Potomac Family Practice

Patient Intake & Consent Forms

This packet contains required demographic, insurance, consent, and office policy forms for patients.

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Potomac Family Practice 46165 Westlake Dr, Ste 120 Potomac Falls, VA 20165 | 224-D Cornwall St, NW, Ste 301 Leesburg, VA 20176

PATIENT INFORMATION

Prefix: Mr./Mrs./ Other **Last Name** **First Name** **Middle Name**

Birth Sex*: ☐ Female ☐ Male **Marital Status*:** ☐ Single ☐ Married ☐ Widowed ☐ Separated ☐ Divorced ☐ Other:

Social Security # **Employer Name** **Occupation**

Employment Status: ☐ Full Time ☐ Part Time ☐ Not Employed ☐ Self Employed ☐ Retired ☐ Active Military ☐ Retired Military

Student Status: ☐ Full Time ☐Part Time ☐ N/A

Mailing Street Address* **Apt#** **City** **State** **Zip Code**

Email address: **Phone number:** ☐ Cell ☐ Home ☐ Work w/ Ext

Preferred Method of Contact for Appointment Reminders: ☐ Text Message ☐ Home Phone ☐ Cell Phone

ADDITIONAL INFORMATION*

Race*: ☐ Asian ☐ Black/ African American ☐ Hawaiian/Pacific Islander ☐ Other Race ☐ White/ Caucasian

Ethnicity*: ☐ Hispanic/Latino ☐ Non-Hispanic or Latino

Gender Identity: ☐ Male ☐ Female ☐ Female-to-Male (FTM)/ Transgender Male/Trans Man ☐ Male-to-Female (MTF)/ Transgender Female/Trans Woman ☐ Genderqueer, neither exclusively male nor female ☐ Choose not to disclose ☐ Other:

Sexual Orientation: ☐ Lesbian, gay/homosexual ☐ Straight or Heterosexual ☐ Bisexual ☐ Don't Know ☐ Choose not to disclose ☐ Something else, please describe:

Preferred Language other than English*:

PHARMACY INFORMATION*

Pharmacy Name **Address** **Phone Number**

EMERGENCY CONTACT / NEXT OF KIN CONATACT INFORMATION

Last Name **First Name** **Relationship to Patient**

Address **Apt#** **City** **State** **Zip Code**

Contact Preference Number: ☐ Cell ☐ Home ☐ Work w/ Ext

PARENT / GUARDIAN INFORMATION* - *Required if the patient is under 18 years of age*

Last Name **First Name** **Sex** **Relationship to Patient**

Date of Birth: **Social Security#:** **Contact Preference:** ☐ Cell ☐ Home ☐ Work w/ Ext

Address **Apt#** **City** **State** **Zip Code**

RESPONSIBLE PARTY (GUARANTOR) / POLICYHOLDER INFORMATION

Select all that apply: ☐ Responsible Party ☐ Policyholder for Primary Insurance ☐ Party Policyholder for Secondary Insurance

Last Name **First Name** **Sex** **Marital Status** **Relationship to Patient**

Date of Birth **Social Security#** **Contact Preference:** ☐ Cell ☐ Home ☐ Work w/ Ext

Address **Apt#** **City** **State** **Zip Code**

PRIMARY INSURANCE INFORMATION*

Insurance Name **Member ID/Group#** **Effective Date** **Employer** **Relationship to Policyholder**

SECONDARY INSURANCE INFORMATION*

Insurance Name **Member ID/Group#** **Effective Date** **Employer** **Relationship to Policyholder**

CONSENT INFORMATION

I authorize my insurance benefits to be paid directly to the physician and I am financially responsible for all charges. I hereby consent to the release and re-disclosure of my medical record to enable or facilitate the collection, verification or settlement of my account for any amounts due from me or any third-party payor, health maintenance organization, insurer or other health benefit plan. This consent applies to LMG, PC, or any of its affiliates or agents, lenders, or any third-party servicer acting for LMG, PC or any of its affiliates. I also authorize LMG to test my blood for hepatitis and/or the AIDS virus, if in their opinion an employee has suffered an exposure incident as a result of my treatment, as defined by the Occupational Safety and Health Administration. **X_____ (Please initial)**

NOTICE OF DEEMED CONSENT FOR HIV, HEPATITIS B OR C TESTING

LMG is required by § 32.1-45.1 of the Code of Virginia (1950), as amended, to give you the following notice:
If any LMG health professional, worker or employee should be directly exposed to your blood or your body fluids in a way that may transmit disease, your blood will be tested for infection with human immunodeficiency virus (the "AIDS" virus), as well as for Hepatitis B and C. A physician or other health care provider will tell you the result of the test. Under Va. Code § 32.1- 45.1(A), you are deemed to have consented to the release of the test results to the person exposed. **X _____(Please initial)**

If you should be directly exposed to blood or body fluids of a LMG health care professional, worker or employee in a way that may transit disease, that person's blood will be tested for infection with human immunodeficiency virus (the "AIDS" virus), as well as for Hepatitis B and C. A physician or other health care provider will tell you and that person the result of the test. **X_____ (Please initial)**

CONSENT FOR HEALTH INFORMATION EXCHANGE

PRISMA is the health information exchange that brings together records from small clinics to large-scale hospital systems whose medical records systems participate in the Carequality and CommonWell Health alliance networks. PRISMA also aggregates patient information from insurance payers and patients' wearable devices to promote better interoperability and patient health outcomes.

Please initial beside the option of your choice:

Opt In: Send and Receive Documents
X_____ Loudoun Medical Group will send clinical documents when requested by external connected sites (PRISMA) and will also request clinical documents from external connected sites (PRISMA) and display them in our electronic medical records.

Opt Out:
X_____ Loudoun Medical Group will neither send clinical documents to nor request clinical documents from external connected sites.

MEDICATION HISTORY CONSENT

I give permission for Loudoun Medical Group to access my pharmacy benefits data electronically through RXHub/SureScript. This consent will enable Loudoun Medical Group to:

- Determine the pharmacy benefits and drug co pays for a patient's health plan. Check whether a prescribed medication is covered (in formulary) under a patient's plan.
- Display therapeutic alternatives with preference rank (if available) within a drug class for medications.
- Determine if a patient's health plan allows electronic prescribing to Mail Order pharmacies, and if so, e-prescribe to these pharmacies.
- Download a historic list of all medications prescribed for a patient by any provider.
- Also, this is notice that Loudoun Medical Group has consent to utilize the Virginia Prescription Monitoring Program on all patients prescribed controlled substances.

In summary, we ask your permission to obtain formulary information, and information about other prescriptions prescribed by other providers using RXHub and Virginia Prescription Monitoring Program. **X_____(Please initial)**

Signature of Patient, Parent/Legal Guardian, or Person Acting Loco Parentis	Date

Relationship (if any)

Potomac Family Practice

46165 Westlake Drive, Suite 120 | Potomac Falls, VA 20165 | (703) 444-3302
224-D Cornwall Street, NW, Suite 301 | Leesburg, VA 20176 | (703) 779-0700

INSURANCE WAIVER

PRIVATE, COMMERCIAL & MEDICARE INSURANCES

Medicare and/or your private insurance carrier will only pay for the services that it determines to be "Reasonable & Customary" under section 1862 (A) (I) of the Medicare law.

Medicare will not cover any routine physical or routine lab work. Medicare will only cover a wellness exam for women one every 2 years.

It will be the patient's responsibility to verify that your insurance will cover any procedure that you're requesting to be done.

Private & Commercial insurances will deny coverage for the following reasons:

A. Potomac Family Practice is not listed as PCP.
B. Patient is not listed as a covered Dependent on said plan.
C. Patient policy has terminated at the time of service and/or did not present the front desk with a current insurance card.
D. Patient went to a non-participating facility for any labs or tests. It is the patient's responsibility to verify the correct lab and/or facility for tests.
E. Insurance will only cover a limited amount towards a routine physical and/or labs, and vaccines.
F. Routine physicals are only allowed every year or every other year depending on your insurance coverage.
G. School & Sports: and any other third-party physicals are not covered benefit under any insurance plan.
H. Immunizations that they deem as not preventative or medically necessary.

If Medicare and/or commercial insurance should deny any or all charges, then I agree to be personally and fully responsible for any, and all balances.

Printed Name: _____ Patient DOB: _____

Signature: _____ Today's Date: _____

LOUDOUN MEDICAL GROUP
Receipt of Notice of Privacy Practices Acknowledgement

_____
Patient's Name

I have a received a copy of Loudoun Medical Group's Notice of Privacy Practices and understand that the notice describes how my/the patient's medical information may be used and how access to this information may be obtained. I have also been given an opportunity to ask questions about the information provided in the Notice.

_____
Signature

Date:_____

_____
Relationship to Patient (if Acknowledgement Form is executed by someone other than the Patient)

FOR OFFICE USE ONLY

I attempted to obtain the patient's/representative's signature in acknowledgement of this Receipt of Notice of Privacy Practices Acknowledgement, but was unable to do so as documented below:

Date	Staff Initials	Reason
		Refused to sign (circle if applicable) **Other:**

LOUDOUN MEDICAL GROUP PC
NOTICE OF PATIENT PRIVACY PRACTICES

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 or comments about this Notice please contact:

Loudoun Medical Group, PC
224-D Cornwall St. N.W., Suite 403
Leesburg, VA 20176

Our Privacy Officer is: Clara McAuley Nussbaum, Director of Compliance, 703-737-6010

Who Does this Notice Apply to?

Loudoun Medical Group, PC ("LMG"), has published this Notice. It applies to everyone who works for Loudoun Medical Group, PC, including our employees, contractors, and volunteers.

Why Do We Publish this Notice?

LMG understands that information about you and your health is sensitive and personal. We are required by law to maintain the privacy of information we gather and use about our patients, and provide them with notices of our legal duties and privacy practices with respect to their information. We are also required to notify affected individuals of any breach of unsecured protected health information.

While we are committed to the privacy of our patients' information, in order to serve them we need to gather, keep and use records of this information. We sometimes also need to share information with other parties. This Notice is intended to let you know how we use and disclose your information.

This Notice is also to let you know about certain legal rights you have with respect to the information we hold about you. You have certain rights to review and obtain a copy of our records of information about you. You may also request that we amend these records, and may ask us to account for certain disclosures we may have made of information about you. Requests for amendments and requests for accountings must be made in writing and directed to the Privacy Officer.

When Is This Notice Effective?

We are required to comply with the terms of this Notice while it is in effect. We reserve the right to change the terms of this Notice, and make the new terms effective for all information to which this Notice applies. This Notice will be in effect from **May 20, 2013** until the date we publish an amended Notice. If we do publish an amended Notice, we will notify you at your next visit. We will also publish the amended Notice in our offices, and will publish it on our web site if we maintain one.

What Information Does this Notice Cover?

This Notice covers all information in our written or electronic records which concerns you, your health care, and payment for your health care. It also covers information we may have shared with other organizations to help us provide your care, get paid for providing care, or manage some of our administrative operations.

When Can We Use or Disclose Information About You?

- ***Treatment***. We may use or disclose information about you for treatment purposes to doctors, nurses, technicians, medical students or other individuals who work in our practice who are involved in providing you with health care. We may also disclose information about you to organizations and individuals involved in your care who are outside of our practice, such as consulting physicians, laboratories, social workers, and so on.

  For example, if we refer you to another physician or a hospital for specialty services, we will provide that physician or hospital with all clinical information, which might be necessary or helpful to help them provide you with the right care. Or, if we need to send a sample of your blood to a laboratory for analysis, we will provide the laboratory with the information they need to process your blood correctly.
  These are only examples, and we may use or disclose information about you to provide you proper treatment in many other ways.

- ***Payment***. We may use or disclose information about you for payment purposes to our clerks and officers involved in billing and claims

payment. We may also disclose such information to your health plan or other party financially responsible for your care, or to claims and billing services if necessary.

For example, if you are covered by a health plan we cannot get paid for the services we provide you unless we submit information in a claim. This might include detailed clinical information, depending on the kind of plan and claim. This is only an example, and there may be many other ways in which we may use or disclose information about you in connection with payment for your care.

- ***Health care operations***. We may use or disclose information about you for operations in connection with our practice. These activities might include practice quality improvement, training of medical students, insurance underwriting, medical or legal review, and business planning or administration of our practice.

  For example, we may wish to review the quality of care you receive, in order to help us deliver the best care we can. Or, we may audit our management practices so we can become more efficient. These are only examples, and we may use or disclose information about you for health care operations in many other ways.

We may also use and disclose information about you in the following situations, without your prior authorization:

- To a public health agency, for purposes such as controlling disease.
- In case of suspected child abuse, to the appropriate governmental authority.
- In other cases of suspected abuse, neglect or domestic violence, to the appropriate governmental authority, with your agreement or if required by law, or if you are incapacitated or it appears necessary to prevent serious harm to you or others.
- Unless you object, to friends or family members who are involved in your medical care.
- Unless you object, to notify, or to assist in notifying, a family member or friend of your location or condition.
- To health oversight authorities, for regulatory, licensing and other legal purposes.
- In litigation and legal proceedings, subject to certain requirements controlling the terms of the disclosure.
- To law enforcement agencies, subject to applicable legal requirements and limitations.
- We may disclose health information to the extent authorized by and to the extent necessary to comply with laws relating to workers' compensation or other similar programs established by law.
- To Funeral Directors/Medical Examiners/Coroners in the event of your death.
- When required by Federal, State or Local law.
- For medical research purposes, subject to your authorization or approval by an institutional review board or privacy board.
- If you are in the United States military, national security or intelligence, Foreign Service, to your authorized superiors or other authorized federal officials.

We may contact you for information to support your health care, including appointment reminders, information about alternative treatments, and health-related services, which may be of interest to you. We will routinely contact patients via telephone at home and/or work and, unless otherwise requested, may leave messages on the appropriate voice mail or answering service regarding appoint-ments. *Please advise us if you do not wish to receive such communications*, and we will not use or disclose your information for such purposes. If you wish not to receive this kind of communication, you must advise the Privacy Officer in writing at the address given above.

Most uses and disclosures of psychotherapy notes and most uses and disclosures of your information for marketing purposes will require your written authorization. Further, LMG would typically be required to obtain your written authorization in order to sell your information. Except for uses and disclosures described in this notice, we may not use or disclose information about you for any other purpose without your written authorization.

What Legal Rights Do You Have In Connection With Your Information?

- Right to Inspect and Copy. You have the right to inspect or obtain copies of your medical information. To inspect and copy medical information, you must submit your request in writing to the Privacy Officer at the address set forth above. If you request a copy of the information, there will be a charge based on our costs.

  We may deny your request to inspect and copy in certain very limited circumstances. If you are denied access to medical information, you may request that the denial be reviewed by another licensed health care professional. We will comply with the outcome of the review.

- Right to Amend. If you feel that medical information we have about

you is incorrect or incomplete, you may ask us to amend the information. You have the right to request an amendment for as long as we keep the information.

To request an amendment, your request must be made in writing and submitted to the Privacy Officer at the address set forth above. In addition, you must provide a reason that supports your request.

We may deny your request for an amendment if it is not in writing or does not include a reason to support the request. In addition, we may deny your request if you ask us to amend information that:

- Was not created by us, unless the person or entity that created the information is no longer available to make the amendment;
- Is not part of the medical information kept by or for LMG;
- Is not part of the information which you would be permitted to inspect and copy; or
- Is accurate and complete.

You will be informed of the decision regarding any request for amendment of your medical information and, if we deny your request for amendment, we will provide you with information regarding your right to respond to that decision.

- Right to an Accounting of Disclosures. You have the right to request an accounting of disclosures we have made of your medical information. The accounting of disclosures typically would not list disclosures we made of medical information about you that were made for purposes of treatment, payment, or health care operations and that were made in response to a specific authorization from you.

  To request this list or accounting of disclosures, you must submit your request in writing to the Privacy Officer at the address set forth above. Your request must state a time period for which you want the accounting (which may not be longer than six years prior to the request).

- Right to Request Restrictions. You have the right to request a restriction or limitation on the medical information we use or disclose about you for treatment, payment or health care operations. You also have the right to request a limit on the medical information we disclose about you to someone who is involved in your care or the payment for your care, like a family member or friend. For example, you could ask that we not use or disclose information about a surgery you had.

  We are not required to agree to a requested restriction, unless (i) you are requesting that we not disclose information to a health plan for payment or health care operations of the health plan, and (ii) the information pertains solely to an item or service for which you or someone other than the health plan has already paid in full. If we do agree to a requested restriction, we will comply with your request unless the information is needed to provide you emergency treatment. Additionally, even when we do not agree to a requested restriction, health information about you may only be disclosed to family or friends if, in the exercise of professional judgment, we believe it is in your best interest to have such information disclosed. However, under such circumstances, where practical, you will be given the opportunity to object to any such disclosure.

  To request restrictions, you must make your request in writing to the Privacy Officer at the address set forth above.

- 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 at work or by mail.

  To request confidential communications, you must make your request in writing to the Privacy Officer at the address set forth above. Your request must specify how or where you wish to be contacted.

- 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.

- Complaints. If you believe your privacy rights have been violated, you may file a complaint with LMG or with the Secretary of the Department of Health and Human Services. To file a complaint with LMG, contact the Privacy Officer at the phone number or address set forth above. All complaints to the Department of Health and Human Services must be submitted in writing. We will not retaliate against you for filing a complaint.

Loudoun Medical Group PC/ Potomac Family Practice

ADDENDUM TO NOTICE OF PATIENT PRIVACY PRACTICES

THIS NOTICE IS AN ADDENDUM TO OUR STANDAR PATIENT PRIVACY NOTICE.

New Technology to help LMG Providers create medical notes.

Overview: As part of LMG's commitment to efficient and accurate documentation of healthcare services, LMG may use AI to assist in increasing the medical note. This technology converts conversations between patients and providers into medical notes. The technology will only be used for the purpose of improving patient care and assisting in accurate record-keeping. Any healthcare data collected using this new technology is protected under the same stringent privacy regulations as all other health information.

Security Details:
Patient information is fully encrypted and anonymized (only pt ID included).
Data is deleted after a short retention period.
Because the medical documentation process is fully automated any patient data is LESS exposed to human eyes compared to other documentation methods.

Benefit to patients:
Providers can focus on patient care while more detailed and accurate documentation is created.

Ambient listening/AI software used: The LMG Provider may use the following Ambient Listening/AI platform/software: **ScribeBrain**/ **Sunoh.ai**
By signing the below, you agree to allow LMG to use the above technology to help us help you.

This consent was signed by: _____ DOB: _____

Signature: _____ Date: _____

LOUDOUN MEDICAL GROUP /AUTHORIZATION TO DISCLOSE HEALTH INFORMATION

Patient Name: _____ DOB: _____

Street Address/PO Box: _____ City: _____ State: _____ Zip: _____

Home Phone: _____Cell Phone: _____ Work Phone: _____

EMAIL ADDRESS: _____@ _____

Patient Portal: (Please circle)

SIGN ME UP! ALREADY ENROLLED NOT INTERESTED

Preferred method of contact for appointment reminders: (Please circle)

TEXT CALL EMAIL

I give Potomac Family Practice permission to leave my results or any pertinent medical information on my home voicemail or my cell phone: (Please circle) **YES** or **NO** **HOME/ CELL/ BOTH**

ADDITIONAL CONTACT INFORMATION

I hereby authorize this office and any of its employees to use or disclose my patient health information to the following person(s), entities, or business associate of this office:

NAME	PHONE NUMBER	RELATIONSHIP

My signature verifies that this request accurately reflects my wishes. I understand that this form is valid for 1 YEAR from date of signature. It is my responsibility to notify Potomac Family Practice of any changes prior to the expiration of this form.

_____ _____

Signature Date

I understand that I have the right to: Revoke this authorization at any time by giving written notice to the office. Inspect a copy of patient health information being used for disclosure under federal law. Refuse to sign this authorization. Receive a copy of this authorization and restrict what is disclosed.

LOUDOUN MEDICAL GROUP PC

Welcome to Potomac Family Practice! We are pleased you have chosen us for your Family Care needs. We are dedicated to giving you the best care while providing you with support and explanations regarding your condition.

APPOINTMENTS

Visits are by appointment and be scheduled by calling the front desk. **** If you are unable to keep your appointment, you must call at least 24 hours prior to the appointment or there will be a $50 no show fee charge to your account which Is not billable to your insurance. **** PFP has a strict No-Show policy in effect since April 1st 2023. If you no-show for your appointment 2 times, you will be dismissed from the practice.

REFERRALS

It is the responsibility of the patient to know and understand their insurance policy. Some insurances require the member to obtain a referral from their primary care physician before seeing a specialist.
Referrals can be obtained by speaking to the front desk or leaving a voice message on our referral line.
****Phone referrals can only be completed If you have seen your primary care physician for the condition within the past 6 months. If it has been over 6 months an office visit Is required. ****
Please allow 72 hours for referrals to be processed. Unfortunately, we do not backdate referrals.

PRESCRIPTIONS/REFILLS

All prescriptions and refill requests should come from the pharmacy, or by calling and speaking with the nurse. Please have your pharmacy telephone number, prescription name and dosage close at hand.
**After-hours prescription requests will not be processed until the next business day. **

FORM FEES

Forms that have been dropped off at the front desk for the providers to fill out (I.e. School forms, physical forms and disability paperwork) are subject to a $10-$5O fee, which cannot be billed to your Insurance company. Also, please allow 3-5 business days for the forms to be completed. **Fees are dependent upon the nature of the form and are charged at the discretion of the provider**

EMERGENCIES

In the event an emergency occurs after business hours, please call the after-hours line at (703) 755-1410. Phone consultations are subject to a $10-$20 fee which will be billed to the patient directly as they cannot be billed to your insurance company. ****Please keep in mind that after-hours calls are for emergent problems only. **** if you feel your condition requires Immediate medical attention, please go to the nearest emergency room, or visit LMG's Cornwall Urgent Care at 211 Gibson St NW #215, Leesburg, VA 20176. The phone number is (571) 707-2085.

BILLING AND COLLECTIONS

Payment for the office visits, including co-pay and balances, is expected at the time of service. Payment may be made by cash, check, Visa, Mastercard, Discover, or American Express. A $30 insufficient fund fee will be applied to any returned checks.
If we participate with your Insurance, we will file an insurance claim for your office visit. Unfortunately, we do not submit to third party payors, such as motor vehicle Insurance. ** Routine labs are not covered under Medicare Insurance. ***** If you have general Medicaid, we will refer you to the VA Health Department for vaccines as they are not a covered benefit*****
For billing Inquiries, please contact our billing department at (703)737-6001, option 2.

BACK PAGE

COPY OF OFFICE POLICY

A copy is available upon request.

I, _____ *hav*e read, understand, and agree with the conditions outlined in Potomac Family Practice's office policy.

_____ _____

Signature **Date**