

OFFICE: 714-223-7000 | FAX: 714-223-7001

Welcome! Thank you for choosing our office to assist you with your rehabilitation.

NEW PATIENTS

To provide our patients with the best level of care, it is imperative that we receive a documented medical history to review before you can be seen by one of our Providers.

<u>All current</u> medical documentation should be faxed or mailed to our office at least 48 hours prior to your scheduled consultation.

Please	include all:
	☐ Medical visit notes
	☐ Imaging (MRI and/or XRAY) with reports
	☐ Physical Therapy notes
	☐ Surgical Reports
	☐ List of current medications

Please remember that all documents and imaging must be <u>specific to the body part</u> with which you are being seen for at the time of your consultation.



I his letter is to confirm your appointment on
**You must arrive 30 minutes early at the following location or your appointment may be rescheduled:
□ 1041 E. YORBA LINDA BLVD., SUITE 210, PLACENTIA, CA 92870
□ 1010 W. LA VETA, SUITE 615, ORANGE, CA 92868
□ 23141 MOULTON PKWY, SUITE 102, LAGUNA HILLS, 92653
For your convenience, our patient packet will be mailed or emailed to you. Please bring this packet with you to your appointment fully completed. If not completed, your appointment may be rescheduled.
Please bring the following items to your appointment: ☐ Photo ID & Insurance Card ☐ All Current prescription medication bottles ☐ Copies of radiology reports + films / MRI / X-rays ☐ Reminder: We do NO☐accept checks for copays. For your convenience, we accept cash, Visa & Mastercard
Should you require additional assistance or have questions regarding this information, please do not hesitate to contact us at (714) 223-7000 or if you need to FAX us, please Fax: (714) 223-7001

Once again, we look forward to meeting you.



OUTSIDE MEDICAL RECORDS PROTOCOL

Thank you for choosing Centers of Rehabilitation and Pain Medicine to assist you with your rehabilitation. We are committed to providing you with the best possible care and treatment.

To be able to provide you with proper treatment we must have medical records outlining your recent medical care to include office visit notes, radiology testing, lab results and medication lists.

We must have copies of your medical records in our office prior to your appointment. If you have been referred by another medical office, we will call them to request your medical records be sent to our office prior to your appointment.

If you are obtaining the medical records, they must be provided to our office no later than the **day before** your appointment. You may fax them to 714-223-7001. If you choose to fax records, please notify our office at 714-223-7000, so we can let you know if we do not receive them.

If we do not receive medical records prior to your appointment, we will be unable to write any medications for you until we do receive them.

You may call our office at 714-223-7000 the day before your appointment to verify we have received your records.

If you choose not to provide us with records, you must have a medical work up possibly to include: radiology testing, electrical studies and lab work before we will be able to safely write you prescriptions for medications.

Thank you for your understanding and cooperation, Management

Centers of Rehabilitation & Pain Medicine



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AUTHORIZATION TO RELEASE INFORMATION

Patient Name (Last):	(Firs	t):	
DOB:			
Cell #:			
INFORM	MATION REQUESTED FI	ROM:	
Name:			
Address:			
City:		Zip:	
Phone:	Fax:		
Information I would like sent / red	quested:		
Copies of pertinent info or	nly (H&P, OP reports, Lab	s, Imaging Reports)	
Copy of entire medical rec	ord		
Other (Please Specify):			
Patient Signature:		Date:	
Please send to FAX # 714-223-7	' 001 or		

Please send to FAX # /14-223-7001 or

Mail to: 1041 E. Yorba Linda Blvd. Suite #210, Placentia, CA 92870



PATIENT REGISTRATION

Last Name:							
First Name: Middle Name:							
DOB:	SSN:						
SEX: M F DRIVERS LICE	ENSE #:		_ STATE:				
MARITAL STATUS: MARRIED	SINGLE	DIVORCED	WIDOWED				
RACE:E	THNICITY:						
PARENT/GUARDIAN NAME (if pati	ent is a minor)):					
RELATIONSHIP TO MINOR:							
HOME STREET ADDRESS:							
CITY:	STATE:		_ZIP:				
* PLEASE INDICATE BELOW WHICH	CH IS YOUR I	PRIMARY PHONE	ENUMBER				
□ HOME #:	□ N	10BILE #:					
May our office leave a message on	your primary v	voicemail? YES	NO				
EMAIL ADDRESS:							
EMPLOYER:		OCCUPATION	ON:				
WORK ADDRESS:							
EMERGENCY CONTACT (OTHER	THAN YOUR	OWN NUMBER)					
NAME:		PH #:					

Primary Insurance:	
Name of Primary Ins Co:	Phone:
Id/Policy Number:	Group #:
Subscriber/Insured:	Relationship:
Date of Birth:	Social Security Number:
Insured Employer Name:	
Employer Phone:	
Secondary Insurance:	
Name of Secondary Ins Co:	Phone:
Id/Policy Number:	Group #:
Subscriber/Insured:	Relationship:
Date of Birth:	Social Security Number:
Insured Employer Name:	
Employer Phone:	
consents to general and medical laboratory procedures and medic	tient or the patient's legal representative hereby care, including but not limited to x-ray examinations, all services rendered to patient under the general and an. It is understood that the patient is under the care ag physician.
medical benefits if any, otherwise that I will be required to present r coverage and identity. I hereby a	to the Office of Albert Lai, M.D. all surgical and/or payable to me for services rendered. I understand y health insurance card and driver's license to ensure thorize the doctor to release all information necessary ould my insurance deny payment I am fully aware that curred.
Signature of Patient, Parent, Legal Gua	dian, or Legal Representative Date



FINANCIAL POLICY

We want to welcome you to our office. We are committed to providing you with the best possible care and we will be pleased to discuss our professional fees with you at any time. Your clear understanding of our financial policy is important to our professional relationship. Please feel free to ask any questions that you may have about our fees, financial policy or your responsibilities.

We cannot bill your insurance unless you bring your complete insurance information with you. Our office will bill your insurance as a courtesy, but ultimately the balance is your responsibility. Your insurance policy is a contract between you and your insurance company; we are not a party to that contract. If you have a co-payment with your insurance, it is due at the time of service or we will charge you a \$15 billing fee per missed co-payment. You may choose to pay by cash, Visa or Mastercard. It is necessary for you to verify your benefits through your insurance, as some services may be considered "non-covered" or may have a benefit limitation.

Auto Accidents: We will bill your auto insurance if you have "Med Pay" on your policy. <u>If you are represented and you lose your case, you are fully responsible for all charges.</u>

Medicare Clients: Medicare will pay 80% of the acceptable charges. If you have a secondary insurance, we will bill them for the remaining 20%. If you do not have a secondary insurance, the balance will be due and payable by you. You will receive a statement for your portion after Medicare has completed their payments.

hereby assign all medical benefits to the Offices of Albe personally responsible for all legitimate charges incurred	rt Lai, M.D. I understand I am
coverage.	, 3
Responsible Party Signature	 Date



PATIENT AUTHORIZATION TO USE OR DISCLOSE PROTECTED HEALTH INFORMATION - (HIPAA)

	orized by me to use or di r than treatment, or heal		stand the Offices of Albert Lai, protected health information erations.
disclosed, who mainformation. I specially allowed Albert Lai, M.D., or information as designed when the information subject to redisclosinformation. I further	r any other individual listed cribed on this form to the on is used or disclosed pu sure by the recipient and r	ormation alent employed below to delow to delow to delow to delom to the may no long the right to	nd the recipient(s) of that ee or owner of the Offices of disclose my protected health isted below. I understand that his authorization, it may be
Description of the	e information to be used	or disclos	sed (check all that apply)
·	`	ent's demo	quires an explanation as to why ographic information (check all ecific condition(s) ecific medication(s) ecific professional service(s)
information or serv	ces of Albert Lai, M.D. to or rices that may be helpful or		
Signature			Date

CRPM

Patient Reschedule - Cancellation and Late Policy

Cancelling or Rescheduling



NEW Patients



ESTABLISHED Patients



LATE =
Rescheduled



24 HRS NOTICE

Should you need to reschedule or cancel.

30 MIN BEFORE

Please arrive
30 minutes prior
to your
appointment.

15 MIN BEFORE

Please arrive 15 minutes prior to your appointment. 10 MIN IS LATE

Patients arriving
10 minutes or later
will be
rescheduled.

A "no-show" policy which will affect all who do not keep their appointment or cancel with less than a 24-hour notice.

Patients arriving 15 minutes or more after will be considered as a "no-show" and will be rescheduled, in addition:

1st occurrence - Patient/parent will receive a letter advising of our policy.

2nd occurrence - 2nd letter + a \$50 No Show Fee assessment.

3rd and subsequent occurrences - May potentially result in dismissal from practice + an additional \$50 No Show Fee



Patient Reschedule / Late Arrivals / Cancellation Policy

In order for us to continue to provide the highest quality service and to minimize your wait time, it is requested that you give 24-hour notice, should you need to reschedule or cancel an appointment.

NEW Patients, please arrive 30 minutes prior to your scheduled appointment.

ESTABLISHED Patients, please arrive 15 minutes prior to your scheduled appointment.

Patients arriving 10 minutes or later for a scheduled appointment will be rescheduled.

A "no-show" policy which will affect all patients who do not keep their scheduled appointment or who cancel an appointment with less than a 24-hour notice.

Patients arriving 15 minutes or more after their scheduled appointment will be considered as a "no-show" and will be rescheduled at another time. in addition:

I understand that I may be charged a \$50.00 fee for each cancelled/no show

- First occurrence: Patient/guardian will receive a letter advising of our policy.
- Second occurrence: Patient/guardian will receive a 2nd letter and a \$50 no show fee assessment
- Third and subsequent occurrences: May potentially result in dismissal from practice and an additional \$50 no show fee

appointment where a 24-hour notice has not been provided.

Patient Name (Please Print)

Date

Signature



Call Monitoring and Recording Acknowledgment

This acknowledges that you understand and agree that Centers of Rehabilitation and Pain Medicine's (CRPM) phone calls and its recordings may be used for the purposes of customer service, examination, and/or training purposes. Call data and recordings are protected by systems that are HIPAA compliant.

r nereby acknowledge and understand that Centers of Renabilitation and Pain Medicine (CRPM) records and review calls for training, examination, and/or quality assurance ourposes.							
F 41. P 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6							
Patient Name (Please Print)							
Signature	 Date						

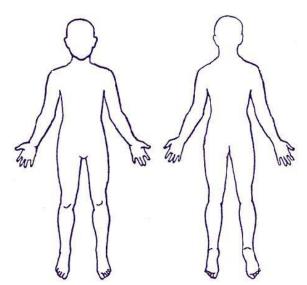


New Patient Questionnaire

Name:				
Age:	Sex:	Height:	Weight:	
Current Problem:_				
Any imaging studi	es for this problem?	□ Yes □ No		
Who referred you?	?:			
History of Present	Illness (history of painfu	ul situation/description	of pain):	

WHERE IS THE PAIN? Please mark on the drawing where you feel pain right now.

Front Back



Please Use the Key Below

Pins & Needles = 0 0 0 Stabbing = / // Burning = X X X Deep Aches = Z Z Z

Rate Your Pain											
0 = No Pain	10) = W	orst	t Pai	in E	ver					
 Right now: 									10		
2. At Best:											
3. At Worst:	1 2	3	4	5	6	7	8	9	10		
Describe Your Pair Dull Sharp Aching		bbing	E	Burni	ing	Sł	nooti	ng	Tingli	ng Nu	umbness
How does the pain of Sitting: Standing											
Laying Down: W	alking:_		Tw	istin	g:		Sn	eezir	ng:	PT:_	Massage:
Medications:Oth											•
How long can you: Sit											
Tion forig can your on _			.00		Ū						
Medication: Medication Please list all medication:	ations	you a	are	curr		y ta Oose		g:	Read	MOTI.	Frequency:
					=						
					_					_	
					_					<u> </u>	
										_	
					_						
					_						
Are you currently							ıl do	octo	rs for	your p	painful condition?
Please list their nam Name:	es and	I pho	ne ı	num	ber	s:			Phon	ie:	

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Please write down any X-rays, MRIs, CAT Scans, EMG (Nerve tests) and any other tests you have had: (please enclose copies of the results, including films if you have them, if not please list body part, facility, and telephone number) Facility: Phone: Image: What Medical Treatment Have You Had?: Dates: Did this help your pain? □ Physical Therapy ☐ YES ☐ NO If YES, How many times? ☐ YES ☐ NO If YES, Name: ___ □ Psychologist □ Spine Injection ☐ YES ☐ NO If YES, Procedure: □ Trigger Point Injections _____ □ YES □ NO ☐ T.E.N.S. (Nerve Stimulator) _____ ☐ YES ☐ NO ☐ Heat/ Ice Treatment ☐ YES ☐ NO □ Acupuncture ☐ YES ☐ NO ☐ Chiropractic Therapy _____ ☐ YES ☐ NO ☐ Other ☐ YES ☐ NO If YES, Procedure:____ Does pain limit your activities of daily living? ☐ YES ☐ NO If yes, what percent of the day? \square 10% \square 25% \square 50% \square 75% \square 100% **Self-Care**: □ Showering □ Hair Brushing □ Teeth Brushing □ Putting on clothes **Communication**: □ Speaking □ Writing □ Typing Physical Activity: ☐ Walking Stairs ☐ Walking ☐ Standing ☐ Sitting **Sensory Function**: □ Hearing □ Seeing □ Feeling □ Tasting □ Smelling Hand Activity: ☐ Lifting ☐ Grasping ☐ Turning Pages ☐ Feeling Things **Travel**: □ Driving a Car □ Turning head to look in mirror □ Pain with sitting □ Pain w/ bumps in road **Sexual Function**: □ Performing □ Erection □ Ejaculation □ Enjoying

Past Medical History: (Check Box) Specify If Known

☐ Heart Disease/Attack	□ Diabetes	☐ Lung Problems:_					
☐ High Blood Pressure	□ Seizures	□ Cancer:					
☐ TIA/Stroke	☐ Thyroid:		□ HIV:				
☐ Bleeding Problems	☐ Hepatitis:_		☐ Kidney Stones				
☐ Stomach/Intestine:			<u></u>				
□ Other:							
□ Other:							
Surgical History:							
□ Appendectomy	☐ Tonsillecto	omy					
☐ C-Section	☐ Spine Sur	gery:					
☐ Hysterectomy	☐ Joint Repl	acement:					
□ Hernia Repair	□ Arthrosco	□ Arthroscopy:					
☐ Carpal Tunnel Surgery	☐ Surgery Fi	racture Repair:					
☐ Gallbladder	□ Other:						
□ CABG	□ Other:						
□ CA/Stent	□ Other:						
Family History:							
Any family medical problen	ns? 🗆 YES 🗆 No	O If YES, Please explai	n?				

Social History :				
Marital Status: ☐ Sing	le ☐ Married ☐ Widowed	☐ Divorced Children? ☐	I YES #: □ NO	
Do you drink alcohol (l	beer, wine, etc)? □ NO □	l YES □ Daily □ Weekly	☐ Monthly	
Do you smoke cigarett	tes? □ YES □ NO How m	nany packs/day?:		
Do you or have you ev	ver used recreational drug	gs? □ YES □ NO		
If Yes, What kind and	how often?:			
Review of System	ns - Any problems w	<u>/ith : (Check Box)</u>		
□ Chills	☐ Palpitations	☐ Back Pain	☐ Headaches	
☐ Sweats	□ Cough	☐ Joint Stiffness	□ Numbness/Tingling	
☐ Fevers	☐ Shortness of Breath	☐ Joint Swelling	☐ Limb Weakness	
☐ Weight Loss	☐ Abdominal Pain	□ Leg Swelling	☐ Easy Bruising/Bleeding	
□ Weight Gain	☐ Constipation	☐ Exposure to TB	☐ Vision Changes	
☐ Depression	□ Diarrhea	□ Rash/Lesions	☐ Hearing Problems	
☐ Stress	□ Itching	☐ Anxiety	☐ Incontinence Urine/Stool	
☐ Chest Pain	☐ Blood in Stool	☐ Dizziness	□ Sleep	
Current Work Sta	tus :			
Job title/Description:	1			
□ Full Time □ Part	Time Student] Homemaker □ Retir	ed Other	
☐ Unemployed, Disab	led □ Unemployed	d, Not Disabled		
☐ Length of time uner	nployed:years	months		
☐ Working with restric	tions: Occupation:	Restric	etions:	
Are you unemployed/u	underemployed because o	of your injury? □ YES	□NO	

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Past Injuries or Accidents:

Accident	
Date: Body Part Injur	red:
What happened?	
Did you get medical treatment? ☐ YES ☐ NO	Did you make a full recovery? ☐ YES ☐ NO
Has the injury affected your ability to work/ Do	o you have current restrictions?
Work Related Injury	
Date: Body Part Injur	red:
Have you ever hurt this part before? ☐ YES [□ NO How?:
Did you get medical treatment? ☐ YES ☐ NO) Who first treated you?:
Where?:	Who has treated you since?:
Did you make a full recovery? \square YES \square NO	
Has the injury affected your ability to work / D	o you have current restrictions?:
Date you last worked: Date yo	ou started with your employer:
What were your job duties and hours?:	

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LONG-TERM CONTROLLED SUBSTANCES THERAPY FOR CHRONIC PAIN

The purpose of this agreement is to protect your access to controlled substances and to protect our ability to prescribe for you.

The long-term use of such substances as opioids (narcotic analgesics), benzodiazepine tranquilizers, and barbiturate sedatives are controversial because of uncertainty regarding the extent to which they provide long-term benefit. There is also the risk of an addictive disorder developing or of relapse occurring in a person with a prior addiction. The extent of this risk is not certain.

Because these drugs have potential for abuse or diversion, strict accountability is necessary when use is prolonged. For this reason the following policies <u>are agreed to by you</u>, the patient, as consideration for, and a condition of, the willingness of the physician whose signature appears below to consider the initial and/or confirmed prescription of controlled substances to treat your chronic pain.

I will not be involved in any activity that may be dangerous to me or someone else if I feel drowsy or am not thinking clearly. I am aware that even if I do not notice it, my reflexes and reaction time might still be slowed. Such activities include, but are not limited to, using heavy equipment or a motor vehicle, working in unprotected heights or being responsible for another individual who is unable to care for him or herself.

I am aware that certain other medicines such as nalbuphine (Nubain), pentazocine (Talwin), buprenorphine (Buprenex), and butorphanol (Stadol), may reverse the action of the medicine I am using for pain control. Taking any of these other medicines while I am taking pain medicines can cause symptoms like bad flu, called a withdrawal symptom. I agree not to take any of these medicines and to tell any doctors that I am taking an opioid as my pain medicine and cannot take any of the medicines listed above.

I am aware that addiction is defined as the use of a medicine even if it causes harm, having cravings for a drug, feeling the need to use a drug and a decreased quality of life. I am aware that the chance of becoming addicted to my pain medicine is low. I am aware that the development of addiction has been reported rarely in medical journals and is much more common in a person who has a family or personal history of addiction. I agree to tell my doctor my complete and honest personal drug history, as well as that of my family, to the best of my knowledge.

- 1. All controlled substances must come from the physician whose signature appears below or, during his or her absence, by the covering physician, unless specified authorization is obtained for an exception. (Multiple sources can lead to untoward drug interactions or poor coordination of treatment.) Obtaining medications from other healthcare providers without the knowledge of your physician at the Offices of Albert Lai, M.D. can lead to a discharge and an inability to obtain narcotic prescriptions.
- 3. You are expected to inform our office of any new medications or medical conditions, and of any adverse effects you experience from any of the medications that you take.
- 4. The prescribing physician has permission to discuss all diagnostic and treatment details with dispensing pharmacists or other professionals who provide your health care for purposes of maintaining accountability.
- 5. You may not share, trade, sell, or otherwise permit others to have access to these medications.
- 6. I agree to take the medications as prescribed. If I do take more than directed and will run out early, I will notify my physician and I may be asked to come for a discussion. I will not call 'at the last minute' and request medications when you're about to run out early when you have failed to notify the doctor and the Offices of Albert Lai, M.D. in a timely manner.
- 7. These drugs should not be stopped abruptly, as a withdrawal syndrome will develop.
- 8. Unannounced urine toxicology screens may be requested, and your cooperation is required. Presence of unauthorized substances may prompt referral for assessment for addictive disorder.
- 9. Prescriptions and bottles of these medications may be sought by other individuals with chemical dependency and should be closely safeguarded. It is expected that you will take the highest possible degree of care with your medication and prescription. They should not be left where others might see or otherwise have access to them.
- 10. Original Containers of medications should be brought in to the office when requested.
- 11. Since the drug may be hazardous or lethal to a person who is not tolerant to their effects, especially a child, you must keep them out of reach of such people.
- 12. Medications will not be replaced if they are lost, get wet, are destroyed, misplaced (i.e. left on an airplane), etc. If your medication has been stolen and you complete a police report regarding the theft, an exception may be made after we discuss the situation with you and/or the police.

- 13. Early refills will not be given unless the physician authorizes this on a case by case basis, there is a change in condition, or the exception as described above.
- 14. Prescriptions may be issued early if the physician will be out of town when a refill is due. These prescriptions will contain instructions to the pharmacist that they may not be filled prior to the appropriate date. In some cases, extra medication may be given for the sole purpose of giving you enough to last until you return. However, this does not mean that you can take extra during the course of your monthly regimen.
- 15. I do not use or distribute any illegal or illicit drugs, medications or substances.
- 16. I agree that discussion about my treatment or changes in my pain medication regimen will take place only during my appointments, and not on the phone, email, or by letter.
- 17. If the responsible legal authorities have questions concerning your treatment, as might occur, for example, if you were obtaining medications at several pharmacies, all confidentiality is waived and these authorities may be given full access to our records of controlled substances administration.
- 18. It is understood that failure to adhere to these policies may result in cessation of therapy with controlled substances prescribing by this physician or referral for further specialty assessment.
- 19. Renewals are contingent on keeping scheduled appointments. Refills will not be made after two consecutive missed appointments. To keep receiving refills, a pain medicine evaluation is required at least every month. Please do not phone for refills after hours or on weekends. Refills will be made during scheduled office visits only if the visit coincides with the refill date, by patient pick up at the office, or via pharmacy faxed requests; all types of requests need to be called in three business days prior to requiring a refill.
- 20. It should be understood that any medical treatment is initially a trial, and that getting continued prescriptions is contingent on evidence of pain reduction and functional benefit.
- 21. (Males Only) I am aware that chronic opioid use has been associated with low testosterone levels in males. This may affect my mood, stamina, sexual desire, and physical and sexual performance. My doctor may reduce or discontinue opioids if these side effects occur.
- 22. (Females Only) If I plan to become pregnant or believe that I have become pregnant while taking this pain medicine, I will immediately call my obstetric doctor and this office to inform them. I am aware that, should I carry a baby to delivery while taking these medicines, the baby will be physically dependent upon opioids. I am aware that the use of opioids is not generally associated with a risk of birth defects. However, birth defects can occur whether or not the mother is on medicines and there is always the possibility that my child will have birth defects while I am taking an opioid.
- 23. I agree that this agreement is essential to my medical care, and my physicians' ability to treat my pain effectively, and that failure on the part of the Patient (myself) to comply with the terms of this agreement may result in the withdrawal of all

- prescribed medication by the physician/provider at Offices of Dr. Albert Lai, M.D., and the termination of the physician-patient relationship, with immediate discharge from the physician practice and Offices of Dr. Albert Lai, M.D.
- 24. I understand that if I am discharged from Offices of Albert Lai, M.D. and the care of the prescribing physician/provider due to non-compliance with this agreement, that I MAY be given a prescription for a 30 day tapering supply of my medication(s), so as to attempt to avoid withdrawal symptoms.
- 25. This agreement will be reviewed and renewed while it is in effect.
- 26. You affirm that you have full right and power to sign and be bound by this agreement, and that you have read, understood, and accept all of its terms.

Patient Signature	Physician Signature
Patient Name (Printed)	
Date	