

## PATIENT INFORMATION – ADULT

Patient's Name \_\_\_\_\_ Title  Mrs.  Ms.  Mr.  Dr.  
Date of Birth \_\_\_\_\_ Age \_\_\_\_\_ Sex  Male  Female Preferred Name \_\_\_\_\_  
How did you hear about our office? \_\_\_\_\_  
Relatives or friends previously treated here? \_\_\_\_\_  
Address \_\_\_\_\_  
Cell Phone Number \_\_\_\_\_ Email \_\_\_\_\_  
Social Security # \_\_\_\_\_  
I am:  Married  Divorced  Separated  Single  Widowed **Please fill the information below for Spouse/Other:**  
Spouse / Other Name \_\_\_\_\_ Relationship to Patient \_\_\_\_\_  
Date of Birth \_\_\_\_\_ Social Security # \_\_\_\_\_  
If anyone else besides you is Financially Responsible for your treatment, Name? \_\_\_\_\_

### DENTAL INSURANCE INFORMATION

Dental Insurance Coverage?  Yes  No Orthodontic Insurance Coverage?  Yes  No  Unsure  
Insured's Name \_\_\_\_\_ Insured's Date of Birth \_\_\_\_\_  
Insured's Social Security # \_\_\_\_\_ Insured's ID # \_\_\_\_\_  
Insurance Company \_\_\_\_\_ Group # \_\_\_\_\_  
Employer \_\_\_\_\_ Occupation \_\_\_\_\_  
Do you have dual coverage?  Yes  No **If yes, please fill the information below for the second insurance:**  
Insured's Name \_\_\_\_\_ Insured's Date of Birth \_\_\_\_\_  
Insured's Social Security # \_\_\_\_\_ Insured's ID # \_\_\_\_\_  
Insurance Company \_\_\_\_\_ Group # \_\_\_\_\_  
Employer \_\_\_\_\_ Occupation \_\_\_\_\_

### EMERGENCY CONTACT INFORMATION

Emergency Contact Name \_\_\_\_\_ Relationship to Patient \_\_\_\_\_  
Address \_\_\_\_\_  
Cell Phone \_\_\_\_\_ Email \_\_\_\_\_

Orthodontics is a service that provides an improvement in the appearance of the teeth (esthetics), in the general function of the teeth, and in general dental health. Teeth, gums, and jaws are an intricate part of the body and may or may not respond well to treatment. If good oral hygiene is not practiced, problems such as tooth decay, enlarged and inflamed gums, and permanent marks on the teeth can result. Different amounts of risk exist in any medical or dental procedure, for example in orthodontics symptoms such as joint discomfort and root shortening are observed in a small percentage of cases. Whether or not there is any orthodontic treatment, teeth still may change and shift throughout our lifetime, and there can be some movement of teeth and some changes after treatment is over.

I have read and understand the above paragraph. I also understand that my diagnostic records may be used for educational and promotional purposes. I have read and understand the questions on this form and have accurately and truthfully answered all the above questions. I will not hold the doctor or any other staff member responsible for any errors or omissions that I have made in completing this form. I agree to inform this office of any changes in the patient's medical or dental history. In addition, I authorize the doctor to perform a complete orthodontic exam and take any diagnostic records (photos/x-rays) if necessary.

\_\_\_\_\_  
**Signature**\_\_\_\_\_  
**Print Name**\_\_\_\_\_  
**Date**

**MEDICAL HISTORY**

Physician Name: \_\_\_\_\_ Date of Last Visit: \_\_\_\_\_

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

**Please mark (Yes) or (No) for the following questions about the Patient (If Yes, Please Fill in Details):**

- Yes  No Currently taking any **medication**? List and reason for taking: \_\_\_\_\_
- Yes  No Ever taken a **bisphosphonate**? (Fosamax, Boniva, Actonel, Zometa, Aredia, other) \_\_\_\_\_
- Yes  No Need any **Pre-Medication** for Dental Procedures? \_\_\_\_\_
- Yes  No **Allergy** to any medication or Local Anesthetics (Novocaine or Lidocaine)? \_\_\_\_\_
- Yes  No **Allergy** to anything else? (Metals/**Nickel**, **Latex**, Acrylic, plastic etc.) \_\_\_\_\_
- Yes  No History of a major illness? \_\_\_\_\_
- Yes  No Had any surgeries? Please explain: \_\_\_\_\_
- Yes  No Ever been involved in a serious accident or had Bone Fractures? \_\_\_\_\_
- Yes  No Has seen a physician in the last 12 months? Why? \_\_\_\_\_
- Yes  No Smoke, vape, chew or use any tobacco or marijuana products? \_\_\_\_\_

**Female Patients Only:**

Yes  No Is the patient pregnant? Expected Due Date? \_\_\_\_\_

**Please mark any of the Medical Conditions below that the Patient has had in the past or currently has:**

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Abnormal Bleeding/Hemophilia             | <input type="checkbox"/> Diabetes                    | <input type="checkbox"/> HIV/AIDS                               |
| <input type="checkbox"/> ADD/ADHD                                 | <input type="checkbox"/> Dizziness/Fainting          | <input type="checkbox"/> Jaw Pain/TMJ Disorder                  |
| <input type="checkbox"/> Anemia                                   | <input type="checkbox"/> Drug/Alcohol Abuse          | <input type="checkbox"/> Kidney Disorders                       |
| <input type="checkbox"/> Arthritis                                | <input type="checkbox"/> Endocrine Problems          | <input type="checkbox"/> Mental Disorders (Anxiety, Depression) |
| <input type="checkbox"/> Artificial Heart Valves                  | <input type="checkbox"/> Epilepsy/Convulsions        | <input type="checkbox"/> Nervous System/Neurological Disorders  |
| <input type="checkbox"/> Artificial Joints                        | <input type="checkbox"/> Family History of Underbite | <input type="checkbox"/> Pneumonia                              |
| <input type="checkbox"/> Asthma                                   | <input type="checkbox"/> Gastrointestinal Disorders  | <input type="checkbox"/> Radiation/Chemotherapy                 |
| <input type="checkbox"/> Back Problems                            | <input type="checkbox"/> Headaches                   | <input type="checkbox"/> Respiratory Disease                    |
| <input type="checkbox"/> Blood Disease                            | <input type="checkbox"/> Heart Defect (Congenital)   | <input type="checkbox"/> Rheumatic Fever                        |
| <input type="checkbox"/> Blood Pressure Problems (High or Low)    | <input type="checkbox"/> Heart Disease               | <input type="checkbox"/> Seasonal Allergies/Hay Fever           |
| <input type="checkbox"/> Bone Disorders (Osteo- porosis or penia) | <input type="checkbox"/> Hepatitis/Liver Problems    | <input type="checkbox"/> Tuberculosis                           |
| <input type="checkbox"/> Cancer                                   | <input type="checkbox"/> Herpes                      | <input type="checkbox"/> Venereal Diseases                      |

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

**DENTAL HISTORY**

General Dentist or Pediatric Dentist Name: \_\_\_\_\_ Date of Last Visit: \_\_\_\_\_

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

What concerns you most about your teeth? \_\_\_\_\_

Any preferred orthodontic option?  Metal Braces  Esthetic Metal Braces  Clear Aligners (ex: Invisalign)  No Preference

How soon do you want to get started?  ASAP  Within Weeks  Within Months  You tell me, Doc!

**Is the Patient ... or Has the Patient ...**

- Yes  No Sensitive or self-conscious about his/her teeth? \_\_\_\_\_
- Yes  No Excited to start orthodontic treatment? If not, why not? \_\_\_\_\_
- Yes  No Ever seen an orthodontist before? Who and when? \_\_\_\_\_
- Yes  No Had anyone in the family received orthodontic treatment? Who? \_\_\_\_\_
- Yes  No Currently in any dental pain? \_\_\_\_\_
- Yes  No Currently seeing another dental specialist? Who and why? \_\_\_\_\_
- Yes  No Ever experienced any unfavorable reaction to dentistry or specific treatment? \_\_\_\_\_
- Yes  No Ever lost, chipped, or damaged any teeth? \_\_\_\_\_
- Yes  No Had any teeth extracted previously (baby teeth, extra teeth etc.) \_\_\_\_\_
- Yes  No Ever had any injuries to face, mouth, or teeth? \_\_\_\_\_
- Yes  No Extra sensitive (to temperature or pressure) in any part of his/her mouth? \_\_\_\_\_
- Yes  No Noticed gum bleeding when brushing? \_\_\_\_\_
- Yes  No Ever had any type of thumb/finger sucking or tongue thrusting habit? \_\_\_\_\_
- Yes  No Ever had mouth breathing habit, snoring, or difficulty breathing? \_\_\_\_\_
- Yes  No Ever had or needed Speech Therapy? When? \_\_\_\_\_
- Yes  No Experienced jaw clicking, popping, or TMJ pain? \_\_\_\_\_
- Yes  No Ever had teeth or jaws ever feel uncomfortable first thing in the morning? \_\_\_\_\_
- Yes  No Aware of clenching or grinding teeth? \_\_\_\_\_
- Yes  No Experienced "tension" headaches or chronic ringing in the ears (tinnitus)? \_\_\_\_\_
- Yes  No In need of extra help with instructions? \_\_\_\_\_
- Yes  No **Are you aware that some appointments will be during school/work hours?** \_\_\_\_\_