

New Patient Intake Sheet

Date: _____ Initials: _____ Doctor: AA JF JH SK MM MR CM Assigned MD Requested MD

Referral/How did you hear about us? _____ Mother's DOB: _____

1. Mother: _____ Cell: _____
Last Name _____ First Name _____

2. Father: _____ Cell: _____
Last Name First Name

3. Address: _____ Street _____ Town _____ State _____ Zip _____

4. Home Phone: _____ Mother Work: _____ Father Work: _____

4.5 Best Phone to Leave Message on: Home Cell (Mother's or Father's)

5. Email: _____

6. Will deliver at which Hospital?:

7. Name of OB/GYN: _____

8. Name of Insurance Carrier: _____ DOB: _____

Insurance provided through an employer? Yes No

Insurance provided through an employer? Yes No

Name of Responsible Parent: _____

Insurance ID#: _____

NO EMPIRE HMO (ANTHEM) OR AETNA HMO PLANS ARE ACCEPTED IN THIS PRACTICE

9. If a transfer - What practice are you transferring from? _____

What is the reason for leaving your current Practice? _____

10. If a transfer – Are your children up-to-date with their immunizations? _____

If no, then explain to them that it is the policy of this Practice to follow the American Academy of Pediatrics (AAP) recommendations for immunizations. If they will not immunize their children, then we cannot provide them with medical care and they will need to find a different practice to transfer to.

11. Were their children ever patients here? Yes No

If yes, why did they leave? _____

12. If it's for a prenatal consult, please be sure to tell them that they will be charged their co-pay at the time of the visit and that a claim for the consultation will be filed with their insurance provider. (They don't have to have a prenatal appointment if they already know they want to come here).

13. Other Child/Children's names:

First	DOB	Allergies
-------	-----	-----------

First DOB Allergies

Intake Sheet for New Families

When a new patient calls, first ask who referred them, then ask what insurance they have.

If the patient is insured by a carrier other than these plans, please complete the Intake Sheet.

Explain to the caller that someone will be in contact with them to set up an appointment and obtain a number where they can be reached. They should be called within a day or two.

Verify insurance coverage either online or by phone call.

Only after the Billing Dept. has initialed the Intake Sheet, can a patient be accepted into the practice.