

Patient Information (Age 18 and Over)

Please complete this form and return it to our front desk staff. If you would like assistance, please ask.

If you are completing this form for another person:

Name _____

Relationship _____

PATIENT PERSONAL INFORMATION

Today's Date _____

Legal Name _____
(Last First Middle Initial)

Maiden or Previous Name _____ Date of Birth (DOB) _____

Name you prefer to be called _____ Social Security # (SSN) _____

Mailing Address _____
(Street City State Zip)

Home Phone _____ Cell _____ Ok to leave message? Yes ___ No ___

Email Address _____

Interested in signing up for the MyChart patient portal? Yes ___ No ___ Already on MyChart ___

Pronoun: She/Her/Hers ___ He/Him/His ___ They/Them/Theirs ___ Other _____

Gender Identity: Female ___ Male ___ Questioning ___ Non-Binary ___ Other _____

Sex Assigned at Birth: Female ___ Male ___

Do you think of yourself as: Straight ___ Bisexual ___ Gay ___ Lesbian ___ Other _____

Marital Status: Single ___ Married ___ Partnered ___ Divorced ___ Other _____

Race (check all that apply): Native American/Native Alaskan ___ Asian ___ White ___
Black or African American ___ Native Hawaiian ___ Pacific Islander (other than Native Hawaiian) ___

Ethnicity (select one): Hispanic or Latinx ___ Not Hispanic or Latinx ___

Preferred Language: _____

Primary Care Provider: _____

Clinic or Hospital Name/Location/State: _____

Emergency Contact Name _____ Phone _____ Relationship _____
Name _____ Phone _____ Relationship _____

INSURANCE INFORMATION

PRIMARY Medical Insurance (If uninsured, please write "NONE") _____

Policy Holder _____ Relationship to patient: Self ___ Parent ___ Spouse ___ Other ___

Policy Holder Address (if different than above) _____

DOB _____ SSN _____ Insurance ID/Policy # _____ Group # _____

SECONDARY Medical Insurance (If uninsured, please write "NONE") _____

Policy Holder _____ Relationship to patient: Self ___ Parent ___ Spouse ___ Other ___

Policy Holder Address (if different than above) _____

DOB _____ SSN _____ Insurance ID/Policy # _____ Group # _____

CONSENT FOR GENERAL CARE

I present myself for health care services at NorthLakes Community Clinic (NorthLakes) to be provided by authorized employees of the Clinic and clinical staff as may, in their professional judgment, be deemed necessary or beneficial. I realize that among those who attend to patients are NorthLakes health care staff and other health care personnel in training who, unless requested otherwise, may be present during patient care as part of their education. Required by the CARES Act, all services and care team members that are a part of my health care plan will have access to all of my Protected Health Information in order to better serve my health care needs. I understand there is an added layer of protection to any Mental Health records. I acknowledge that no guarantees have been made to me as to the effect of such examinations or treatments on my condition. As a patient of NorthLakes, I understand that I am automatically included in Care Everywhere which is an information-sharing platform that allows for care management, continuity and coordination of care at any Care Everywhere participating clinic or hospital. I understand that they will have access to my electronic health records. If I am seen in an Emergency Room or Urgent Care, I understand that these outside medical facilities will have access to my electronic health records. I also understand that I may opt out of Care Everywhere at any time by informing my care team members.

If a health care worker is exposed to my blood or other potentially infectious materials through any eye, mouth or other mucous membrane, non-intact skin or parenteral contact, I consent to a test of my blood to screen for the presence of Hepatitis B, Hepatitis C, Human Immunodeficiency Virus (HIV) or any antibody to the HIV virus, the cause of Acquired Immunodeficiency Syndrome (AIDS). I also consent to the release of reasonable, necessary portions of my medical record to assist NorthLakes in assessing potential risk related to such exposure. I authorize NorthLakes to release the test results to the exposed health care worker and any health care professional responsible for evaluating the exposed health care worker. I understand that I may have the right to consent to release of my test results to myself and/or my primary care physician.

AUTHORIZATION TO RELEASE INFORMATION

I authorize NorthLakes to disclose information from my medical/dental records (including transfer records) and/or my business office records to whom NorthLakes believes is responsible for the payment of my bill or is involved in my care and treatment. Should any portion of my records contain information regarding drug or alcohol abuse, consent is given to release such information necessary to obtain payment of my bill from insurance companies or other funding sources as named on the Requisition Records. I may revoke this consent at any future date upon written notification to NorthLakes; however, I understand NorthLakes may release information in good faith from the date I sign this consent until the date I may choose to revoke it. I authorize use of my medical/dental records and information for legitimate medical or scientific research purposes. Research procedures to not identify individuals by name or personal identifying characteristics.

OCCUPATIONAL HEALTH SERVICES

I consent to a physical examination/evaluation or testing to be performed by the staff of NorthLakes occupational health and any affiliated sites. I understand that I can expect an explanation of findings of the physical examination and any tests performed. No treatment is expected in connection with this exam/testing as it is for evaluation purposes only. I understand that my employer or insurer who is requesting this examination may be responsible for reimbursing NorthLakes or affiliated sites per company policy. Access to information from this evaluation/testing shall follow applicable statutes and regulations.

MEDICARE/MEDICAID PATIENTS

I certify the information I gave in applying for payment under Title XVIII or XIX of the Social Security Act is correct. I request payment of authorized benefits on my behalf for any services furnished me by NorthLakes, including physician services, and assign such benefits to NorthLakes. I authorize NorthLakes to release to Medicare/Medicaid and its agents any information needed to determine these benefits or related services. I understand I am responsible for the costs of non-covered services and for the deductible, co-insurance and co-payment charges allowed under federal regulations.

FINANCIAL AGREEMENT

I agree to pay NorthLakes for all services provided to me by NorthLakes and others for whom NorthLakes collects bills at the regular rates. This includes services which, for any reason, are not paid by insurance, government programs or other third party sources. I understand that any self-pay portion of my clinic bill is due upon notification.

I authorize payments be made directly to NorthLakes of insurance, Medicare/Medicaid benefits or other funding sources I am entitled to as payment for services provided me. I understand professional (physician) services for radiology, lab and pathology are charged separately from my clinic bill and that I am financially responsible to those physicians for any charges for their professional services. If assignment of insurance benefits is accepted by such physicians, I authorize insurance payments be made directly to those physicians.

X Signature of Patient or Authorized Representative _____ Date _____

X I acknowledge being offered the NorthLakes Notice of Privacy Practices _____ (Initials)

PERMISSION TO DISCUSS

Patient Name: LAST FIRST MI Date of Birth

The staff at NorthLakes Community Clinic may discuss my health information with individuals that I have designated below. A staff member has fully explained what this consent means.

YES, I give permission to (PLEASE PRINT):

Name Relationship
(Check all that apply) Make Appointments/Receive Appointment Reminders Pharmacy Billing Information Health Care Guidance
 Non-Confidential Test Results

Name Relationship
(Check all that apply) Make Appointments/Receive Appointment Reminders Pharmacy Billing Information Health Care Guidance
 Non-Confidential Test Results

Name Relationship
(Check all that apply) Make Appointments/Receive Appointment Reminders Pharmacy Billing Information Health Care Guidance
 Non-Confidential Test Results

NO, DO NOT share my health information and/or medical records.

Patient Initials

YOUR RIGHTS WITH RESPECT TO THIS AUTHORIZATION:

Right to Inspect or Copy the Health Information to Be Used or Disclosed – I understand that I have the right to inspect or copy the health information I have authorized to be used or disclosed by this authorization form. I may arrange to inspect my health information or obtain copies of my health information by contacting the Medical Records Dept. **Right to Receive Copy of This Authorization** – I understand that if I agree to sign this authorization, I will be provided with a copy of it. **Right to Refuse to Sign This Authorization** – I understand I am under no obligation to sign this form and that the person(s) listed above who I am authorizing to use and/or disclose my information may not condition treatment, payment, enrollment in a health plan or eligibility for health care benefits on my decision to sign this authorization. **Right to Revoke This Authorization** – I understand that the revocation will not apply to information that has already been released in response to this or any other previously received authorization. I understand that the revocation will not apply to my insurance company when the law provides my insurer with the right to contest claim under my policy. Unless otherwise revoked, this consent is effective for one year from the date of signature. This authorization expressly waives any requirement that it must be used within a certain number of days after the date of signing, or that it must be dated within any time period before the date it is used. This authorization shall also extend to records of future treatment, after the date of signing of this authorization, as long as such treatment occurs while this authorization is still in effect. I have had an opportunity to review and understand the content of this authorization. By signing this authorization, I am confirming that it accurately reflects my wishes.

If I am signing as Authorized Representative of the patient, I am:

Parent of minor Court appointed guardian/conservator POA for HealthCare

Patient Signature/Legal Rep: Date

Signature of Witness Title

REQUIRED INFORMATION ABOUT YOUR HOUSEHOLD INCOME

This site is a Federally Qualified Health Center (FQHC) which means we receive a federal grant that allows us to provide a discounted fee on services to our patients who qualify. We are required to provide certain information to the Bureau of Primary Health Care each year regarding all of our patients. The *only* reason this information is collected is for reporting purposes and we respect that this is personal and confidential information. Your help is very much appreciated.

Today's Date _____

Patient Name _____ Date of Birth _____

How many people are in your household? _____

(Please include yourself and anyone related by blood, marriage or adoption, and are legally financially responsible for each other)

Total Annual Household Income No Income

Using the table below, please indicate which column represents your TOTAL family/household gross income level (before anything is deducted) based on the number of persons included in your household. This includes any wages, alimony, disability, social security, retirement, unemployment, etc. **Check Below.**

Level - % of poverty (FPG) and Family Size:	<input type="checkbox"/> ≤100%	<input type="checkbox"/> 101%-150%	<input type="checkbox"/> 151%-200%	<input type="checkbox"/> >200%
1 Adult	≤ \$13,590	\$13,591- \$20,385	\$20,386- \$27,180	\$27,181
2- person Family	≤ \$18,310	\$18,311- \$27,465	\$27,466- \$36,620	\$36,621
3- person Family	≤ \$23,030	\$23,031- \$34,545	\$34,546- \$46,060	\$46,061
4- person Family	≤ \$27,750	\$27,751- \$41,625	\$41,626- \$55,500	\$55,501
5- person Family	≤ \$32,470	\$32,471- \$48,705	\$48,706- \$64,940	\$64,941
6-person Family	≤ \$37,190	\$37,191- \$55,785	\$55,786- \$74,380	\$74,381
7-person Family	≤ \$41,910	\$41,911- \$62,865	\$62,866- \$83,820	\$83,821
8-person Family	≤ \$46,630	\$46,631- \$69,945	\$69,946- \$93,260	\$93,261

If your household size is larger than 8, please see our Patient Services Representative for assistance in calculating your federal poverty level.

SLIDING FEE INFORMATION

We are able to offer a sliding fee scale on eligible services at NorthLakes to individuals or families with no income, low-income, or underinsured. Sliding fee calculations are based on the family/household size and annual gross income. Eligibility is based on your ability to pay according to Health Resource and Service Administration (HRSA) guidelines. Our Patient Financial Advocates are available to help if you need assistance applying for the sliding fee scale.

- YES! I want to apply for the sliding fee scale.** **Currently on the sliding fee scale**
- NO THANKS. I do not want to apply for the sliding fee scale.**

YOU MAY BE ELIGIBLE!

1. Even if you have insurance
2. Even if you don't have insurance
3. Even if you live out of state or live in WI seasonally
4. Even if you don't have many appointments
5. Even if you applied but were previously denied
6. Even if you do not have any income or POI
7. Even if you and your children have Medicaid/ MA/BadgerCare

NorthLakes COMMUNITY CLINIC

NOTICE OF PRIVACY PRACTICES

As required by the privacy regulation created as a result of the Health Insurance Portability and Accountability Act of 1996 (HIPAA)
Effective January 28, 2008

THIS NOTICE DESCRIBES HOW YOUR HEALTH INFORMATION (AS A PATIENT OF THIS PRACTICE) MAY BE USED, DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE READ IT CAREFULLY.

Our Commitment to Your Privacy

Our practice is dedicated to maintaining the privacy of your individually identifiable health information (also called PHI). In conducting our business, we will create records regarding you and the treatment and services we provide to you. We are required by law to provide you with this notice of our legal duties and the privacy practices that we maintain in our practice concerning your PHI. By federal and state law, we must follow the terms of the Notice of Privacy Practices that we have in effect at the time.

We realize that these laws are complicated, but we must provide you with the following important information:

- How we may use and disclose your PHI,
- Your privacy rights in your PHI,
- Our obligations concerning the use and disclosure of your PHI.

The terms of this notice apply to all records containing your PHI that are created or retained by our practice. We reserve the right to revise or amend this Notice of Privacy Practices. Any revision or amendment to this notice will be effective for all of your records that our practice has created or maintained in the past, and for any of your records that we may create or maintain in the future. Our practice will post a copy of our current Notice in our offices in a visible location at all times, and you may request a copy of our most current Notice at any time.

We may use and disclose your PHI in the following ways:

1. **Treatment:** Our practice may use your PHI to treat you. For example, we may ask you to have laboratory tests (such as blood or urine tests), and we may use the results to help us reach a diagnosis. We might use your PHI in order to write a prescription for you, or we might disclose your PHI to a pharmacy when we order a prescription for you. Many of the people who work for our practice—including, but not limited to our doctors and nurses—may use or disclose your PHI in order to treat you or to assist others in your treatment. Additionally, we may disclose your PHI to others who may assist in your care, such as your spouse, children or parents. Finally, we may also disclose your PHI to other health care providers for purposes related to your treatment.
2. **Payment:** Our practice may use and disclose your PHI in order to bill and collect payment for the services and items you may receive from us. For example, we may contact your health insurer to certify that you are eligible for benefits (and for what range of benefits), and we may provide your insurer with details regarding your treatment to determine if your insurer will cover, or pay for, your treatment. We also may use and disclose your PHI to obtain payment from third parties that may be responsible for such costs, such as family members. Also, we may use your PHI to bill you directly for services and items. We may disclose your PHI to other health care providers and entities to assist in the billing and collection efforts.

3. **Health Care Operations:** Our practice may use and disclose your PHI to operate our business. For example, our practice may use your PHI to evaluate the quality of care you received from us, or to conduct cost management and business planning activities for our practice. We may disclose your PHI to other health care providers and entities to assist in the health care operations.
4. **Appointment Reminders:** Our practice may use and disclose your PHI to contact you and remind you of an appointment.
5. **Treatment Options:** Our practice may use and disclose your PHI to inform you of potential treatment options or alternatives.
6. **Health-related Benefits and Services:** Our practice may use and disclose your PHI to inform you of health-related benefits or services that may be of interest to you.
7. **Release of Information to Family/Friends:** Our practice may release your PHI to a friend or family member that is involved in your care or who assists in taking care of you. For example, a parent or guardian may ask that a babysitter take their child to the pediatrician's office for treatment of a cold. In this example, the babysitter may have access to this child's medical information. A release to family or friend requires written consent.
8. **Disclosures Required by Law:** Our practice will use and disclose your PHI when required to do so by federal, state or local law.
9. **Fundraising:** Our practice may use your PHI for our own fundraising activities. You may opt out of this at anytime by following the instructions that will be included on any solicitation sent to you generated from using your PHI. If there are not instructions on that correspondence, your PHI was not used in creating or sending the materials.

Use and disclosure of your PHI in certain special circumstances: The following categories describe unique scenarios in which we may use or disclose your identifiable health information (PHI).

Public Health Risks: Our practice may disclose your PHI to public health authorities that are authorized by law to collect information for the purpose of:

- Maintaining vital records, such as births and deaths,
- Reporting child abuse or neglect,
- Preventing or controlling disease, injury, or disability,
- Notifying a person regarding a potential risk to spreading or contracting a disease or condition,
- Reporting reaction to drugs or problems with products or devices,
- Notifying individuals if a product or device they may be using has been recalled,
- Notifying appropriate government agencies and authorities regarding the potential abuse or neglect of an adult patient (including domestic violence); however, we will only disclose this information if the patient agrees or we are required or authorized by law to disclose this information,
- Notifying your employer under limited circumstances related primarily to workplace injury or illness or medical surveillance.

Health Oversight Activities: Our practice may disclose your PHI to a health oversight agency for activities authorized by law. Oversight activities can include, for example, investigations, inspections, audits, surveys, licensure and disciplinary actions; civil, administrative and criminal procedures or actions; or other activities necessary for the government to monitor government programs, compliance with civil rights laws and the health care system in general.

Lawsuits and Similar Proceedings: Our practice may use and disclose your PHI in response to a court or administrative order, if you are involved in a lawsuit or similar proceeding. We also may disclose your PHI in response to a discovery request, subpoena or other lawful process by another party involved in the dispute, but only if we have made an effort to inform you of the request or to obtain an order protecting the information the party has requested.

Law Enforcement: We may release PHI if asked to do so by a law enforcement official:

- Regarding a crime victim in certain situations, if we are unable to obtain the person's agreement,
- Concerning a death we believe has resulted from criminal conduct,
- Regarding criminal conduct at our offices,
- In response to a warrant, summons, court order, subpoena or similar legal process,
- To identify/locate a suspect, material witness, fugitive or missing person,
- In an emergency, to report a crime (including the location of victim(s) of the crime, or the description, identity or location of the perpetrator).

Serious Threats to Health or Safety: Our practice may use and disclose your PHI when necessary to reduce or prevent a serious threat to your health and safety or the health and safety of another individual or the public. Under these circumstances, we will only make disclosures to a person or organization able to help prevent the threat.

Military: Our practice may disclose your PHI if you are a member of the U.S. or foreign military forces (including veterans) and if required by the appropriate authorities.

National Security: Our practice may disclose your PHI to federal officials for intelligence and national security activities authorized by law. We also may disclose your PHI to federal and national security authorized by law. We also may disclose your PHI to federal officials in order to protect the president, other officials or foreign heads of state, or to conduct investigations.

Inmates: Our practice may disclose your PHI to correctional institutions or law enforcement officials if you are an inmate or under the custody of a law enforcement official. Disclosure for these purposes would be necessary: (a) for the institution to provide health care services to you, (b) for the safety and security of the institution, and/or (c) to protect your health and safety or the health and safety of other individuals.

Worker's Compensation: Our practice may release your PHI for worker's compensation and similar programs.

You have the following rights regarding the PHI that we maintain about you:

Confidential Communications: You have the right to request that our practice communicate with you about your health and related issues in a particular manner or at a certain location. For instance, you may ask that we contact you at home rather than at work. In order to request a type of confidential communication, you must make a written request to our Site Manager specifying the requested method of contact or the locations where you wish to be contacted. Our practice will accommodate reasonable requests. You do not need to give a reason for your request.

Requesting Restrictions: You have the right to request a restriction in our use or disclosure of your PHI for treatment, payment or health care operations. Additionally, you have the right to request that we restrict our disclosure of your PHI to only certain individuals involved in your care or the payment for your care, such as family members and friends. We are not required to agree to your request; however, if we do agree, we are bound by our agreement except when otherwise required by law, in emergencies or when the information is necessary to treat you. In order to request a restriction in our use or disclosure of your PHI, you must make a written request to our Site Manager. Your request must describe in a clear and concise fashion:

- The information you want restricted,
- Whether you are requesting to limit our practice's use, disclosure, or both,
- To whom you want limits to apply.

Inspection and Copies: You have the right to inspect and obtain a copy of the PHI that may be used to make decisions about you, including patient medical records and billing records, but not including psychotherapy notes. You must submit your request in writing to our Site

Manager in order to inspect and/or obtain a copy of your PHI. Our practice may charge a fee for the costs of copying, mailing, labor and supplies associated with your request. Our practice may deny your request to inspect and/or copy in certain limited circumstances; however, you may request a review of our denial. Another licensed health care professional chosen by us will conduct reviews.

Amendment: You may ask us to amend your health information if you believe it is incorrect or incomplete, and you may request an amendment for as long as the information is kept by or for our practice. To request an amendment, your request must be made in writing and submitted to our Site Manager. You must provide us with a reason that supports your request for amendment. Our practice will deny your request if you fail to submit your request (and the reason supporting your request) in writing. Also, we may deny your request if you ask us to amend information that is, in our opinion: (a) accurate and complete, (b) not part of the PHI kept by or for the practice, (c) not part of the PHI which you would be permitted to inspect and copy, or (d) not created by our practice, unless the individual or entity that created the information is not available to amend the information.

Accounting of Disclosures: All of our patients have the right to request an "accounting of disclosures." An "accounting of disclosures" is a list of certain non-routine disclosures our practice has made of your PHI for purposes not related to treatment, payment, operations, or fundraising. Use of your PHI as part of the routine patient care in our practice is not required to be documented—for example, the doctor sharing information with the nurse, or the billing department using your information to file your insurance claim. In order to obtain an "accounting of disclosures," you must submit your request in writing to our Site Manager. All requests for an "accounting of disclosures" must state a time period, which may not be longer than six (6) years from the date of disclosure and may not include dates before January 28, 2008. The first list you request within a 12-month period is free of charge, but our practice may charge you for additional lists within the same 12-month period. Our practice will notify you of the costs involved with additional requests, and you may withdraw your request before you incur any costs.

Right to File a Complaint: If you believe your privacy rights have been violated, you may file a complaint with our practice or with the Secretary of the Department of Health and Human Services. To file a complaint with our practice, contact our Site Manager. Complaints must be submitted in writing. You will not be penalized for filing a complaint.

Right to Provide an Authorization for Other Uses and Disclosures: Our practice will obtain your written authorization for uses and disclosures that are not identified by this notice or permitted by applicable law. Any authorization you provide to us regarding the use and disclosure of your PHI may be revoked at any time in writing. After you revoke your authorization, we will no longer use or disclose your PHI for the reasons described in the authorization. Please note: we are required to retain records of your care.

If you have any questions regarding this notice or our health information privacy policies, please contact our Chief Executive Officer.

Adult Proxy Access to an Adult's MyChart

This form is an authorization that will permit NorthLakes your medical information to your designated. Record adult proxy. This form should be completed by the patient who is authorizing another adult to access medical information in his or her MyChart electronic record. This form must include the name and information of the patient and the individual who the patient is authorizing to access their MyChart record as a proxy.

Patient Name (last, first, middle initial) _____ Patient Date of Birth: ___/___/___

I am requesting that _____ **(insert printed name of proxy)** be allowed to have access to my health information that is available in my MyChart electronic record. This person is my designated MyChart proxy. I authorize NorthLakes to release the health information contained in my electronic MyChart record to my proxy. I understand that the medical information in MyChart is obtained from my electronic medical record and may include information from facilities listed in NorthLakes Notice of Privacy Practices. I understand that MyChart contains a portion of my medical record and that MyChart does not reflect the complete contents of the medical record. **Information in MyChart may include pregnancy, STD treatment, reproductive health care, alcohol and/or substance abuse treatment, genetic testing, mental health or HIV related information. I authorize release of my health information only through my electronic MyChart record.**

This form does not authorize release of my medical record to my designated proxy by other methods or in other ways. I understand that once information has been disclosed, it could be re-disclosed by the proxy, and the disclosed information may not be protected by federal privacy protections.

Participation in MyChart and designating a MyChart proxy is completely voluntary. Access to my MyChart electronic record is solely at my request. I understand that I am not required to designate a MyChart proxy and I am not required to provide MyChart access authorization to any other person. I also understand that NorthLakes does not condition any of my health care treatment, payment or other services on whether I provide this authorization. However, I also understand that if I do not provide this authorization, NorthLakes is not permitted to provide access to my MyChart record to my designated proxy.

This authorization will expire only when I revoke my permission for my proxy to access my information through MyChart. I understand that I also may revoke this authorization at any time by providing a written request for revocation to NorthLakes. I understand that if I revoke this authorization, my designated proxy's access to my MyChart record will end. I also understand my revocation will not affect any disclosures that were made prior to processing the revocation request and that any re-disclosures made by the proxy may no longer be covered by federal privacy protections. I have been provided a copy of this authorization.

Signature of Patient (or authorized representative): _____ Date: ___/___/___

Printed Name: _____

If a person other than the patient signs this form, indicate their legal authority to sign for patient (e.g., legal guardian) and attach documentation: _____

NOTE: This authorization will expire one year from the above date, unless listed here: _____ I may deactivate the access of the adult proxy specified above by providing a written request to NorthLakes.