



HOLISTIC HEALTH ASSOCIATES

603-B W. Patrick Street, Frederick, MD 21701
301-620-1414

MASSAGE

Medical History

\*CONFIDENTIAL\*

Legal Name Preferred Name

DOB Today's date

Address City State Zip

Telephone (home) (cell) (work)

Ok to leave voicemail? Yes or No Indicate which phone number:

Email Married: Yes or No

Preferred means of contact: (please indicate one): text message email

Occupation Employed by

Primary Care Doctor Experienced Acupuncture/Herbs in the past? Y or N

Height Weight Average Blood Pressure Reading

How did you hear about us? (please indicate): Radio Sign Yellow Pages Health Fair BNI

Referral-Who? Internet-Which Search?

What do you hope to gain from your massage sessions?

Do you have now, or have you ever had, any of the following?

- No Yes/When? Under a Doctor or a therapist's care? Explain?
Previous Massage? What kinds?
Allergies: What kind?
Arthritis/Gout
Neck/Back Problems Upper Middle Lower - Type:
Sciatica Right side Left Side
Spondylitis/Spondylolisthesis/Scoliosis: Mild Rods
Shoulder/Arm Problems - Type:
Hip/Leg Problems - Type:
Skin Problems: Rashes Eczema Psoriasis Other:
Blood Pressure Low High Controlled by Medication
Implants: Where?
Cancer/Tumors: What Kind?
Chronic Pain/Cramping: Explain?
Wear Contact Lenses
Emotional Changes/Depression/Grieving: Explain?
Diabetes or Hypoglycemic
Headaches or Migraines
Phlebitis/Blood Clots
Heart Problems: What Kind?
Hernia: What Kind?
Infections Conditions Herpes HIV/Aids Hepatitis: circle A B C D
Neurological Diseases: M.S. Parkinson's Other:
TMJ (Diagnosed jaw dysfunction)
Varicose Veins/Edema (Persistent swelling)- Where?
Osteoporosis: Type I or Type II
Surgery - Where? What kind?
Recent Injuries/Accidents: Within last 6 months?
Prior Injuries/Accidents: Prior to last 6 months?
Pregnant/Trying?
Taking medications: What Kind?

I UNDERSTAND THAT MASSAGE PRACTITIONERS ARE NOT TRAINED IN THE DIAGNOIS AND TREATMENT OF DISEASES. I CONFIRM THAT I HAVE CONSULTED A MEDICAL DOCTOR FOR ALL THE CONDITIONS CHECKED AND HAVE RECEIVED AUTHORIZATIONS TO HAVE MASSAGE BY SIGNING THIS RELEASE, I DO HERBY WAIVE AND RELEASE THE MASSAGE PRACTIONER FROM ALL LIABILITY, PAST, PRESENT, AND FUTURE.

CLIENT SIGNATURE:



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**INFORMED CONSENT FOR CARE**

By signing below, I hereby request and consent to the performance of acupuncture, massage therapy, and/or nutrition/health counseling treatments and other procedures within the scope of the practice of these respective forms of care on me (or on the patient named below, for whom I am legally responsible) by a licensed practitioner in the practice listed above. I understand that acupuncturists and massage therapists are not primary care providers and that regular primary care by a licensed physician is an important choice that is strongly recommended.

I understand that acupuncture is performed by the insertion of single use, sterile needles through the skin, at certain points on or near the surface of the body in an attempt to treat bodily dysfunction or diseases, to modify or prevent pain perception, and to normalize the body's physiological functions. I understand that methods of treatment related to acupuncture may include, but are not limited to, acupuncture, moxibustion, cupping, electrical stimulation, Tui-Na (Chinese massage), Chinese herbal medicine, and nutritional counseling. I understand that the herbs may need to be prepared and the teas consumed according to the instructions provided orally and in writing. The herbs may be an unpleasant smell or taste. I will immediately notify a member of the clinical staff of any unanticipated or unpleasant effects associated with the consumption of the herbs.

Acupuncture typically involves safe methods of treatment, however, certain adverse side effects may result. These unusual side effects could include, but are not limited to, minor bruising or bleeding, soreness, numbness or tingling near the needling sites that may last a few days, dizziness, fainting, infection, spontaneous miscarriage, nerve damage and organ puncture, including lung puncture (pneumothorax). Burns and/or scarring are a potential risk of moxibustion and cupping, or when treatment involves the use of heat lamps. Bruising is a common side effect of cupping. The herbs and nutritional supplements (which are from plant, animal and mineral sources) that have been recommended are traditionally considered safe in the practice of Chinese Medicine, although some may be toxic in large doses. I understand that some herbs may be inappropriate during pregnancy. Some possible side effects of taking herbs are nausea, gas, stomachache, vomiting, headache, diarrhea, rashes, hives, and tingling of the tongue. **I will notify a clinical staff member who is caring for me if I am or become pregnant.** I do not expect the clinical staff to be able to anticipate and explain all possible risks and complications of treatment, and I wish to rely on the clinical staff to exercise judgment during the course of treatment. I understand that results are not guaranteed and that I am free to stop the treatment at any time. I understand that while this document describes the major risks of treatment, albeit rare, there are other side effects that may occur.

I understand the clinical and administrative staff may review my patient records and lab reports, but all my records will be kept confidential and will not be released without my written consent.

By voluntarily signing below, I show that I have carefully read, or have had read to me, all of the above information and have been told about the risks and benefits of acupuncture, massage therapy, and other procedures. I have had an opportunity to ask questions and am fully aware of what I am signing. I intend this consent form to cover the entire course of treatment for my present condition and for any future condition(s) for which I seek treatment.

\_\_\_\_\_  
**Signature of Patient or Personal Representative**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Printed Name of Patient or Personal Representative**

\_\_\_\_\_  
**Relationship to Patient**



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## FINANCIAL POLICY

We are dedicated to providing you with the highest quality of healthcare. Beyond the practice of medicine, all healthcare providers are faced with the task of working with many different insurance companies who help coordinate your healthcare and also help you meet your medical financial responsibilities. It is therefore important to us that you understand our financial policy. By signing this form, you acknowledge your financial responsibility. Please you're your insurance. **Your responsibility** begins when you call to make an appointment. Be aware of what your insurance pays for and does not pay for, as well as any co-pay and deductible. If you have health coverage with more than one plan, know the information for all. It is very important that all demographic information you provide at the time of scheduling is accurate. This includes any secondary insurance and in the event you are a dependent on a policy, the subscriber information.

### Private Insurance

We currently accept and process for Aetna, Blue Cross Blue Shield, United, and Cigna. We will also process when Medicare is primary and one of the afore-named insurance providers is secondary. We are a group practice; the services that you will receive may be billed under numerous providers.

Your health insurance coverage is a contract between you and your health insurance company. Insurance policies may vary greatly in terms of deductible and percentage of coverage for acupuncture care. We provide billing as a courtesy to you and we will do our best to verify your insurance coverage. The information we receive is a QUOTE from the insurance and not a guarantee of benefits or payment for services. It is your responsibility to know your plan. You need to know what your plan will and will not pay as well as your co-pay and deductible. You may be required to present your current insurance card at each visit. We will submit your services to your insurance company as long as you have provided us with the proper information. Waiting for the insurance company to reimburse our practice is a courtesy and it may be withdrawn under certain circumstances. Patient is still responsible for payment in instances when the insurance company does not reimburse our practice. If you change insurance companies or employers, or your policy is updated or changed, you agree to provide this office with the current information immediately.

By signing this form, you are authorizing payment of medical benefits will be made directly to this office. If your insurance carrier sends payment to you for services incurred in this office, you agree to send or bring those payments to this office upon receipt. You may also choose to opt out of insurance assignment by signing an insurance waiver provided by this office.

If we are a participating provider with your plan, all co-pays and deductibles are due in full at time of service and we will accept the usual and customary rate allowed by your insurance company. However, there are some modalities we use that may not be covered by different insurance plans or may require an additional co-pay, even if we are a participating provider. If so, the patient is responsible for the unpaid balance or the additional co-pay.

### Copays and Co-Insurance

If you have a policy that identifies a flat copay, we require that you pay the copay amount at the time of each visit. If your policy identifies a % liability, we require that you pay an approximate amount at the time of service. Amounts are as follows: 10% - \$10, 20% - \$20, 25% - \$25, and so forth. Once the insurance carrier has processed the claim and designated the exact amount due, you will be credited for any over payment or billed for any remaining balance. In addition, if we are able to identify a consistent trend amount with your percent responsibility, we will update our records and collect the most common percent identified by your insurance, and any amounts more or less than the average amount, will be "balance billed".

If we are not a participating provider with your plan, you will be responsible for full payment of services, regardless of your insurance company's determination of usual and customary rates. If your plan has out-of-network benefits you can file the claim yourself and a form to do so can be provided our office upon request and payment should be sent directly to you by your insurance. We will not enter into any dispute with your insurance company. If coverage problems arise, you will be expected to address those directly with your insurance adjuster or agent.

### Self-Pay

Patients who are not covered by a current insurance plan or do not present a current insurance card at the time of service, are required to pay, in full, for all charges on the day of service. We accept cash, check and credit card payments. There will be a \$30 fee for a returned check. If a second check is returned, cash will be required for all future payments.

**Worker's Compensation**

It is your responsibility to notify us prior to or upon registration for the first office visit, that your case involves a workers' compensation claim. Otherwise, we will bill your regular insurance or hold you responsible for all charges. You are responsible for making sure that we receive the WC claim number, managed care organization handling your claim, allowed diagnosis and accurate date of injury. Upon receipt of this information your claim will be filed. Until all appropriate information is received, you are responsible for the bill. Regular insurance will not be filed for any visits associated with a possible worker's compensation claim, unless a notification is received from the insurer that the claim has been disallowed by WC.

**Motor Vehicle Accidents/Personal Injury**

In a case where a third party may be liable for payment of your bills, you are responsible for your charges. We cannot act as a go-between in these situations. We will not sign a Doctor's Lien with your attorney. We require payment at the time of service. If you have PIP coverage, we will bill your auto/personal injury insurance if we can confirm that the claim is still open. If not, you will be required to provide payment in full at the time of service. We will not bill your regular insurance for these services. The only exception is an insurance company in which our contract with them specifically states that we must file these claims with the subrogation department. Ultimately, you are responsible for the full balance of these charges.

**Unpaid Balances**

Any account that goes beyond 90 days (3 months) with an unpaid balance and for which no contact or arrangements have been made, is automatically put into our in-house collection system. If an additional 2 months goes by with no response to our collection letters, the account will be evaluated for potential collection by our outside collection agency and you will be notified by mail that you have been dismissed from our practice.

At times temporary financial problems may affect the timely payment of your account. You are encouraged to contact and keep in touch with our billing staff to do everything possible to keep our relationship in good standing.

**Missed Appointments**

Please see and sign our separate form for our patient missed appointment policy.

Please be prepared when you schedule an appointment. Know your insurance and your responsibilities. We are happy to provide a further explanation for any of the above criteria. Our number one goal is to make our patient's time with us as worry-free and smooth as possible so that we can focus on assisting in your healing.

**By signing this form, I have read, understand and agree to the financial policies of Holistic Health Associates.**

\_\_\_\_\_  
**Signature of Patient or Personal Representative**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Printed Patient Name or Personal Representative**

\_\_\_\_\_  
**Relationship to Patient**



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**PATIENT MISSED APPOINTMENT POLICY**

It is our goal that every patient cared for by Holistic Health Associates receives the very best care and service possible. Your program consists of a specific series of treatments given over a pre-planned time span, to maximize results. We care deeply about your results and the results of our other patients who are trying to maintain their programs in our busy center. Therefore, we have a few simple rules that we insist you follow:

1. Meet all your appointments. Arrange your activities so that this can occur.
2. If you become ill, please check with us by phone. We may still want you to arrive, because treatments may be able to help you.
3. If you are unable to make an appointment due to an emergency, please contact us by phone so we can reschedule your appointment.
4. With the exception of an unexpected emergency, we require that you notify us at least 24 hours in advance as to any appointment changes.
5. All cancelled/missed appointments should be rescheduled & made up within 1 week.
6. There is a \$40 service charge for cancellations made with less than 24-hour notice or no call/no show appointments.

I have read, understand, and agree to follow the above policy.

\_\_\_\_\_  
**Signature of Patient or Personal Representative**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Printed Patient Name or Personal Representative**

\_\_\_\_\_  
**Relationship to Patient**



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## **NOTICE OF PRIVACY PRACTICES**

**THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.**

### **WHO WILL FOLLOW THIS NOTICE**

We care about our patient's privacy and strive to protect the confidentiality of your medical information at this practice. Current federal legislation requires that we issue this official notice of our privacy practices. You have the right to the confidentiality of your medical information and we respect our legal obligation to keep health information that identifies you private. This practice (all medical professionals, all employees, staff and other personnel, subsidiaries and business associates (e.g. software program company)) are required to abide by the terms of the Notice Of Privacy Practices currently in effect, and to provide notice of its legal duties and privacy practices with respect to protected health information. We reserve the right to change this notice at any time as allowed by law. If we change the Notice, the new privacy practices will apply to your health information that we already have as well as to such information that we may generate in the future. If we change our Notice of Privacy Practices, we will post information about the change in our office, have copies available in our office, and post it on our Website. This Notice describes how we protect your health information and what rights you have regarding it.

### **TREATMENT, PAYMENT, AND HEALTH CARE OPERATIONS**

The most common reason why we use or disclose your health information is for treatment, payment or health care operations. Examples of how we use or disclose information for treatment purposes are (if applicable): allergies you may have to certain materials, herbs or supplements, setting up an appointment for you, calling to remind you of an appointment, prescribing herbal supplements, developing treatment plans, or referring you to another doctor, practitioner or clinic for services. Examples of how we use or disclose your health information for payment purposes are: so that the treatment and services you receive from us may be billed and payment may be collected from you; an insurance company or a third party or inquiring about your health care plan(s). "Health care operations" mean those administrative and managerial functions that we must do to run our office. Examples of how we use or disclose your health information for health care operations are: financial or billing audits; internal quality assurance; personnel decisions; participation in managed care plans; defense of legal matters; business planning; and outside storage of our records.

**APPOINTMENT REMINDERS, TREATMENT ALTERNATIVES AND HEALTH RELATED BENEFITS AND SERVICES.** We may contact you to provide appointment reminders or information about treatment alternatives or other health-related benefits and services that may be of interest to you. We may also leave voicemail messages, emails or text messages unless indicated otherwise.

**INDIVIDUALS INVOLVED IN YOUR CARE OR PAYMENT FOR YOUR CARE.** When appropriate, we may share Health Information with a person who is involved in your medical care or payment for your care, such as your family member or close friend. Proper authorization for release of information to persons other than the patient or getting copies of your health information from another professional that you may have seen before us will be given by written consent from the patient.

**RESEARCH.** Under certain circumstances, we may use and disclose Health Information for research. For example, a research project may involve comparing the health of patients who received one treatment to those who received another, for the same condition. In this situation, your name will not be used without permission, only the results of the treatment.

### **OTHER USES OR DISCLOSURES THAT CAN BE MADE WITHOUT CONSENT OR AUTHORIZATION**

In some limited situations, the law allows or requires us to use or disclose your health information without your permission. Not all of these situations will apply; some may never come up at our office at all. Such uses or disclosures are:

- when a state or federal law mandates that certain health information be reported for a specific purpose;
- for public health purposes, such as contagious disease reporting, investigation or surveillance; and notices to and from the federal Food and Drug Administration regarding drugs or medical devices;
- disclosures to governmental authorities about victims of suspected abuse, neglect or domestic violence;
- uses and disclosures for health oversight activities, such as for the licensing of doctors; for audits by Medicare or Medicaid if applicable; or for investigation of possible violations of health care laws;
- disclosures for judicial and administrative proceedings, such as in response to subpoenas or orders of courts or administrative agencies;

- disclosures for law enforcement purposes, such as to provide information about someone who is or is suspected to be a victim of a crime; to provide information about a crime at our office; or to report a crime that happened somewhere else;
- disclosure to a medical examiner to identify a dead person or to determine the cause of death; or to funeral directors to aid in burial; or to organizations that handle organ or tissue donations;
- uses or disclosures for health-related research;
- uses and disclosures to prevent a serious threat to health or safety;
- uses or disclosures for specialized government functions, such as for the protection of the president or high-ranking government officials; for lawful national intelligence activities; for military purposes; or for the evaluation and health of members of the foreign service;
- disclosures of de-identified information;
- disclosures relating to worker’s compensation programs;
- disclosures of a “limited data set” for research, public health, or health care operations;
- incidental disclosures that are an unavoidable by-product of permitted uses or disclosures;
- disclosures to business associates (Ex: software company) who perform health care operations for us and who commit to respect the privacy of your health information

**YOUR RIGHTS REGARDING YOUR HEALTH INFORMATION**

The law gives you many rights regarding your health information. You are welcome to request, in writing; a restriction; amendment or adjustment to the use or disclosure of your information. All written requests should be sent to the Privacy Officer and address listed at the beginning of this Notice. You have the right to:

- ask us to restrict our uses and disclosures for purposes of treatment, payment or health care operations.
- ask us to communicate with you in a confidential way, such as phoning at work rather than home, by mailing health information to a different address, or via email to your personal email address.
- ask to see or obtain photocopies of your health information. You will be able to review your information within 5 business days of your written request, once received and/or receive a copy of your health information within 15 business days of your written request, once received.
- ask us to amend your health information if you think that it is incorrect or incomplete. If we agree, we will amend the information within 60 days from the date the written request was received.
- get a list of all disclosures that we have made within the last six years (or any shorter period).
- get additional paper copies of this Notice of Privacy Practices upon request.

**COMPLAINTS**

If you think that we have not properly respected the privacy of your health information, you are free to complain to us or the U.S. Department of Health and Human Services, Office for Civil Rights. We will not retaliate against you if you make a complaint. If you want to complain to us, please send a written complaint to the Privacy Officer at the address shown at the beginning of this Notice. If you prefer, you can discuss your complaint in person or by phone.

**NOTICE OF PRIVACY PRACTICES PATIENT ACKNOWLEDGEMENT**

I, \_\_\_\_\_, have been presented with the Notice of Privacy Practices explaining my rights  
(First and Last Name)

regarding my individually identifiable protected health information (PHI). I consent to the use and disclosure of my PHI for purposes of treatment, payment or other health care operations. Other uses of my PHI will require an authorization from me for the specific intention of disclosure.

Thank you for your continued confidence in our practice and for supporting our requirements.

\_\_\_\_\_  
**Signature of Patient or Personal Representative**

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Printed Name of Patient or Personal Representative**

\_\_\_\_\_  
**Relationship to Patient**



HOLISTIC HEALTH ASSOCIATES

HIPAA PRIVACY AUTHORIZATION FORM

Authorization for Use or Disclosure of Protected Health Information
(Required by the Health Insurance Portability and Accountability Act, 45 C.F.R. Parts 160 and 164)

There are no other affiliated parties that I require to have access to my health information

CHECK BOX ABOVE OR COMPLETE THE FOLLOWING BELOW

1. AUTHORIZATION

I, (First and Last Name), authorize Holistic Health Associates to use and disclose the protected health information described below to the following person(s) or health care professional(s):

Name: Relationship:

Name: Relationship:

2. DATES OF SERVICE (check one)

This authorization for the release of information covers the period of healthcare from:

to

OR

All past, present and future periods.

3. EXTENT OF AUTHORIZATION (check one)

I authorize the release of my complete health record (including records relating to mental healthcare, communicable diseases, HIV or AIDS, and the treatment of alcohol or drug abuse).

OR

I authorize the release of my complete health record with the exception of the following information:

- Mental Health Records
Communicable diseases (including HIV and AIDS)
Alcohol/drug abuse treatment
Other (please specify):

4. EXPIRATION

Unless sooner revoked, this authorization expires one year from the date this authorization is signed, or as otherwise indicated here:

5. REVOCATION

I understand that I have the right to revoke this authorization, in writing, at any time by sending written notice to Holistic Health Associates at 603-B West Patrick Street, Frederick, MD 21701. I understand that a revocation is not effective to the extent of any person or entity that has already acted in reliance on my authorization or if my authorization was acquired as a condition of obtaining insurance coverage and the insurer has a legal right to contest a claim.

This medical information may be used by the person(s) or health care professional(s) I authorize to receive this information for medical treatment or consultation, billing or claims payment, or other purposes as I may direct.

I understand that my treatment, payment, enrollment, or eligibility for benefits will not be conditioned on whether I sign this authorization form.

I understand that protected health information (PHI) used or disclosed pursuant to this authorization may be redisclosed by the recipient and may no longer be protected by federal or state law privacy regulations.

Signature of Patient or Personal Representative

Date

Printed Name of Patient or Personal Representative

Relationship to Patient