O. David Taunton Jr., M.D.

Mid-Cities • 2425 Highway 121 • Bedford, TX 76021 • 817-540-4477

Dear Patient,

The following forms need to be filled out before you come to your appointment. Filling out these forms completely and accurately will expedite the registration process. Please also ensure all items listed are brought with you to your appointment. Please arrive 15 minutes prior to your appointment time if you have not completed your forms. Thank you in advance for your time. We look forward to seeing you in the office.

1. New Patient Packet
   Consent/HIPAA/Financial Release Forms
   Required Government Form
2. Physician Questionnaire
3. Insurance Card and form of identification
4. Any surgical x-rays/MRI films and MRI report done within the last 6 months
5. A Copay/deductible will be collected at the time of visit. If you do not have insurance coverage, payment in full is expected prior to each visit.

Sincerely,
The staff of O. David Taunton Jr., M.D.

POS Reorder # 2316248

PLEASE INITIAL ALL SECTIONS, SIGN & DATE FORM

FINANCIAL RESPONSIBILITY AGREEMENT

_____ initials **FINANCIAL RESPONSIBILITY AGREEMENT**
I agree to assign insurance benefits to Texas Orthopedic Specialists, PLLC. We bill all insurance companies that we are contracted with as "network" providers as a courtesy to our patients. I acknowledge full financial responsibility for services rendered by Texas Orthopedic Specialists, PLLC, and authorize transfer of all unpaid amounts to me, which includes, but is not limited to, Co-pays, Deductibles, Co-Insurance, Pre-existing Clauses, excluded conditions and/or termination of coverage. I agree to pay all legal fees including attorney and court fees as well as collection costs in the event of default payment of charges that are my financial responsibility. I further authorize and request all insurance payments be made directly to Texas Orthopedic Specialists, PLLC. Payment is expected at the time of service. We will file your insurance as a courtesy to you. If your deductible has not been met and/or if you are responsible for a co-payment under your plan, we will expect the payment of such upon delivery of services and immediately upon the end of your visit. There will be a $30 fee for returned checks.

_____ initials **PATIENT PRIVACY PRACTICES**
We are committed to ensuring your Protected Health Information (PHI) remains confidential. Your paper and electronic medical records are safeguarded and released only with your consent or to your insurance carrier, other medical professionals directly involved with your care, or as required by law. Our "Notice of Privacy Practices" policy manual, which explains how your medical information may be used and disclosed, is available for your review or you are welcome to have a copy. If you would like to release your PHI to another doctor or facility you will be required to fill out a separate form to request your records.

_____ initials **CONSENT OF TREATMENT**
I authorize Texas Orthopedic Specialists Physicians and the Physicians' Assistants to evaluate and treat me or my family member for any orthopedic illness or injury for which I seek medical care. I have read and understand the above clinic polices and I further acknowledge that I accept the terms outlined in each of the above policies.

_____ initials **PHYSICIAN ASSISTANT CONSENT**
This facility has on staff Certified Physician Assistants (PA-C) to assist in the delivery of orthopedic medical care. I acknowledge a Physician Assistant is not a physician. A PA-C is licensed by the state medical board and under the supervision of a physician can diagnose, treat, and monitor common acute and chronic diseases as well as provide health maintenance care. "Supervision" does NOT require constant physical presence of the supervising physician, but rather overseeing and accepting responsibility for the medical services provided. A list of services may be provided that are within the scope of practice for a PA-C upon request. I hereby acknowledge the above information and consent to the services of a Certified PA for my health care needs. I understand that at any given time I can request to see the Physician instead of the PA-C.

_____ initials **PROOF AND CHANGE OF INSURANCE**
Patient are required to show both proof of insurance and a Government issued photo ID at their initial and subsequent visits. The patient (parent/legal guardian) is responsible for informing our office of any changes in your insurance coverage since your last visit. Please assure that notification is made no later than 24 hours prior to your appointment to avoid having to re-schedule your appointment.

_____ initials **DISABILITY PAPERWORK/ MISSED APPOINTMENT POLICY/ RADIOLOGY AND LAB FEES**
Please give all forms regarding disability to the nursing staff. Please do not give these forms to the physician. Please note that there is a $25.00 completion fee per form. You will need to expect 72 hours for these forms to be completed. Fill out the portion of the disability form that is for the patient and leave physician areas blank.
We must be notified at least 24 hours in advance of an appointment cancellation/need to reschedule. A $50 fee may be charged for a no-show or late cancellation of appointments. Payment of this fee is the responsibility of the patient and is not covered by insurance.
You may incur additional charges from providers outside of your network for procedures done outside of our facility that may be part of your surgical procedure or radiological exam. This can include pathology, radiology and/or lab fees.

ACKNOWLEDGEMENT

- I acknowledge that I received access to the "Notice of Privacy Practices" information for Texas Orthopedic Specialists, PLLC. I have read and understand the "HIPAA & Release of Medical Information Policy".
- I hereby authorize Texas Orthopedic Specialists, PLLC, to release any information requested by the insurance company or companies or respective representatives and act as my agent to secure payment from any and all services rendered.
- I understand that I am financially responsible to the physician for any and all charges incurred by myself and/or dependents.
- I have read and understand the "Physician's Consent" and the "Disclosure of Financial Interest".
- I further acknowledge and understand that I accept the terms outlined in each of the policies.
- I understand that no warranty or guarantee has been made to me relative to result of care or medical outcome.
- This authorization remains valid and effective from the date of signing until revoked in writing.

X _____ _____
Patient or Guardian Signature | Date

X _____ _____
Patient or Guardian Printed Name | Patient ID - Office Use Only

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2425 HIGHWAY 121 | BEDFORD 76021

AUTHORIZATION FOR RELEASE OF PROTECTED HEALTH INFORMATION

Please read this entire form before signing and complete all the sections that apply to your decisions relating to the disclosure of protected health information. Texas Orthopedic Specialists must obtain a signed authorization from the patient or the patient's legally authorized representative to electronically disclose the patient's protected health information. Individuals cannot be denied treatment based on a failure to sign this authorization form, and a refusal to sign this form will not affect the payment, enrollment, or eligibility for benefits.

Patient Name: _____ Date of Birth: _____

I HEREBY AUTHORIZE TEXAS ORTHOPEDIC SPECIALISTS TO DISCLOSE THE PATIENT'S PROTECTED HEALTH INFORMATION TO THE FOLLOWING PERSON/ORGANIZATION:

1. Person / Organization Name: _____

Address: _____

Phone: _____ Fax Number: _____

2. Person / Organization Name: _____

Address: _____

Phone: _____ Fax Number: _____

REASON FOR DISCLOSURE (Choose One):

☐ Treatment / Continuing Medical Care ☐ Personal Use ☐ Billing or Claims
☐ Insurance ☐ Legal Purposes ☐ Disability Determination ☐ School ☐ Employment ☐ Other: _____

WHAT INFORMATION CAN BE DISCLOSED: Complete the following by indicating those items that you want disclosed. The signature of a minor patient is required for the release of some of these items. If all health information is to be released, then simply check the appropriate spot:

☐ All Health Information ☐ Pathology Reports

☐ Operation Reports ☐ Billing Information

☐ Lab Results ☐ Radiology Reports/Images

☐ Diagnostic Test Results ☐ Other: _____

RIGHT TO REVOKE: I understand that I can withdraw permission at any time by giving written notice stating my intent to revoke this authorization. I understand that prior actions taken by Texas Orthopedic Specialists and other entities that had permission to access my protected health information in reliance on this authorization will not be affected by such revocation.

SIGNATURE AUTHORIZATION: I have read this form and agree to the uses and disclosures of the information as described. I understand that refusing to sign this form does not stop disclosure of health information that has occurred prior to revocation or that is otherwise permitted by law without my specific authorization or permission, including disclosures by covered entities. I understand that information disclosed pursuant to this authorization may be subject to re-disclosure by the recipient and may no longer be protected by federal or state privacy laws. In addition, I hereby authorize Texas Orthopedic Specialists to leave detailed messages for me regarding appointments, prescriptions, or any other information pertinent to my medical care, on any phone number that I have provided.

This authorization remains valid and effective from the date of signing until revoked in writing.

X _____ _____
Signature of Patient or Legally Authorized Representative Date

Printed Name of Legally Authorized Representative of Patient (if applicable): _____

If representative, specify relationship to patient:

☐ Parent of Minor

☐ Guardian

☐ Other: _____

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MEDICATION POLICY AND DISCLOSURE OF FINANCIAL INTEREST

Medication Refill Policy:

1. For refills on medication, please call between: Monday - Thursday, 8:30 - 4:00pm
2. Please call several days before your supply of medication runs out. This allows adequate time to have your prescription refilled, as it's important to understand this **CANNOT** be considered an emergency for our staff.
3. We request that you use the same pharmacy for all your prescriptions and use only one physician to obtain pain medications.

Please allow 24 hours to process a prescription refill request and understand medications are refilled on a patient-by-patient basis and never refilled over the weekends or after normal business hours.

Thank you in advance for acknowledging and following our simple medication policy.

X _____ _____

Signature Date

Disclosure of Financial Interest:

A Texas Orthopedic Specialists, PLLC, physician you are seeing may have a financial interest in the facilities listed below. The facilities and our physicians are committed to providing clinical excellence in a safe and attractive environment for you and your family members. Their financial interest in these facilities enables them to have a voice in administration and their policies. This involvement helps to ensure the highest quality of care for you. Should you have any concerns regarding this notice, please ask your physician or a member of the staff. My signature below acknowledges that I understand that my plan of care may include admission to any of the below facilities, in which O. David Taunton Jr., M.D., of Texas Orthopedic Specialists, PLLC, has a financial interest.

X _____ _____

Signature Date

Texas Health Harris Methodist Southlake Hospital 1545 E Southlake Blvd. Southlake, TX 76092 Ph. (817) 748-8700	Bear Creek Surgery Center 100 Bourland Rd. Suite 110 Keller, TX 76248 Ph: (817) 518-9130
Baylor Scott & White Medical Center - Trophy Club 2850 TX-114 Trophy Club, TX 76262 Ph. (817) 837-4600	

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Office Use Only: Patient ID#:_____ Date: _____ /_____ /_____

O. David Taunton Jr., M.D. - PATIENT QUESTIONNAIRE - KNEE

Date: _____ /_____ /_____ **Name:** _____ **DOB:** _____ /_____ /_____

REFERRING DOCTOR/FRIEND: _____ **YOUR AGE:** _____

CHIEF COMPLAINT: _____

WORK RELATED?: ☐ Y ☐ N **MOTOR VEHICLE ACCIDENT?:** ☐ Y ☐ N **HEIGHT:** _____ **WEIGHT:** _____

Describe the location of pain: (☐ left knee ☐ right knee) (please be as detailed as possible on how and where the pain is located and when the pain started; if injury was involved, please describe in detail):

_____

Location of Pain:

Left Knee: ☐ Front ☐ Back ☐ Side ☐ Other: _____ **Right Knee:** ☐ Front ☐ Back ☐ Side ☐ Other: _____

Does the pain radiate: ☐ To Thigh ☐ To Lower Leg ☐ To Foot ☐ Other: _____

Frequency or Duration of Limitations: ☐ Occasionally ☐ Often ☐ Constantly **Severity:** ☐ Mild ☐ Moderate ☐ Intense

Activity Quality of Life Limitations (check any that apply):

☐ Climbing Stairs ☐ In & Out of Car ☐ Kneeling ☐ Walking ☐ Getting Up from chair or commode

How long have you had these issues: _____

Does the pain keep you up at night: ☐ Yes ☐ No **Are you:** ☐ Improving ☐ Unchanged ☐ Worsening

Associated Signs and Symptoms (check all that apply):

☐ Catching ☐ Locking ☐ Giving Way ☐ Stiffness ☐ Weakness
☐ Numbness ☐ Tingling ☐ Bruising ☐ Swelling ☐ Other: _____

Type of Pain (check all that apply):

☐ Aching ☐ Burning ☐ Constant ☐ Diffuse ☐ Dull ☐ Infrequent
☐ Pounding ☐ Shooting ☐ Sharp ☐ Stabbing ☐ Tearing ☐ Throbbing

Aggravating Factors:

☐ Climbing Stairs ☐ Prolonged Sitting ☐ Lying Down ☐ Standing ☐ Routine Activities ☐ Weather Changes
☐ Getting Up from a Chair/Commode ☐ Recreational Activities ☐ Other: _____

What gives you relief? (check all that apply):

☐ Avoiding Activities ☐ Use of Brace ☐ Cane ☐ Crutches ☐ Walker ☐ Cold Packs
☐ Heat ☐ Exercising ☐ Joint Injections ☐ Physical Therapy ☐ OTC/RX Meds

Please list medications that give you relief: _____

Review of Symptoms in the past 6 weeks (check any that you have experienced):

☐ Sore Throat/Cough/Runny Nose ☐ Light Headed/Dizziness/Fainting ☐ Fever/Chills ☐ Headaches/Migraines
☐ Abdominal Pain/Vomiting Blood ☐ Painful Urination ☐ Blood in Stool
☐ Chest Pain/Shortness of Breath ☐ Swelling/Skin Rash ☐ Pain Level (rate 1-10): _____

PAST ILLNESSES (check all that apply):

☐ None ☐ DVT/Clots ☐ Diabetes ☐ Gastrointestinal Disease ☐ Heart Disease
☐ Cancer (localized - one area) ☐ Hepatitis ☐ HIV ☐ Seizure Disorder ☐ Kidney Disease
☐ Cancer (metastatic - spread) ☐ Lung Disease ☐ Stroke ☐ Rheumatoid Arthritis ☐ Infection in Any Joint
☐ Cholesterol ☐ Osteoarthritis ☐ Thyroid ☐ High Blood Pressure
☐ Obstructive Sleep Apnea ☐ Blood Clots ☐ Other: _____

PAST SURGERIES (list with approximate age, including all minor surgeries):

Surgery:	Date:	Physician:

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FAMILY HISTORY

FAMILY HISTORY (list the relationship of family member next to applicable health issue):

Bleeding: _____ Heart Disease: _____

Diabetes: _____ Strokes: _____

Amputations: _____ High Blood Pressure: _____

Cancer: _____ Other: _____

Tuberculosis: _____ _____

SOCIAL HISTORY:

Employer: _____ Job Description: _____

Recreational Activities/Exercise: _____

☐ Single ☐ Married ☐ Divorced ☐ Widow No. Living Children: _____ No. of pregnancies: _____

Do you smoke?: ☐ Y ☐ N Approx. amount/day: _____ Have you ever smoked?: ☐ Y ☐ N

Do you drink alcoholic beverages?: ☐ Y ☐ N Type: _____ Approx. amount: _____ ☐ Daily ☐ Weekly ☐ Monthly

Recreational Drugs: _____ Hand Dominance: ☐ Left ☐ Right

Medication List:

Current Medications	Dosage (mg's per day)

Please list any medication ALLERGIES you have:

Allergy	Type of Reaction

Are you seeing a pain management physician? ☐ Y ☐ N

If so, who is your physician? _____

Do you have a surrogate decision maker? ☐ Y ☐ N

If yes, please name: _____

Do you have a pain management contract? ☐ Y ☐ N

Preferred Pharmacy: _____ Pharmacy Phone: _____

Do you have allergies to: ☐ Iodine ☐ IV Contrast ☐ Tape ☐ X-ray Dye ☐ Latex

Do you use a CPAP or Bi PAP Machine: ☐ Y ☐ N

Notice of Medication and Pharmacy Benefit Management Consent:

Texas Orthopedic Specialists has the permission to obtain formulary information, information about other prescriptions prescribed by other providers and/or third party pharmacy benefit payors for treatment purposes.

_____ _____

Signature Date

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KNEE SCORE

Date: _____ / _____ / _____ **Name:** _____ **DOB:** _____ / _____ / _____

Please check the answer that best describes your knee pain.

How much pain do you have when you are walking?:
- ☐ None/Ignore It
- ☐ Mild or occasional
- ☐ Moderate
- ☐ Severe

How much pain does your knee cause when going up and down stairs?:
- ☐ None/Ignore It
- ☐ Mild or occasional
- ☐ Moderate
- ☐ Severe

How much pain does your knee cause when at rest?:
- ☐ None/Ignore It
- ☐ Mild or occasional
- ☐ Moderate
- ☐ Severe

How does your knee affect your walking ability?:
- ☐ I can walk unlimited distances
- ☐ I can walk 10-20 blocks
- ☐ I can walk 5-10 blocks
- ☐ I can walk 1-5 blocks
- ☐ I can walk less than one block
- ☐ I cannot walk at all

How do you go down stairs?:
- ☐ Normally, with one foot in front of the other
- ☐ I use a handrail for balance
- ☐ I use the handrail to support myself
- ☐ I cannot go down stairs

How do you go up stairs?:
- ☐ Normally, with one foot in front of the other
- ☐ I use a handrail for balance
- ☐ I use the handrail to support myself
- ☐ I cannot go up stairs

How do you get out of a chair?:
- ☐ I can get out of a chair normally
- ☐ I use the arm rest for balance
- ☐ I use the arm rest to push myself up
- ☐ I cannot get out of a chair

What type of support do you use when walking?:
- ☐ None
- ☐ Cane
- ☐ 2 Canes
- ☐ Crutches
- ☐ Walker

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TRANSLATION GUIDE

	Language	Notice
1	English	Language assistance services are available at the front desk at all of our locations.
2	Spanish Español	Servicios de asistencia lingüística están disponibles en la recepción en todas nuestras localidades.
3	Vietnamese Tiếng Việt	Dịch vụ hỗ trợ ngôn ngữ có sẵn tại quầy lễ tân ở tất cả các địa điểm của chúng tôi.
4	Chinese 中文 Zhōngwén	语言协助服务，可于我们所有位置的前台。 Yǔyán xiézhù fúwù, kě yú wǒmen suǒyǒu wèizhì de qiántái.
5	Korean 한국어 Hangug-eo	언어 지원 서비스는 우리의 모든 위치에서 프론트 데스크에서 사용할 수 있습니다. Eon-eo jiwon seobiseuneun uliui modeun wichieseo peulonteu deseukeueseo sayonghal su issseubnida.
6	Arabic العربية Alearabia	تشتمل الخدمات على خدمات المساعدة اللغوية في مكتب الاستقبال في جميع مواقعنا. Tashtamil alkhadamat ealaa khadamat almusaeadat allughawiat fi maktab alaistiqbal fi jmye mawaqieina.
7	Urdu اردو	زبان کی مدد کی خدمات ہمارے مقامات میں سے سب پر سامنے میز پر دستیاب ہیں.
8	Tagalog (Filipino)	Serbisyong tulong sa wika ay magagamit sa front desk sa lahat ng aming mga lokasyon.
9	French Français	Services d'assistance linguistique sont disponibles à la réception à tous nos sites.
10	Hindi हिंदी Hindee	भाषा सहायता सेवाओं हमारे स्थानों के सभी पर सामने मेज़ पर उपलब्ध हैं। Bhaasha sahaayata sevaon hamaare sthaanon ke sabhee par saamane mez par upalabdh hain.
11	Persian (Farsi) فارسی	خدمات کمک زبان در میز جلو در همه مکان های ما در دسترس هستند.
12	German Deutsche	Sprachassistenzdienste sind an der Rezeption an allen Standorten zur Verfügung.
13	Gujarati ગુજરાતી Gujarātī	ભાષા સહાય સેવાઓ અમારા સ્થાનોનો બધા ખાતે ફ્રન્ટ ડેસ્ક પર ઉપલબ્ધ છે. Bhāṣā sahāya sēvā'ō amārā sthānōnō badhā khātē phranṭa ḍēska para upalabdha chē.
14	Russian Русский Russkiy	Мереводческие услуги предоставляются на стойке регистрации на всех наших местах. Perevodcheskiye uslugi predostavlyayutsya na stoyke registratsii na vsekh nashikh mestakh.
15	Japanese 日本語 Nihongo	言語支援サービスは、当社のすべての場所で、フロントデスクでご利用いただけます。 Gengo shien sābisu wa, tōsha no subete no basho de, furonto desuku de go riyō itadakemasu.
16	Laotian ລາວ	ການບໍລິການການຊ່ວຍເຫຼືອພາສາແມ່ນມີຢູ່ໃນຫນ້າຫີ່ຕ້ອນຮັບຢູ່ໃນທັງຫມົດຂອງສະຖານທີ່ຂອງພວກເຮົາ.
17	Lav	Kanbolikan kansuanyheu phasa aemnmi yunai na thitonhab yunai thangmod khong sathanthi khongphuakhao.

DISCRIMINATION IS AGAINST THE LAW

Texas Orthopedic Specialists, P.L.L.C. (TOS), complies with applicable Federal civil rights laws and does not discriminate on the basis of race, national origin, age, disability, or sex. TOS does not exclude people or treat them differently because of race, national origin, age, disability, or sex.

TOS provides free aids and services to people with disabilities to communicate effectively with us, such as qualified sign language interpreters.

TOS provides free language services to people whose primary language is not English, such as information written in other languages.

Language services are available at the front desk at all of our locations.

If you believe that TOS has failed to provide these services or discriminated in another way on the basis of race, national origin, age, disability, or sex, you can file a grievance with:

- Attention: TOS's Compliance Officer
- Mailing Address: 2425 Hwy 121, Bedford, TX
- Fax: (817) 510-0059
- Email: pam@txortho.net

You can file a grievance in person or by mail, fax, or email. If you need help filing a grievance, TOS's Compliance Officer is available to help you.

You can also file a civil rights complaint with the U. S. Department of Health and Human Services, Office for Civil Rights, electronically through the Office for Civil Rights Complaint Portal, available at: **https://ocrportal.hhs.gov/portal/lobby.jsf**, or by mail or phone at:

U. S. Department of Health and Human Services
200 Independence Avenue SW
Room 509F, HHH Building
Washington, D.C. 20201
Phone 1-800-368-1019. (TDD) 1-800-537-7697.

Complaint forms are available at https://www.hhs.gov/ocr/office/file/index.html.