



5520 Ridgewood Cove  
Minnetrista, MN 55364

612-865-5262 Office  
855-356-4042 Fax

[info@consultativehealth.com](mailto:info@consultativehealth.com)  
[www.consultativehealth.com](http://www.consultativehealth.com)

## ENROLLMENT INFORMATION

### PATIENT IDENTIFICATION INFORMATION

PATIENT NAME: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

RESIDENTIAL COMMUNITY OR FACILITY: \_\_\_\_\_

### INSURANCE INFORMATION

**Please enclose photocopies of both sides of Medicare and insurance cards**

Medicare #: \_\_\_\_\_

Secondary Ins: \_\_\_\_\_ ID#: \_\_\_\_\_ Group#: \_\_\_\_\_

Additional Ins: \_\_\_\_\_ ID#: \_\_\_\_\_ Group#: \_\_\_\_\_

### RESPONSIBLE PARTY INFORMATION

NAME: \_\_\_\_\_ RELATIONSHIP TO PATIENT: \_\_\_\_\_

PRIMARY PHONE #: \_\_\_\_\_ ADDITIONAL PHONE #: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

Please check all those appropriate and include photocopies of documentation if possible

Financial POA

Guardian

Other \_\_\_\_\_

Health Care POA

Conservator

Not currently any of the above

### ALTERNATIVE EMERGENCY CONTACT:

NAME: \_\_\_\_\_ RELATIONSHIP TO PATIENT: \_\_\_\_\_

PRIMARY PHONE #: \_\_\_\_\_ ADDITIONAL PHONE #: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

### BILLING CONTACT AND ADDRESS (if other than above):

NAME: \_\_\_\_\_ RELATIONSHIP TO PATIENT: \_\_\_\_\_

PRIMARY PHONE #: \_\_\_\_\_ ADDITIONAL PHONE #: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

## Consent for Services

### Permission to Enroll in Collaborative Care Model and Chronic Care Management Authorization of Release of Health Information for Insurance Payment and other Uses Acknowledgement of Notice of Privacy Practices

Patient's Full Name: \_\_\_\_\_ Facility: \_\_\_\_\_

**COLLABORATIVE CARE MODEL/CHRONIC CARE MANAGEMENT:** I give Consultative Health and Medicine, "CH&M," permission to enroll me in CH&M's Collaborative Care Model, and if I am eligible, in Medicare's Chronic Care Management program, which include nurse practitioner and physician visits and non-face-to-face care coordination/care management services, which will be billed to Medicare and my insurance with normal deductibles, coinsurance or copays. I understand that depending upon my health insurance benefits, there may be a coinsurance requirement for the months in which chronic care management services are provided. I may cancel services provided by CH&M at any time by providing written notice, and understand I will be responsible for the cost of services provided to that date. Further information on these programs is included with CH&M's enrollment information and on CH&M's website.

**CONSENT FOR SERVICES:** I give consent for Consultative Health and Medicine's physicians, nurse practitioners and nurses to perform or order examinations, treatments, laboratory tests or x-rays, scheduled immunizations, minor procedures and to prescribe medicine they believe to be necessary for my health. I consent to the release and disclosure by CH&M of my protected health information, including paper or electronic records, to other health care providers and facilities that are or may become involved in my care.

**AUTHORIZATION OF PAYMENT:** I authorize payment from Medicare, Medical Assistance and/or my health insurance company, to be paid directly to CH&M for my care and treatment. I understand that I am responsible for normal deductibles, coinsurance or copayments.

**INSURANCE CONSENT:** I give permission to CH&M to release my protected health information, including paper or electronic records of my health history, symptoms, examination and test results, diagnoses, treatment, and any plans for future care or treatment, to Medicare, Medical Assistance and/or my health insurance company for the purposes of payment, treatment or health care operations. I understand that this information serves as a source of information for applying my diagnosis and treatment information to my medical bill; a verification to third party payers that I did in fact receive these health care services; and a tool for routine health care operations.

**USE OF HEALTH CARE RECORDS IN PROGRAM EVALUATION AND TRAINING:** I give CH&M permission to use information gathered during the course of my treatment from CH&M, including information from my treatment records, for the purposes of program evaluation, training and quality review.

**NOTICE OF PRIVACY PRACTICES:** I acknowledge I have received a copy of CH&M's Notice of Privacy Practices and I understand that I have a right to review these privacy practices before signing this consent form. I understand that CH&M may change its privacy practices in the future and will be posted on CH&M's web site ([www.consultative-health.com](http://www.consultative-health.com)), and that I may request a copy of the new privacy practices at any time. I also understand that I can contact CH&M's Privacy Officer with any questions I may have about the Notice of Privacy Practices.

This consent applies to health records that my CH&M health care providers already have about me, and information about future care I may receive from them. This consent will continue unless I cancel by giving written notice to CH&M or it expires as required by law. If I cancel the consent, it will apply to information generated after the date when the notice to cancel is received. It will not affect information that has already been shared among my health care providers

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Signature (Patient or legal representative)                      Printed Name                      Date

\_\_\_\_\_  
If legal representative, what is relationship to patient                      Reason patient is unable to sign

Please attach Health Care Power of Attorney documents. Thank you

## AUTHORIZATION FOR RELEASE OF MEDICAL RECORDS

### **PATIENT**

Name (Last, First, MI): \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

### **INFORMATION TO BE RELEASED FROM**

Name of health care provider, clinic, or facility \_\_\_\_\_

Address: \_\_\_\_\_

Date Requested: \_\_\_\_\_ Date Needed By: \_\_\_\_\_

### **INFORMATION TO BE SENT TO**

By Fax, if less than 50 pages TO: \_\_\_\_\_ FAX: **855-356-4042**

By Mail if more 50 pages or more to: **Consultative Health and Medicine, P.A.**  
**5520 Ridgewood Cove**  
**Minnetrissa, MN 55364**

### **INFORMATION TO BE RELEASED**

**PLEASE RUSH:** Our clinic is assuming primary care for the patient and need the following information for continuity of care.

- X Most recent H&P and 6 months of MD/NP clinic visits
- X Problem List
- X Medication List
- X Lab and Xray reports from last 6 months
- X Immunization Record

Other \_\_\_\_\_

### **PATIENT AUTHORIZATION**

I understand I do not have to sign this authorization in order to obtain health care benefits (treatment, payment or enrollment). I may revoke this authorization, in writing, at any time. I understand that there may be a copy fee associated with the medical record release. I understand the expiration of this authorization is one year from the date signed.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Date

(Patient, legal guardian or legal representative)

If you are the legal representative, please include with this form a copy of supporting documentation of Health Care Power of Attorney or Guardian/Conservator authority so that medical records can be sent without additional delay. Thank you.

## Chronic Care Management

Medicare has expanded the ability of physicians and nurse practitioners to coordinate the care for Medicare patients through Chronic Care Management. This legislation includes payment to primary care providers, such as Consultative Health and Medicine, for providing care coordination and management of chronic conditions that may occur outside of the traditional face-to-face visit. This is in addition to Consultative Health and Medicine's regular primary care services.

Medicare patients who have two or more chronic conditions that pose significant risk to their health and functioning are eligible to receive this benefit. Chronic Care Management includes the following services:

- Ability to access the Consultative Health and Medicine care team 24 hours-a-day, 7 days-a-week, by telephone or other non face-to-face means, to provide management of ongoing medical conditions
- Creation of a comprehensive care plan for all your health issues, specific to you and congruent with your choices and values. You will receive a copy of your comprehensive plan of care along with periodic updates.
- Ongoing continuity of care through regular visits by your designated primary care nurse practitioner and/or consulting physician
- Care management of your chronic conditions, including timely scheduling of recommended preventive care services, medication reconciliation, and oversight of your medication management
- Management of your care as you move between and among healthcare providers and settings including:
  - Referrals to other health care providers
  - Follow-up after a visit to an emergency department
  - Follow-up after a discharge from the hospital or other facility
- Coordination with home care and community providers of clinical services, including home care for skilled nursing, physical therapy, occupational therapy, speech therapy, medical suppliers and other equipment suppliers
- Consultative Health and Medicine care team access to your medical history and care plan through a certified electronic health record that can also be securely shared with other treating providers

Chronic Care Management services are billed to Medicare and your health insurance company on a calendar-month basis. Depending upon the terms of your health insurance contract, there may be no direct cost to you, or you may be responsible for a coinsurance payment of approximately \$8 for each month in which Chronic Care Management services are provided.

Chronic Care Management services are included for all UCare members. There is no additional charge.

**Notice of Privacy Practices  
Consultative Health and Medicine, PA**

*Effective Date: 09-06-2013*

**THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION.  
PLEASE REVIEW IT CAREFULLY.**

If you have any questions about this notice, please contact:

Chris J Johnson, M.D.  
Chief Compliance and Privacy Officer  
Consultative Health and Medicine, PA,  
5520 Ridgewood Cove  
Minnetrista, MN 55364

**OUR OBLIGATIONS:**

We are required by law to:

- Maintain the privacy of protected health information
- Give you this notice of our legal duties and privacy practices regarding health information about you
- Follow the terms of our notice that is currently in effect

**HOW WE MAY USE AND DISCLOSE HEALTH INFORMATION:**

The following describes the ways we may use and disclose health information that identifies you ("Health Information"). Except for the purposes described below, we will use and disclose Health Information only with your written permission. You may revoke such permission at any time by writing to our practice Privacy Officer.

***For Treatment.*** We may use and disclose Health Information for your treatment and to provide you with treatment-related health care services. For example, we may disclose Health Information to doctors, nurses, technicians, or other personnel, including people outside our office, who are involved in your medical care and need the information to provide you with medical care.

***For Payment.*** We may use and disclose Health Information so that we or others may bill and receive payment from you, an insurance company or a third party for the treatment and services you received. For example, we may give your health plan information about you so that they will pay for your treatment.

***For Health Care Operations.*** We may use and disclose Health Information for health care operations purposes. These uses and disclosures are necessary to make sure that all of our patients receive quality care and to operate and manage our office. For example, we may use and disclose information to make sure the preventive care and the care you receive for certain chronic illnesses is of the highest quality. We also may share information with other entities that have a relationship with you (for example, your health plan) for their health care operation activities.

***Appointment Reminders, Treatment Alternatives and Health Related Benefits and Services.*** We may use and disclose Health Information to contact you to remind you that you have an appointment with us. We also may use and disclose Health Information to tell you about treatment alternatives or health-related benefits and services that may be of interest to you.

***Individuals Involved in Your Care or Payment for Your Care.*** When appropriate, we may share Health Information with a person who is involved in your medical care or payment for your care, such as your family or a close friend. We also may notify your family about your location or general condition or disclose such information to an entity assisting in a disaster relief effort.

***Research.*** Under certain circumstances, we may use and disclose Health Information for research. For example, a research project may involve comparing the health of patients who received one treatment to those who received another, for the same condition. Before we use or disclose Health Information for research, the project will go through a special approval process. Even without special approval, we may permit researchers to look at records to help them identify patients who may be included in their research project or for other similar purposes, as long as they do not remove or take a copy of any Health Information.

**SPECIAL SITUATIONS:**

***As Required by Law.*** We will disclose Health Information when required to do so by international, federal, state or local law.

***To Avert a Serious Threat to Health or Safety.*** We may use and disclose Health Information when necessary to prevent a serious threat to your health and safety or the health and safety of the public or another person. Disclosures, however, will be made only to someone who may be able to help prevent the threat.

***Business Associates.*** We may disclose Health Information to our business associates that perform functions on our behalf or provide us with services if the information is necessary for such functions or services. For example, we may use another company to perform billing services on our behalf. All of our business associates are obligated to protect the privacy of your information and are not allowed to use or disclose any information other than as specified in our contract.

**Organ and Tissue Donation.** If you are an organ donor, we may use or release Health Information to organizations that handle organ procurement or other entities engaged in procurement, banking or transportation of organs, eyes or tissues to facilitate organ, eye or tissue donation and transplantation.

**Military and Veterans.** If you are a member of the armed forces, we may release Health Information as required by military command authorities. We also may release Health Information to the appropriate foreign military authority if you are a member of a foreign military.

**Workers' Compensation.** We may release Health Information for workers' compensation or similar programs. These programs provide benefits for work-related injuries or illness.

**Public Health Risks.** We may disclose Health Information for public health activities. These activities generally include disclosures to prevent or control disease, injury or disability; report births and deaths; report child abuse or neglect; report reactions to medications or problems with products; notify people of recalls of products they may be using; a person who may have been exposed to a disease or may be at risk for contracting or spreading a disease or condition; and the appropriate government authority if we believe a patient has been the victim of abuse, neglect or domestic violence. We will only make this disclosure if you agree or when required or authorized by law.

**Health Oversight Activities.** We may disclose Health Information to a health oversight agency for activities authorized by law. These oversight activities include, for example, audits, investigations, inspections, and licensure. These activities are necessary for the government to monitor the health care system, government programs, and compliance with civil rights laws.

**Data Breach Notification Purposes.** We may use or disclose your Protected Health Information to provide legally required notices of unauthorized access to or disclosure of your health information.

**Lawsuits and Disputes.** If you are involved in a lawsuit or a dispute, we may disclose Health Information in response to a court or administrative order. We also may disclose Health Information in response to a subpoena, discovery request, or other lawful process by someone else involved in the dispute, but only if efforts have been made to tell you about the request or to obtain an order protecting the information requested.

**Law Enforcement.** We may release Health Information if asked by a law enforcement official if the information is: (1) in response to a court order, subpoena, warrant, summons or similar process; (2) limited information to identify or locate a suspect, fugitive, material witness, or missing person; (3) about the victim of a crime even if, under certain very limited circumstances, we are unable to obtain the person's agreement; (4) about a death we believe may be the result of criminal conduct; (5) about criminal conduct on our premises; and (6) in an emergency to report a crime, the location of the crime or victims, or the identity, description or location of the person who committed the crime.

**Coroners, Medical Examiners and Funeral Directors.** We may release Health Information to a coroner or medical examiner. This may be necessary, for example, to identify a deceased person or determine the cause of death. We also may release Health Information to funeral directors as necessary for their duties.

**National Security and Intelligence Activities.** We may release Health Information to authorized federal officials for intelligence, counter-intelligence, and other national security activities authorized by law.

**Protective Services for the President and Others.** We may disclose Health Information to authorized federal officials so they may provide protection to the President, other authorized persons or foreign heads of state or to conduct special investigations.

**Inmates or Individuals in Custody.** If you are an inmate of a correctional institution or under the custody of a law enforcement official, we may release Health Information to the correctional institution or law enforcement official. This release would be if necessary: (1) for the institution to provide you with health care; (2) to protect your health and safety or the health and safety of others; or (3) the safety and security of the correctional institution.

## **USES AND DISCLOSURES THAT REQUIRE US TO GIVE YOU AN OPPORTUNITY TO OBJECT AND OPT**

**Individuals Involved in Your Care or Payment for Your Care.** Unless you object, we may disclose to a member of your family, a relative, a close friend or any other person you identify, your Protected Health Information that directly relates to that person's involvement in your health care. If you are unable to agree or object to such a disclosure, we may disclose such information as necessary if we determine that it is in your best interest based on our professional judgment.

**Disaster Relief.** We may disclose your Protected Health Information to disaster relief organizations that seek your Protected Health Information to coordinate your care, or notify family and friends of your location or condition in a disaster. We will provide you with an opportunity to agree or object to such a disclosure whenever we practically can do so.

## **YOUR WRITTEN AUTHORIZATION IS REQUIRED FOR OTHER USES AND DISCLOSURES**

The following uses and disclosures of your Protected Health Information will be made only with your written authorization:

1. Uses and disclosures of Protected Health Information for marketing purposes; and
2. Disclosures that constitute a sale of your Protected Health Information

Other uses and disclosures of Protected Health Information not covered by this Notice or the laws that apply to us will be made only with your written authorization. If you do give us an authorization, you may revoke it at any time by submitting a written revocation to our Privacy Officer and we will no longer disclose Protected Health Information under the authorization. But disclosure that we made in reliance on your authorization before you revoked it will not be affected by the revocation.

## **YOUR RIGHTS:**

You have the following rights regarding Health Information we have about you:

**Right to Inspect and Copy.** You have a right to inspect and copy Health Information that may be used to make decisions about your care or payment for your care. This includes medical and billing records, other than psychotherapy notes. To inspect and copy this Health Information, you must make your request, in writing, to Chris J. Johnson, M.D., Chief Compliance and Privacy Officer. We have up to 30 days to make your Protected Health Information available to you and we may charge you a reasonable fee for the costs of copying, mailing or other supplies associated with your request. We may not charge you a fee if you need the information for a claim for benefits under the Social Security Act or any other state or federal needs-based benefit program. We may deny your request in certain limited circumstances. If we do deny your request, you have the right to have the denial reviewed by a licensed healthcare professional who was not directly involved in the denial of your request, and we will comply with the outcome of the review.

**Right to an Electronic Copy of Electronic Medical Records.** If your Protected Health Information is maintained in an electronic format (known as an electronic medical record or an electronic health record), you have the right to request that an electronic copy of your record be given to you or transmitted to another individual or entity. We will make every effort to provide access to your Protected Health Information in the form or format you request, if it is readily producible in such form or format. If the Protected Health Information is not readily producible in the form or format you request your record will be provided in either our standard electronic format or if you do not want this form or format, a readable hard copy form. We may charge you a reasonable, cost-based fee for the labor associated with transmitting the electronic medical record.

**Right to Get Notice of a Breach.** You have the right to be notified upon a breach of any of your unsecured Protected Health Information.

**Right to Amend.** If you feel that Health Information we have is incorrect or incomplete, you may ask us to amend the information. You have the right to request an amendment for as long as the information is kept by or for our office. To request an amendment, you must make your request, in writing, to Chris J. Johnson, M.D., Chief Compliance and Privacy Officer.

**Right to an Accounting of Disclosures.** You have the right to request a list of certain disclosures we made of Health Information for purposes other than treatment, payment and health care operations or for which you provided written authorization. To request an accounting of disclosures, you must make your request, in writing, to Chris J. Johnson, M.D., Chief Compliance and Privacy Officer.

**Right to Request Restrictions.** You have the right to request a restriction or limitation on the Health Information we use or disclose for treatment, payment, or health care operations. You also have the right to request a limit on the Health Information we disclose to someone involved in your care or the payment for your care, like a family member or friend. For example, you could ask that we not share information about a particular diagnosis or treatment with your spouse. To request a restriction, you must make your request, in writing, to Chris J. Johnson, M.D., Chief Compliance and Privacy Officer. We are not required to agree to your request unless you are asking us to restrict the use and disclosure of your Protected Health Information to a health plan for payment or health care operation purposes and such information you wish to restrict pertains solely to a health care item or service for which you have paid us "out-of-pocket" in full. If we agree, we will comply with your request unless the information is needed to provide you with emergency treatment.

**Out-of-Pocket-Payments.** If you paid out-of-pocket (or in other words, you have requested that we not bill your health plan) in full for a specific item or service, you have the right to ask that your Protected Health Information with respect to that item or service not be disclosed to a health plan for purposes of payment or health care operations, and we will honor that request.

**Right to Request Confidential Communications.** You have the right to request that we communicate with you about medical matters in a certain way or at a certain location. For example, you can ask that we only contact you by mail or at work. To request confidential communications, you must make your request, in writing, to Chris J. Johnson, M.D., Chief Compliance and Privacy Officer. Your request must specify how or where you wish to be contacted. We will accommodate reasonable requests.

**Right to a Paper Copy of This Notice.** You have the right to a paper copy of this notice. You may ask us to give you a copy of this notice at any time. Even if you have agreed to receive this notice electronically, you are still entitled to a paper copy of this notice. You may obtain a copy of this notice at our web site, [www.consultativehealth.com](http://www.consultativehealth.com). To obtain a paper copy of this notice, to:

Chris J. Johnson, M.D.  
Chief Compliance and Privacy Officer  
Consultative Health and Medicine, PA  
5520 Ridgewood Cove  
Minnetrista, MN 55364

## **CHANGES TO THIS NOTICE:**

We reserve the right to change this notice and make the new notice apply to Health Information we already have as well as any information we receive in the future. We will post a copy of our current notice at our office. The notice will contain the effective date on the first page, in the top right-hand corner.

## **COMPLAINTS:**

If you believe your privacy rights have been violated, you may file a complaint with our office or with the Secretary of the Department of Health and Human Services. To file a complaint with our office, contact Chris J. Johnson, M.D., Chief Compliance and Privacy Officer. All complaints must be made in writing. **You will not be penalized for filing a complaint.**