

**CONFIDENTIAL INFORMATION QUESTIONNAIRE**

PATIENT'S LEGAL NAME		LAST	FIRST	MI	DATE OF BIRTH	SEX	SSN(US) / SIN(CAN)
PREFER TO BE CALLED				HOME PHONE #		CELL PHONE #	
PATIENT'S ADDRESS		STREET	APT#	CITY	STATE	ZIP/POSTAL CODE	E-MAIL
<b>MARITAL STATUS</b>		PATIENT'S / GUARDIAN'S EMPLOYER				OCCUPATION	
S M W D UNDER AGE 18							
WORK ADDRESS		STREET	APT#	CITY	STATE	ZIP/POSTAL CODE	WORK PHONE #
SPOUSE'S NAME		LAST	FIRST	MI	SPOUSE'S EMPLOYER		OCCUPATION
SPOUSE'S WORK ADDRESS		STREET	APT#	CITY	STATE	ZIP/POSTAL CODE	WORK PHONE #
OTHER FAMILY MEMBERS THAT ARE PATIENTS HERE					WHO CAN WE THANK FOR REFERRING YOU TO OUR OFFICE?		

**EMERGENCY CONTACT INFORMATION****PERSON WE MAY CONTACT IN CASE OF AN EMERGENCY (OTHER THAN YOUR FAMILY HOME)**

NAME		RELATIONSHIP	
HOME PHONE #	WORK PHONE #	CELL PHONE #	

**REQUEST FOR CONFIDENTIAL COMMUNICATION****AS MY DENTAL CARE PROVIDER, YOU MAY DO THE FOLLOWING WITH MY PERMISSION:**

	YES	NO
Contact me at home		
Contact me via cell phone		
Contact me at work		
Contact me via e-mail		
Leave messages on my home voicemail		
Leave messages on my cell phone voicemail		
Leave messages on my work voicemail		

# INSURANCE AND FINANCIAL INFORMATION

INSURANCE COVERAGE		INSURANCE COMPANY NAME	INSURANCE ADDRESS	INSURANCE PHONE
YES	NO			
SUBSCRIBER'S NAME		PATIENT'S RELATIONSHIP TO SUBSCRIBER	SUBSCRIBER'S BIRTHDAY	SSN(US) / SIN(CAN)
		SELF    SPOUSE    DEPENDENT		
GROUP / PROGRAM NUMBER		EMPLOYER (IF DIFFERENT FROM ABOVE)	EMPLOYER'S ADDRESS	
SECONDARY COVERAGE		INSURANCE COMPANY NAME	INSURANCE ADDRESS	INSURANCE PHONE
YES	NO			
SUBSCRIBER'S NAME		PATIENT'S RELATIONSHIP TO SUBSCRIBER	SUBSCRIBER'S BIRTHDAY	SSN(US) / SIN(CA)
		SELF    SPOUSE    DEPENDENT		
GROUP / PROGRAM NUMBER		EMPLOYER (IF DIFFERENT FROM ABOVE)	EMPLOYER'S ADDRESS	

## RELEASE INFORMATION

### YOU MAY DISCUSS MY HEALTHCARE WITH

	YES	NO	OTHERS (PLEASE PRINT)
Health Care Providers			1.
Insurance Companies			2.

## CONFIRMATIONS



### DO YOU PREFER A CONFIRMATION CALL

No, it is unnecessary

Yes, it is a helpful reminder

## ASSIGNMENT & RELEASE

I hereby authorize (1) any available insurance benefits to be paid directly to my dentist, (2) the release of my dental health care information for any of my dental health care insurance claim, (3) the use of my dental records by my dentist in any professional manner that he/she determines, (4) the making of videotapes, photographs, and x-rays of my dental care treatment (collectively "My Images"), and (5) my dentist's use of My Images in scientific papers, demonstrations and/or presentations without compensation to me. I agree that to the extent the cost of the dental care provided by my dentist is not covered by insurance, I am obligated to pay him/her such uninsured cost (the "Uninsured Costs") in accordance with his/her payment terms and policies. Finally, I certify that I have read or had read to me the contents of this form and understand the risks and limitations involved with the dental treatment that I am to receive.

SIGNATURE - PATIENT / GUARDIAN	DATE
WITNESS SIGNATURE	DATE
If the above named Patient is a minor or unable to pay the his/her Uninsured Costs, the undersigned agrees to guaranty the payment of such Uninsured Costs to the Patient's dentist in accordance with his/her payment terms and policies.	
SIGNATURE - GUARANTOR OF PATIENT	DATE

# MEDICAL HISTORY

Patient Name \_\_\_\_\_ Nickname \_\_\_\_\_ Age \_\_\_\_\_

Name of Physician/and their specialty \_\_\_\_\_

Most recent physical examination \_\_\_\_\_ Purpose \_\_\_\_\_

What is your estimate of your general health?                      Excellent                      Good                      Fair                      Poor

**DO YOU HAVE or HAVE YOU EVER HAD:**                      YES NO                      YES NO

1. hospitalization for illness or injury \_\_\_\_\_
2. an allergic or bad reaction to any of the following:
  - aspirin, ibuprofen, acetaminophen, codeine
  - penicillin
  - erythromycin
  - tetracycline
  - sulfa
  - local anesthetic
  - fluoride
  - chlorhexidine (CHX)
  - metals (nickel, gold, silver, \_\_\_\_\_ )
  - latex \_\_\_\_\_
  - nuts \_\_\_\_\_
  - fruit \_\_\_\_\_
  - milk \_\_\_\_\_
  - red dye \_\_\_\_\_
  - other \_\_\_\_\_
3. heart problems, or cardiac stent within the last six months \_\_\_\_\_
4. history of infective endocarditis \_\_\_\_\_
5. artificial heart valve, repaired heart defect (PFO) \_\_\_\_\_
6. pacemaker or implantable defibrillator \_\_\_\_\_
7. orthopedic or soft tissue implant (e.g. joint replacement, breast implant) \_\_\_\_\_
8. heart murmur, rheumatic or scarlet fever \_\_\_\_\_
9. high or low blood pressure \_\_\_\_\_
10. a stroke (taking blood thinners) \_\_\_\_\_
11. anemia or other blood disorder \_\_\_\_\_
12. prolonged bleeding due to a slight cut (or INR > 3.5) \_\_\_\_\_
13. pneumonia, emphysema, shortness of breath, sarcoidosis \_\_\_\_\_
14. chronic ear infections, tuberculosis, measles, chicken pox \_\_\_\_\_
15. breathing problems (e.g. asthma, stuffy nose, sinus congestion) \_\_\_\_\_
16. sleep problems (e.g. sleep apnea, snoring, insomnia, restless sleep, bedwetting) \_\_\_\_\_
17. kidney disease \_\_\_\_\_
18. liver disease or jaundice \_\_\_\_\_
19. vertigo (e.g. "the room is spinning") \_\_\_\_\_
20. thyroid, parathyroid disease, or calcium deficiency \_\_\_\_\_
21. hormone deficiency or imbalance (e.g. polycystic ovarian syndrome) \_\_\_\_\_
22. high cholesterol or taking statin drugs \_\_\_\_\_
23. diabetes (HbA1c = \_\_\_\_\_ ) \_\_\_\_\_
24. stomach or duodenal ulcer \_\_\_\_\_
25. digestive or eating disorders (e.g. celiac disease, gastric reflux, bulimia, anorexia) \_\_\_\_\_

26. osteoporosis/osteopenia or ever taken anti-resorptive medications (e.g. bisphosphonates) \_\_\_\_\_
27. arthritis or gout \_\_\_\_\_
28. autoimmune disease (e.g. rheumatoid arthritis, lupus, scleroderma) \_\_\_\_\_
29. glaucoma \_\_\_\_\_
30. contact lenses \_\_\_\_\_
31. head or neck injuries \_\_\_\_\_
32. epilepsy, convulsions (seizures) \_\_\_\_\_
33. neurologic disorders (ADD/ADHD, prion disease) \_\_\_\_\_
34. viral infections and cold sores \_\_\_\_\_
35. any lumps or swelling in the mouth \_\_\_\_\_
36. hives, skin rash, hay fever \_\_\_\_\_
37. STI/STD/HPV \_\_\_\_\_
38. hepatitis (type \_\_\_\_\_ ) \_\_\_\_\_
39. HIV/AIDS \_\_\_\_\_
40. tumor, abnormal growth \_\_\_\_\_
41. radiation therapy \_\_\_\_\_
42. chemotherapy, immunosuppressive medication \_\_\_\_\_
43. emotional difficulties \_\_\_\_\_
44. psychiatric treatment or antidepressant medication \_\_\_\_\_
45. concentration problems or ADD/ADHD diagnosis \_\_\_\_\_
46. alcohol/recreational drug use \_\_\_\_\_

**ARE YOU:**

47. presently being treated for any other illness \_\_\_\_\_
48. aware of a change in your health in the last 24 hours (e.g., fever, chills, new cough, or diarrhea) \_\_\_\_\_
49. taking medication for weight management \_\_\_\_\_
50. taking dietary supplements \_\_\_\_\_
51. often exhausted or fatigued \_\_\_\_\_
52. experiencing frequent headaches or chronic pain \_\_\_\_\_
53. a smoker, smoked previously or other (smokeless tobacco, vaping, e-cigarettes, and cannabis) \_\_\_\_\_
54. considered a touchy/sensitive person \_\_\_\_\_
55. often unhappy or depressed \_\_\_\_\_
56. taking birth control pills \_\_\_\_\_
57. currently pregnant \_\_\_\_\_
58. diagnosed with a prostate disorder \_\_\_\_\_

Describe any current medical treatment, impending surgery, genetic/development delay, or other treatment that may possibly affect your dental treatment. (i.e. Botox, Collagen Injections) \_\_\_\_\_

List all medications, supplements, and or vitamins taken within the last two years

Drug	Purpose	Drug	Purpose
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**PLEASE ADVISE US IN THE FUTURE OF ANY CHANGE IN YOUR MEDICAL HISTORY OR ANY MEDICATIONS YOU MAY BE TAKING.**

Patient's Signature \_\_\_\_\_ Date \_\_\_\_\_

Doctor's Signature \_\_\_\_\_ Date \_\_\_\_\_

# DENTAL HISTORY

Patient Name \_\_\_\_\_ Nickname \_\_\_\_\_ Age \_\_\_\_\_  
Referred by \_\_\_\_\_ How would you rate the condition of your mouth? Excellent Good Fair Poor  
Previous Dentist \_\_\_\_\_ How long have you been a patient? \_\_\_\_\_ Months/Years  
Date of most recent dental exam \_\_\_\_/\_\_\_\_/\_\_\_\_ Date of most recent x-rays \_\_\_\_/\_\_\_\_/\_\_\_\_  
Date of most recent treatment (other than a cleaning) \_\_\_\_/\_\_\_\_/\_\_\_\_  
I routinely see my dentist every 3 mo. 4 mo. 6 mo. 12 mo. Not routinely

WHAT IS YOUR IMMEDIATE CONCERN? \_\_\_\_\_

## PLEASE ANSWER YES OR NO TO THE FOLLOWING:

### PERSONAL HISTORY



YES NO

1. Are you fearful of dental treatment? How fearful, on a scale of 1 (least) to 10 (most) [\_\_\_\_] \_\_\_\_\_
2. Have you had an unfavorable dental experience? \_\_\_\_\_
3. Have you ever had complications from past dental treatment? \_\_\_\_\_
4. Have you ever had trouble getting numb or had any reactions to local anesthetic? \_\_\_\_\_
5. Did you ever have braces, orthodontic treatment or had your bite adjusted, and at what age? \_\_\_\_\_
6. Have you had any teeth removed, missing teeth that never developed or lost teeth due to injury or facial trauma? \_\_\_\_\_

### GUM AND BONE



YES NO

7. Do your gums bleed sometimes or are they ever painful when brushing or flossing? \_\_\_\_\_
8. Have you ever been treated for gum disease or been told you have lost bone around your teeth? \_\_\_\_\_
9. Have you ever noticed an unpleasant taste or odor in your mouth? \_\_\_\_\_
10. Is there anyone with a history of periodontal disease in your family? \_\_\_\_\_
11. Have you ever experienced gum recession, or can you see more of the roots of your teeth? \_\_\_\_\_
12. Have you ever had any teeth become loose on their own (without an injury), or do you have difficulty eating an apple? \_\_\_\_\_
13. Have you experienced a burning or painful sensation in your mouth not related to your teeth? \_\_\_\_\_

### TOOTH STRUCTURE



YES NO

14. Have you had any cavities within the past 3 years? \_\_\_\_\_
15. Does the amount of saliva in your mouth seem too little or do you have difficulty swallowing any food? \_\_\_\_\_
16. Do you feel or notice any holes (i.e. pitting, craters) on the biting surface of your teeth? \_\_\_\_\_
17. Are any teeth sensitive to hot, cold, biting, sweets, or do you avoid brushing any part of your mouth? \_\_\_\_\_
18. Do you have grooves or notches on your teeth near the gum line? \_\_\_\_\_
19. Have you ever broken teeth, chipped teeth, or had a toothache or cracked filling? \_\_\_\_\_
20. Do you frequently get food caught between any teeth? \_\_\_\_\_

### BITE AND JAW JOINT



YES NO

21. Do you have problems with your jaw joint? (pain, sounds, limited opening, locking, popping) \_\_\_\_\_
22. Do you feel like your lower jaw is being pushed back when you try to bite your back teeth together? \_\_\_\_\_
23. Do you avoid or have difficulty chewing gum, carrots, nuts, bagels, baguettes, protein bars, or other hard, dry foods? \_\_\_\_\_
24. In the past 5 years, have your teeth changed (become shorter, thinner, or worn) or has your bite changed? \_\_\_\_\_
25. Are your teeth becoming more crooked, crowded, or overlapped? \_\_\_\_\_
26. Are your teeth developing spaces or becoming more loose? \_\_\_\_\_
27. Do you have trouble finding your bite, or need to squeeze, tap your teeth together, or shift your jaw to make your teeth fit together? \_\_\_\_\_
28. Do you place your tongue between your teeth or close your teeth against your tongue? \_\_\_\_\_
29. Do you chew ice, bite your nails, use your teeth to hold objects, or have any other oral habits? \_\_\_\_\_
30. Do you clench or grind your teeth together in the daytime or make them sore? \_\_\_\_\_
31. Do you have any problems with sleep (i.e. restlessness or teeth grinding), wake up with a headache or an awareness of your teeth? \_\_\_\_\_
32. Do you wear or have you ever worn a bite appliance? \_\_\_\_\_

### SMILE CHARACTERISTICS



YES NO

33. Is there anything about the appearance of your mouth (smile, lips, teeth, gums) that you would like to change (shape, color, size, display)? \_\_\_\_\_
34. Have you ever whitened (bleached) your teeth? \_\_\_\_\_
35. Have you felt uncomfortable or self-conscious about the appearance of your teeth? \_\_\_\_\_
36. Have you been disappointed with the appearance of previous dental work? \_\_\_\_\_

Patient's Signature \_\_\_\_\_ Date \_\_\_\_\_

Doctor's Signature \_\_\_\_\_ Date \_\_\_\_\_