



## PATIENT INFORMATION

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Date: \_\_\_\_\_  
Address \_\_\_\_\_ Apt # \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home Phone (\_\_\_\_) \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_ Cell (\_\_\_\_) \_\_\_\_\_  
SS# \_\_\_\_\_ DOB: \_\_\_\_\_ Height: \_\_\_\_\_ Weight: \_\_\_\_\_ Gender: \_M\_F  
**Email** \_\_\_\_\_ How may we contact you for upcoming appointments? Phone/Text/Email \_\_\_\_\_  
Emergency contact: \_\_\_\_\_ Relationship: \_\_\_\_\_ Home Phone (\_\_\_\_) \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_

## DENTAL INSURANCE POLICY HOLDER INFORMATION

### Primary:

Insurance Company Name \_\_\_\_\_ Insurance Phone (\_\_\_\_) \_\_\_\_\_  
Insured Name \_\_\_\_\_ Insured DOB \_\_\_\_\_  
Insured Employer \_\_\_\_\_ Patient's relationship to insured: \_self \_spouse \_child \_other  
Insured ID# \_\_\_\_\_ Group# \_\_\_\_\_

### Secondary:

Insurance Company Name \_\_\_\_\_ Insurance Phone (\_\_\_\_) \_\_\_\_\_  
Insured Name \_\_\_\_\_ Insured DOB \_\_\_\_\_  
Insured Employer \_\_\_\_\_ Patient's relationship to insured: \_self \_spouse \_child \_other  
Insured ID# \_\_\_\_\_ Group# \_\_\_\_\_

I hereby authorize assignment of my insurance rights and benefits directly to Saratoga Healthy Smiles for services rendered. I fully understand that I am solely responsible for any balance not paid by my insurance company.

\_\_\_\_\_  
(Insured's signature)

\_\_\_\_\_  
(Date)

## MEDICAL PLAN POLICY HOLDER INFORMATION

Plan Name \_\_\_\_\_ Insurance Phone (\_\_\_\_) \_\_\_\_\_  
Name of insured \_\_\_\_\_ Date of Birth \_\_\_\_\_ ID Number \_\_\_\_\_  
Policy Number \_\_\_\_\_ Patient Relationship \_\_\_\_\_ Policy \_\_\_\_\_

I hereby authorize assignment of my insurance rights and benefits directly to Saratoga Healthy Smiles for services rendered. I fully understand that I am solely responsible for any balance not paid by my insurance company.

\_\_\_\_\_  
(Insured's signature)

\_\_\_\_\_  
(Date)



## CONSENT TO PROCEED/ POLICIES

**Patient Responsibilities:** We are committed to providing you with the best possible care and helping you achieve your optimum oral health. Toward these goals, we would like to explain your financial and scheduling responsibilities with our practice.

**Payment:** Payment is due at the time services are rendered. Financial arrangements are discussed during the initial visit and a financial agreement is completed in advance of performing any treatment with our practice. We accept the following forms of payment: Check, Visa, MasterCard, American Express, Care Credit, and Cash.

**Dental Benefit Plans:** Your dental benefit is a contract between you or your employer and the dental benefit plan. Benefits and payments received are based on the terms of the contract negotiated between you or your employer and the plan. We are happy to help our patients with dental benefit plans to understand and maximize their coverage.

**If we are a contracted provider with your plan,** you are responsible only for your portion of the approved fee as determined by your plan. We are required to collect the patient's portion (deductible, co-insurance, co-pay, or any amount not covered by the dental benefit plan) in full at time of service or time of scheduling your appointment. If our estimate of your portion is less than the amount determined by your plan, the amount billed to you will be adjusted to reflect this.

**If we are not a contracted provider with your dental benefit plan,** it is the patient's responsibility to verify with the plan whether the plan allows patients to receive reimbursement for services from out-of-network providers. If your plan allows reimbursement for services from out-of-network providers, our practice can file the claim with your plan and receive reimbursement directly from the plan if you "assign benefits" to us. In this circumstance, you are responsible and will be billed for any unpaid balance for services rendered upon receipt of payment from the plan to our practice, even if that amount is different than our estimated patient portion of the bill. If you choose to not "assign benefits" to our practice, you are responsible for filing claims and obtaining reimbursement directly from your dental benefit plan and will be responsible for payment to our practice before or at the time of service.

**Scheduling of Appointments:** We reserve the doctor's time on the schedule for each patient procedure and are diligent about being on-time. Because of this courtesy, when a patient cancels an appointment, it impacts the overall quality of service we are able to provide. To maintain the utmost service and care, we do require 2 business days to reschedule an appointment. With less than 48-hour notice, a fee of \$ 50 or deposit to reserve the appointment time again, may be required. To serve all of our patients in a timely manner, we may need to reschedule an appointment if a patient is fifteen minutes late or more arriving to our practice. To reschedule an appointment due to late arrival, a fee of \$25 or deposit to reserve the appointment time again, may be required.

**Authorizations:** I understand that the information I have given today is correct to the best of my knowledge. I authorize this dental team to perform any necessary dental services that I may need and have consented to during diagnosis and treatment. \_\_\_\_\_ (Initial)

I have read the above and agree to the financial and scheduling terms. \_\_\_\_\_ (Initial)

I hereby acknowledge that a copy of this practice's Notice of Privacy Practices has been made available to me. I have been given the opportunity to ask any questions I may have regarding this Notice. \_\_\_\_\_ (Initial)

I hereby acknowledge that a copy of this practice's Dental Materials Fact Sheet has been made available to me. I have been given the opportunity to ask any questions I may have regarding this Fact Sheet. \_\_\_\_\_ (Initial)

**Waiver or breach of contract:** You agree that a waiver or breach of any term or condition of this agreement will not automatically void any other term or condition of this contract and you agree to pay any costs and reasonable attorney fees involved with any lawsuit involved with this agreement.

\_\_\_\_\_ I consent to the use of my photographs for marketing advertisement, articles, lectures, and laboratory use.

\_\_\_\_\_ I **DO NOT** consent to the use of my photographs.

I have read the above conditions for treatment and payment and agree to their content, and understand that any use of the word "you" in the above refers to me, the undersigned.

**Permission to Contact:** I give you my permission for you or your assignee to contact me by telephone or other means.

Patient name: \_\_\_\_\_

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

(Patient, legal guardian and authorized agent of patient)

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



## DENTAL HEALTH HISTORY

Patient Name \_\_\_\_\_

The information you provide is important to your health. If you have any questions, do not hesitate to ask.

	Yes	No	DK		Yes	No	DK
Do your gums bleed when you brush or floss? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Are you currently experiencing bad breath? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are your teeth sensitive to cold, hot, sweets or pressure? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you have earaches or neck pains? ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does food or floss catch between your teeth? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you have any clicking, popping or discomfort in the jaw? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you had any periodontal (gum) treatments? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you brux or grind your teeth? ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever had orthodontic (braces) treatment? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you have sores or ulcers in your mouth? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the amount of saliva in your mouth seem too little? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you wear dentures or partials? ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your mouth feel dry when eating a meal? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you ever had a serious injury to your head or mouth? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have difficulty swallowing any food? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Are your teeth turning yellow or losing brightness? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you sip liquids to aid in swallowing dry foods? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you had any problems associated with previous dental treatment? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your home water supply fluoridated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does dental treatment make you nervous? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you drink bottled or filtered water?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If yes, what can we do to make your dental visit more comfortable? .....			

Are you currently experiencing dental pain or discomfort? \_\_\_\_\_

What is the reason for your dental visit today? \_\_\_\_\_

Date of your last dental exam: \_\_\_\_\_ What was done at this time? \_\_\_\_\_

Date of your last dental x-rays: \_\_\_\_\_

How do you feel about your smile? \_\_\_\_\_

What about your smile that you would like to change?

- ☐ Make teeth whiter
- ☐ Close spaces
- ☐ Replace stained front fillings
- ☐ Change silver fillings to white ones
- ☐ Repair chipped teeth
- ☐ Other: \_\_\_\_\_

Who should we thank for referring you to our office?

- ☐ postcard by mail
- ☐ friend/relative \_\_\_\_\_
- ☐ referral card
- ☐ insurance company
- ☐ internet
- ☐ patient referral \_\_\_\_\_
- ☐ other \_\_\_\_\_



## MEDICAL HISTORY

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

Are you under the care of a physician? YES NO

Physician Name: \_\_\_\_\_ Physician's Number: \_\_\_\_\_

Address/City/State/Zip: \_\_\_\_\_

Has there been any change in your general health within the past year? \_\_\_\_\_

If YES, what condition is being treated? \_\_\_\_\_

Date of last physical: \_\_\_\_\_

Have you had a serious illness, operation or been hospitalized in the past 5 years? \_\_\_\_\_

If YES, what was the illness or problem? \_\_\_\_\_

Please list all prescription medication you are currently taking or have recently taken, including vitamins, natural or herbal preparations and/or diet supplements:

Medication	Dosage
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Please mark (X) your response to indicate if you have or have not had any of the following diseases or problems.

	Yes	No	DK		Yes	No	DK
Congestive heart failure .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Artificial (prosthetic) heart valve .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Damaged heart valves .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Previous infective endocarditis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heart attack .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Damaged valves in transplanted heart ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heart murmur .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Congenital heart disease (CHD) .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low blood pressure .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Unrepaired, cyanotic CHD .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High blood pressure .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Repaired (completely) in last 6 months ..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other congenital heart defects .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Repaired CHD with residual defects .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mitral valve prolapse .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you ever taken Fen-Phen or Redux?			
Pacemaker .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cardiovascular disease .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rheumatic fever .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Angina .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rheumatic heart disease .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shortness of breath .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G.E. Reflux/persistent heartburn .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arteriosclerosis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ulcers .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Abnormal bleeding .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thyroid problems .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Anemia .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Herpes .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Easy bruising .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stroke .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Frequent nose bleeds .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Glaucoma .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				



	Yes	No	DK		Yes	No	DK
Gastrointestinal disease .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Blood transfusion .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hepatitis, jaundice or liver disease .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	When? .....			
Epilepsy .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hemophilia .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fainting spells or seizures .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AIDS or HIV infection .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Neurological disorders .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arthritis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If yes, specify .....				Autoimmune disease .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sleep disorder .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rheumatoid arthritis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mental health disorders .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Systemic lupus erythematosus .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If yes, specify .....				Asthma .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurrent infections .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bronchitis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Type of infection .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Emphysema .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kidney problems .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cancer/Tumor/Chemotherapy/Radiation			
Night sweats .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tuberculosis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Osteoporosis .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sinus trouble .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Persistent swollen glands in neck .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chest pain upon exertion .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Severe headaches/migraines .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chronic pain .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Severe or rapid weight loss .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diabetes Type I or II .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sexually transmitted disease .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eating disorder .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Excessive urination .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Malnutrition .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Yes	No	DK		Yes	No	DK
Have you had an orthopedic total joint (hip, knee, elbow, and finger) replacement? Date: .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you use controlled substances (drugs)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any complications? .....				Do you use tobacco (smoking, snuff, chew, bidis)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you taking or scheduled to begin taking either of the medications, alendronate (Fosamax®) or risedronate (Actonel®) for osteoporosis or Paget's disease?.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	..... If so, how interested are you in stopping? (Circle one ) VERY/SOMEWHAT/NOT INTERESTED			
Since 2001, were you treated or are you presently scheduled to begin treatment with the intravenous bisphosphonates (Aredia® or Zometa®) for bone pain, hypercalcemia or skeletal complications resulting from Paget's disease, multiple myeloma or metastatic cancer? .....				Do you drink alcoholic beverages?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date treatment began: .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If yes, how much alcohol did you drink if within the last 24 hours? .....			
				If yes, how much do you typically drink in a week? .....			

WOMEN ONLY: Are you:

	Yes	No	DK
Pregnant?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of weeks: .....			
Taking birth control pills or hormonal replacement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nursing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**ALLERGIES:** Are you allergic to or have you had a reaction to:

	Yes	No	DK		Yes	No	DK
Local anesthetics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Metals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aspirin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Latex (rubber)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Penicillin or other antibiotics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Iodine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barbiturates, sedatives, or	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hay fever/	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sulfa drugs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Animals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Codeine or other narcotics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				