

Patient Information

Patient Name: _____ Date: _____
Last First MI Preferred Name
Address: _____
Street Apartment #
City State Zip Code
Employer: _____ Occupation: _____
Family Status: ☐ Married ☐ Divorced ☐ Single ☐ Child ☐ Other: _____
Social Security #: _____ Birth Date: _____ Gender: ☐ Male ☐ Female
Phone: ☐ Cell _____ ☐ Home _____ ☐ Work _____
Please check number to be used for appointment reminders
Email Address: _____
Emergency Contact Name _____ Phone _____ Relationship _____
I agree to receive emails from the practice ☐ Yes ☐ No

Spouse, Parent, or Responsible Party Information

The following is for: ☐ Spouse ☐ Patient's Parent/Guardian ☐ Person Responsible for Payment
Name: _____ Employer: _____
Social Security #: _____ Birth Date: _____ Gender: ☐ Male ☐ Female
Phone: Home _____ Work _____ ext. _____ Cell: _____
Address: _____

Insurance Information

Name: _____ Is subscriber a patient? ☐ Yes ☐ No
Subscriber Birth Date: _____ Social Security #: _____ Group# _____
Subscriber's Address: _____
Subscriber's Employer/Address: _____
Patient Relationship to Subscriber: ☐ Self ☐ Spouse ☐ Child ☐ Other _____
Insurance Co Name _____ Insurance Co Phone _____
Insurance Co Address _____

Consent for Services (Read Carefully)

As a condition of your treatment by this office, financial arrangements must be made in advance. The practice depends upon reimbursement from the patients for the costs incurred in their care and financial responsibility on the part of each patient must be determined before treatment. All emergency dental services, or any dental services performed without previous financial arrangements, must be paid for in cash at the time services are performed.

Patients who carry dental insurance understand that all dental services furnished are charged directly to the patient and that he or she is personally responsible for payment of all dental services. **This office will help prepare the patients insurance forms or assist in making collections from the insurance companies and will credit any such collections to the patient's account. However, this dental office cannot render services on the assumption that our charges will be paid by an insurance company.**

A service charge of 1 1/2 % per month (18% per annum) on the unpaid balance may be charged on all accounts exceeding 60 days, unless previously written financial arrangements are satisfied.

I understand that the fee estimate listed for this dental care can only be extended for a period of 30 days from the date of the patient examination.

I grant my permission to you or your assignee, to telephone me at home or my work or cell to discuss matters related to this form.

I have read the above conditions of treatment and payment and agree to their content.

Signature of Patient, Parent, or Guardian Date: _____ Relationship to Patient _____

Signature of Guarantor of Payment/Responsible Party Date: _____ Relationship to Patient _____

How did you hear about our practice?

☐ Friend, relative, neighbor, etc. ☐ Another dentist ☐ Post Card ☐ Mailbox Flyer ☐ Internet ☐ Sign/Drive-by

So we may thank them, please provide name of person or dentist who referred you: _____

MEDICAL HISTORY

Patient Name: _____ Date: _____

Please check all of the medical conditions/situations that apply to you.

- | | | | |
|---|--|--|---|
| ☐ Heart Surgery | ☐ Stroke | ☐ Tuberculosis | ☐ AIDS |
| ☐ Heart Disease | ☐ High Cholesterol | ☐ Asthma | ☐ Blood Transfusion |
| ☐ Heart Attack | ☐ Kidney Trouble | ☐ Hay Fever | ☐ Blood Thinners |
| ☐ Chest Pain | ☐ Kidney Stent/Shunt | ☐ Sinus Trouble | ☐ Hemophilia |
| ☐ Congenital Heart Disease | ☐ Diabetes | ☐ Allergies or Hives | ☐ Sickle Cell Disease |
| ☐ Heart Murmur | ☐ Thyroid Problems | ☐ Latex Sensitivity | ☐ Neurological Disorder |
| ☐ High Blood Pressure | ☐ Osteoporosis | ☐ Liver Disease | ☐ Epilepsy or Seizures |
| ☐ Mitral Valve Prolapse | ☐ History of Bisphosphonates? | ☐ Hepatitis A/B/C | ☐ Fainting or Dizzy Spells |
| ☐ Artificial Heart Valve | ☐ Emphysema | ☐ Headaches | ☐ Nervous/Anxious |
| ☐ Heart Stent/Shunt | ☐ Chronic Cough | ☐ Venereal Disease | ☐ Psychiatric Care |
| ☐ Heart Pacemaker | ☐ Cancer | ☐ HPV Diagnosis | ☐ TMJ Disorder |
| ☐ Sleep Apnea | ☐ Radiation Therapy | ☐ Cold Sores/Fever Blisters | ☐ Smoke/Chew/Vape Tobacco |
| ☐ Rheumatic Fever | ☐ Chemotherapy | ☐ HIV Positive | ☐ Jaw/Ear Pain |
| ☐ Arthritis/Rheumatism | ☐ Tumors | ☐ Glaucoma | |

Do you have any artificial joints? ☐ No ☐ Yes ➔ Please tell us which joint(s) and what year you got it/them _____

Do you have or have you had any disease, condition, or problem not listed above? ☐ No ☐ Yes ➔ Please list _____

Are you under the care of a physician? ☐ No ☐ Yes ➔ Please explain _____

Name of Physician _____

Are you taking any medication, drugs, or pills now? ☐ No ☐ Yes ➔ Please list _____

Are you aware of having an allergy (or adverse reaction) to any medication or substance? ☐ No ☐ Yes ➔ Please list _____

What is the reason for your visit today? _____

Date of Last Cleaning? _____ Date of Last Full Set of X-Rays? _____

Have you ever been diagnosed with periodontal "gum" disease? ☐ No ☐ Yes ➔ Date of treatment _____

What is your goal in seeking dental care? Please check all that apply

- ☐ Prevent problems ☐ Maintain current oral health ☐ Fix cosmetic problems ☐ Resolve pain only

WOMEN: Are you pregnant? ☐ No ☐ Yes ➔ _____ Months Are you nursing? ☐ No ☐ Yes

Are you taking birth control pills? ☐ No ☐ Yes

Doctor Signature: _____

I understand that the information above is necessary to provide me with dental care in a safe and efficient manner. I have answered all questions to the best of my knowledge. Should further information be needed, you have my permission to ask the respective care provider or agency who may release such information to you. I will notify the doctor of any change in my health or medication. I hereby authorize the doctor or designated staff to take x-rays, study models, photographs, audio recordings and any other diagnostic aids deemed appropriate by the doctor to make a thorough diagnosis of _____ (Patient Name)'s dental needs. Upon such diagnosis, I authorize the doctor to perform all recommended treatment mutual agreed upon by me and to employ such assistance as required to provide proper care. I agree to the use of anesthetics, sedatives, and other medication necessary. I fully understand that using anesthetic agents embodies certain risks; I understand that I can ask for a complete recital of any possible complications.

Patient _____ Date _____ Witness _____

Responsible Party _____ Relationship to Patient _____



Medical Information Release Form (HIPAA Release Form)

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

Release of Information

- ☐ I authorize the release of information including the diagnosis, records, examination rendered to me and claims information. This information may be released to:
- ☐ Spouse _____
- ☐ Child(ren) _____
- ☐ Other(s) _____
- ☐ Information is not to be released to anyone.

This ***Release of information*** will remain in effect until terminated by me in writing.

Messages

Please call ☐ my home ☐ my work ☐ my cell number: _____

If unable to reach me:

- ☐ you may leave a detailed message
- ☐ leave a message asking me to return your call
- ☐ Other instruction: _____

The best time to reach me is (day) _____ between (time) _____

Signed: _____ Date: ____/____/____

Witness: _____ Date: ____/____/____



Consent for AI-Assisted Clinical Documentation

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

To assist with accurate chart keeping, our office utilizes secure, HIPAA-compliant Artificial Intelligence (AI) technology.

How It Works: During your visit, an ambient AI documentation tool may listen to and transcribe the conversation between you and your dental team. This tool drafts a clinical progress note for your dental chart.

Human Review: Your treating dentist or hygienist will review, edit, and approve all AI-generated notes before they become part of your official record.

Privacy & Security: Audio streams and transcripts are encrypted and processed by authorized vendors bound by strict privacy contracts. Audio files are used solely to draft your notes and are permanently deleted after processing. Your data will never be sold or used to train public AI models.

Voluntary Choice: You have the right to decline or turn off AI documentation at any time. Declining will not affect your care or treatment in any way.

☐ I CONSENT to the use of AI documentation tools during my dental visits.

☐ I DECLINE the use of AI documentation tools.

Signed: _____ Date: ____/____/____

Witness: _____ Date: ____/____/____