

PERSONAL INJURY PATIENT CHECK LIST

We have prepared this easy to use check off list for your convenience. The first part is information you need to bring into the office in order for us to determine the best way to assist you with your case and to minimize your out of pocket expense. Many times your medical costs will be 100% covered by you or the other party's insurance. Please put N/A next to any of the items on the list that you don't have access to.

The second part of the list is action steps for you to take in order to report and document your case properly.

If you have any questions or concerns don't hesitate to call our office 408.985.1111 for clarification.

Please bring these items to your next visit if you do not have them today:

Police Report Your auto insurance policy. Your health insurance card.	
Other party's auto insurance information.	
Please take the following action steps before your next visit if you have not already	y done so:
Call your auto insurance to report your accident.	
Inform your auto insurance that you have suffered a bodily injury.	
Ask for a claim number for your bodily injury claim.	
Ask if you have Med Pay on your auto insurance policy and if yes, how much	h. <mark>IF YOU HAVE MED-PAY IT IS YOUR</mark>
RESPONSIBILITY TO FIND OUT THE AMOUNT IN ADVANCE \$	



Discover Chiropractic

...an extraordinary chiropractic experience

Today's Date:

Automobile Accident/Personal Injury Questionnaire Please answer all questions completely anything that does not apply put N/A

e: Age:Sex: □ M□ State: _Zip: Cell #: ocial Security Number: □ Married□ Single □ Widowed□ Divorce yer: Relationship:					
ocial Security Number: _ □ Married□ Single □ Widowed□ Divorce yer: Relationship:					
_ □ Married□ Single □ Widowed□ Divorce yer: Relationship:					
yer: Relationship:					
Relationship:					
Relationship:					
☐ Attorney Lien					
Policy #:					
Phone#:					
ur policy?					
Police #					
Policy #:					
icy#: Claim#					
·					
					
-					

Please mark all areas that apply and the percentage of the day that you experience the symptom. If something does not apply at this time please mark as N/A.

	Hea	ıd				Ne	ck		
☐ Migraine☐ Light hea						Right	Left	Both	
\square Blurred vision \square Ear				light	Pain:				
☐ Balance loss ☐ Hear	ing loss [□Doubl	e vision		Stiffness:				
N D . CCCCCC					Muscle spasm				
							tuana D		
% of day □ 0-25 □ 26-	50 🗆 51	/5 🗆 /	0-10		No Pain $\square\square\square\square\square\square\square\square$ % of day \square 0-25 \square 26-				
	CITOTIL	DEDC			70 of day □ 0-23 □ 20-			0-100	
	SHOUL	DERS	_	_		MIDE		_	
_ ,			Right	Left	. .	Right	Left	Both	
Both					Pain:				
Pain in joint: Pain across shoulder:					Muscle spasm				
Limitation of movemen	_				No Pain □□□□□□□		treme P	ain	
Tension:	□				% of day \square 0-25 \square 26-				
10	_	_	_		70 or day = 0 = 0 = 10	00 _ 01		0 100	
No Pain □□□□□□□□	$\Box\Box\Box$ Ex	treme F	Pain						
% of day □ 0-25 □ 26-	50 🗆 51	75 🗆 7	76-100						
	CHE	ST				LOW			
	Right	Left	Both			Right	Left	Both	
Pain around ribs:					Upper low back pain:				
Deep chest pain:					Lower low back pain:				
No Pain □□□□□□□		tromo D	ain		Sacroiliac pain: Muscle spasm:				
% of day \square 0-25 \square 26-					Muscle spasiii.	Ш	Ш		
70 01 day = 0 = 0 = = = 0	00 _ 01		0 100		N No Pain □□□□□□		Extreme	Pain	
					% of day □ 0-25 □ 26-				
	AR	M				FEI	ET		
	Right	Left	Both			Right	Left	Both	
Pain in upper arm:					Ankle pain:				
Pain in elbow:					Swollen Ankle:				
Pain in forearm:					Foot pain:				
Pins& needles (arm):					Numbness of feet:				
Pins& needles (forearm Numbness in arm:	ı): □				Swollen feet:				
Numbness in forearm:					Cramps:		Ш	Ш	
rumbness m for carm.					No Pain □□□□□□□	⊐□□ Ex	treme P	ain	
No Pain □□□□□□□	$\Box\Box\Box$ Ex	treme F	Pain		% of day □ 0-25 □ 26-				
% of day □ 0-25 □ 26-					,				
	HAN	ID				HIPS &	LEGS		
Right Left	Both					Right	Left	Both	
Pain in wrist:					Pain in buttocks:				
Pain in hand:					Pain down leg				
Pins& needles (hand):					Numbness down leg				
Numbness (hand):					Pins& needles				
N D . CCCCCC					Knee pain				
No Pain \square \square \square \square \square \square							tuons o D	ain	
% of day □ 0-25 □ 26-	$50 \sqcup 51$	/5 L /	0-100		No Pain □□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□				
					% of day □ 0-25 □ 26-	30 🗆 31	/3 🗆 /	0-100	
Patient Na					% of day □ 0-23 □ 26-	20 🗆 21	Date:	0-100	

Over th	ne past week: On average, how would completely abl			3 4	5 6	7 {	3 9	10	totally unable	to function
•	How much have you be		ntrol (re	duce/h		r bac	k pain	n on y	•	
•	How anxious (tense, u) not at								nave you been f extremely anxid	
•	How depressed (down not at all	_		_	_			_	py) have you bo extremely depr	_
•	How have you felt you have made it								ed (or would aff nave made it mu	
Over th	ne past week, how mude Interact with your fam school)				-		-		chores at home	or driving the kids to
	completely abl	e to function	1 2	3 4	5 6	7 8	3 9	10	totally unable	to function
•	Perform your normal r completely abl									
•	Participate in your nor functions)	mal social act	ivities?	(i.e. par	ties, the	ater,	conce	rts, d	ining -out and	attending other social
	completely abl	e to function	1 2	3 4	5 6	7 8	3 9	10	totally unable	to function
•	Perform your normal a									
•	Perform your normal completely able									
•	Perform your normal obed/chair)?	laily activities	? (house	ework, v	vashing,	dres	sing, v	walki	ng, climbing sta	irs, getting in/out of
	no interferen	1 2	3 4	5 6	7 8	9	10 1	unabl	le to carry out a	ctivity
•	Participate in normal l completely abl				ting and 5 6	sleep 7 {		10	totally unable	to function
AC'	TIVITIES:	EFFECT:								
Car	ry Children/Groceries	☐ No Effect		Painful	(can do)		Pain	ful (limits)	☐ Unable to Perform
	to Stand	☐ No Effect			(can do				ful (limits)	☐ Unable to Perform
	nb Stairs	\square No Effect		Painful	(can do)		Pain	ful (limits)	\square Unable to Perform
	ended Computer Use	\square No Effect			(can do				ful (limits)	\square Unable to Perform
	Children/Groceries	□ No Effect			(can do				ful (limits)	☐ Unable to Perform
	nd/Concentrate	□ No Effect			(can do				ful (limits)	☐ Unable to Perform
	ting Dressed	□ No Effect			(can do				ful (limits)	☐ Unable to Perform
Sex Sle	rual Activities	☐ No Effect☐ No Effect			(can do (can do				ful (limits) ful (limits)	☐ Unable to Perform☐ Unable to Perform
	ep tic Sitting	□ No Effect			(can do				ful (limits)	☐ Unable to Perform
	tic Standing	□ No Effect			(can do				ful (limits)	☐ Unable to Perform
	d work	□ No Effect			(can do				ful (limits)	☐ Unable to Perform
	lking	□ No Effect			(can do				ful (limits)	☐ Unable to Perform

Washing/Bathing ☐ No Effect ☐ Painful (can do) ☐ Painful (limits) ☐ Unable to Perform Garbage ☐ No Effect ☐ Painful (can do) ☐ Painful (limits) ☐ Unable to Perform					
Driving \square No Effect \square Painful (can do) \square Painful (limits) \square Unable to Perform					
Accident Report					
Date of accident/ Time of accident:					
Visibility at the time of the accident:					
Where did the accident occur?					
Road conditions at the time of accident:					
Position in the Car? □ Driver □ Front passenger □ Rear passenger □ Right □ Left					
Other passengers?					
Vehicle year Make Model Year					
Type of accident: ☐ Head-on collision ☐ Rear-end ☐ Broad-side ☐ Front impact ☐ Rear-ended car in front					
What was your vehicle's estimated property damage?					
How fast was your vehicle traveling (estimate) How fast was the other vehicle traveling (estimate)					
Were you pre-warned that the accident was about to happen? Yes No					
Did you brace yourself for impact? ☐ Yes ☐ No					
Were seatbelts and shoulder harnesses worn? □Yes □ No					
Where were your hands upon impact? Both on steering wheel One hand on steering wheel					
If there were airbags, did any inflate and from which direction? Side Front					
Did you receive any injury or bruises from the seatbelt? □Yes □ No					
Does your car have headrests? ☐Yes ☐ No					
Head position at the time of impact: Left Left Looking straight ahead					
As a result of the accident were you: \square Rendered unconscious \square Circumstances vague \square Dazed \square Shaken up but could function					
Other:					
Since the accident have you had any: \square Disoriented /Confusion \square Dizzy \square Light-headed \square Blurred vision \square Ring/Buzzing in ears					
Other:					
Was a police report made? ☐Yes ☐ No					
Were you able to get out of the car and walk unaided? ☐Yes ☐ No					
After the accident, was the car drivable? No					
Were you examined by paramedics? □Yes □ No					
Were you taken to a hospital? ☐ Yes ☐ No If Yes, what hospital?					
Was Treatment Rendered? ☐ Yes ☐ No If so, what treatment?					
Were x-rays taken? ☐ Yes ☐ No What parts of the body were x-rays taken of?					
Were any fractures reported to you? □Yes □ No					
Were you given any medications? ☐Yes ☐ No If Yes, what medications?					
Did you have any immediate symptoms after the accident? □Yes □ No If Yes Describe					
Anything else you would like to share?					

Please Print Full Legal Name:	Date:	

PATIENT FINANCIAL RESPONSIBILITY OUR POLICY REGARDING PERSONAL INJURY INSURANCE

Dr. Osborne will be pleased to accept your personal injury insurance coverage as soon as your exact coverage is verified by the responsible

party. We will file the claim forms an payment of services rendered at Disc	, ,		•	nderstood that you are ultimately r vill cover all expenses.	esponsible for full
Office policy regarding Personal	Injury Protection o	<mark>r Med Pay:</mark>			
I was injured in a motor In the event this claim is rejected I request that my automob 408-985-1111; Fax (408) 985-222	d by my insurance o	company, I und	erstand that	I am liable for full payment of s	ervices rendered
MY INSURANCE COMPANY IN	<u>FORMATION</u>				
Name:		Claim #: _		DOA:	_
Address:					
Claims Adjuster:		Phone:		Fax:	_
If you understand and agree witl	n the statements th	at are initialed	above, sign ar	nd date the form here.	
Print Full Name	 Signature		Date		
settlement of the third party clain I agree to complete the Fina I will take full responsibility receipt of the settlement check. I will notify this office imme Osborne with a medical lien to pr I completely understand tha	m. ancial Agreement as to ensure all outsta diately if or when I otect Dr. Osborne's at with or without a of an attorney to h	s security for Di anding debt for retain the <u>cour</u> s interest. In attorney I am andle matters i	r. Osborne. services rend usel of an atto uresponsible for		en days from ney to furnish Dr
Osborne with a medical lien to pr MY ATTORNEY INFORMATION	otect Dr. Osborne's	s interest upon	settlement.		
Name:		p	hone:		
Address:					
If you understand and agree with					

Signature

Date

Print Full Name

ASSIGNMENT OF BENEFITS, ASSIGNMENT OF RIGHTS TO PURSUE PERSONAL INJURY, WORK COMP, ERISA, AND OTHER LEGAL AND ADMINISTRATIVE CLAIMS ASSOCIATED WITH MY HEALTH INSURANCE AND /OR HEALTH BENEFIT PLAN (INCLUDING BREACH OF FIDUCIARY DUTY) AND DESIGNATION OF AUTHORIZED REPRESENTATIVE

Provider Name: Dr. Thomas J. Osborne

Clinic: <u>Discover Chiropractic</u>

Address: 1305 C No. Bascom Ave. ~ San Jose, CA 95128

I hereby assign and convey directly to the above-named health care provider, as my designated authorized representative, any and all medical benefits and/or any insurance reimbursement, if any, otherwise payable to me for services, treatments, therapies, and/or medications rendered or provided by the above-named health care provider, regardless of its managed care network participation status. I understand that I am financially responsible for all charges regardless of any applicable insurance or benefit payments. I hereby authorize the above-named health care provider to release all medical information necessary to process my claims. Further, I hereby authorize my plan administrator fiduciary, insurer, and/or attorney to release to the above-named health care provider any and all Plan documents, summary benefit description, insurance policy, and/or settlement information upon written request from the above-named health care provider or its attorneys in order to claim such medical benefits.

In addition to the assignment of all medical benefits and/or insurance reimbursement above, I also assign and/or convey to the above named health care provider any legal or administrative claim or chose an action arising under any group health plan, employee benefits plan, health insurance or tort feasor insurance concerning medical expenses incurred as a result of the medical services, treatments, therapies, and/or medications I receive from the above-named health care provider (including any right to pursue those legal or administrative claims or chose an action). This constitutes an express and knowing assignment of ERISA breach or fiduciary duty claims and other legal and/or administrative claims.

I intend by this assignment and designation of authorized representative to convey to the above-named provider all of my rights to claim (or place a lien on) the medical benefits related to the services, treatments, therapies, and/or mediations provided by the above-named health care provider, including rights to any settlement, insurance or applicable legal or administrative remedies (including damages arising from ERISA breach of fiduciary duty claims). The assignee and/or designated representative (above-named provider) is given the right by me to (1) obtain information regarding the claim to the same extent as me; (2) submit evidence; (3) make statements about facts or law; (4) make any request including providing or receiving notice of appeal proceedings; (5) participate in any administrative and judicial actions and pursue claims or chose in action or right against any liable party, insurance company, employee benefit plan, health care benefit plan, or plan administrator. The above-named provider as my assignee and my designated authorized representative may bring suit against any such health care benefit plan, employee benefit plan, plan administrator or insurance company in my name with derivative standing at provider's expense.

Unless revoked, this assignment is valid for all administrative and judicial reviews under PPACA (health care reform legislation), ERISA, Medicare and applicable federal and state laws. A photocopy of this assignment is to be considered valid, the same as if it was the original.

I HAVE READ AND FULLY UNDERSTAND THIS AGREEMENT.		
THAVE READ AND FOLLT ONDERSTAND THIS AGREEMENT.		
Patient Signature	Date	

Please Print Full Legal	Name:	Date:
	MEDICAL LIEN	N
Patient:		
Claim Nr:		
Date of Injury:		
D.A.A.S.P. such sums as may be due a and to withhold such sums from any compensate said doctor. And I hereby paid to myself, as the result of the treamy rights and benefits under this claim. I fully understand that I am directly a rendered me and that this agreement is And I further understand that such parecover. Please acknowledge your agreement.	nd owing him/her for medical/chiry settlement, judgment or verdicty further request that payment be atment charges injured for the injurt. Ind fully responsible to said doctor is made solely for said doctor's proyments are not contingent on any to this request by signing below a terate in protecting the doctor's interest of the settlement of the settl	, my attorney, to pay to Dr. Thomas J. Osborne, D.C., ropractic services rendered me by reason of the accident at as may be necessary to adequately protect and fully a made directly to said doctor which would otherwise be ries in connection therewith. This is a direct assignment of or for all medical bills submitted by him/her for services otection and in consideration of his/her awaiting payment. It is settlement, judgment or verdict which I may eventually and returning to the doctor's office below. I have been terest, the doctor will not await payment, but may declare
Date	Patient's Signature	
-	ay be necessary to adequately pro	of the above and agrees to withhold such sums from any otect and fully compensate said doctor above and below
 Date	Attorney's Signature	

Please Print Full Legal Name:	Date:	

Medical Information Release Form (HIPAA Release Form)

Name:	Date of Birth:
Release of Information: [] I authorize the release of information including the dia information. This information may be released to:	agnosis, records; examination rendered to me and claims
[] Spouse	
[] Child(ren)	
[]Automobile Insurance to be billed	
[] Information is not to be released to any	yone.
This <i>Release of Information</i> will remain in effect until terr	ninated by me in writing.
<i>Messages:</i> Please call [] my home [] my work [] my mobile numb	per:
If unable to reach me: [] you may leave a detailed message	
[] please leave a message asking me to return your c	all
[]	-
The best time to reach me is (day)	between (time)
Signed:	Date:

Witness: ______ Date: ______

Informed Consent			
REGARDING: Chiropractic Adjustments, Modalities, and Therapeutic Procedures:			
I have been advised that chiropractic care, like all forms of health care, holds certain risks. While the risks are most often very minimal, in rare cases, complications such as sprain/strain injuries, irritation of a disc condition, and although rare, minor fractures, and possible stroke, which occurs at a rate between one instance per one million to one per two million, have been associated with chiropractic adjustments.			
Treatment objectives as well as the risks associated with chiropractic adjustments and, all other procedures provided at Discover Chiropractic have been explained to me to my satisfaction and I have conveyed my understanding of both to the doctor. After careful consideration, I do hereby consent to treatment by any means, method, and or techniques, the doctor deems necessary to treat my condition at any time throughout the entire clinical course of my care.			
/ / Witness Initials			
Patient or Authorized Person's Signature Date			
REGARDING: X-rays/Imaging Studies			
FEMALES ONLY → please read carefully and check the boxes, include the appropriate date, then sign below if you understand and have no further questions, otherwise see our receptionist for further explanation.			
☐ The first day of my last menstrual cycle was on(Date)			
□ I have been provided a full explanation of when I am most likely to become pregnant, and to the best of my knowledge, I am not pregnant.			
By my signature below I am acknowledging that the doctor and or a member of the staff has discussed with me the hazardous effects of ionization to an unborn child, and I have conveyed my understanding of the risks associated with exposure to x-rays. After careful consideration I therefore, do hereby consent to have the diagnostic x-ray examination the doctor has deemed necessary in my case.			
Patient or Authorized Person's Signature Date			

Please Print Full Legal Name: _____ Date: _____

DISCOVER CHIROPRACTIC NOTICE OF PRIVACY PRACTICE

This office is required to notify you in writing, that by law, we must maintain the privacy and confidentiality of your **P**ersonal **H**ealth Information. In addition we must provide you with written notice concerning your rights to gain access to your health information, and the potential circumstances under which, by law, or as **dictated by our office policy**, we are permitted to disclose information about you to a third party without your authorization. Below is a brief summary of these circumstances. If you would like a more detailed explanation, one will be provided to you. In addition, you will find we have placed several copies in report folders labeled **'HIPAA'** on tables in the reception. Once you have read this notice, please sign the last page, and return only the signature page (page 2) to our front desk receptionist. Keep this page for your records.

PERMITTED DISCLOSURES:

- 1. Treatment purposes discussion with other health care providers involved in your care.
- 2. Inadvertent disclosures open treating area mean open discussion. If you need to speak privately to the doctor, please let our staff know so we can place you in a private consultation room.
- 3. For payment purposes to obtain payment from your insurance company or any other collateral source.
- 4. For workers compensation purposes to process a claim or aid in investigation.
- 5. Emergency in the event of a medical emergency we may notify a family member.
- 6. For Public health and safety in order to prevent or lessen a serious or eminent threat to the health or safety of a person or general public.
- 7. To Government agencies or Law enforcement to identify or locate a suspect, fugitive, material witness or missing person.
- 8. For military, national security, prisoner and government benefits purposes.
- 9. Deceased persons discussion with coroners and medical examiners in the event of a patient's death.
- 10. Telephone calls or emails and appointment reminders we may call your home and leave messages regarding a missed appointment or apprize you of changes in practice hours or upcoming events.
- 11. Change of ownership- in the event this practice is sold, the new owners would have access to your PHI.

YOUR RIGHTS:

- 1. To receive an accounting of disclosures.
- 2. To receive a paper copy of the comprehensive "Detail" Privacy Notice.
- 3. To request mailings to an address different than residence.
- 4. To request Restrictions on certain uses and disclosures and with whom we release information to, although we are not required to comply. If, however, we agree, the restriction will be in place until written notice of your intent to remove the restriction.
- 5. To inspect your records and receive one copy of your records at no charge, with notice in advance.
- 6. To request amendments to information. However, like restrictions, we are not required to agree to them.
- 7. To obtain **one copy** of your records at no charge, when timely notice is provided (72 hours). **X-rays** are original records and you are therefore not entitled to them. If you would like us to outsource them to an imaging center, to have copies made, we will be happy to accommodate you. However, you will be responsible for this cost.

COMPLAINTS:

If you wish to make a formal complaint about how we handle your health information, please call Susan Field at (408) 985-1111. If she is unavailable, you may make an appointment with our receptionist to see her within 72 hours or 3 working days. If you are still not satisfied with the manner in which this office handles your complaint, you can submit a formal complaint to:

DHHS, Office of Civil Rights 200 Independence Ave. SW Room 509F HHH Building Washington DC 20201

Patient initials	s: <mark>retaining p</mark> o	age 1 of 2
DISCOVER CHIROPRACTIC NOTICE	E REGARDING YOUR RI	IGHT TO PRIVACY continued
have received a copy of Discover Chiropractic Patient Protect my health information, and have conveyed my that this office reserves the right to amend this "Notice provisions effective for all information that it maintains am aware that a more comprehensive version of this "his time, I do not have any questions regarding my right."	understanding of these ri of Privacy Practice" at a past and present. Notice" is available to m	ights and duties to the doctor. I further understand time in the future and will make the new e and several copies kept in the reception area. At
Patient's Name		HR#
Patient's Signature	 	
Vitness	 	

Please Print Full Legal Name: _____ Date: _____