

2222 Santa Monica Blvd, Suite 105 Santa Monica, CA 90404 (310) 828-8258 phone, (310) 828-5258 fax www.lotussm.com, info@lotussm.com

New Patient Welcome Letter

Dear New Patient,

Welcome! Thank you so much for your interest in our integrative medical center. At Lotus we do our best in every way possible to assure that you receive the best quality care. We want you to know that everyone on our staff is trained to:

- Make sure that our customer service always meets the highest standards.
- Make sure that any questions you have about your care are answered in a way that you can understand.
- Make sure that your phone calls are returned promptly.
- Make sure that your private health care information is kept secure and private.

Enclosed you will find several forms that we'd like you to fill out and bring with you to your first appointment. If you have any questions about these forms, please call us at 310.828.8258 and any one of us will be happy to help you.

Please understand your appointment time is reserved for you. We recognize there may be occasions when you need to cancel or reschedule an appointment. If you need to cancel or reschedule your appointment for any reason, we require a minimum of 24-hour advanced notice to avoid cancellation/rescheduling fees in the full amount of your scheduled visit. Thank you for respecting this policy.

Again, welcome to Lotus Integrative Medicine Santa Monica. You have taken an important step on the road to more vibrant health. We look forward to serving you.

Yours Sincerely,

Lotus Integrative Medicine Santa Monica

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Our Clinic Protects Your Health Information and Privacy

Dear Valued Patient,

This notice describes our office's policy for how medical information about you may be used and disclosed, how you can get access to this information, and how your privacy is being protected.

In order to maintain the level of service that you expect from our office, we may need to share limited personal medical and financial information with your insurance company, Worker's Compensation (and your employer as well in this instance), and/or with other medical practitioners that you authorize.

Safeguards in place at our office include:

- Limited access to facilities where information is stored.
- Policies and procedures for handling information.
- Requirements for third parties to contractually comply with privacy laws.
- All medical files and records (including email, regular mail, telephone, and faxes sent) are kept on permanent file.

Types of information that we gather and use:

In administering your health care, we gather and maintain information that may include non-public personal information:

- About your financial transactions with us (billing transactions).
- From your medical history, treatment notes, all test results, and any letters, faxes, emails or telephone conversations to or from other health care practitioners.
- From health care providers, insurance companies, workman's comp and your employer, and other third part administrators (*e.g.* requests for medical records, claim payment information).

In certain states, you may be able to access and correct personal information we have collected about you, (information that can identify you - *e.g.* your name, address, Social Security number, etc.).

We value our relationship, and respect your right to privacy. If you have questions about our privacy guidelines, please call us during regular business hours at 310.828.8258.

Kindly,

Lotus Integrative Medicine Santa Monica

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I acknowledge that I was provided a copy of the <u>Notice of Privacy Practices</u> and that I have read them or declined the opportunity to read them and understand the Notice of Privacy Practices. I understand that this form will be placed in my patient chart and maintained for six years.

PRACTICE'S REQUIREMENTS

- 1. The Practice:
- Is required by federal law to maintain the privacy of your PHI and to provide you
 with this Privacy Notice detailing the Practice's legal duties and privacy practices
 with respect to your PHI.
- Is required to abide by the terms of this Privacy Notice.
- Reserves the right to change the terms of this Privacy Notice and to make the new Privacy Notice provisions effective for your entire PHI that it maintains.
- Will distribute any revised Privacy Notice to you prior to implementation.
- Will not retaliate against you for filing a complaint.

Patient Name:	
Patient Signature:	
i alient Signature.	
_	
Date:	

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Consent for Purposes of Treatment, Payment and Health Care Operation

I consent to the use or disclosure of my identifiable health information by healthcare practitioners at Lotus Integrative Medicine Santa Monica for the purposes of diagnosis or providing treatment to, obtaining payment for my health care bills or to conduct health care operations. I understand that diagnosis or treatment of me at Lotus Integrative Medicine Santa Monica may be conditioned upon my consent as evidenced by my signature on this document.

I understand I have the right to request a restriction as to how my identifiable health information is used or disclosed to carry out treatment, payment or health care operations of the practice. Healthcare practitioners at Lotus Integrative Medicine Santa Monica are not required to agree to the restrictions that I may request. However, if healthcare practitioners at Lotus Integrative Medicine Santa Monica agree to a restriction that I request, the restriction is binding upon healthcare practitioners at Lotus Integrative Medicine Santa Monica.

I have the right to revoke this consent, in writing, at any time except to the extent that Lotus Integrative Medicine Santa Monica has taken action in reliance on this consent.

My *identifiable health information* means health information, including my demographic information, collected from me and created or received by my practitioner, another health care provider, a health plan, my employer or a health care clearinghouse. This identifiable health information relates to my past, present or future physical or mental health or condition and identifies me, or there is a reasonable basis to believe the information may identify me.

I understand I have the right to review Lotus Integrative Medicine Santa Monica's Notice of Privacy Practices prior to signing this document. The Notice of Privacy Practices describes the types of uses and disclosures of my identifiable health information that will occur in my treatment, payment of my bills or in the performance of health care operations of Lotus Integrative Medicine Santa Monica. The Notice of Privacy Practices is also provided at the front desk and on the organization's web site at www.lotussm.com. This Notice of Privacy Practices also describes my rights and the duties of my practitioners and Lotus Integrative Medicine Santa Monica with respect to my identifiable health information.

Lotus Integrative Medicine Santa Monica reserves the right to change information contained in the Notice of Privacy Practices at any time. I may obtain a revised Notice of Privacy Practices by accessing the website or requesting the most current notice during any office visit.

Signature of Patient or Authorized Representative	Date	
Printed Name of Patient or Authorized Representative and Relationship		_

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Informed Consent for Acupuncture Treatment

I hereby request and consent to the performance treatments and other procedures within the scope of the practice of acupuncture on me (or on the patient named below, for whom I am legally responsible) by: Brendan Armm, DAOM, LAc, Dipl OM Richard C. Hsu, LAc Kristin Rotblatt, LAc Jennifer Canfield, LAc, Dipl OM	
I understand that methods of treatment may include, but are not limited to, acupuncture, moxibustion, cupping, electrical stimulation, acupressure, shiatsu, Chinese herbal medicine, exercise prescriptions, and nutritional counseling. I also understand that the herbs may need to be prepared and the teas consumed according to the instructions provided orally and in writing. The herbs may have an unpleasant smell or taste. I agree to immediately notify a member of the clinical staff of any unanticipated or unpleasant effects associated with the consumption of the herbs. Because of the possibility of interaction of drugs with herbal formulas, I will inform the practitioner of any medications or recreational drugs I may be taking, including dietary supplements and herbs. Herbal formulas and acupuncture treatment may have effects on pregnancy. Patients must inform the practitioner of any possibility pregnancy. I hereby state my understanding that as per California Prop. 65, herbal supplements may contain chemicals known to the State of California to cause cancer, birth defects, and/or other reproductive harm.	
I have been informed that acupuncture is a generally safe method of treatment, but that it may have some side effects including bruising , numbness or tingling near the needling sites that may last a few days, and dizziness or fainting . Bruising is a common side effect of cupping. Unusual risks of acupuncture include spontaneous miscarriage nerve damage, and organ puncture, including lung puncture (pneumothorax). Infection is another possible risk, although the clinic uses sterile disposable needles and maintains a clean and safe environment. Burns and/or scarrin are a potential risk of moxibustion and cupping. I understand that while this document describes the major risks of treatment, other side effects and risk may occur. The herbs are nutritional supplements (which are from plants, animals, and mineral sources) that have been recommended are traditionally considered safe in the practice of Chinese Medicine, although some may be toxic in large doses. Some possible side effects of taking herbs are naused gas, stomachache, vomiting, diarrhea, rashes, hives, and tingling of the tongue. I further understand that results are not guaranteed and realize that a series of treatments and some long-term maintenance may be necessary dependin on the severity and chronic nature of problem. It has been made clear to me that any herbal supplement is intended only for my consumption as prescribed and directed by my qualified practitioner on staff and under no circumstances any herbal supplement intended to replace medication(s) prescribed by my medical doctor.	g g a,
I have also been informed that the clinical and administrative staff may review my patient records and lab reports, but all my records will be kept confidential and will not be released without my written consent.	
By voluntarily signing below, I acknowledge that I understand that acupuncture is NOT a substitute for the traditional medical management of my condition but rather it is considered complementary and alternative medicine. I agree to discuss the progression of my symptoms with my primary care physician should acupuncture not relieve these symptoms. I have read the above consent to treatment, have been told about the risks and benefits of acupuncture and other procedures, and have had an opportunity to ask questions. This consent form is intended to cover the entire course of treatment for my present condition and for any future condition(s) for which I may seek treatment.	Э
Patient's Name (please print):	
Patient's Signature: Date:	

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Acupuncture is a technique using small, sterile, stainless steel needles at specific points in the body, causing a positive response in order to correct various ailments. Only disposable needles are used in this clinic. The location of the application of the needles and the depth of the needle insertion is determined by the nature of the problem. I understand that the application of these needles may be accompanied by a brief painful sensation, and that there is a slight possibility of minor swelling, bleeding of the skin, hematoma, a bruise at the needling site, or fainting. Momentary euphoria or light-headedness may occur after acupuncture treatment.

Electrical stimulation of the acupuncture needles, involves using a small, battery-powered stimulator attached by wires to the acupuncture needles. A slight throbbing or tingling sensation may be felt during and for a few hours after the use of this stimulation. This modality is usually employed for pain management and other specific conditions.

Moxibustion is the application of indirect heat supplied by burning the herb *Folium Artimesiae Vulgaris*, (commonly know as mugwort) over a single acupuncture point or a group of points. This generally produces a pleasurable sensation of relaxation. The area being treated may remain red and warm for several hours after treatment. In rare incidents, a minor burn may occur at the site of moxibustion. The attending acupuncturist can readily address this.

Cupping uses round vacuum cups over a large muscular area, such as the back, to enhance blood circulation to the designated area. This method may produce a deep redness, discoloration and on rare occasions, a minor blister which may persist for up to several days. These marks may resolve on their own and are not indications of complications or injury.

Qi gong Chinese for "energy work," is a non-invasive healing modality that predates the use of acupuncture needles, and incorporates the same therapeutic basis as acupuncture.

Herbal supplements are used to facilitate the body's own restorative process. These herbs are usually taken in tea form by boiling dried plants in their natural forms. Chinese herbal teas tend to taste bitter because they are made mostly from roots and barks. On rare occasions, temporary gastric upset may occur. If any discomfort persists, and is accompanied by hives or shortness of breath, contact our attending acupuncturist immediately.

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Patient Payment Responsibility Agreement and Cancellation Policy

Dear Patient,

This letter is to keep you informed of the policies regarding your payment responsibilities. As a patient you are responsible for the total charges incurred from each visit to your practitioner. Charges are to be paid at the time of each visit. We recognize and appreciate that health care can involve major financial commitment. We aim to provide you with effective and affordable health care.

Visa, MasterCard, American Express, Checks and Cash are all acceptable forms of payment.

Please remember that you have the primary relationship with your insurance company and you are responsible for the total amount owed at the time of your visit. We will provide you with the appropriate super-bill with the appropriate codes needed for you to seek reimbursement from your insurance company. You will need to mail the super-bill provided, to your insurance company and your insurance company will reimburse you for all the amounts covered within your policy. If this concerns you, before your first appointment contact your insurance company or refer to your insurance contract agreement regarding coverage for Acupuncture and/or Alternative and Complementary medical services. Items to note are: 1) the service covered, 2) which diagnosis are covered, 3) how many visits are allowed per calendar year, 4) the amount of your deductible, 5) any limitations. If you have insurance that does not cover acupuncture and Oriental medical care, use of a Health Savings Account (HSA) or flexible spending account may cover this care. Check with your employer to determine if one of these options is available to you. Answers to these questions will help clarify treatment and financial responsibility.

All patients are required to provide a valid credit card number, including expiration date and billing zip code, in order to schedule an appointment. If you cancel/reschedule your appointment with less than 24 hours' notice, or fail to show for your appointment without notification your credit card will be charged for the cost of your office visit. This charge will not be billable to your insurance.

- Regretfully, we have been forced to institute this policy.
- Assuring that all established patients have access to their doctor when necessary is a constant challenge. When you cancel or reschedule with adequate advance notice, it is more *likely that another patient in need will be able to use your time-slot.* When you cancel or reschedule at the last minute, or fail to show for your appointment, you are depriving another patient the care they need.
- Patient visits require us to block out large time slots, making last minute cancellations and rescheduling even more problematic. We spend an inordinate amount of time and energy with each and every one of our patients because we are committed to providing the highest quality care.

Payment for all pharmacy items is due at the time of the visit. Many insurance companies do not cover herbal pharmacy items.

We bill for phone consultations. They require the same time and expertise as office visits. Billing for phone consultations is, however, at the doctor's discretion. Your doctor may choose not to bill you if the nature of the phone consultation is uncomplicated, such as taking a minute to answer a question about your treatment protocol. If any type of extended discussion ensues or if a number of questions need to be addressed, it is likely your doctor will bill for the phone consultation.

By signing this payment agreement and cancellation policy, you are indicating that you understand and agree to the terms of service explained above. You are also indicating that you have given your permission to us to charge your credit card if any of the above stipulations apply to you.

Name of Patient or Legal Guardian:						
Signature:					Date:	
Type of card:	Visa	MC	AMEX	Card Number:		
Expiration:			Security	y Code:	Billing Zip Code:	

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PATIENT INFORMATION

Last Name:	First Name:					
Parent/Guardian of patient? Name and Relationship to	Patient:					
Today's Date:/ Male Fen	nale Other					
Date of Birth:/ Status: Single Married Divorced Widowed Other						
Physical Address: Apt	City:State:Zip:					
Billing Address: Apt	City: State: Zip:					
Home Phone () Work: ()	Cell/Alternate.: ()					
Fax: ()	r information is confidential					
you	r information is confidential					
Employer:	Occupation:					
Employer Address:	Telephone: ()					
INSURANCE INFORMATION Company Name: Policy H	łolder's Name:					
EMERGENCY CONTACT Name: Relation	onship to you					
Address: City:						
Daytime Phone: () Evening: () _						
REFERRED BY (specify)						
□ NAME						
INTERNET: Search Engine / Browser (ex Google, Doctible, Yelp,et	c.) RCVD EMAIL, Re:					
	WORKSHOP, Title:					
FLYER, From:						
Has any other family member already been a patient at the ce						

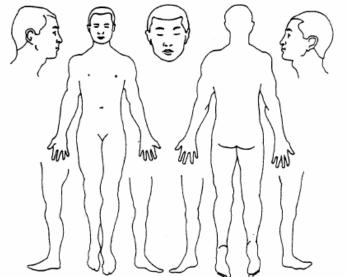
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Health History Questionnaire

SUCCESSFUL HEALTH AND PREVENTATIVE MEDICINE ARE ONLY POSSIBLE WHEN THE DOCTOR HAS A COMPLETE UNDERSTANDING OF THE PATIENT PHYSICALLY, MENTALLY AND EMOTIONALLY. PLEASE COMPLETE THIS QUESTIONNAIRE AS THOROUGHLY AS POSSIBLE. PRINT ALL INFORMATION AND MARK ANYTHING YOU DON'T UNDERSTAND WITH A QUESTION MARK.

ANYTHING YOU DON'T UNDERSTAND WITH A QUESTION MARK.
CHIEF COMPLAINT / HISTORY OF PRESENT ILLNESS
Are you currently receiving healthcare? If yes, where and from whom?
If no, when and where did you last receive medical or health treatment?
Either way, what was the reason?
GOALS
What would you most like to achieve through your work at Lotus Integrative Medicine Santa Monica?
1
2.
3.
4.
5
MAJOR SYMPTOMS
Please list in order of importance what symptoms are of concern to you. most concerning to least, along with the duration of the symptom)
1
2
3
4
Use the following illustration to indicate painful or distressed areas: X = mild

	^		<i>,</i> ,,,	moderate	7070	50.51
Circle	qua	lity of p	oain o	r distress:		
	acł	пе				
	bui	rning				
	nuı	mbness	;			
	pin	s & nee	edles			
	sta	bbing				
	oth	or:				



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GENERAL			, , ,
Height:		Weight 1 yr a	go:
Max Weight:			
When during the day is you	ur energy the best?	The worst?	
ALLERGIES			
		n foods, medications, herbs/supns, insect stings, etc., and indications. Effect:	oplements, dusts/environment/molds, ate how each affects you:
CURRENT MEDICATIONS	S AND NUTRITIONAL S	SUPPLEMENTS prescription a	and over the counter medications
include vitamins, herbal	supplements, laxatives yroid medications, sleep	, cortisone, pain relievers, appe	tite suppressant, antacids, replacement therapy, birth control
	Dosage:		Dosage:
	Dosage:		Dosage:
Please list any hospitalizat			
Do you have any known co	ontagious diseases at th	is time? Y N If yes, wha	t?
Mental /Emotional Treat	ed for emotional probler concentration Memory	-	s Anxiety Considered/Attempted heaviness, sluggishness or fogginess
Endocrine Hypothyroid Hunger Fatigue Season		ce Hypoglycemia Diabetes	Excessive thirst Excessive
Immune Last tetanus bo Chronic Fatigue Syndrome		Vaccination Chronically swollen glands	s Reactions to vaccinations Slow wound healing
Neurological Seizures Vertigo or dizziness Loss	•	akness Numbness or tingling	Loss of memory Easily stressed
Musculoskeletal Joint p Sciatica Prolapsed organ Low back pain			Muscle spasms or cramps s in body Sore, cold or weak knees
<u>Vascular</u> Easy bleeding Thrombophlebitis Swolle	•	Deep leg pain Cold hands/fee ss of hands and feet	t Varicose Veins
Skin Rashes Eczema/l	Hives Acne/Boils Co	olor change Perpetual hair loss	s Night sweats Lumps
<u>Head</u> Headaches Head	d injury Migraines Ja	aw/TMJ problems	

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Eyes/Ears Spots in eyes Cataracts Impaired vision Glasses or contacts Blurriness Eye pain/strain Color blindness Tearing/dryness Double vision Glaucoma Blood shot/dry eyes Ringing in ears Deafness Earache Nose and Sinus Frequent colds Nose bleeds Stuffiness Hay fever Sinus Problems Loss of smell Mouth and Throat Frequent sore throat Copious saliva Teeth grinding Sore tongue/Lips Gum problems Hoarseness Dental cavities Jaw clicks Neck Lumps Swollen glands Goiter Pain/Stiffness Respiratory Cough Sputum Spitting up blood Wheezing Asthma Bronchitis Pneumonia Pleurisy Emphysema Difficulty breathing Pain on breathing Shortness of breath Shortness of breathing at night Shortness of breathing lying down Cardiovascular Heart disease Angina High blood pressure Low blood pressure Murmurs Blood clots Fainting Phlebitis Rheumatic fever Palpations/Fluttering Swelling in ankles Chest pains Gastrointestinal # of Bowel Movements? _____ per day or week (circle) Is this a change? _____ Are they well-formed, loose, hard, thin, in pieces, incomplete, sticky, etc.? _____ The color is normal, dark, black, light, green, red, etc.? Pain/Cramps Belching/Gas Constipation Diarrhea Alternating Const./Diarrhea Black stools Gall bladder disease Jaundice Ulcer Liver disease Hemorrhoids Trouble swallowing Heartburn Bad breath Mouth sores/canker sores Bleeding, swollen, painful gums Change in thirst Change in appetite Nausea Vomiting Vomiting blood Blood in stool Bitter taste in the mouth _____Amount is: _____ Odor Pain Difficulty Urgency Burning Increased frequency Frequency at night Inability to hold urine Frequent infections Kidney stones Male Reproduction Are you sexually active? Birth control? What type? Low libido Hernias Testicular masses Testicular pain Prostate disease Breast lumps Venereal disease Discharge/sores Chlamydia Gonorrhea Impotence/ Erectile dysfunction Condyloma Premature ejaculation Herpes Syphilis Female Reproduction Are you sexually active?_____Birth control?_____What type?____ Age of 1st menses? _____ Are cycles regular? _____ Length of cycle? _____ Date of last menses? _____ Average number of days of flow? _____ Date of last Pap?______Date of last Mammogram? _____ PMS symptoms?_____ The flow is (circle): Normal heavy light The color is (circle): Fresh red Dark Purple Light brown Brown Number of pregnancies? _____ # of live births? _____ # of miscarriages? _____ # of abortions?_____ Are you pregnant now?

Age of menopause (if applicable)

Do you do breast exams?_____ Low libido Bleeding between cycles Painful menses Clotting Heavy/Excessive flow Discharge Breast tenderness/lumps Nipple discharge Endometriosis Hot flashes Ovarian cysts Difficulty conceiving Cervical Dysplasia Menopausal Symptoms Abnormal Pap Pain during intercourse Sexual difficulties Chlamydia Gonorrhea Herpes Condyloma Syphilis

Glaucoma Tuberculosis Cause of death 2222 Santa Monica Blvd, Suite 105 Santa Monica, CA 90404 (310) 828-8258 phone, (310) 828-5258 fax www.lotussm.com, info@lotussm.com

PS	CHO	D-SOCIAL HISTORY							
		SE/ACTIVITY ny hours of exercise/ac	tivity do you	get per wee	ek?	What type:	s of exercise	do vou do?	
Yes	<u>No</u>	(circle)							
Υ	N	Do you smoke?		If yes, ho	w much?		How long?		
Υ	N	Are you a previous s	moker?	If yes, wh	nen did you qu	uit?			
Υ	N	Do you drink alcoholi	ic beverages'	? If yes, ho	w much?		How long?		
Υ	N	Do you use illicit/illeg	al drugs?	If yes, wl	nat type?		How often?		
Υ	N	Do you live alone?		If no, who	o else lives wi	th you?			
Υ	N	Have you traveled at	oroad in the p	ast year?	If yes, where	?			
DIE	<u>T</u>								
Plea	ase d	lescribe your typical foo	od intake:						
		Morning		Afte	rnoon			Evening	
									
Foo	ds y	ou crave:			_ Foods you	dislike:			
Do	you e	eat refined sugar/artificia	al sweetener	s?	_ Do you add	l salt?			
Hov	v mu	ch coffee do you drink e	each week? _		Tea per we	eek?	Soft drin	ks per week	?
FAN	/ILY	HISTORY		0.1.1.				D / 1014	D / 105
Age	if) ج	living)							
_	•	(G = good/ P = poor)							
		death							
Che	ck t	hose applicable							
		•		 .					
	bete								
		Disease lood Pressure		-					
_	oke	1000 1 1633016							
	leps	SV							
•	•	Illness							
Ast	hma	a/Hay fever/Hives							
	emia								
Kid	nev	Disease							

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SOCIAL HISTORY

SLEEP		
Hours of sleep per night? Do yo		
What hours do you go to sleep?		
Do you have difficulty falling asleep? Diff	ficulty staying asleep?	Do you remember your dreams?
ENERGY On a scale of 1-10 (10 = highest), please rank yo	ou energy?	
INTERESTS Main interests and hobbies?		
Do you have a religious or spiritual practice?	What?	
Level of joy with your work?	Level of stress with your	r job?
Do you take vacations? Spend time out	side? Have a s	upportive relationship?
Watch television? hours/day?	r	nours/day?
How does your condition affect you?		
What do you think is happening? Why?		
What do you feel needs to happen for you to get		
What do you enjoy most about your life?		
How much effort are you willing to make at this ti	me to improve your health	? []Minimal []Some []Complete
Thank you for completing these forms. Pleas are currently taking. If you have any question		
Warmly,		
Lotus Integrative Medicine Santa Monica		