



PEDIATRIC NEW PATIENT PAPERWORK

PATIENT INFORMATION

Child's Legal Name: _____ Date of Birth: _____
Age: _____ Sex at Birth: _____ Identified Gender: _____ Preferred Pronouns: _____

GUARDIAN INFORMATION

Legal Guardian: _____	Legal Guardian: _____
Date of Birth: _____	Date of Birth: _____
Home Phone: _____	Home Phone: _____
Cell Phone: _____	Cell Phone: _____
Email: _____	Email: _____
Mailing Address: _____	Mailing Address: _____
City, State, Zip: _____	City, State, Zip: _____
Occupation/Employer: _____	Occupation/Employer: _____

Who is your child's primary care physician/pediatrician? _____
Which physician/doctor referred you to our office? _____
Who does the child reside with? _____
Who has custody of the child? _____
What is the primary language(s) spoken at home? _____

EMERGENCY CONTACT

Name/Relationship: _____ Phone Number: _____

INSURANCE INFORMATION

Primary Insurance: _____	Secondary Insurance: _____
Policy Number: _____	Policy Number: _____
Group Number: _____	Group Number: _____
Policy Holder's Name: _____	Policy Holder's Name: _____
Policy Holder's Date of Birth: _____	Policy Holder's Date of Birth: _____



INSURANCE COVERAGE AND POLICY ACKNOWLEDGEMENT

Initial the following statements:

I DO NOT have any other insurance coverage from any other source other than the above-mentioned.

I acknowledge that I have viewed, read, and understand the HIPAA Privacy Policy and COVID-19 Policies and Procedures.

AUTHORIZATION AND CONSENT FOR EVALUATION, TREATMENT, AND OPERATIONS

Initial the following statements:

I give Sandia Sunrise Therapy permission to evaluate and treat my child. I understand there will be written, oral, and electronic communication between care providers/physicians, insurance companies, and Sandia Sunrise Therapy staff.

I understand that state representatives, for insurance certification or licensing and quality assurance, may review my child's records. I understand that all practices of confidentiality will be followed with the information gathered.

PHOTO PERMISSION

Initial the following *OPTIONAL* statements:

I give permission for photos/videos of my child to be used for treatment, education, and documentation.

I give permission for photos/videos of my child to be used for advertisement, website, and social media.

TECHNOLOGY AND ELECTRONIC COMMUNICATION PERMISSION

Initial the following *OPTIONAL* statements:

EMAIL: I give Sandia Sunrise Therapy permission to correspond with my child's caregivers via e-mail regarding treatment, scheduling, documentation, and home programming. I understand that Sandia Sunrise Therapy's e-mail is encrypted internally; however, once an email is sent externally, correspondence may potentially be intercepted by a third party.

TEXT/VOICE MAIL: I give Sandia Sunrise Therapy permission to correspond with my child's caregivers via text/voice messages regarding treatment and scheduling. I understand that communication via text message is not secure and may potentially be intercepted by a third party. I understand that standard data and text messaging rates will apply to any messages received from Sandia Sunrise Therapy. I agree not to hold Sandia Sunrise Therapy liable for any electronic messaging charges or fees generated by this service.



STATEMENT OF AGREEMENT

EMERGENCY MEDICAL RELEASE

In the event that medical attention is required for your child while on the premises of Sandia Sunrise Therapy, you authorize Sandia Sunrise Therapy to implement treatment.

MEDICAID & PRIVATE INSURANCE CO-PAYMENTS, DEDUCTIBLES, AND NON-COVERED SERVICE

Insurance companies may have limits on the amount of therapy services covered. Once you have exhausted this limit, you are responsible for the payment of these services. While this practice will not discontinue services for financial hardships, it is expected that patients pay at the time of service and/or set up payment arrangements. If arrangements are needed, contact our business office.

Not all services are a covered benefit, some insurance companies arbitrarily select certain services they will not cover. These particular services, if any, are your responsibility. ***Insurance companies may indicate services were not medically necessary and claim that, because Sandia Sunrise Therapy is a preferred provider, you do not have to pay the balance. This is NOT the case, and you will be billed for services rendered.*** This office cannot accept responsibility for negotiating settlements on disputed claims. You are responsible for checking with your insurance company regarding limits of coverage, fees, and charges.

Should your insurance coverage change, our office must be notified within 30 days of the effective date. If you fail to provide this information, we will no longer bill insurance, and future balances will be your responsibility. Payment is due at the time of service in full.

FINANCIAL AGREEMENT

You authorize payment of medical benefits billed to health insurance by Sandia Sunrise Therapy. You authorize treatment for the forenamed patient and accept responsibility for payment for any service(s) provided that is not covered by health insurance. You agree to pay all copayments, coinsurance, and deductibles at the time services are rendered. You accept responsibility for fees that exceed the payment made by health insurance. If Sandia Sunrise Therapy does not participate with your child's health insurance, you agree to pay all fees and charges for such treatment. You authorize Sandia Sunrise Therapy to use and/or disclose health information for your child, which can reasonably be used to identify the insured, to carry out treatment, payment, and healthcare operations. You understand that while this consent is voluntary, if you refuse to sign this consent, Sandia Sunrise Therapy can refuse treatment. You understand this authorization can only be revoked in writing. If you revoke consent, such revocation will not affect any actions that Sandia Sunrise Therapy took before receiving your revocation. Any returned checks will be subject to a non-sufficient funds fee of \$25.00, which will be due at the next visit. Accounts that are past due will incur a finance charge at the rate of 18% annually.



COLLECTION OF PAST DUE ACCOUNTS

We communicate with you to resolve past due accounts in all cases. If we cannot reach you by phone following the return of undeliverable mail, or if your payment agreement cannot be made or paid as agreed, we are forced to use the services of a professional collection agency. Once an account is placed with a collection agency, we cannot take the account back. Let us know when or if your contact information changes so that we can always reach you, if needed, to discuss past due accounts.

ATTENDANCE POLICY

Discuss schedule changes with the business office. We understand that sometimes changes are necessary because of illness, vacations, etc. If you need to cancel or reschedule a scheduled appointment, call our office within 24 hours of your scheduled appointment. For Monday morning appointments, notify our office by Friday at noon. If you are running more than 20 minutes late to your appointment, call our office to reschedule.

If a therapy session is not canceled before your scheduled appointment or is missed without any notice, this missed appointment is counted as a no-show and will result in a \$35.00 no-show fee. **Insurance companies DO NOT reimburse for no-show fees; this is your responsibility.** Two consecutive no-shows or three no-shows within three months will result in your child being taken off the schedule. We require an 80% attendance rate and appointment punctuality, which will be monitored monthly. As a courtesy, we will notify you if your percentage falls below 80%. Patients may be removed from the schedule if efforts are not made to maintain this rate and for frequent tardiness.

Let us know if you are experiencing a problem with your current schedule. We are happy to work out scheduling conflicts with you. If therapy needs to be canceled for more than three consecutive weeks, we will place your child back on the waiting list and will resume services as scheduling permits. Exceptions may be made for medical procedures that require a longer recovery period, but you must notify the business office in advance for approval to remain on the schedule. To return to therapy following a medical procedure, a medical clearance will be required from your doctor.

TELEHEALTH CONSENT

Telehealth is a form of therapy services provided via internet technology, which can include consultation, treatment, telephone conversations, and/or education using interactive audio or video. Telehealth has the same intention as in-person treatment sessions; however, it may be experienced somewhat differently than face-to-face treatment sessions. Risks in participating in telehealth include, but are not limited to, transmission of information being disrupted by technical failures or interrupted by unauthorized persons and/or electronic storage of medical information accessed by unauthorized persons. The laws that protect the confidentiality of medical information also apply to telehealth. Sandia Sunrise Therapy will use a HIPPA-compliant platform to provide telehealth, and all practices of confidentiality will be followed. Telehealth is not a covered benefit by all insurance companies, and you will be responsible for payment if services are not covered.



MANDATED REPORTING

As licensed healthcare providers, our therapists are mandated reporters under state law. This means we are legally required to report any suspected abuse, neglect, or exploitation of a child to the appropriate child protective services agency. Our responsibility is to ensure the safety and well-being of every child we serve. If a report is necessary, it will be made in good faith and with the intent of protecting your child. We will do our best to maintain open communication with you while also complying with the law.

TERMINATION OF PATIENT RELATIONSHIP

Sandia Sunrise Therapy has the right to terminate a patient relationship and discontinue your child's services if the relationship is inappropriate or unsuccessful, and all efforts to resolve the matter have been exhausted. Circumstances that will result in the termination of a patient relationship include, but are not limited to, nonadherence, noncompliance, inappropriate behavior or violence, inappropriate or criminal conduct, and nonpayment. Sandia Sunrise Therapy will provide a written notice with reason for termination and the effective date. No retaliation may be taken against the therapist or Sandia Sunrise Therapy following the termination.

THERAPEUTIC ITEMS FOR HOME USE – ACKNOWLEDGEMENT AND RELEASE

I understand that Sandia Sunrise Therapy may recommend or, in limited circumstances, provide therapeutic items for home use to support my child's treatment. These items may include, but are not limited to, Theraband, therapy putty, sensory items, fidgets, 3D prints, Fabrifoam, Kinesio Tape, adaptive switches, or other therapeutic tools. I understand that these items are not medical devices and are provided or recommended as supportive tools only. Sandia Sunrise Therapy does not warrant that any item is fit for a particular purpose or appropriate for every individual child. I acknowledge that I am solely responsible for supervising my child's use of any therapeutic items at home. I understand that my child's therapist may provide general guidance on intended use during therapy sessions, and that it is my responsibility to ensure these items are used safely, appropriately, and in accordance with my child's abilities and needs. I release, indemnify, and hold harmless Sandia Sunrise Therapy, including its owners, employees, and agents, from any and all claims, liabilities, or damages arising out of or related to the possession or use of therapeutic items outside of therapy sessions, except in cases of gross negligence or willful misconduct. I understand that I may discontinue use of any item at any time and may contact my child's therapist with questions or concerns regarding safe use.

I have read, understand, and agree to the above statement of agreement and intend to comply with it to the best of my ability. I understand that if I fail to follow the terms of this agreement, services could be discontinued.

Guardian's Signature: _____

Date: _____

MEDICAL AND DEVELOPMENTAL HISTORY

Allergies:	Medication (Name/Dosage):
Has your child been diagnosed by a doctor or psychologist with a developmental, behavioral disorder, or other medical diagnosis?	
Has anyone (teacher, pediatrician, friend, relative) suggested your child be evaluated for a specific diagnosis? If yes, what diagnosis?	

Difficulties with Pregnancy:			Difficulties with Labor:		
Bedrest	Gestational Diabetes	Pre-Eclampsia			
Other: _____					
Length of Pregnancy: wks	Delivery: Vaginal Caesarian	Length of Labor: hrs	Labor was: Normal Induced		
Birth Weight: lbs oz	Duration of Hospital Stay Post Birth:			NICU Stay: Yes No	
Concerns Post Birth:					
Jaundice	Colic	Reflux	Feeding	Head Shape/Tilt	Respiratory
Other: _____					

Indicate if your child has ever experienced the following and specify if yes

Condition	Yes or No	Specify		
Hospitalized	Yes No			
Seizures	Yes No	Date of First Seizure:	Frequency:	Triggers:
Respiratory/ Lung Difficulties	Yes No			
Cardiac Problems	Yes No			
Hip Dysplasia	Yes No			
Surgery	Yes No			
Sleep Difficulties	Yes No			
Poor Weight Gain	Yes No			
Hearing Problems/ Ear Infections	Yes No		Tubes? Yes No	Date of Last Screen:
Vision Problems	Yes No			Date of Last Screen:
Dizziness/Headaches	Yes No			
Imaging (X-Ray, MRI, CT scan)	Yes No			
EEG	Yes No			
Genetic Screen	Yes No			



List current providers that your child has outside of Sandia Sunrise Therapy

Service	Practice Name	Provider Name	Frequency Seen
Occupational Therapist			
Speech Therapist			
Physical Therapist			
Counselor/Psychologist			
Psychiatrist			
Early Intervention			
Caseworkers/ Case Coordinator			
Dietitian/Nutritionist			
Specialty Doctor			
Other			

Indicate whether your child performed the following skills and indicate approximate age if known

Gross Motor Skill	Age Skill Achieved	Comments
Rolling		
Sitting		



Gross Motor Skill	Age Skill Achieved	Comments
Crawling		
Standing		
Walking		

Circle answers that apply and/or write in answers

Name of Daycare/School:	Grade Level:
Services in School: Occupational Therapy Physical Therapy Speech Therapy Social Work/Counseling	
Other: _____	
Is your child involved in any structured after school/weekend programs (i.e., gymnastics, swimming, soccer, YMCA)? _____ _____	
Is there anything else you would like to share about your child's medical and developmental history that was not listed above? _____ _____	