



*Welcome to our office! In an effort to provide the best service possible, we ask you to fill out this form as completely as possible. You can either print out this form or submit it online. Thank you for your cooperation!*

### Patient Information

Last Name \_\_\_\_\_ First name \_\_\_\_\_ Middle \_\_\_\_\_  
I prefer to be called (Nickname) \_\_\_\_\_ Gender ☐ Male ☐ Female  
Birth date (MM-DD-YYYY) \_\_\_\_\_ Social Security # \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Cell/Other Phone \_\_\_\_\_  
Email \_\_\_\_\_ Other family members seen by us \_\_\_\_\_  
Whom may we thank for referring you to our office? \_\_\_\_\_

### Responsible Party Information

Responsible Party Last Name \_\_\_\_\_ First Name \_\_\_\_\_  
Residential Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
How long at this address \_\_\_\_\_ Home Ph. \_\_\_\_\_ Work Ph. \_\_\_\_\_ Cell Ph. \_\_\_\_\_  
Previous Address (if less than 3 yrs) Street \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Birth date (MM-DD-YYYY) \_\_\_\_\_ Social Security # \_\_\_\_\_ Email \_\_\_\_\_  
Relationship to Patient \_\_\_\_\_ Employer \_\_\_\_\_  
Occupation \_\_\_\_\_ Number of years employed with above employer \_\_\_\_\_  
  
Spouse's Last Name \_\_\_\_\_ First Name \_\_\_\_\_  
Address (if different) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Cell/Other Phone \_\_\_\_\_  
Birth date (MM-DD-YYYY) \_\_\_\_\_ Social Security # \_\_\_\_\_ Email \_\_\_\_\_  
Relationship to Patient \_\_\_\_\_ Employer \_\_\_\_\_  
Occupation \_\_\_\_\_ Number of years employed with above employer \_\_\_\_\_

### Emergency Information

Who should we notify in case of emergency \_\_\_\_\_ Phone \_\_\_\_\_  
Relationship to patient \_\_\_\_\_

## Dental Insurance Information

Primary Policy Holder's Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
Insurance Company \_\_\_\_\_ Group # \_\_\_\_\_ Union Local # \_\_\_\_\_  
Insurance Co. Address \_\_\_\_\_ Insurance Co. Phone \_\_\_\_\_  
Policy Holder's Employer \_\_\_\_\_  
Do you have dual coverage? ☐ Yes ☐ No (If yes, please fill out the Secondary Policy Information below)

Secondary Policy Holder's Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
Insurance Company \_\_\_\_\_ Group # \_\_\_\_\_ Union Local # \_\_\_\_\_  
Insurance Co. Address \_\_\_\_\_ Insurance Co. Phone \_\_\_\_\_  
Policy Holder's Employer \_\_\_\_\_

## Medical History

Physician \_\_\_\_\_ Phone \_\_\_\_\_ Date of Last Visit \_\_\_\_\_  
Address \_\_\_\_\_

Please fill out the following fields and elaborate as necessary.

- ☐ Yes ☐ No Is there a current medical problem? \_\_\_\_\_  
☐ Yes ☐ No Is the patient taking any pills, medications, or drugs? \_\_\_\_\_  
☐ Yes ☐ No Is the patient allergic to any medications or anesthetics? \_\_\_\_\_  
☐ Yes ☐ No Is the patient allergic to latex? \_\_\_\_\_  
☐ Yes ☐ No Is the patient allergic to anything else? \_\_\_\_\_  
☐ Yes ☐ No Has the patient had a serious illness? \_\_\_\_\_  
☐ Yes ☐ No Has the patient had any surgery or been hospitalized? \_\_\_\_\_  
☐ Yes ☐ No Has the patient ever had an injury to the head, face, or mouth? \_\_\_\_\_  
☐ Yes ☐ No Has patient's tonsils and/or adenoids been removed? \_\_\_\_\_  
☐ Yes ☐ No Does the patient snore? \_\_\_\_\_  
☐ Yes ☐ No Is patient sleepy during the day? \_\_\_\_\_

Please check any of the following conditions the patient has had or currently has

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Abnormal/Prolonged Bleeding | <input type="checkbox"/> Pneumonia                | <input type="checkbox"/> Psychiatric Care               |
| <input type="checkbox"/> Anemia/Blood Disease        | <input type="checkbox"/> Nervousness / Anxiety    | <input type="checkbox"/> Immune System Problems         |
| <input type="checkbox"/> Arthritis                   | <input type="checkbox"/> Radiation / Chemotherapy | <input type="checkbox"/> High Blood Pressure            |
| <input type="checkbox"/> Asthma                      | <input type="checkbox"/> Rheumatic Fever          | <input type="checkbox"/> Sinus Trouble                  |
| <input type="checkbox"/> Cancer                      | <input type="checkbox"/> Tuberculosis             | <input type="checkbox"/> Fainting                       |
| <input type="checkbox"/> Congenital Heart Defect     | <input type="checkbox"/> Tumor or other growths   | <input type="checkbox"/> Bone Disorders                 |
| <input type="checkbox"/> Diabetes                    | <input type="checkbox"/> Stomach Ulcers           | <input type="checkbox"/> Thyroid / Parathyroid Problems |
| <input type="checkbox"/> Dizziness                   | <input type="checkbox"/> Tonsillitis              | <input type="checkbox"/> Endocrine Problems             |
| <input type="checkbox"/> Epilepsy / Seizures         | <input type="checkbox"/> Herpes                   | <input type="checkbox"/> Frequent Headaches             |
| <input type="checkbox"/> Heart Problems              | <input type="checkbox"/> HIV / AIDS               | <input type="checkbox"/> Hepatitis/Liver Problems       |
| <input type="checkbox"/> Heart Murmur                | <input type="checkbox"/> Kidney Problems          | <input type="checkbox"/> Gastrointestinal Disorders     |

Are there any medical conditions we have not discussed that you feel we should be aware of? \_\_\_\_\_  
\_\_\_\_\_

## Dental History

Who is the patient's dentist? \_\_\_\_\_

When was the patient last seen by a dentist? \_\_\_\_\_

What was the reason for the visit? \_\_\_\_\_

Has any member of the family had orthodontic treatment? \_\_\_\_\_

What are your main concerns about your teeth and what would you like orthodontics to accomplish? \_\_\_\_\_

\_\_\_\_\_

Has the patient:

- |                           |                          |   |
|---------------------------|--------------------------|---|
| <input type="radio"/> Yes | <input type="radio"/> No | Had trouble associated with dental treatment? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Had a previous orthodontic treatment or consultation?<br>With whom? _____ When _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Had any teeth extracted? Why? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Ever injured or broken any teeth? When/what happened? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Ever injured the head or face? When/what happened? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Had any problems with eating, chewing, or swallowing? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Ever sucked <input type="checkbox"/> thumb <input type="checkbox"/> fingers <input type="checkbox"/> bit nails? Until what age? _____ |
| <input type="radio"/> Yes | <input type="radio"/> No | Dental or facial pain? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Jaw joints make a noise when opening/closing? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Jaw joints cause pain? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Teeth or jaws feel uncomfortable when you awake in the morning? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Clench or grind teeth? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Tension headaches? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Speech problems? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Normally breathe with lips parted? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Swellings or growths in mouth or face? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Had/has periodontal (gum) disease? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Any negative or resistant feelings about orthodontic treatment? _____   |
| <input type="radio"/> Yes | <input type="radio"/> No | Dissatisfied with appearance of the teeth? _____  |
| <input type="radio"/> Yes | <input type="radio"/> No | Specifically resistant to: <input type="checkbox"/> Braces <input type="checkbox"/> Headgear <input type="checkbox"/> Retainers       |
| <input type="radio"/> Yes | <input type="radio"/> No | Is there any other information we should know? _____  |

I understand that the information that I have provided is correct to the best of my knowledge, that it will be held in the strictest of confidence, and it is my responsibility to inform this office of any changes in my medical, dental, or insurance status. I understand that I am responsible for payment of services rendered and also responsible for paying any co-payment and deductibles that my insurance does not cover. I hereby authorize the release of any information related to insurance claims. I consent to the examination by the doctor and I authorize payment of any insurance benefits to the office. I understand that where appropriate, credit bureau reports may be obtained for the purpose of considering payment options.

Responsible Party Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse Signature (required if dual coverage) \_\_\_\_\_ Date \_\_\_\_\_