

Patient's Name: \_\_\_\_\_ Preferred Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Sex: \_\_\_\_\_

Home Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
*Street City State Zip Code*

Patient's General Dentist: \_\_\_\_\_ Last Visit to Dentist: \_\_\_\_\_

IS THERE SOMEONE OTHER THAN YOUR DENTIST WHOM WE MAY THANK FOR REFERRING YOU TO OUR OFFICE? (FRIENDS, NEIGHBORS, PATIENTS, ETC.?)

**Information For Patients Who Are MINORS:**

Age: \_\_\_\_\_ Grade: \_\_\_\_\_ School: \_\_\_\_\_

Interests: \_\_\_\_\_

What is the child's attitude towards: Brushing \_\_\_\_\_ Dentistry \_\_\_\_\_ Orthodontics \_\_\_\_\_

Mother's Name: \_\_\_\_\_ Father's Name: \_\_\_\_\_ Guardian's Name (if diff.) \_\_\_\_\_

Parents' Marital Status:  Married  Separated  Widowed  Divorced (if divorced, who has custody of child? \_\_\_\_\_)

**Responsible Party Information** (to be completed by all adult patients and the parent/guardian of patients who are minors)

**Responsible Party #1** \_\_\_\_\_ Relationship to patient: \_\_\_\_\_

Home Address \_\_\_\_\_  
*Street /PO Box City County State Zip Code*

SS#: \_\_\_\_\_ DOB: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Dental Insurance? (y/n) \_\_\_\_\_ Orthodontic Insurance? (y/n) \_\_\_\_\_ Insurance Co.: \_\_\_\_\_

**Responsible Party #2** \_\_\_\_\_ Relationship to patient: \_\_\_\_\_

Home Address: \_\_\_\_\_  
*Street /PO Box City County State Zip Code*

SS#: \_\_\_\_\_ DOB: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Dental Insurance? (y/n) \_\_\_\_\_ Orthodontic Insurance? (y/n) \_\_\_\_\_ Insurance Co.: \_\_\_\_\_

**MEDICAL HISTORY**

Name & Address of patient's physician \_\_\_\_\_

Is the patient in good health?  Yes  No If No Please Explain: \_\_\_\_\_

Any serious accidents, operations, or unusual illnesses:  Yes  No Explain: \_\_\_\_\_

Currently under physician's care?  Yes  No If Yes Please Explain: \_\_\_\_\_

Allergies?  Yes  No List: \_\_\_\_\_

Drug Sensitivity?  Yes  No List: \_\_\_\_\_

Does the patient have an artificial heart valve, a history of endocarditis, any other serious congenital heart condition (including heart transplant) or any other medical condition that requires being premedicated with antibiotics prior to dental treatment?  Yes  No (If yes, please explain \_\_\_\_\_)

Does the patient take (or have they ever taken) a bisphosphonate drug such as Fosamax, Boniva, Actonel, etc. that is used to treat osteoporosis or other bone disorders?  Yes  No

Does the patient use non-steroidal anti-inflammatory drugs (NSAIDS) such as Ibuprofen/Advil, Naproxen, Relafen, etc. on a daily basis?  Yes  No

**Please indicate whether or not the patient has or had any of the following:**

- |                          |                          |                     |                          |                          |                    |                          |                          |                   |                          |                          |                         |
|--------------------------|--------------------------|---------------------|--------------------------|--------------------------|--------------------|--------------------------|--------------------------|-------------------|--------------------------|--------------------------|-------------------------|
| YES                      | NO                       |                     | YES                      | NO                       |                    | YES                      | NO                       |                   | YES                      | NO                       |                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Arthritis           | <input type="checkbox"/> | <input type="checkbox"/> | Asthma             | <input type="checkbox"/> | <input type="checkbox"/> | Frequent Cold/Flu | <input type="checkbox"/> | <input type="checkbox"/> | Mental Retardation      |
| <input type="checkbox"/> | <input type="checkbox"/> | Anemia              | <input type="checkbox"/> | <input type="checkbox"/> | Kidney Problems    | <input type="checkbox"/> | <input type="checkbox"/> | Tonsillitis       | <input type="checkbox"/> | <input type="checkbox"/> | Nervous Disorder        |
| <input type="checkbox"/> | <input type="checkbox"/> | Bleeding Problems   | <input type="checkbox"/> | <input type="checkbox"/> | Liver Problems     | <input type="checkbox"/> | <input type="checkbox"/> | Hepatitis         | <input type="checkbox"/> | <input type="checkbox"/> | Emotional Problems      |
| <input type="checkbox"/> | <input type="checkbox"/> | Heart Disease       | <input type="checkbox"/> | <input type="checkbox"/> | Endocrine Problems | <input type="checkbox"/> | <input type="checkbox"/> | Tuberculosis      | <input type="checkbox"/> | <input type="checkbox"/> | Learning Disability     |
| <input type="checkbox"/> | <input type="checkbox"/> | High Blood Pressure | <input type="checkbox"/> | <input type="checkbox"/> | Epilepsy/Seizures  | <input type="checkbox"/> | <input type="checkbox"/> | HIV/AIDS          | <input type="checkbox"/> | <input type="checkbox"/> | Speech/Hearing Problems |
| <input type="checkbox"/> | <input type="checkbox"/> | Rheumatic Fever     | <input type="checkbox"/> | <input type="checkbox"/> | Diabetes           | <input type="checkbox"/> | <input type="checkbox"/> | Herpes            | <input type="checkbox"/> | <input type="checkbox"/> | Glaucoma                |

**Growth/Family History Information For Patients Under 18 Years of Age**

Child's Height: \_\_\_\_\_ Father's Height: \_\_\_\_\_ Mother's Height: \_\_\_\_\_

Patient Resembles:  Neither Parent  Mother  Father

Girls: Has she started menstruation?  No  Yes Age: \_\_\_\_\_

Boys: Has his voice changed?  No  Yes Age: \_\_\_\_\_

Is there any family history of a strong lower jaw and/or underbite?  No  Yes

Names and Ages of Patient's Brothers and Sisters? \_\_\_\_\_

Have any had Orthodontic Treatment?  No  Yes When? \_\_\_\_\_

**DENTAL HISTORY**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| YES                      | NO                       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Is the patient currently in orthodontic treatment? Name & address of orthodontist: _____           |
| <input type="checkbox"/> | <input type="checkbox"/> | Has the patient consulted an orthodontist previously? Name & address of orthodontist: _____        |
| <input type="checkbox"/> | <input type="checkbox"/> | Has the patient ever had gum disease? _____ Treatment? _____                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Has the patient had any severe head or face injuries? Explain: _____                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Has the patient had a history of thumb sucking or finger sucking? _____ Stopped? _____ When? _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the patient play any musical (wind) instruments? _____ What? _____                            |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you ever been informed of missing or extra permanent teeth? _____                             |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the patient's jaw ever get "stuck" or "locked" or have difficulty opening his/her mouth?      |
| <input type="checkbox"/> | <input type="checkbox"/> | Do the patient's jaw joints ever "pop" or make noise? How often? _____                             |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the patient have jaw joint pain? How often? _____   |
| <input type="checkbox"/> | <input type="checkbox"/> | Has the patient previously been treated for jaw joint ("TMJ") problem?                             |

Why are you seeking orthodontic consultation? \_\_\_\_\_

Is there any other information which may be helpful? \_\_\_\_\_

**Please read the following regarding our financial policies:**

In separation/divorce situations, the individual who initiates services with us is held financially responsible. We do not bill another person or an estranged spouse unless that individual informs us in writing of his or her willingness to pay for services. Even when another party or estranged spouse is billed, the person initiating treatment is ultimately responsible should the other party fail to pay.

Please note that our office is very willing to help out with the filing of insurance and, in most cases, we will file the primary insurance for you and accept the assignment of benefits. In the case of secondary insurance, we will gladly assist you in filing it but due to the uncertainty of secondary coverage, our office policy is to have secondary insurance benefits paid to the patient.

In the event of a denied insurance claim, we will do our best to help you work things out with the insurance company but any insurance dispute is ultimately between the insured and the insurance company. If a claim remains unpaid despite our good faith effort to file it, the responsible party is ultimately responsible for payment of the entire account balance - including that part not paid by the insurance company.

I have read and understand the financial policies listed above.

Signed \_\_\_\_\_ Date \_\_\_\_\_