🛹 Heart of Wellness

205 Clark Place SE, Tumwater, WA 98501 www.heartofwellness.org (360) 570-0401

Thank you for scheduling your appointment with Heart of Wellness! We provide a comprehensive and coordinated care approach, offering the following modalities:

Naturopathic Primary Care Naturopathic Specialty Care Nutritional Therapy Acupuncture & East Asian Medicine Functional Medicine Myofascial Release Therapy

Many of these services may be covered by your insurance but may not. We will do our best to help you understand your benefits, but to prevent the stress of unexpected bills we urge you to contact your insurance directly to review your coverage. We can provide a form to assist you in contacting your insurance.

Please be aware that your physician may recommend lab tests. What you might owe for lab tests and what is covered by insurance varies from network to network. To prevent the stress of unexpected bills we urge you to contact your insurance directly to get a clear understanding of your lab benefits prior to completing any lab tests. For your convenience we have a lab company phlebotomist stationed in our building. However, we have no financial relationship with this or any other lab. Your relationship with the lab companies is independent of your relationship with us.

Appointments are often filled several weeks in advance. There is a <u>\$50 NO SHOW fee</u> if a cancellation is not made at least 24 hours prior to your appointment. We thank you in advance for your cooperation.

Our in-house dispensary stocks hundreds of natural medicines, supplements and nutraceuticals. It is important to purchase or reorder these before you run out as **refill of prescriptions may take up to 48 hours**, please plan accordingly.

Please help us protect our patients and staff who are chemically sensitive to fragrances and other scented products (perfume, lotions, hair products, etc.) **Thank you for not wearing scented products the day of your appointment**.

Please complete the attached forms that gather the information needed for us to best serve you:

- **Patient Demographics** your contact information
- Health History Questionnaire the basic health information your provider needs to begin your care
- Financial Information how your care will be paid for
- Financial Policy an agreement between you and Heart of Wellness regarding payment for services, requires signature
- Informed Consent permission for our providers to perform your care, and confirmation you have had the opportunity to review our Notice of Privacy Practices, requires initials on first page and signature on second

Heart of Wellness Patient Demographics

Date Completed:	How did you hear about us?
Full Legal Name:	
Name of Parent(s) if patient is a child:	
Date of Birth:	Legal Gender: Male Female
	Gender Identity (optional)?
Marital Status: Single Married	Widowed Divorced/Separated Other:
Marital Status: Single Married	Widowed Divorced/Separated Other:
Physical Address:	Mailing Address:
Home Phone: ()	Work Phone: ()
Cell Phone: ()	Other Phone: ()
Email Address:	
Would you like to receive email reminder	rs of appointments? Yes No
Employment Status: Full-Time Part-	Time Retired Self Disabled Unemployed Student
Employer's Name:	
Emergency Contact Name:	
Emergency Contact Phone:	
Emergency Contact Relationship:	
Do you have a primary physician (other the	
	Physician Name:
Preferred Pharmacy:	
Location:	

Heart of Wellness Insurance and Payment Information

Guarantor Email:	
Guarantor Address:	
Health Insurance Coverage: Please provide a billing. We cannot bill your insurance without	copy of the front and back of all insurance card(s) for copies on file.
Primary Insurance:	
Subscriber Name:	Subscriber Date of Birth:
Relationship to Patient:	
Is this an employer sponsored plan? Y N	
Secondary Insurance:	
Subscriber Name:	Subscriber Date of Birth:
Relationship to Patient:	
Is this an employer sponsored plan? Y N	
Tricare will not pay for any services we recor for labs we have made arrangements with a c	not bill Medicare or Tricare for our services. Medicare and mmend, including labs. In lieu of billing Medicare or Tricare cash-only lab that offers significantly reduced cash rates, but re or Tricare. We therefore require all patients to complete
No, I am not a Medicare or Tricare subs	criber. Name:
Signature:	Date:
 Medicare Part D – Prescriptio Tricare or other military insur 	NF and Hospice Coverage Lab and Diagnostic Coverage on of A and B via a 3 rd Party (aka Medicare Advantage) on Drug Coverage rance administered by the federal government
Name:	
Signature:	Date:

Heart of Wellness 205 Clark Place SE, Tumwater, WA 98501 * PH: (360) 570-0401 * info@heartofwellness.org

	HEALTH HISTORY QUESTIONNA	RE		
Name:				
Reason for Visit (list your ma	ain health concerns or reason for scheduli	ng an appointment):		
Primary Concern:				
	Vork? 🗆 Yes 🗆 No 🛛 Auto Accident	? 🗆 Yes 🗆 No		
What treatments have you trie	d?			
To what extent does it interferent	e with daily activities? (work, sleep, eating	, etc)		
Other Health Goals:				
Current Care (list ongoing ca	re by providers outside Heart of Wellness,	and conditions monitored)		
Provider Name Prov	ider Type Condition(s) Monitored			
Surgeries/Hospitalizations	S:			
	nd symptoms experienced in last 6 month			
Generals	RESPIRATORY	CARDIOVASCULAR		
Fatigue/Tiredness	□ Asthma	Heart Attack		
Loss of Sleep/Poor Sleep	Bronchitis	□ Stroke		
Night Sweats or Hot Flashes	Emphysemausing supplemental O2	Elevated Lipids		
Weight Gain or Weight Loss	Pneumonia	Varicose Veins, Phlebitis		
Chills (recent or persistent)	Sleep Apneausing C-pap	High or Low Blood Pressure		
Fever (recent or persistent)	Earaches	Edema, Swelling of Hands or Fee		
Sweat Easily	Nose Bleeds	Bleed or Bruise Easily		
Other	□ Sores on Lips/Tongue/Mouth	Chest Discomfort or Pain		
	Recurrent Sore Throats	Rapid or Irregular Heartbeat		
VISION AND HEARING	Frequent Colds	Heart Palpitations		
Dizziness or Vertigo	Swollen Glands	Fainting		
□ Blurry Vision □ Nasal Drainage □ Cold Hands or Feet				
Floaters Five Strain or Pain	□ Sinus Congestion	Pacemaker or defibrillator		
Eye Strain or Pain Eye Drypess		□ Other		
Eye DrynessExcessive Tearing	□ Shortness of breath	METABOLIC/ENDOCRINE		
□ Ringing in Ears	□ Other			
□ Other		 Diabetes or pre-Diabetes Thyroid Disease 		

Heart of Wellness HEALTH HISTORY QUESTIONNAIRE

Health History (Continued)

DIGESTIVE	GENI
Hemorrhoids	🗆 Kid
IBS, Crohn's, or Ulcerative Colitis	🗆 Pai
Gastritis or Peptic Ulcer	🗆 Urg
Gallstones or Gallbladder Disease	□ Inc
Liver Disease or Hepatitis	🗆 Fre
□ Poor Appetite	🗆 Blo
Excessive Appetite	🗆 Wa
□ Belching	🗆 Fre
Heartburn or Acid Reflux	🗆 Cha
Gas or Bloating	🗆 Ere
Constipation or Chronic Laxative Use	□ Otł
Blood in Stools/Black Stools	
Abdominal Pain/Cramps	INFLA
Rectal Pain	□ Ch
Nausea or vomiting	
□ Other	□ He
SKIN	
Eczema or Psoriasis	□ Otl

Eczema or Psoriasis
 Acne
 Fungal Infection/Athletes Foot

Women's Health History

Age at First Period Last Menstrual Period Irregular Cycle Hormonal Contraception Use Heavy Flow Pain or Cramps

Family History

ranny motory								
Check if Applicable	Mother	Father	Brothers	Sisters	Maternal GM	Maternal GF	Paternal GM	Paternal GF
Cancer								
Diabetes								
Heart Disease								
High Blood Pressure								
Stroke								
Mental Illness								
Allergies/Asthma/Hives								
Other								

GENITAL AND URINARY
Kidney Stones
Pain with Urination
Urgency to Urinate
Incontinence
Frequent Urination
Blood in Urine
Waking to Urinate
Frequent Urinary Tract Infections
Change in Libido
Erectile Difficulties
□ Other

- INFLAMMATORY/IMMUNE
- Chronic Fatigue Syndrome
 Autoimmune Disease (e.g. RA, Lupus)
 Herpes (Oral or Genital)
 HIV Positive
 Cancer, type:
 Other
- NEUROLOGIC

 Cognitive Impairment
 Memory Problems
 Parkinson's Disease
 Multiple Sclerosis
 Seizures
 Concussion or TBI
 Migraines
 Headaches
 Slurred speech
 Tremors
 Other______

PSYCHOLOGICAL

Depression
Anxiety
Bipolar Disorder
ADD/ADHD
Autism
Eating Disorder
PTSD
Other_____

Are you pregnant? 🗆 Yes 🛛 No

PMS Symptoms

 Describe
 Perimenopausal
 Menopause
 Infertility
 Fibrocystic Breasts

Endometriosis
 Fibroids
 Frequent Yeast Infections
 Number of Pregnancies
 Number of Births
 Other

Heart of Wellness HEALTH HISTORY QUESTIONNAIRE

Known Allergies or Hypersensitivities Drugs:
Foods:
Environmental Allergens (e.g., lotions, oils, fragrances):
Nutrition History
Height (feet/inches) Current weight/usual weight range
Do you currently follow a special diet or nutritional program? □ Yes □ No If yes, describe:
Avg oz water per day
Caffeine, Alcohol, and Tobacco Drinks per day of coffee, tea, or soda: Drinks a week containing alcohol:
Currently Smoking: □ Yes □ No Previous Smoking: □ Yes□ No
Exercise Current Exercise Program: (activity, sessions/week, and duration)
List any problems that limit activity:
Sleep Average number of hours you sleep per night: < 6 6-8 8-10 >10 Do you have trouble falling or staying asleep: □ Yes □ No □ Do you use sleeping aids: □ Yes □ No
Stress and Coping
Are currently in counseling or therapy: Yes No
Stressors (Rate 1-10): Work Family Social Finances Health Other
Do you practice meditation or relaxation techniques:

MEDICATIONS (Please ask reception for an additional sheet if you need more space)

Medication	Dose	Frequency	Start Date (month/year)	Reason For Use

Have medications or supplements ever caused you unusual side effects or problems	□ Yes	□ No
Describe:		

Heart of Wellness HEALTH HISTORY QUESTIONNAIRE

NUTRITIONAL SUPPLEMENTS (VITAMINS/MINERALS/HERBS/HOMEOPATHY)

Supplement	Dose	Frequency	Start Date (month/year)	Reason For Use

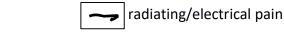
Physical History (indicate if you experience any of the following)

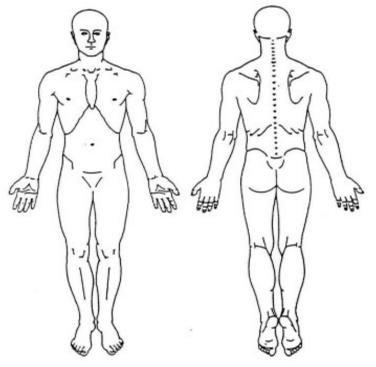
- Muscle Cramps or Spasms
- □ Easily Bleed or Bruise
- □ Swelling
- □ Hand, Wrist, or Elbow Pain
- Numbness in Hands or Feet

- Carpal Tunnel SyndromeNeck Pain or Whiplash
- □ Thoracic Outlet Syndrome
- Upper or Mid Back Pain
- Low Back Pain

Use the following diagram to indicate painful or distressed areas:







Additional Details:

How severe the pain now (0-10)? The most severe in the last week (0-10)? Frequency of pain: □ Constant □ Frequent □ Occasional □ Intermittent Since onset, pain is: □ Same □ Worse Better Symptoms are most present: □ Waking □ Morning □ Mid-day □ Night □Evenings Do you sit for long hours at a computer workstation or driving? □ No



- □ Herniated or Bulging Disk(s)
- □ Sciatic Pain
- □ Arthritis
- □ Fibromyalgia or Chronic Pain
- □ Other___



Heart of Wellness FINANCIAL POLICY

Financial Responsibility: Our providers are credentialed with numerous insurance companies. If we have accurate insurance information, we will bill your insurance company for you. However, it is important you understand that **you are ultimately responsible for payment for all services you receive.**

Payment at Time of Service: High-quality integrative medical care should be accessible to everyone, including patients without health insurance. We offer a discount when you pay at the time of service. The amount of the discount represents the savings in not having to bill you or an insurance company. If you want to pay at the time of service, please let us know when you schedule your appointment.

Insurance Billing: We require a copy of your driver's license/identification and current valid insurance card at the time of your appointment. Insurance is a contract between you and your insurance company; we are NOT a party to this contract. All copays/coinsurance must be paid at the time of service.

Non-covered Services: we are not able to know for certain your insurer will cover all services you receive. If we believe a service will not be covered, you may be asked to pay at the time of service.

Account Balances & Statements: You are responsible for paying any balance your insurance does not pay. Unpaid balances are due upon receipt of a statement. Partial payments or payment plans must be negotiated with Heart of Wellness in advance.

Past Due Balances: If unpaid after 28 days of receipt of a statement the following additional charges will apply; \$20.00 per incident administrative fee, and 1.5% outstanding balance charge per month until all balances are paid in full. If a balance remains unpaid, we may refer your account to a collection agency, and you and your immediate family members may be dismissed from this practice.

Cancellations: We ask that you give us notice by 2:00 pm the day before the appointment for any cancellations, for Monday appointments notice by 2:00 pm the Friday before. **There is a \$50 charge for all missed appointments or for cancellations with less than a 24-hour notice.** This fee is not billable to insurance. At our discretion, unavoidable emergencies may be considered reasonable exceptions. If you miss three appointments or have three late cancellations, you and your immediate family members may be dismissed from this practice.

Special Fees: We reserve the right to charge for the following services. These fees are not generally billable to insurance.

- MVA, Disability, FMLA, & Other Reports
 \$30.00
 Returned Checks
- Medical Records
 \$26 clerical fee + per page fee
 Emergency Phone Calls

Supplement Sales: With some limited exceptions, all supplement purchases are final.

Choose Option 1 OR Option 2:

□ Option 1 (CREDIT CARD ON FILE): I authorize and request Heart of Wellness to charge the credit/debit card account named below. After Heart of Wellness has submitted charges to my insurance carrier and after my insurance carrier processes my claim, any amounts remaining due will be charged to my card within 3 business days of the 20th of the month with a receipt to be sent to me via email. This authorization is good until I revoke it in writing with a 30-day notification period and choose another payment option to start at the end of that period.

Card Type: Discover Visa Mastercard	Card Number:
Expiration Date:	3 Digit Security Code:
Name as it appears on card:	Email address:
Credit Card Billing Address:	

Option 2 (MAILED STATEMENT): In the event a balance remains due after Heart of Wellness has submitted charges to my insurance carrier, and after my insurance carrier processes my claim, then please send me a statement. I agree to remit payment immediately on receipt of this statement. If I do not pay any outstanding balance within 28 days of receipt of the statement, additional charges will apply. See Past Due Balances above.

I, ______, acknowledge that I have read and agree to Heart of Wellness's Financial Policy. I agree to pay at the time of service all applicable co-pays, cash-pay services, non-covered service charges, and service charges going toward deductibles. I agree to either Option 1 or 2, above, for any additional balance incurred.

Patient/Guarantor Signature:

Date:

\$30.00

\$50.00

Heart of Wellness INFORMED CONSENT AGREEMENT

This Document Constitutes an Agreement: We have written this document to inform you about our practice, to ensure you understand our professional relationship, and to obtain your informed consent in this relationship. Your informed consent is important not only because it protects both parties in this agreement, but also because it helps you to feel empowered in your own healing process. When you sign this document, it will authorize us to initiate care and commence treatment in accordance with this document. Please read this document carefully and bring any questions you might have to your first meeting with a Heart of Wellness practitioner. Please also be responsible for maintaining clarity and communication regarding your ongoing informed consent. If at any time you are uncomfortable or dissatisfied with your care or treatment, for any reason, please let us know immediately.

Purpose of Treatment & Therapeutic Orientation: Heart of Wellness is an integrative and collaborative medical group practice dedicated to helping you achieve and maintain optimum health. We will help you as best we can to resolve your complaints and to achieve your health goals. We understand healing as a natural process and our fundamental goal in relation to this is to support, facilitate, and empower you in your own healing journey.

Naturopathic Medicine Practice & Limitations: Naturopathic Physicians currently practicing at Heart of Wellness include Dr. Morgan Schuster ND (NT60811436), Dr. Tim Shannon ND (NT60332027), Dr. Michele Deisering ND (NT60332030), Dr. Diana Duncan ND (NT60464581), Dr. Katie Shaff ND (NT00001331), Dr. Michelle Kent ND (NT60912971), and Dr. Mark Fredericksen ND (NT00000737). In the State of Washington, naturopathic medical practice includes the prescription, administration, dispensing, and use of: nutrition and food science, homeopathy, hygiene, immunizations & vaccinations, contraceptive devices; non-legend medicines including vitamins, minerals, botanical medicines, homeopathic medicines, and hormones; and legend drugs with the exception of Botox and certain controlled substances. The practice of naturopathic medicine also includes manual manipulation, physical modalities, minor office procedures, common diagnostic procedures, and suggestion. Naturopathic physicians may not treat malignancies except in collaboration with a Medical Doctor (MD) or Osteopathic Physician (DO). Therefore, if you have cancer, or suspect you have cancer. If you have cancer or suspect you have cancer, by signing this document you hereby agree to remain under the continuing care of a qualified MD or DO and you agree that your relationship with this MD or DO shall be the primary therapeutic relationship, and that the care you receive at Heart of Wellness shall be secondary and supportive of your general health and shall not be understood as treatment of a malignancy.

East Asian Medicine Practice & Limitations: Acupuncture & East Asian Medicine Practitioners currently practicing at Heart of Wellness include David Lerner MTCM, EAMP (AC00000217) and Morgan Tougas MAOM, EAMP (AC00002943). East Asian Medicine includes the following diagnostic tools and treatment methods used to promote health and treat organic or functional disorders: acupuncture, including the use of acupuncture needles or lancets to directly or indirectly stimulate acupuncture points and meridians; use of electrical, mechanical, or magnetic devices to stimulate acupuncture points and meridians; moxibustion; acupressure; cupping; dermal friction technique; infrared; sonopuncture; laserpuncture; point injection therapy (aquapuncture); dietary advice and health education based on East Asian medical theory, including the recommendation and sale of herbs, vitamins, minerals, and dietary and nutritional supplements; breathing, relaxation, and East Asian exercise techniques; Qi Gong; East Asian massage; Tui Na; and superficial heat and cold therapies. Potential side effects of these therapies may include, but are not limited to, the following: discomfort during treatment, pain following treatment; minor bruising or swelling; infection; minor burns, "needle sickness" (including dizziness or fainting); and broken needle. In addition, it is important that you understand that under Washington State law the techniques of East Asian Medicine are not considered capable of resolving certain potentially serious health disorders, including but not limited to uncontrolled high blood pressure, other serious cardiac conditions, acute abdominal symptoms, acute neurological changes, unexplained weight loss or gain, fracture or dislocation, systemic infection, any serious bleeding disorder, or acute respiratory distress. If you have or suspect you may have any of these disorders, or any equally serious condition, or if you have a pacemaker installed, or if you are pregnant, by signing this agreement you hereby agree; (1) to inform your EAMP practitioner of this condition, (2) to remain under the continuing care of a qualified physician (MD, DO, or ND), and (3) to provide us with continuing authorization to consult with this physician. By signing this agreement, you further agree that your relationship with this physician shall be the primary therapeutic relationship and that the East Asian Medicine care you receive shall be secondary and supportive in nature.

Heart of Wellness INFORMED CONSENT AGREEMENT

Occupational Therapy Practice & Limitations: The licensed Occupational Therapist currently practicing at Heart of Wellness is Amy Howell (OT00002292). Occupational therapy is the scientifically based use of purposeful activity with individuals who are limited by physical injury or illness, psychosocial dysfunction, developmental or learning disabilities, or the aging process in order to maximize independence, prevent disability, and maintain health. The practice encompasses evaluation, treatment, and consultation. Specific occupational therapy services include but are not limited to: Using specifically designed activities and exercises to enhance neurodevelopmental, cognitive, perceptual motor, sensory integrative, and psychomotor functioning; administering and interpreting tests such as manual muscle and sensory integration; teaching daily living skills; developing prevocational skills and play and avocational capabilities; designing, fabricating, or applying selected orthotic and prosthetic devices or selected adaptive equipment; wound care management as provided in RCW 18.59.170; and adapting environments for persons with disabilities. These services are provided individually, in groups, or through social systems.

Massage Therapy Practice & Limitations: The licensed Massage Therapist currently practicing at Heart of Wellness is Gary Black (MA60326924). Massage therapy involves the external manipulation or pressure of soft tissue for therapeutic purposes, including techniques such as tapping, compressions, friction, reflexology, gymnastics or movements, gliding, kneading, shaking, and fascial or connective tissue stretching, with or without the aids of superficial heat, cold, water, lubricants, or salts. Massage does not include diagnosis or attempts to adjust or manipulate any articulations of the body or spine or mobilization of these articulations by the use of a thrusting force, nor does it include genital manipulation. By signing this agreement you assert your understanding of the scope of massage therapy and acknowledge that massage therapy is not a substitute for medical examination or diagnosis. Massage Therapy as practiced at Heart of Wellness does not include breast massage but can include chest massage, which includes manipulation of the muscle, fascia and connective tissue of the upper torso and traction engaging the sternum and rib cage. Massage Therapy does not include genital manipulation but can include manipulation of the gluteal muscles and manipulation of muscle attachments located on the pubic and pelvic bones. Draping is provided so that the breasts, genitals, and tailbone are always covered. You always have the right to discontinue the entire massage therapy session, or any part of the session, at any time and for any reason. You have the right to request, at any time and for any reason, that the massage be given through a drape rather than directly on your body. You also have the right to provide a witness to be in the room with you while you receive massage therapy. Please let your therapist know immediately if you change your mind or if any part of the treatment process feels uncomfortable in any way.

Having read and understood the foregoing: By signing below you are asserting your understanding of and agreement with the entirety of this agreement and voluntarily consenting to treatment as outlined here, while also acknowledging that you are free to withdraw consent and to discontinue treatment at any time. By signing below you are authorizing physicians and other practitioners at Heart of Wellness to provide all examinations, treatments and/or diagnostic procedures which now or during the course of your care they deem advisable. By signing below you are acknowledging that while the course of treatment is designed to be helpful, it may at times be difficult and uncomfortable, and that there is no guarantee that there will be any benefit from treatment. By signing below you are agreeing that you and no one else is responsible for your own healing and that maximum benefit will occur with consistent treatment and compliance and when you take full responsibility for your own healing journey. By signing below you acknowledge that Heart of Wellness is responsible only for the failure to perform your treatment with appropriate care. By signing below you are certifying that you have read and understood all preceding information and you are committing to immediately notifying your Heart of Wellness practitioner or other Heart of Wellness staff if you have any questions or should concerns arise at any time during the course of your treatment.

Mailing List: By signing below I consent to be added to the Heart of Wellness mailing list. I can unsubscribe at any time.

Confirmation of Review of Notice of Privacy Practices: By signing below I confirm I have reviewed and understand the Heart of Wellness **Notice of Privacy Practices**, that I understand that I am entitled to keep a copy of the notice for my records, and that a copy is for download on the Heart of Wellness website.

Patient's Name (Please print):

Patient's Signature:

Date Signed: