

**Yu Jin Lee, LAc.**  
GroundSpring Healing Center  
8283 SW Barbur Blvd.  
Portland, OR 97219

**Initial Intake Form**

Chinese medicine and holistic medical model utilizes the patient’s whole picture of health in order to treat the root cause of the symptoms that you are experiencing. Please fill out this form as thoroughly as possible. More information I have, better the service I can provide you. That having said, you are welcomed to provide only the information with which you are comfortable.

**Patient Information**

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

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_ Occupation: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Phone: \_\_\_\_\_ Can I contact you through text? \_\_\_\_\_ voicemail? \_\_\_\_\_

Email: \_\_\_\_\_ Can I contact you through email? \_\_\_\_\_

Marital Status:      Single      Married      Partnership  
                           Divorced      Separated      Other \_\_\_\_\_

With Whom Do you live?    Alone    Spouse    Friends  
 Parents    Children    Other \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Relationship: \_\_\_\_\_

What are your most important health concerns and goals? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please list any medications and/or supplements that you currently take. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you have any allergies to food, drugs, or other environmental allergens? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

What hospitalizations or surgeries have you had and when? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Have you experienced any major traumas? Please explain. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Height: \_\_\_\_\_ Weight: \_\_\_\_\_ Past maximum weight and when: \_\_\_\_\_

Blood pressure: \_\_\_\_\_ (most recent if known)

### **Childhood illnesses**

Scarlet fever  Diptheria  Rheumatic fever  Mumps  Measles

German Measles  Chicken pox  Other \_\_\_\_\_

### **Immunizations**

Diptheria  Rheumatic fever  Measles/Mumps/Rubella  Polio

Pertussis  Tetanus  Hep A&B  Others \_\_\_\_\_

### **Life Style**

What are your main interests/hobbies? \_\_\_\_\_

Do you feel you have a healthy diet and eat regularly? Do you have food cravings (ie sugar/salt)?

\_\_\_\_\_

\_\_\_\_\_

Do you exercise? If so, what type and how frequently? \_\_\_\_\_

\_\_\_\_\_

Do you sleep well and awake rested? How many hours? \_\_\_\_\_

\_\_\_\_\_

Do you have a spiritual practice? \_\_\_\_\_

Do you use recreational drugs? \_\_\_\_\_ How much and how often? \_\_\_\_\_

Do you use tobacco? \_\_\_\_\_ How much and how often? \_\_\_\_\_

Do you use alcohol? \_\_\_\_\_ How much and how often? \_\_\_\_\_

Have ever been treated for alcohol/drug dependence? \_\_\_\_\_ When? \_\_\_\_\_

**Self and Family History**

	Father	Mother	Self	Siblings	Children	Grandparents
Cancer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diabetes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heart Disorder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High Blood Pressure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stroke	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Epilepsy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mental Illness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asthma/Hayfever/Hives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anemia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kidney Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Liver Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gall Bladder Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ulcer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuberculosis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goiter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arthritis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heart Murmur	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eye Disease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alcoholism/Drug abuse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Father:

Health  Good  Poor

Age (current or at death) \_\_\_\_\_

If deceased, cause of death

\_\_\_\_\_

Mother:

Health  Good  Poor

Age (current or at death) \_\_\_\_\_

If deceased, cause of death

\_\_\_\_\_

## Review of Systems

Please circle that applies.

Y = a condition you have now      P = a condition you had in the past

<b>SKIN</b>			Dental cavities	Y	P	Hemorrhoid	Y	P
Rashes	Y	P	<b>NECK</b>			Jaundice (yellow skin)	Y	P
Eczema	Y	P	Swollen glands	Y	P	Liver disease	Y	P
Acne/Boils	Y	P	Goiter	Y	P	Bowel movement		
Itching	Y	P	Pain/Stiffness	Y	P	How often? _____		
Color Change	Y	P	<b>RESPIRATORY</b>			Is this a change? _____		
Lumps	Y	P	Cough	Y	P	<b>URINARY</b>		
Night Sweats	Y	P	Wheezing	Y	P	Pain on urination	Y	P
<b>HEAD</b>			Asthma	Y	P	Frequent	Y	P
Headache	Y	P	Bronchitis	Y	P	Frequent at night	Y	P
Head injury	Y	P	Pneumonia	Y	P	Inability to hold	Y	P
<b>EYES</b>			Pleurisy	Y	P	Frequent infection	Y	P
Impaired vision	Y	P	Emphysema	Y	P	Kidney stones	Y	P
Glasses/Contacts	Y	P	Shortness of breath			Blood in urine	Y	P
Eye Pain	Y	P	at night	Y	P	Impaired urination	Y	P
Tearing/Dryness	Y	P	lying down	Y	P	<b>MUSCULOSKELETAL</b>		
Glaucoma	Y	P	Tuberculosis	Y	P	Joint pain/stiffness	Y	P
Cataracts	Y	P	<b>CARDIOVASCULAR</b>			Arthritis	Y	P
<b>EARS</b>			Heart disorder	Y	P	Broken bones	Y	P
Impaired hearing	Y	P	Angina	Y	P	Sprains	Y	P
Ringing	Y	P	High blood pressure	Y	P	Muscles spasms/cramps	Y	P
Earache	Y	P	Murmurs	Y	P	Weakness	Y	P
Dizziness	Y	P	Rheumatic fever	Y	P	<b>PERIPHERAL VASCULAR</b>		
<b>NOSE and SINUSES</b>			Chest Pain	Y	P	Deep leg pain	Y	P
Frequent colds	Y	P	Swelling of ankles	Y	P	Cold hand/feet	Y	P
Frequent nose bleeds	Y	P	Palpitations/Fluttering	Y	P	Varicose veins	Y	P
Stuffiness	Y	P	<b>GASTROINTESTINAL</b>			<b>NEUROLOGIC</b>		
Hay fever	Y	P	Heartburn	Y	P	Fainting	Y	P
Sinus problems	Y	P	Change in appetite	Y	P	Seizures	Y	P
<b>MOUTH and THROAT</b>			Nausea/Vomiting	Y	P	Paralysis	Y	P
Sore throat	Y	P	Vomiting blood	Y	P	Muscles weakness	Y	P
Gum problems	Y	P	Excessive gas	Y	P	Numbness/Tingling	Y	P
Hoarseness	Y	P	Blood in stool	Y	P	Loss of memory	Y	P

**EMOTIONAL**

Depression Y P  
Mood swings Y P  
Anxiety/Nervousness Y P  
Tension Y P

**ENDOCRINE**

Hypothyroid Y P  
Hyperthyroid Y P  
Diabetes Y P  
Heat/Cold intolerance Y P  
Excessive thirst Y P  
Excessive hunger Y P  
Fatigue Y P

**BLOOD**

Anemia Y P  
Easy bleeding/bruising Y P

**FEMALE REPRODUCTIVE**

Age menses began? \_\_\_\_\_  
Average days of bleeding?  
\_\_\_\_\_  
Length of cycle? \_\_\_\_\_  
Irregular cycles Y P

Bleeding between periods

Y P  
PMS Y P  
Painful menses Y P  
Excessive flow Y P  
PCOS Y P  
Endometriosis Y P  
Breast tenderness/pain Y P  
Nipple discharge Y P

Have you reached menopause? If so  
when? \_\_\_\_\_

Menopausal symptoms Y P  
Are you sexually active? \_\_\_\_\_

Sexual difficulties Y P  
Vaginal pain/infection Y P  
Venereal Disease Y P

Sexual preference

- Heterosexual
- Bisexual
- Homosexual

Birth control of choice:

now: \_\_\_\_\_  
past: \_\_\_\_\_  
\_\_\_\_\_

# of pregnancies \_\_\_\_\_  
# of live births \_\_\_\_\_  
# of miscarriages \_\_\_\_\_  
# of abortions \_\_\_\_\_  
Difficulty conceiving? \_\_\_\_\_

**MALE REPRODUCTIVE**

Hernias Y P  
Testicular masses Y P  
Testicular pain Y P  
Prostate disease Y P  
Venereal disease Y P  
Discharge/sores Y P  
Are you sexually active? \_\_\_\_\_  
Erectile difficulties Y P

Sexual preference

- Heterosexual
- Bisexual
- Homosexual

**Yu Jin Lee, LAc.**  
**8283 SW Barbur Boulevard, Portland, OR 97219**  
**503-244-1330**

**Financial and Office Policies**

If you have insurance that covers acupuncture, I will submit your claim for you. You are responsible for your deductible, your co-pay and your co-insurance amounts. In the case of insurance billing, you are authorizing the release of any medical or other information necessary to process the insurance claim. You are also authorizing payment of medical benefits to me. If your insurance denies payment of a claim, you are responsible for the billed charges unless I have an agreement with the insurance company to do otherwise.

I accept cash or personal checks as well as credit cards namely Visa, Master Card, and American Express.

I also have a sliding scale available upon request for low-income patients. There is no need to show proof of your income. I would like to ask you to pay what is affordable and honorable within the ranges offered. On a sliding scale, a new patient appointment for acupuncture ranges between \$50~\$75 and a return patient appointment for acupuncture ranges between \$40~\$65.

Your appointment time is reserved specifically for you. In the event of a missed appointment or an appointment cancelled with less than 24 hours notice, you may be charged a \$35 fee. Your insurance will not pay for a missed appointment.

Service	Fee	“Pay at the Time of Service” Discount ~30%
New patient, acupuncture (97810+97811)	\$145	\$118
Return patient, acupuncture (97810)	\$85	\$70
Tuina (billed in 15min increments) (97124)	\$45	\$30
Chinese herbs	\$30~\$150	N/A
Chinese herbal poultice	\$20~\$40	N/A
New patient, evaluation and management (99203)	\$215	\$150
Established patient, reevaluation (99213)	\$145	\$101
Moxibustion/other manual therapy (97139/97140)	\$53	\$37
Infrared heat lamp application (97026)	\$13	\$9

Please indicate your understanding and acceptance of these policies by signing below.

\_\_\_\_\_  
 Patient Signature  
 (Parent/Guardian Signature)

\_\_\_\_\_  
 Printed Name

\_\_\_\_\_  
 Date

**Yu Jin Lee, LAc.**  
8283 SW Barbur Boulevard, Portland, OR 97219  
503-244-1330

## NOTICE OF PRIVACY PRACTICES

Dear Valued Patient,

This notice describes my 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. Please review it carefully. The privacy of your health information is important to me.

### MY LEGAL DUTY

I am required by applicable federal and state law to maintain the privacy of your health information. I am also required to give you this notice about our privacy practices, your rights concerning your health information, and our legal duties. We must follow the privacy practices that are described in this notice while it is in effect. This notice takes effect June 2009, and will remain in effect until I replace it.

I reserve the right to make the changes in my privacy practices and the new terms of my notice effective for all health information that I maintain. Before I make significant changes in my privacy practices, I will revise this notice and make the new notice available for your review.

You may request a copy of my notice at any time. For more information about my privacy practices, or for additional copies of this notice, please contact me.

### USES AND DISCLOSURES OF HEALTH INFORMATION

I use and disclose health information about you for **treatment, payment, and healthcare operations**. In order to maintain the level of service that you expect from my office, I may need to share limited personal medical and financial information with your insurance company, with Worker's Compensation (and your employer as well in this instance), or with other medical practitioners that you authorize. I may use or disclose your healthcare information to provide you with appointment reminders such as voicemail messages or emails. I may share your health information to a family member, friend or other person to the extent necessary to help with your healthcare or with payment for your healthcare, but only if you agree that I may do so as described by the "Patient Rights" section of this notice. I may be required to disclose your health information when I am required to do so by law. This may include disclosure to appropriate authorities if I have a reason to believe that you are a possible victim of abuse, neglect, or domestic violence or the possible victim of other crimes. Lastly, I will not use your health information for marketing communications without your written authorization.

### ***Safeguards in place at my 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 I gather and use:***

In administering your health care, I 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).

**PATIENT RIGHTS**

**Access:** You have the right to get copies of your health information. You must make a request in writing to obtain access to your health information. If you request a copy of the information, I may charge a fee for the costs of copying, mailing, or other associated supplies.

**Your Authorization:** In addition to my use of your health information in connection to my healthcare operations, you may give us a written authorization to use your health information or to disclose it to anyone for any purpose. If you give us an authorization, you may revoke it in writing at any time. Your revocation will not affect any use or disclosures permitted by your authorization while it was in effect. Unless you give me a written authorization, I cannot use or disclose your health information for any reason except those described in this notice.

**Right to Amend:** If you believe health information I have about you is incorrect or incomplete, you may ask us to amend the information. You have the right to request an amendment as long as this office keeps the information. I may deny your request for an amendment if it is not in writing or does not include the reason to support the request.

**Restriction:** You have the right to request that we place additional restrictions on my use of your health information. I am not required to agree to these restrictions, but I will do my best to respect your wishes within reason and legal boundaries.

**Right to Request Confidential Communications:** You have the right to request that we communicate with you about medical matters in a certain way or at a certain location. For example, you can ask that we only contact you at work or by mail.

**COMPLAINTS**

If you believe your privacy rights have been violated, you may file a complaint with me or with the U.S. Department of Health and Human Services. To file a complaint, please contact me at the number or address listed at the top first page of this notice.



**Yu Jin Lee, LAc.**  
**8283 SW Barbur Boulevard, Portland, OR 97219**  
**503-244-1330**

### **Consent/Written Acknowledgement of Notice of Privacy Practices**

I hereby consent to the use and disclosure of my protected health information Yu Jin Lee, LAc. for the purposes of **treatment, payment and healthcare operations**, or as otherwise required by law.

- I acknowledge that I have a right to review or receive a printed copy of the Notice of Privacy Practices provided by Yu Jin Lee, LAc. prior to signing this consent. The Notice of Privacy Practices describes how medical information about me may be used and disclosed, and how I can access this information.
- I have the right to request restrictions to the usage and disclosure of my protected health information.
- I have the right to request an alternative to the standard method of communication of my protected health information.
- I understand that if I wish to revoke this consent at any time I will do so in writing and submit to the address listed below. I understand that while Yu Jin Lee, LAc. may honor these requests, she is not required by law to do so. I also understand that revocations will be honored as of the date they are received by Yu Jin Lee, LAc. at the following address:  

**8283 SW Barbur Boulevard**  
**Portland, OR 97219**
- I understand that if I have any questions or complaints I may submit them in writing to the address above or contact Yu Jin Lee, LAc. by phone at: **503-244-1330**.
- I am aware that Yu Jin Lee, LAc. reserves the right to change the terms of her Notice of Privacy Practices and to make new notice of Privacy Practices provisions effective for all protected health information that she maintains. In the event of amendments, Yu Jin Lee, LAc. will make available a revised Notice of Privacy Practice for my review.

\_\_\_\_\_  
Patient (18 years or older)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent, Guardian, Responsible Party

\_\_\_\_\_  
Date

**THIS SECTION IS TO BE COMPLETED BY YU JIN LEE, LAC. IF UNABLE  
TO OBTAIN WRITTEN ACKNOWLEDGEMENT FROM PATIENT**

I made a good faith effort to obtain a written acknowledgement of receipt of the Notice of Privacy Practices from the above-named patient, but was unable to because:

- Patient declined to sign this Written Acknowledgement
- Other (specify):

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Name and title of employee

Date