☐ Osteoporosis

Please check any of the following that apply to you:

- ☐ Pain
- ☐ Numbness/Tingling
- ☐ Osteoarthritis
- ☐ Multiple Sclerosis
- ☐ Asthma
- ☐ Dizziness/Fainting
- ☐ Alcohol/Drug Dependence
- ☐ High Blood Pressure
- ☐ Circulation Problems
- ☐ Osteoporosis
- ☐ Epilepsy
- ☐ Emphysema/Bronchitis
- ☐ Recent Fever
- ☐ High Cholesterol
- ☐ Blood Clots
- ☐ Rheumatoid Arthritis
- ☐ Stroke/CVA (Date) _____
- ☐ Tuberculosis
- ☐ Stomach Ulcers
- ☐ Diabetes
- ☐ Ehlers-Danlos Syndrome
- ☐ Other Arthritic Conditions
- ☐ MRSA
- ☐ Hepatitis
- ☐ Depression

☐ Cancer If Yes, describe what kind & treatment _____

☐ Heart Problems If Yes, describe what kind & treatment _____

☐ Kidney Problems If Yes, describe what kind & treatment _____

OTHER CONDITIONS

Please check any of the below that you have experienced in the **last 12 months?**

- ☐ Easy Bruising
- ☐ Nausea/Vomiting
- ☐ Fatigue
- ☐ Weakness
- ☐ Fever/Chills/Sweats
- ☐ Stress at Home or Work
- ☐ Tremors
- ☐ Seizures
- ☐ Double Vision
- ☐ Loss of Vision
- ☐ Eye Redness
- ☐ Joint/Muscle Swelling
- ☐ Excessive Bleeding
- ☐ Difficulty Breathing
- ☐ Regular Cough
- ☐ Arm/Leg Swelling
- ☐ Heart Racing in your Chest
- ☐ Difficulty Swallowing
- ☐ Heartburn/Indigestion
- ☐ Constipation/Diarrhea
- ☐ Blood in Stool
- ☐ Blood in Urine
- ☐ Skin Rash
- ☐ Problems Sleeping
- ☐ Sexual Difficulties
- ☐ Urinary Incontinence
- ☐ Problems Urinating
- ☐ Fecal Incontinence

How much caffeinated coffee or other caffeinated beverages do you drink per day? _____

How many days per week do you drink alcohol? _____

If one drink equals one beer or one glass of wine, how much do you drink at an average sitting? _____

Are you now, or have you ever been, a smoker? ☐ Yes ☐ No If Yes, how many packs of cigarettes do you smoke a day? _____

Have you ever taken an anticoagulant? ☐ Yes ☐ No

Do you have a pacemaker? ☐ Yes ☐ No

Have you ever taken steroid medications for any reason? ☐ Yes ☐ No

During the past month, have you been feeling down, depressed, or hopeless? ☐ Yes ☐ No

During the past month, have you been bothered by having little interest or pleasure in doing things? ☐ Yes ☐ No

Do you ever feel unsafe at home or has anyone hit you or tried to injure you in any way? ☐ Yes ☐ No

Are you currently pregnant or think you might be pregnant? If Yes, estimated delivery date? ☐ Yes ☐ No
If Yes, estimated delivery date _____

Medical History Questionnaire

Dba Progress Physical Therapy, LLC/Progress Rehabilitation Network, LLC ("Progress")

PROCEDURES / SURGERIES: ☐ **NONE** ☐ **BELOW**

DATE	TYPE	DATE	TYPE

CURRENT MEDICATIONS: ☐ **NONE** ☐ **BELOW** ☐ **LIST ATTACHED**

Please list ALL medications that you are **currently** taking **or** attach a copy of your own list. (**Include** prescription, over-the-counter, and vitamin/nutritional supplements). For each medication, list the name, dosage, frequency and route (mouth, inhaler, intravenously, topically, etc).

MEDICATION	DOSE	FREQUENCY	ROUTE

I certify to the best of my knowledge, the above information is complete and accurate. I agree to notify this provider/practitioner immediately whenever I have changes in my health condition. I understand that this provider/practitioner may need to contact my physician if my condition needs to be co-managed.

Patient/Guardian Signature _____ **Date** _____

Printed Name _____ **PT Initial Review (Date & Initial)** _____

PT Updated (Date & Initial) _____ **PT Updated (Date & Initial)** _____ **PT Updated (Date & Initial)** _____

Dba Progress Physical Therapy, LLC

Acknowledgement of Receipt of Privacy Notice

Purpose of this Acknowledgement

This Acknowledgement, which allows the Practice to use and/or disclosure personally identifiable health information for treatment, payment or healthcare operations, is made pursuant to the requirements of 45 CFR §164.520(c)(2)(ii), part of the federal privacy regulations for the Health Insurance Privacy and Accountability Act of 1996 (the "Privacy Regulations").

Please read the following information carefully:

1. I understand and acknowledge that I am consenting to the use and/or disclosure of personally identifiable health information about me by Progress Rehabilitation Network, LLC and its Affiliates (the "Practice") for the purposes of treating me, obtaining payment for treatment of me, and as necessary in order to carry out any healthcare operations that are permitted in the Privacy Regulations.

2. I am aware that the Practice maintains a Privacy Notice that sets forth the types of uses and disclosures that the Practice is permitted to make under the Privacy Regulations and sets forth in detail the way in which the Practice will make such use or disclosure. By signing this Acknowledgement, I understand and acknowledge that I have received a copy of the Privacy Notice.

3. I understand and acknowledge that in its Privacy Notice, the Practice has reserved the right to change its Privacy Notice as it sees fit from time to time. If I wish to obtain a revised Privacy Notice, I need to send a written request for a revised Privacy Notice to the office of the Practice at the following address: 5300 Hickory Park Drive, Suite 110, Glen Allen, VA 23059, Attention: Compliance Officer.

4. I understand and acknowledge that I have the right to request that the Practice restrict how my information is used or disclosed to carry out treatment, payment or healthcare operations. I understand and acknowledge that the Practice is not required to agree to restrictions requested by me except in very limited circumstances as described in the Privacy Notice, but if the Practice agrees to such a requested restriction it will be bound by that restriction until I notify it otherwise in writing.

   I request the following restrictions be placed on the Practice's use and/or disclosure of my health information (leave blank if no restrictions): _____

   _____

5. I hereby agree that the Practice may send me confidential communications (e.g. appointment reminders, scheduling changes, responses to my inquiries via:

   PLEASE CHECK ALL THAT APPLY:

   ☐ Home phone/voicemail ☐ Work phone/Voicemail ☐ Mobile phone/voicemail

   ☐ Text Message ☐ Email (Address: _____)

BY SIGNING THIS FORM, I ACKNOWLEDGE THAT I HAVE REVIEWED AN EXECUTED COPY OF THIS ACKNOWLEDGEMENT AND A COPY OF THE PRACTICE'S POLICY NOTICE AND AGREE TO THE PRACTICE'S USE AND DISCLOSURE OF MY PROTECTED HEALTH INFORMATION FOR TREATMENT, PAYMENT AND HEALTH CARE OPERATIONS.

_____ _____
Signature of Patient or Representative Date

_____
Patient's Name (Printed)

_____ _____
Name of Personal Representative (if applicable) Relationship to Patient

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To Be Completed by the Practice

The requested restrictions on the use and/or disclosure of the patient's health information set forth above are:

___ Accepted ___ Denied ___ Not Applicable _Other (explain) _____

Signature of Authorized Practice Representative _____ Date _____

Progress Physical Therapy, LLC

MEDICARE SECONDARY PAYOR (MSP) QUESTIONNAIRE

Patient Name _____ Progress Physical Therapy Acct # _____

Medicare # (exactly as on Red-White-Blue Government Medicare Card) _____

Please read and respond to each of the following:

1. **Have you had any Home Health Care visits from any Home Health provider in the past 60 days?** Yes or NO

   If yes, please provide the name and phone number of the Home Health Agency:

   Home Health Agency Name: _____

   Home Health Agency Phone Number: _____

2. **Was your illness/injury due to any of the following:** Yes or No If yes, please indicate.

   ☐ Work-Related

   ☐ Automobile Accident

   ☐ Accident on Property (other than your own)
   (Example: store, restaurant, etc.)

3. **If Medicare coverage is due to age or disability, do you have group insurance coverage through another family member's current employer?**

   ☐ Yes – the group insurance will be primary

   ☐ No – Medicare will be primary

4. **Do you have <u>any</u> benefits through TriCare (formerly Champus)?** Yes or No

If you answered yes to questions 2 or 3 there is a second form to be filled out.

Patient's Signature _____ Date _____

Thank You

Travel/Illness History Questionnaire

If any of your answers have an * next to it, PLEASE LET US KNOW IMMEDIATELY!

1. In the past 14 days, have you: ***YES NO**
   - **a.** traveled internationally or flown domestically?
   - **b.** traveled to any known COVID hot spots?
   - **c.** had close contact with a college student who was sent home due to a COVID outbreak?

If you responded yes above, have you self-isolated or quarantined for 14 days? YES *NO

2. Have you had close contact with anyone (family, close relationships, coworkers, etc.) who has travelled by air or to any of the COVID hot spots in the past 14 days? ***YES NO**

3. Have you been eating in restaurants indoors or working out at a fitness facility and/or do you have a child who is in a daycare facility? ***YES NO**

4. Have you experienced any of the following symptoms or have you or a family member been exposed to anyone who has had any these symptoms in the past 14 days?

   ****Fever, chills, generalized muscle aches/pains, cough, sore throat, shortness of breath, loss of smell or taste, new onset of unusual fatigue, headache that is unusual for you, diarrhea, nausea, abdominal pain, acute confusion, hives, redness in toes. *YES NO**

5. Have you or anyone in your household had any known exposure to the Corona Virus?

   ***YES NO**

6. Are your currently taking any medications to suppress a fever? ***YES NO**

7. Do you, or does anyone in your household work in a hospital, urgent care or primary care physician's office, daycare or in a setting, such as a restaurant or fitness center, where customers typically do not wear masks? ***YES NO**

8. Are you wearing a mask when out in the public or socializing indoors, practicing social distancing, avoiding gatherings of groups of 10 or more, and attempting to maintain 6 feet of distance between yourself and other people?

   YES *NO

I understand that it is my responsibility to immediately inform Progress Physical Therapy, LLC if I develop any of symptoms noted above, have had close contact with anyone else with these symptoms or diagnosed with Corona Virus, or if I have been advised to self-quarantine. I also understand that, if any of my answers have a * next to them, my appointment may need to be re-scheduled or virtual visits will be offered, when appropriate. I understand that Progress Physical Therapy, LLC has a strict policy that all who visit will wear a mask (no valve on mask) that covers their nose and mouth for the entire time visiting our office, even when social distanced from others. I will call 804-270-7754 and let Progress Physical Therapy, LLC know if I am unable to follow this policy before arriving at the clinic.**

Name (Print) _____ Signature _____ Date _____

Dba Progress Physical Therapy, LLC

Cancellation/ No Show Policy

You and your Physical Therapist will develop a treatment plan to maximize your progress in physical therapy in order to help you achieve your goals as efficiently as possible. In order to accomplish your treatment goals, adherence to that plan and your attendance to all scheduled appointments is essential.

We understand that normal life events may sometimes interfere with your treatment plan. If you need to cancel, please call us at least 24 hours before your appointment so that we can reschedule you as needed, and offer your original appointment time to another patient waiting for an appointment. There will be a $50 missed appointment fee for cancelling an appointment with less than 24 hours notice, or for missing an appointment without notice (No Show).

We appreciate your commitment to this process, and your consideration for other patients. If you No Show two (2) appointments, and do not respond to our attempts to contact you, we will interpret that as your decision not to continue therapy. If this occurs, we reserve the right to cancel any a future appointments you may already have on the schedule; and to inform your physician of record that you have discontinued physical therapy.

<u>If you need to cancel or change an appointment, please call us at 804-270-7754 at least 24 hours before your scheduled appointment time.</u>

I have received a copy of this statement and understand this policy.

Patient/Patient's Guardian Signature: _____

Dated: _____