



Rex Farrer, D.O.  
Phone: 830-223-8150  
Fax: 830-223-8151  
summitbariatrics@gmail.com

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

### **Consent to Treat**

I hereby authorize employees and agents (including physicians, physician assistants, and nurse practitioners) of this medical office to render routine medical care to me, the patient indicated on this form and to fulfill the orders of the physicians (including consultants, associates, and assistants of the physician's choice.) I hereby authorize employees and agents of this medical office to render routine medical care to the patient indicated on this form and to fulfill the orders of the physicians (including consultants, associates, and assistants of the physician's choice.) The duration of this consent is indefinite and continues until revoked in writing. I understand that by not signing this consent, medical care will not be provided except in a case of emergency.

### **Financial Responsibility**

I hereby authorize payments from Medicare or other insurance companies of medical benefits directly to Summit Bariatric and Robotic Surgical Specialists and/or the attending physician for services rendered. I authorize any holder of medical information about me to release to the Health Care Financing Administration and its agents or insurance company any information needed to determine these benefits or the benefits payable for related services. I appoint Summit Bariatric and Robotic Surgical Specialists to act as my authorized representative in requesting an appeal from my insurance plan regarding its denial of services or denial of payment. I understand that I am financially responsible for the total charges for services rendered which may include services not covered by my insurance companies. I agree that all amounts are due upon request and are payable to Summit Bariatric and Robotic Surgical Specialists. I further understand that should by account become delinquent, I shall pay the reasonable fees or collection expenses, if any. I acknowledge that I am fully responsible for supplying correct insurance information, billing information and payment of any services not covered or approved by my insurance carrier. The duration of this authorization is indefinite and continues until revoked in writing.

### **Release of Information**

Authorization is hereby granted to release of information contained in my medical record as may be necessary for medical treatment or to process and complete my



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insurance claims. I understand that this release of information may include information regarding communicable diseases such as, Human Immunodeficiency Virus (HIV) and Acquired Immune Deficiency Syndrome (AIDS). The duration of this authorization is indefinite and continues until revoked in writing.

**Financial Policies**

I have read and received a copy of the financial policies for Summit Bariatric and Robotic Surgical Specialists.

**Acknowledgement of Receipt of the Notice of Health Information Practices for Summit Bariatric and Robotic Surgical Specialists**

The Health Insurance Portability and Accountability Act (HIPAA) is a federal government regulation designed to ensure that you are aware of your privacy rights and of how your medical information can be used by our staff in providing and arranging your medical care. Summit Bariatric and Robotic Surgical Specialists and associated physicians are committed to securing the privacy of your health information. We have made available to you a copy of the notice which provides information about how its physicians may use and/or disclose protected health information about you for treatment, payment, health care operations and as otherwise allowed by law. By signing this form, you acknowledge that you have received a copy of Summit Bariatric and Robotic Surgical Specialists Notice of Health Information Practices.

I have read all of the above and agree to these terms.

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Signature of Patient/ Legal Guardian (if patient is a minor)

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Date

## Financial Policies

Welcome to our practice and thank you for choosing Summit Bariatric and Robotic Surgical Specialists to care for you and/or your loved ones. We are committed to providing you with the highest-quality care and exceptional customer service. Because some of our patients have had questions regarding patient and insurance responsibilities for services rendered, we have developed this financial policy. Our billing office is located in Dallas and can be reached at **469-608-8544** if you need assistance.

### **INSURANCE:**

We participate in most insurance plans. Please bring your up-to-date insurance card with you to each visit. It is your responsibility to make sure that our providers are on your specific plan and in-network for you. If you are insured by a plan we accept, but do not have an up-to-date insurance card, payment in full is required until we can verify your insurance coverage. If you are not insured by a plan, we do business with, payment is required in full at each visit. Knowing your insurance benefits is your responsibility. Please contact your insurance company with any questions you may have regarding your coverage.

### **PROOF OF INSURANCE:**

We must obtain a copy of your driver's license and a current valid insurance card to provide proof of insurance. If your health insurance changes, please notify us before your next visit so we can make the appropriate changes to help you maximize your benefits. If you fail to provide us with the correct insurance information in a timely manner, you will be responsible for the balance of the claim.

### **CO-PAYMENTS, CO-INSURANCE & DEDUCTIBLES:**

All co-payments, co-insurance and deductibles must be paid at the time of service. This arrangement is part of your contract with your insurance company. Failure on our part to collect co-payments, co-insurance and deductibles from patients can be considered fraud. Please be aware that your insurance company may require a second co-pay if you address other problems during a physical exam or at the same time you have a procedure scheduled. We accept cash, check, Visa, MasterCard and Discover.



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**CLAIM SUBMISSION:**

We will submit your claims and assist you in any way we reasonably can to help get your claims paid. Your insurance company may need you to supply certain information directly to them. It is your responsibility to comply with their request. Please be aware that the balance of your claim is your responsibility whether or not your insurance company pays your claim. Your insurance benefits are a contract between you and your insurance company; we are not party to that contract. While we are pleased to be of service by filing your medical insurance for you, we are not responsible for any limitations in coverage that may be included in your plan. If your health plan denies a claim for any reason, our office cannot be responsible for that bill. It is your responsibility as the patient to pay the denied amounts in full. If your insurance company does not pay your claim in 45 days, the balance will automatically be billed to you. It is your responsibility to know if our providers are in-network for your insurance plan and what your specific insurance plan's benefits are.

**NON-COVERED SERVICES:**

Please be aware that some (and perhaps all) of the services you receive may be non-covered or not considered reasonable or necessary by Medicare or other insurance plans. As with all non-covered services, you will be expected to pay in full whatever the insurance companies do not reimburse.

**NONPAYMENT:**

If your account is over 90 days past due, you will receive a letter stating that the balance should be paid in full. Partial payments will not be accepted unless otherwise negotiated. Please be aware that if a balance remains unpaid, we may refer your account to a collection agency and you may be discharged from this practice. Should this occur, you will be notified by certified mail and will have 30 days to find a new physician.

**PHONE CALLS:**

By providing contact information, I authorize Summit Bariatric and Robotic Surgical Specialists, its assignees, and third-party collection agents to use the contact information I have provided to communicate with me and to place calls to my home/cellular/employment telephone; leave voice or text messages; and use pre-recorded/artificial/voice messages and/or auto-dialing devices in connection with any communication to me.



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**MISSED APPOINTMENTS:**

If you cannot keep your appointment, you will need to reschedule your appointment 24 hours in advance. This will allow us to schedule another patient in that time slot. If any office visit appointment is no-showed, cancelled with less than 24 hours' notice or rescheduled due to late arrival *a fee of \$35* may be billed to your account.

This charge is not payable by your insurance company. If multiple appointments are missed and we identify a problem with you keeping appointments, we will not be able to provide care for you at this office.

**FORMS:**

There is a \$25 charge for the completion of FMLA, disability and other forms. Since insurance companies do not cover this service, this charge is your responsibility. Payment is due at the time the forms or requests are dropped off at the clinic.

## Authorization to Release Medical Records

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

Date of Birth \_\_\_\_\_

I, the undersigned, authorize the release of, or request access to the information specified below from the medical record(s) of the above name patient.

**PATIENT INFORMATION IS NEEDED FOR:**

Continuing Medical Care

**INFORMATION TO BE RELEASED OR ACCESSED:** Check all that apply.

History & Physical

Consultation Report

Emergency Room Record

Operative Reports

Discharge/Death  
Summary

Face Sheet

Lab/Path Reports

X-Ray Reports/Images

Other: \_\_\_\_\_

The above information may be released (specify name or title of the individual or the name of the organization to which records are to be released and the appropriate address):

**TO:**

Summit Bariatrics and Robotics Surgical Specialists Phone 830-223-8150 / Fax 830-223-8151

\_\_\_\_\_  
(Doctor, Hospital, Attorney, Insurance Company, Self, etc.)

\_\_\_\_\_  
Phone Number

1201 S Main Street, Suite 111, Boerne, TX 78006

\_\_\_\_\_  
Address (Street, City, State and ZIP)

**FROM:**

\_\_\_\_\_  
(Doctor, Hospital, Attorney, Insurance Company, Self, etc.)

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Address (Street, City, State and ZIP)

I understand that my records are confidential and cannot be disclosed without my written authorization, except when otherwise permitted by law. Information used or disclosed pursuant to this authorization may be subject to re-disclosure by the recipient and no longer protected. I understand that the specified information to be released may include but is not limited to history, diagnoses, and/or treatment of drug or alcohol abuse, mental illness, or communicable disease, including HIV and AIDS.

I understand that I may revoke this authorization in writing at any time except to the extent that action has been taken in reliance upon the authorization.

The authorization will expire six (6) months from the date of my signature, unless I revoke the authorization prior to that time.

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

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

Patient or Legally Authorized Representative

\_\_\_\_\_  
Printed Name of Patient or Legally Authorized Representative

\_\_\_\_\_  
Relationship to Patient



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### **PATIENT PREFERENCE REGARDING COMMUNICATION OF HEALTH INFORMATION**

I hereby give my permission to Summit Bariatric and Robotic Surgical Specialists to disclose and discuss information related to my medical condition(s) to/with the following persons:

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Ph#: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Ph#: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Ph#: \_\_\_\_\_

\_\_\_\_ I do not wish to give consent for any person to have access to any information regarding my medical condition(s).

### **EMERGENCY CONTACT**

Name : \_\_\_\_\_ Relationship: \_\_\_\_\_  
Ph#: \_\_\_\_\_

This authorization shall remain in effect unless otherwise revoked in writing, I understand that requests for medical information from persons not listed above will require a specific authorization prior to disclosure of any records.

### **Signature of Patient or Legal Representative:**

\_\_\_\_\_  
Signature of Patient/ Legal Guardian (if patient is a minor)

\_\_\_\_\_  
Date



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## AUTHORIZATION TO RETRIEVE MEDICATION RECORDS

I authorize Summit Bariatric and Robotic Surgical Specialists to retrieve my complete medication profile from my insurance, pharmacy, or other third-party source. I understand this information will be kept confidential and used only to aid in my ongoing treatment.

I understand this authorization will remain in effect until/unless I revoke it in writing.

\_\_\_\_\_  
Signature of Patient (or Authorized Representative)

\_\_\_\_\_  
Date



**SUMMIT BARIATRICS**

PATIENT INFORMATION

Patient's Name (First, Middle, Last): \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Email: \_\_\_\_\_

Main Contact#: \_\_\_\_\_ Alternate#: \_\_\_\_\_ Work#: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Sex: \_\_\_Male \_\_\_Female SS#: \_\_\_\_\_

Race: \_\_\_\_\_ Ethnicity:  Hispanic  Non-Hispanic Preferred Language: \_\_\_\_\_

Marital Status: \_\_Single\_\_Married\_\_Divorced\_\_Widowed Occupation: \_\_\_\_\_

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

Patient Referred By: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_ Main Contact #: \_\_\_\_\_

Preferred Pharmacy: \_\_\_\_\_ City: \_\_\_\_\_ Phone #: \_\_\_\_\_

Intersection: \_\_\_\_\_

**INSURANCE INFORMATION**

Primary Insurance: \_\_\_\_\_ Policy/ID# \_\_\_\_\_

Name of Policy Holder: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_ Group/Acct #: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Work #: \_\_\_\_\_

Secondary Insurance: \_\_\_\_\_ Policy/ID# \_\_\_\_\_

Name of Policy Holder: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_ Group/Acct #: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Work #: \_\_\_\_\_

# MEDICAL HISTORY

**NAME:** \_\_\_\_\_ **D.O.B.** \_\_\_\_/\_\_\_\_/\_\_\_\_  
LAST FIRST M.I.

**OCCUPATION:** \_\_\_\_\_

**REASON FOR VISIT TODAY:** \_\_\_\_\_

**ALLERGIES** (Include medications, foods, xray dyes) or  **NONE KNOWN**

Name of allergen	Type of reaction	Approximate date
1		
2		
3		

**CURRENT MEDICATIONS** (Include prescription, over the counter, and herbal medications. Attach extra sheet if necessary) or  **NONE**

Name of medication	Dose (mg)	How often taken	Reason for taking medication	Physician prescribing
1				
2				
3				

**PHARMACY** (list pharmacy most frequently used for prescriptions)

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_ Fax #: \_\_\_\_\_

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

**PREVIOUS HOSPITALIZATIONS** (Include all non surgical hospitalizations. Attach extra sheet if necessary) or  **NONE**

Reasons for hospital stay	Date (approximate)	Hospital or city if known
1		
2		
3		

**SURGERIES** (Include all surgery in your lifetime. Attach extra sheet if necessary) or  **NONE**

Type of surgery	Date (approximate)	Hospital or city if known
1		
2		
3		

**OB/GYN HISTORY:** No. of Pregnancies: \_\_\_\_\_ No. of Deliveries: \_\_\_\_\_ Last Menstrual cycle: \_\_\_\_\_

**TOBACCO HISTORY**

- Are you an active cigarette smoker?  Yes  No  
 Have you ever been a cigarette smoker?  Yes  No  
 If yes, I smoked an average of \_\_\_\_\_ packs/day for \_\_\_\_\_ years. I quit in \_\_\_\_\_ (year)  
 Do you use other tobacco products?  Yes  No  
 If yes, please specify \_\_\_\_\_

**ALCOHOL AND DRUG HISTORY**

- Have you ever been diagnosed with alcoholism?  Yes  No  
 Do you currently drink alcohol regularly?  Yes, currently  Never/rarely  
 If yes, approximately how many drinks per week (beer, wine, or liquor) \_\_\_\_\_  
 Have you ever used intravenous drugs?  Yes  No

**FAMILY HISTORY**

Is there a history in your family of:	Yes	No	Affected relative(s)
Heart attack			
Diabetes			
Prostate cancer			
Kidney cancer			
Kidney stones			
Other significant disease			

**NAME:** \_\_\_\_\_ **D.O.B.** \_\_\_\_/\_\_\_\_/\_\_\_\_  
Last First M.I

Please check the complaint(s) or ailment(s) that apply to you. If you are unsure place a question mark

		Yes	No	(?)	Yes	No	(?)
<b>General</b>	Malaise	Yes	No	(?)			
	Chills						
	Fever						
Weight loss							
	Other: _____						
<b>Respiratory</b>	Cough						
	Hemoptysis						
	Shortness of breath with exertion						
Wheezing							
	Other: _____						
<b>Cardio (Heart)</b>	Chest Pain						
	Claudication						
	Difficulty Laying Flat						
Dizziness							
	Dyspnea on exertion						
	Fluid accumulation, legs						
High Blood Pressure							
	Irregular heartbeat						
	Orthopnea						
Palpitations							
	Shortness of breath						
	Swelling in hands/feet						
Other: _____							
<b>Gastrointestinal</b>	Abdominal discomfort						
	Bloody or black stools						
	Change in Bowel habits						
Decreased appetite							
	Diarrhea						
	Hematemesis						
Nausea							
	Vomiting						
	Weight loss						
Other: _____							
<b>Hematology/Oncology</b>	Pallor						
	Easy bruising						
	History of cancer						
Other: _____							
<b>Genitourinary</b>	Incontinence						
	Urinary retention						
	Painful urination						
Other: _____							
<b>Musculoskeletal</b>	Arthritis/Arthralgia						
	Back problems						
	Muscle aches						
Painful joints							
	Weakness						
	Other: _____						
<b>Skin</b>	Change in pigmentation						
	Foot ulcers						
	Rash						
Other: _____							
<b>Neurologic</b>	Balance difficulty						
	Difficulty speaking						
	Dizziness						
Fainting							
	Gait abnormality						
	Loss of use of extremity						
Stroke							
	Transient loss of vision						
	Other: _____						