

**Consent To Release Medical Information**

I give authorization for the staff of Texas Laparoscopic Consultants, Dr. Yu, Dr. Scarborough, and Dr. Mehta to communicate medical information to the below listed persons. These communications include, but are not limited to: information about the procedure I am having, the scheduling of pre-operative testing, the outcome of my surgery and condition, information regarding any complications, and my post-operative care. Information discussed could also include any additional health conditions (such as psychiatric problems, substance abuse, and or HIV status) as related to my current condition and medical treatment.

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Name

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Relationship

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Name

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Relationship

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Name

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Relationship

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Name

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Relationship

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Printed Name

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Date

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Signature

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Witness

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Date

\_\_\_\_\_ I DO NOT AUTHORIZE THE RELEASE OF ANY INFORMATION

## **Bariatric Patient History Questionnaire**

### **Demographics: Please fill out completely**

First Name: \_\_\_\_\_ Address: \_\_\_\_\_  
Middle Name: \_\_\_\_\_ City, State Zip: \_\_\_\_\_  
Last Name: \_\_\_\_\_ \*Email Address: \_\_\_\_\_ \*

***\*Do you consent for TLC to email you clinical information such as lab reports?*** Yes No \_\_\_\_\_ **Initials**

***\*Do you consent for TLC to send a text to your mobile phone about appointment notifications?*** Yes No \_\_\_\_\_ **Initials**

Nickname / Preferred Name: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Ok to leave voicemail? Y N

Maiden Name: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Ok to leave voicemail? Y N

Gender: Male Female Other Phone: \_\_\_\_\_ Ok to leave voicemail? Y N

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Marital Status: Single Married Partnered Separated Divorced Widowed

Ethnicity: African American Arabic Asian Caucasian Hispanic Native American Other

Highest Level of Education: HS/GED Associate Bachelor Master Professional Doctoral

Employment: Full-time Part-time Homemaker Student Retired Disabled Unemployed

*If disabled, specify the year and the cause:* Year: \_\_\_\_\_ Cause: \_\_\_\_\_

Patient Occupation (indicate if student): \_\_\_\_\_

Employer: \_\_\_\_\_ Years Employed: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Spouse's Date of Birth: \_\_\_\_\_

Spouse employment: Full-time Part-time Homemaker Student Retired Disabled Unemployed

Spouse's occupation (indicate if student): \_\_\_\_\_

Spouse's Employer: \_\_\_\_\_ Years Employed: \_\_\_\_\_

Use spouse as an emergency contact? Yes No Phone: \_\_\_\_\_

### **Emergency Contact #1:**

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Relation to you: \_\_\_\_\_

Phone: \_\_\_\_\_

### **Emergency Contact #2:**

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Relation to you: \_\_\_\_\_

Phone: \_\_\_\_\_

## **Referral and Visit Information**

Reason for Visit (i.e. why are you seeking weight loss surgery?): \_\_\_\_\_

From what age have you been obese? \_\_\_\_\_

Which procedure are you seeking?   Band   Sleeve   Gastric Bypass   Duodenal Switch   Revision

*How did you hear about TLC Surgery?*   Internet/Facebook   Magazine   Newspaper   Other Patient

Our Website   Television   Yellow Pages   Physician or Hospital Referral: \_\_\_\_\_

## **Primary Care Physician Information**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Fax: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

***Do you consent for TLC to send medical records to your PCP?***   Yes   No   \_\_\_\_\_ **Initials**

## **Specialist Physician Information: if you regularly see a specialist**

Name: \_\_\_\_\_

Type: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Fax: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

## **Primary Insurance Information: Please fill out completely**

Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Full Name of Cardholder: \_\_\_\_\_

Group Number: \_\_\_\_\_

Cardholder's DOB: \_\_\_\_\_

Effective Date: \_\_\_\_\_

Cardholder's SS#: \_\_\_\_\_

Termination Date: \_\_\_\_\_

Cardholder's Employer: \_\_\_\_\_

Insured ID: \_\_\_\_\_

Notes: \_\_\_\_\_

Insurance Phone#: \_\_\_\_\_

Relationship to Cardholder:   Self   Spouse   Child

Other: \_\_\_\_\_

Is this plan:   Cobra   Medicare   Medicaid   Disability   Workman's Comp   None

## **Secondary Insurance Information: Please fill out completely**

Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Full Name of Cardholder: \_\_\_\_\_

Group Number: \_\_\_\_\_

Cardholder's DOB: \_\_\_\_\_

Effective Date: \_\_\_\_\_

Cardholder's SS#: \_\_\_\_\_

Termination Date: \_\_\_\_\_

Cardholder's Employer: \_\_\_\_\_

Insured ID: \_\_\_\_\_

Notes: \_\_\_\_\_

Insurance Phone#: \_\_\_\_\_

Relationship to Cardholder:   Self   Spouse   Child

Other: \_\_\_\_\_

Is this plan:   Cobra   Medicare   Medicaid   Disability   Workman's Comp   None

**Comorbidities / Problem List**

\*\*\*Please note that if you are not familiar with a listed condition, then it may not pertain to you.

**Gastrointestinal**

<i>K21.9</i>	Reflux	<input type="radio"/> Yes	<input type="radio"/> No
<i>R12</i>	Heartburn	<input type="radio"/> Yes	<input type="radio"/> No
<i>K21.9</i>	Have you ever taken any of these medications in the past 6 months:	<input type="radio"/> Tums <input type="radio"/> Alka Seltzer Heartburn <input type="radio"/> Zantac <input type="radio"/> Pepcid <input type="radio"/> Prilosec	<input type="radio"/> Nexium <input type="radio"/> Omeprazole <input type="radio"/> Mylanta <input type="radio"/> Pepto <input type="radio"/> Other gas/heartburn meds
<i>K21.0</i>	(Gas) Gastro-esophageal reflux	<input type="radio"/> Yes	<input type="radio"/> No

**General**

<i>E11.9</i>	Diabetes Mellitus (Type 2)	<input type="radio"/> Yes / Non Insulin or Insulin	<input type="radio"/> No
<i>E10.9</i>	Diabetes Mellitus (Type 1)	<input type="radio"/> Yes / Non Insulin or Insulin	<input type="radio"/> No
	Functional Health Status Prior to Surgery	<input type="radio"/> Independent <input type="radio"/> Partially Dependent <input type="radio"/> Totally Dependent	

**Pulmonary**

<i>492</i>	History of Chronic Obstructive Pulmonary Disease	<input type="radio"/> Yes	<input type="radio"/> No
<i>Z99.81</i>	Oxygen Dependent	<input type="radio"/> Yes	<input type="radio"/> No
<i>I26.99</i>	History of Pulmonary Embolism	<input type="radio"/> Yes	<input type="radio"/> No
<i>G47.33</i>	Obstructive Sleep Apnea (Require CPAP or BiPAP)	<input type="radio"/> Yes	<input type="radio"/> No

**Musculoskeletal**

<i>R26.2</i>	Is ambulation (walking) limited most or all of the time?	<input type="radio"/> Yes	<input type="radio"/> No
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**Cardiac**

<i>I25.2</i>	History of Heart Attack	<input type="radio"/> Yes	<input type="radio"/> No
<i>I10</i>	Hypertension Requiring Medication	<input type="radio"/> Yes	<input type="radio"/> No
<i>E78.5</i>	Hyperlipidemia Requiring Medication	<input type="radio"/> Yes	<input type="radio"/> No

**Vascular**

<i>453.4</i>	Deep Vein Thrombosis Requiring Therapy	<input type="radio"/> Yes	<input type="radio"/> No
<i>I87.2</i>	Venous Insufficiency	<input type="radio"/> Yes	<input type="radio"/> No

**Renal (Kidneys)**

<i>N19</i>	Renal Failure (Required use of dialysis)	<input type="radio"/> Yes	<input type="radio"/> No
<i>585</i>	Chronic Renal Disease	<input type="radio"/> Yes	<input type="radio"/> No

**Immune / Nutritional / Oncology / Other**

<i>Z92.25</i>	Steroid / Immunosuppressant Use for Chronic Condition	<input type="radio"/> Yes	<input type="radio"/> No
	Therapeutic Anticoagulation	<input type="radio"/> Yes	<input type="radio"/> No

**Social History: Please select all that apply**

Alcohol Use: Yes No Tobacco Use: Yes No Substance Abuse: Yes No  
Drinks per week: \_\_\_\_\_ Packs per week: \_\_\_\_\_ Uses per week: \_\_\_\_\_ (RX or illegal)  
Cans per week: \_\_\_\_\_

**Surgical/ Hospitalization History: Please check or list all surgeries you have had**

		Month	Year
Gallbladder (Open)	<input type="checkbox"/>	_____	_____
Gallbladder (Laparoscopic)	<input type="checkbox"/>	_____	_____
Appendectomy	<input type="checkbox"/>	_____	_____
Hernia (Body Location: _____)	<input type="checkbox"/>	_____	_____
Hernia (Body Location: _____)	<input type="checkbox"/>	_____	_____
Hysterectomy (Uterus removed vaginally)	<input type="checkbox"/>	_____	_____
Hysterectomy (Uterus removed abdominally)	<input type="checkbox"/>	_____	_____
Ovary Surgery	<input type="checkbox"/>	_____	_____
Cesarean Section	<input type="checkbox"/>	_____	_____
Tubal Ligation:	<input type="checkbox"/>	_____	_____
Left Breast Biopsy	<input type="checkbox"/>	_____	_____
Right Breast Biopsy	<input type="checkbox"/>	_____	_____
Back	<input type="checkbox"/>	_____	_____
Right Knee	<input type="checkbox"/>	_____	_____
Left Knee	<input type="checkbox"/>	_____	_____
Tonsillectomy	<input type="checkbox"/>	_____	_____
Heart Surgery	<input type="checkbox"/>	_____	_____
Kidney Transplant	<input type="checkbox"/>	_____	_____
Liver Transplant	<input type="checkbox"/>	_____	_____
Pancreas Transplant	<input type="checkbox"/>	_____	_____
Other: _____	<input type="checkbox"/>	_____	_____
Other: _____	<input type="checkbox"/>	_____	_____

**\*\*Previous Weight Loss Surgery\*\***

Procedure: _____	Doctor: _____	Date: _____	Weight: _____
Procedure: _____	Doctor: _____	Date: _____	Weight: _____
Procedure: _____	Doctor: _____	Date: _____	Weight: _____
Procedure: _____	Doctor: _____	Date: _____	Weight: _____

*\*If you have had multiple bands, please describe each procedure, including band removal and replacements.*

**Family History: Please check all that apply**

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Obesity ☐Heart Disease ☐High Blood Pressure ☐Liver Problems ☐Bleeding Disorder ☐Mental Illness ☐Are you adopted? ☐Kidney Disease ☐Diabetes Mellitus ☐Alcoholism ☐Lung Problems ☐Gallstones ☐Malignant hyperthermia ☐Cancer ☐*Please describe the person(s) and the type(s) of cancer present in your family:*

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**Drug Allergies: Please list all DRUG allergies**

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*Name of Medication**Reaction it Causes*1. 

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2. 

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3. 

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4. 

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5. 

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6. 

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**Skin Allergies: please circle all SKIN allergies**

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*Circle all that apply**Reaction it Causes*1. Latex 

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2. Iodine 

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3. Band-Aid Bandages or Adhesive 

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4. Other: 

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**Medications, Vitamins, & Minerals: Please check / list all medications that you currently use**

<u>Name</u>	<u>Dosage</u>	<u>Frequency</u>	<u>Indication</u>
<input type="checkbox"/> Lisinopril	_____	_____	Hypertension
<input type="checkbox"/> Levothyroxine / Synthroid	_____	_____	Hypothyroidism
<input type="checkbox"/> Simvastatin / Zocor	_____	_____	High Cholesterol
<input type="checkbox"/> Amlodipine / Norvasc	_____	_____	Hypertension / Angina
<input type="checkbox"/> Metformin / Glucophage	_____	_____	Diabetes
<input type="checkbox"/> Hydrochlorothiazide	_____	_____	Hypertension

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

\*Frequency:

QD: 1x daily

BID: 2x daily

TID: 3x daily

QID: 4x daily

QOD: 1x daily, every other day

**Please list all *weight loss* medication you have taken:**

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**Pharmacy Information:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**Review of Systems: Check all the health problems you have had or are currently experiencing**

\*\*\*Please note that if you are not familiar with a listed condition, then it may not pertain to you.

**Cardiovascular**

Heart Attack ☐

Rhythm disturbance/ palpitations ☐

High Blood Pressure ☐

Varicose Veins ☐

Phlebitis ☐

Heart bypass/valve replacement ☐

Clogged Heart Arteries ☐

Heart Murmur ☐

Other: \_\_\_\_\_ ☐

Angina (chest pain with activity) ☐

Congestive Heart Failure ☐

Ankle Swelling ☐

Cramping in legs when walking ☐

Ankle/ leg ulcers ☐

Pacemaker ☐

Rheumatic fever/ valve damage ☐

Irregular heartbeat ☐

**Respiratory**

Asthma ☐

Bronchitis ☐

Chronic Cough ☐

Use of CPAP or oxygen supplement ☐

Pulmonary Embolism ☐

Cough up blood ☐

Awaken at Night ☐

Sleep Apnea ☐

Lung Cancer ☐

Emphysema ☐

Pneumonia ☐

Short of Breath ☐

Tuberculosis ☐

Hypoventilation Syndrome ☐

Snoring ☐

Daytime Drowsiness ☐

Lung Surgery ☐

Other: \_\_\_\_\_ ☐

**Endocrine**

Hypothyroid (low) ☐

Goiter ☐

Elevated Cholesterol ☐

Low Blood Sugar ☐

Diabetes (Needing insulin shots) ☐

Gout ☐

Cancer of endocrine gland ☐

Abnormal facial hair ☐

Hyperthyroid (high/ overactive) ☐

Parathyroid ☐

Elevated Triglycerides ☐

Diabetes (Managed by diet pills) ☐

“Prediabetes” w/ elevated blood sugar ☐

Endocrine gland tumor ☐

High Calcium level ☐

Other: \_\_\_\_\_ ☐



## **Gastrointestinal**

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Heartburn	<input type="checkbox"/>
Abdominal Hernia	<input type="checkbox"/>
Diarrhea	<input type="checkbox"/>
Change in bowel habit	<input type="checkbox"/>
Irritable Bowel	<input type="checkbox"/>
Crohn's	<input type="checkbox"/>
Fissure	<input type="checkbox"/>
Black, tarry stool	<input type="checkbox"/>
Abdominal pain	<input type="checkbox"/>
Cirrhosis/ hepatitis	<input type="checkbox"/>
Jaundice	<input type="checkbox"/>
Unusual vomiting	<input type="checkbox"/>
Cancer	<input type="checkbox"/>

Hiatal Hernia	<input type="checkbox"/>
Ulcers	<input type="checkbox"/>
Blood in Stool	<input type="checkbox"/>
Constipation	<input type="checkbox"/>
Colitis	<input type="checkbox"/>
Hemorrhoids	<input type="checkbox"/>
Rectal Bleeding	<input type="checkbox"/>
Polyps	<input type="checkbox"/>
Enlarged Liver	<input type="checkbox"/>
Gallbladder problems	<input type="checkbox"/>
Pancreatic disease	<input type="checkbox"/>
Surgery	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>

## **Bladder/ Kidney**

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Kidney Stones	<input type="checkbox"/>
Loss of bladder control (leakage)	<input type="checkbox"/>
For men: PSA in last year?	<input type="checkbox"/>
Trouble starting urine	<input type="checkbox"/>
Surgery	<input type="checkbox"/>

Blood in Urine	<input type="checkbox"/>
Kidney Failure	<input type="checkbox"/>
Prostate Problems	<input type="checkbox"/>
Burning on Urine	<input type="checkbox"/>
Cancer	<input type="checkbox"/>

## **Gynecologic (for women only)**

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Problems conceiving (infertility)	<input type="checkbox"/>
Uterine/ Ovarian Cancer	<input type="checkbox"/>
Menstrual irregularity	<input type="checkbox"/>
Excessively heavy periods	<input type="checkbox"/>

Currently pregnant	<input type="checkbox"/>
Surgery	<input type="checkbox"/>
Menstrual pain	<input type="checkbox"/>
Abdominal pain	<input type="checkbox"/>

Age started menses: \_\_\_\_\_

Date of last menstrual period: \_\_\_\_\_

Number of pregnancies: \_\_\_\_\_

Date of last pap smear: \_\_\_\_\_

Number of children: \_\_\_\_\_

Date of menopause onset: \_\_\_\_\_

Number of miscarriages or abortions: \_\_\_\_\_

**Musculoskeletal**

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Arthritis ☐

Shoulder Pain ☐

Back Pain ☐

Knee Pain ☐

Foot Pain ☐

Ball of foot/toe pain ☐

Carpal tunnel syndrome ☐

Scleroderma ☐

Autoimmune disease ☐

Fibromyalgia ☐

Joint replacement ☐

Muscular dystrophy ☐

Cancer ☐

Neck Pain ☐

Wrist Pain ☐

Hip Pain ☐

Ankle Pain ☐

Heel Pain ☐

plantar fasciitis ☐

Lupus ☐

Sciatica ☐

Muscle pain/spasm ☐

Broken Bones ☐

Nerve injury ☐

Surgery ☐

Other: \_\_\_\_\_ ☐

**Head And Neck**

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Wear Contacts/ Glasses ☐

Hearing Problems ☐

Neck Lumps ☐

Dentures/ Partial ☐

Hoarseness ☐

Cancer ☐

Vision Problems ☐

Sinus Drainage ☐

Swallowing Difficulty ☐

Oral Sores ☐

Head/ Neck Surgery ☐

Other: \_\_\_\_\_ ☐

**Neurologic**

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Migraine Headaches ☐

Seizures or Convulsions ☐

Stroke ☐

Pseudotumor cerebri ☐

Frequent severe headaches ☐

Surgery ☐

Balance Disturbance ☐

Weakness ☐

Alzheimer's ☐

Multiple Sclerosis ☐

Knocked Unconscious ☐

Cancer ☐

**Breast**

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Lumps ☐

Fibrocystic disease ☐

Surgery ☐

Pain ☐

Nipple discharge ☐

Cancer ☐

**Skin**

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Rashes under skin folds ☐

Poor wound healing ☐

Surgery ☐

Keloids (excessively raised scars) ☐

Frequent skin infections ☐

Cancer ☐

**Blood**

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Anemia (iron deficient) ☐

Exposed to HIV ☐

Low platelets (thrombocytopenia) ☐

Hepatitis ☐

Lymphoma ☐

Superficial blood clot in leg ☐

Blood clot in lungs ☐

Would you accept a blood transfusion? Yes No

Anemia (vitamin B12 deficient) ☐

Diagnosed with HIV / AIDS ☐

Received blood transfusion ☐

Abused intravenous drugs ☐

Swollen lymph nodes ☐

Deep blood clot in leg ☐

Bleeding disorder ☐

Blood thinning medicine use ☐

**Psychiatric**

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Anxiety ☐

Anorexia ☐

Bipolar disorder ☐

Drug dependency ☐

Other psychiatric problems ☐

Depression ☐

Bulimia ☐

Alcoholism ☐

Schizophrenia ☐

Hospitalization for psychiatric problems ☐

Have you ever been in a psychiatric hospital? ☐

Have you ever attempted suicide? ☐

Have you ever been physically abused? ☐

Have you ever seen a psychiatrist or counselor? ☐

Are you currently seeing a psychiatrist or counselor? ☐

Have you ever taken medications for psychiatric problems or for depression? ☐

Have you ever been in a chemical dependency program? ☐

**Constitutional**

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Fevers ☐

Anemia ☐

Chronic Fatigue ☐

Night Sweats ☐

Weight Loss ☐

Hair Loss ☐

***Thank you for filling out the questionnaire honestly and completely.***

# Heartburn/Reflux/Gerd Symptoms

## Check all that apply:

- ☐ Chest Pain/Discomfort
- ☐ Long term Cough, Sore Throat
- ☐ Difficulty Swallowing
- ☐ Bad Breath/Dental Erosion
- ☐ Stomach Fullness or Bloating/Gas

- ☐ Upper Abdominal Discomfort
- ☐ Asthma/Shortness of Breath
- ☐ Sudden Saliva
- ☐ Burping

- ☐ Burning Back of Throat
- ☐ Feeling of Lump in Throat
- ☐ Regurgitation
- ☐ Nausea After Eating

OTHER SYMPTOMS?

## Check the foods or beverages that worsen your Heartburn/Reflux/Gerd Symptoms:

- ☐ Spicy Foods
- ☐ Citrus Fruits
- ☐ Milk
- ☐ High-Fat Foods
- ☐ Chocolate
- ☐ Caffeine
- ☐ Salty Foods
- ☐ Sodas and Carbonated Beverages
- ☐ Alcohol

## Have you made any diet modifications?

- ☐ Yes, I have reduced or completely eliminated above listed food from diet.
- ☐ No.

## Has your diet modification been effective?

- ☐ Yes.
- ☐ Somewhat, but still requires medication.
- ☐ Not at all.

## Other methods attempted to improve Heartburn/Reflux/Gerd Symptoms:

- ☐ Changing Position in Bed
- ☐ Sleeps in a Reclined Position
- ☐ New Bed/or Adjustable Mattres
- ☐ Avoid Tight Clothing
- ☐ Weight Loss

OTHER METHODS?

## How often do you use the following medications:

	1-4 Times a Week	Daily	A Few Times a Day
Alkas-Seltzer.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pepcid .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zantac.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tagamet .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maalox.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mylanta.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pepto-Bismol .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roloids .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tums .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## How long have you been on the following medications:

	0-6 Months	6 Months to 1 Year	Over 1 Year
Dexilant.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nexium .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prevacid .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prilosec, Zegerid .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protonix .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aciphex .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reglan .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**TEXAS LAPAROSCOPIC CONSULTANTS, LLP  
MEDICAL SERVICES FINANCIAL AGREEMENT**



**Insurance**

If you have medical insurance, we are eager to help you receive your maximum allowable benefits. In order to achieve this goal, we need your assistance, and your understanding of our payment policy.

You will be asked to update your personal and insurance information periodically, including providing our office with copies of your insurance card and driver's license. If you do not wish to have your insurance carrier billed for services rendered you will be responsible for the total charges for treatment. By initialing you accept complete financial responsibility for services rendered at the time of service unless other arrangements have been established. This will remain in effect unless you complete a new agreement.

If you do wish to have your insurance carrier billed for services rendered we are required by law to obtain your signature for permission to release information to your insurance carrier. Our failure to obtain these updates could result in criminal and civil penalties and/or expulsion from your insurance plan. Please assist us in complying with your insurance requirements.

We will gladly submit fees for your covered medical services to your insurance company. However, we expect payment of all services within 60 days. It may become necessary for you to pay your account in full if your insurance company fails to pay for services within 60 days. It is your responsibility to understand your coverage and benefits, including pre-certifications, referral and authorization requirements. We will, however, assist you to ensure that all plan requirements are met.

I authorize payment of medical benefits to the undersigned physician for services rendered. I also authorize the release of any medical or other information necessary to process claims for services provided to me. I also request payment of government benefits to the party who accepts assignment.

**Payment for Services**

Payment for services, including co-payment and deductible amounts, is due at the time services are rendered unless payment arrangements have been approved in advance by our staff. We accept cash, checks, MasterCard, Visa, and Discover. Our failure to collect these amounts may be a violation of our contract with your insurance company and may result in civil and criminal penalties and/or expulsion from your insurance plan. In addition, your failure to pay the required co-amounts is a violation of your financial responsibility for coverage and we may report your refusal to pay these amounts to your employer and/or insurance company representative.

Returned checks will result in a \$25 fee that will be posted to your account. Returned checks, balances older than 60 days, and failure to pay account balances as promised may be subject to external collection and additional collection fees, including attorney and other court fees. We may investigate your credit record to determine your ability to pay your debt.

**General**

We will gladly discuss your proposed treatment and answer any questions relating to your insurance. Your insurance is a contract between you, your employer and the insurance company. We are not a party to that contract. We must emphasize that as medical care providers, our relationship is with you, not your insurance company. Not all services are a covered benefit in all contracts. Some insurance companies arbitrarily select certain services they will not cover. While the filing of insurance claims is a courtesy that we extend to patients, all charges are your responsibility from the date the services are rendered.

**Physician Disclosure of Financial Interest**

Ownership interests in the following entities reflect our commitment to providing the highest standard of patient care in the office, laboratory and surgery settings and enhances our ability to direct the manner in which your care is delivered (Victory Medical Center Houston, Gala Histology Laboratory, United Pathology Associates). The entities listed above are not contracted with insurance companies and will be considered "out of network" when claims are processed. If you obtain services from these entities, and the service is covered under your benefit plan, the costs of the service will be covered under the "out of network" portion of your benefit plan. If your benefit plan does not have out of network benefits, it is possible that you may not have coverage for the service and will be required to pay the costs yourself. Further, your physician may receive a benefit from the referral. If you have any concerns regarding your referral to any of the above-indicated entities, please do not hesitate to contact our office to request additional information, including an alternative referral. Please be aware of your right to request a referral to an alternative facility.

**For Private Pay Patients**

We, the staff at Texas Laparoscopic Consultants, are accepting you as a private pay patient and will not retro file a claim to your private insurance or Medicaid for services rendered. You will be responsible for paying for any service you receive. **X\_\_\_\_\_ (Please initial)**

If you have any questions about the above information or any uncertainty regarding insurance coverage, please do not hesitate to ask us. Sincerely, Terry Scarborough, M.D. and Sherman Yu, M.D.

**My signature below constitutes acknowledgement and acceptance of these policies.**

\_\_\_\_\_  
**Patient or Guarantor Signature:**

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

\_\_\_\_\_  
**Patients Name (Please Print)**

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

### Consent to Treatment

☐ I am the patient or ☐ I am the parent/guardian of the patient or ☐ Other relationship \_\_\_\_\_

I hereby authorize such medical care, treatment, and diagnostic tests as may be recommended and understand there is no warranty or guarantee of result or cure. This consent will remain in effect until I withdraw my consent in writing. I understand that medical students, under supervision, may be involved in my care.

**Signature of Patient/Parent/Guardian:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### Assignment of Benefits

☐ I am the patient or ☐ I am the parent/guardian of the patient or ☐ Other relationship \_\_\_\_\_

I acknowledge full responsibility for the payment of services received and agree to pay them in full at the time of service unless other arrangements have been made. I understand that insurance coverage is an arrangement between the insurance carrier and the patient. Texas Laparoscopic Consultants will assist I billing my insurance company, but I am ultimately responsible for payment should my insurance fail to pay within a reasonable amount of time.

I authorize Texas Laparoscopic Consultants to bill my insurance or third-party payer and receive payment directly from them for services rendered. I also authorize Texas Laparoscopic Consultants to release information as required to my insurance or third party payer (including my employer's worker's compensation carrier) for the purpose of determining benefits. I understand that such records may include information regarding HIV/AIDS testing, substance abuse, and/or mental health issues. A photocopy or a faxed copy of this authorization shall be deemed as valid as the original.

My signature signifies acceptance of all terms in this Assignment of Benefits.

**Signature of Patient/Parent/Guardian:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### Authorization for Designated Representative

☐ I am the patient or ☐ I am the parent/guardian of the patient or ☐ Other relationship \_\_\_\_\_

I hereby authorize Texas Laparoscopic Consultants to act as my Designated Representative in all matters concerning submission and appeals of insurance claims and decisions on my behalf. I understand this information is privileged and will only be released as specified in this authorization, or as required or permitted by law.

**Signature of Patient/Parent/Guardian:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### HIPAA Consent Form

☐ I am the patient or ☐ I am the parent/guardian of the patient or ☐ Other relationship \_\_\_\_\_

The Health Insurance Portability and Accountability Act (HIPAA) provides safeguards to protect your privacy. Implementation of HIPAA requirements officially began on April 14, 2003. Many of the policies have been our practice for years. The back of this form outlines some of those policies and requests your consent regarding how we may convey information to you and others so as to serve you better. The practice's complete Notice of Privacy Practices (NPP), which we have either given to you before or with this form, is posted in the office and available upon request. You should review the NPP prior to signing this consent.

My signature signifies acceptance of all terms in the HIPAA Information and Consent Form.

**Signature of Patient/Parent/Guardian:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## HIPAA Compliance Patient Consent Form

Our Notice of Privacy Practices provides information about how we may use or disclose protected health information.

The notice contains a patient's rights section describing your rights under the law. You ascertain that by your signature that you have reviewed our notice before signing this consent.

The terms of the notice may change, if so, you will be notified at your next visit to update your signature/date.

You have the right to restrict how your protected health information and potentially anonymous usage in this publication. You have the right to revoke this consent in writing, signed by you. However, such a revocation will not be retroactive.

By signing this form, I understand that:

- Protected health information may be disclosed or used for treatment, payment, or healthcare operations.
- The practice reserves the right to change the privacy policy as allowed by law.
- The practice has the right to restrict the use of the information but the practice does not have to agree to those restrictions.
- The patient has the right to revoke this consent in writing at any time and all full disclosures will then cease.
- The practice may condition receipt of treatment upon execution of this consent.

May we phone, email, or send a text to you to confirm appointments? YES NO

May we leave a message on your answering machine at home or on your cell phone? YES NO

May we discuss your medical condition with any member of your family? YES NO

If YES, please name the members allowed:

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This consent was signed by: \_\_\_\_\_  
(PRINT NAME PLEASE)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness: \_\_\_\_\_ Date: \_\_\_\_\_



## Non-Covered Services Waiver

Date: \_\_\_\_\_

Patients Name: \_\_\_\_\_ ID# \_\_\_\_\_

### Service Description

Date of Service: \_\_\_\_\_

Procedure: Bariatric Products (vitamins, supplements, etc)

Procedure: Psychological Consultation

Procedure: Nutrition Classes/consults

Procedure: \_\_\_\_\_

Procedure: \_\_\_\_\_

Procedure: \_\_\_\_\_

Approximate cost: \_\_\_\_\_

Provider name: \_\_\_\_\_

I hereby affirm that I have been informed and I understand that these services are excluded or excludable under the \_\_\_\_\_ Insurance Program and therefore all cost associated with these services are not an allowable expense under my insurance.

By signing the NON-COVERED WAIVER, I am hereby agreeing in advance in writing, to accept the full financial responsibility for all cost associated with the non-covered medical services, described in the document under "SERVICE DESCRIPTION" and performed by the named provider.

Patient Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_





Terry Scarborough, M.D  
Sherman Yu, M.D  
Sheilendra Mehta, M.D  
1200 Binz Street, Suite 950  
Houston, TX 77004  
Ph: 713-493-7700  
Fx: 281-971-4065

### **Surgery Cancellation/Reschedule Policy**

Texas Laparoscopic Consultants is privileged to provide treatment for our patients. Our staff accommodates the needs of patients to schedule surgery in a timely manner. This requires careful planning and coordination among our office, the surgical facilities, and other medical specialists who may be involved in your care such as the anesthesiologist and surgical technicians. The cancellation/rescheduling of a scheduled surgery/endoscopic procedure results in failure to serve other patients as well as disruption in schedules for other healthcare professionals and the operating room.

Therefore, we respectfully request your cooperation and understanding of the surgery/procedure scheduling process and our cancellation policy.

Cancellations or rescheduling of any general or bariatric surgical procedures made within **10 business days** of the scheduled date, will be assessed a **\$200 administrative fee**. Cancellations or rescheduling of any EGD or colonoscopy procedure made within **5 business days** of the scheduled date, will be assessed a **\$100 administrative fee**. This fee is not billable to insurance or reimbursable, and must be paid before we can schedule any further appointments or procedures.

This fee also applies if you reschedule your procedure more than once (regardless of the 5 or 10 day notice).

\_\_\_\_\_(Initial) If you are requesting a refund of your surgery deposit and are within the 5 or 10 day period, you will receive your refund less the cancellation fee.

By signing below, you are acknowledging that you have read and understand our cancellation policy.

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_