

Dear Patient

We would like to take this opportunity to welcome you to our practice. This letter contains answers to some of the most commonly asked questions by patients entering our practice, as well as instructions on completion of our new patient packet.

At Montano Wellness LLC, we practice preventative medicine as well as caring for your chronic and acute medical needs. Our practice philosophy is to try for early detection, early intervention, and prevention. Regularly scheduled office visits allow us to better assist you in identifying and managing any chronic health problems you may have. We believe this is in your short and long-term best interest. Being proactive about your health care can help us prevent and/or prolong the onset of future health problems as you age. We firmly believe, and our experience has shown it to be true, that those patients who are consistent in keeping their appointments have fewer episodes of acute illness, difficulty with unstable chronic illnesses, and generally continue to enjoy better health overall.

Included with this letter is our new patient packet that we ask to be completed prior to your first appointment with us to ensure a timely visit. Please complete to the best of your ability:

- ☐ The medical history questionnaire
- □ Your demographic information
- □ Screening questionnaires

A HIPPA privacy and release of information authorization will be signed upon arrival for your first visit. To add other individuals to your HIPPA authorization, please request an additional form.

We utilize an automatic calling system that will call you 48 hours in advance of your appointment, as a reminder. Please bring with:

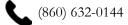
- ☐ Your health insurance cards
- □ Driver's license or photo ID
- ☐ A list of your current medications

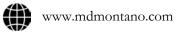
Thank you for allowing us to assist you with your health care needs If you have any questions or concerns, please do not hesitate to contact our office.

Sincerely,

C. Brendan Montano M.D

Owner, Medical Director







# MONTANO WELLNESS LLC

Internal Medicine

160 West Street, Suite 1A Cromwell, CT 06416 P: (860) 632-0144 F: (860) 632-7882

		DEMOGRA	PHIC	INF	ORM	ATION			
Name:									
		First			Middle			Last	
Address:				St	reet Add	ress			
		City				State		ZI	
Date of Birth			SSI	N				Gender	M F
			OT IN	IEOD	3 E A /T	IONI			
		CONTAC	CIIN	IFOR	MAI	ION			
Home Phone			]	Email .	Addres	S			
Cell Phone			Er		cy Conta ame	act			
Work Phone			Er		cy Conta	act			
		I would like to receive text me	essage r	emind	ers for	appointn	nents and	balances	
		MEDIO	A T T T T	EOD	3 6 A /FI	1031			
		MEDICA	AL IN	FOR	MATI	ION			
Preferred Pharma	су								
		Pharmacy					_ NT 1	Location	
Preferred Laboratory		□ Middlesex Hospital □ Quest Diagnostics □ Other:		Preferred Network for Specialist Referrals			□ No Preference □ Middlesex Hospital Network □ Hartford Hospital Network □ UConn Network □ St. Francis Hospital Network □ Other:		
Do you have any allergies?									
Do you take any medications or ov the counter supplements?	er								



## MONTANO WELLNESS LLC

Internal Medicine

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Date

## Authorization for Access/Release of Information

Legal Name:	(Last)	(First)	(M.I.)
		` <i>,</i>	, ,
Date of Birth:	Phone:	Email:	
Address:			
Address:	(street	or box#, city, state, zip)	
D 111	This information is to be		
<ul><li>□ Personal Use</li><li>□ Continuing Care</li></ul>	<ul><li>□ Disability</li><li>□ Workers Comp</li></ul>	□ Other:	
□ Legal	- T ( (C		
O			
I herek	y authorize Montano Wellness l	LLC and C. Brendan Montano M.D. to:	
□ <b>RELEASE</b> information	from my medical record <b>TO</b> :	□ <b>OBTAIN</b> information <b>FROM</b>	:
Name:			
Address:			
	(street or box#,	city, state, zip)	
Phone:		Fax:	
		ation Requested	
	□ Complete 1	Medical Record	
☐ History & Physical Exam/		□ Stress Test	
☐ Discharge Summary/DS	□ Radiology Report		a.t.
<ul><li>□ Emergency Visits/ED</li><li>□ Operative/Procedure Report</li></ul>	☐ Pathology Report☐ Immunization Re		St.
	□ All	272/02/00000110000	
Date(s) of Service:	□ Specific Time Period:		
		<b>DL INFORMATION</b> contained within the medic	cal records
indicated a		uthorization unless otherwise indicated below.  want released with your records:	
□ HIV			
□ Substance Abuse (which	includes □ Genetic Testing □ Behavioral Healtl	Other:	
Alcohol & Drug Abuse)  □ Pregnancy Test	□ Sexually Transmi		
I understand that this au this form, I may change	my mind and cancel (revoke) the authorization will not apply	from the date below. I understand that after I is authorization at any time by contacting our to information that has already been released I	office in
	Printe	d Name	

Signature

#### MEDICAL QUESTIONNAIRE

Name					Age		Marr		er) Date
Occupation				Ali previ	ous				
				occupat	lons			List all States in	
Birth Place		Birti	hda	te				which you have live	od .
Education		ears Hig	rh S	School		years Col	lege		years Post Grad
		oars riig	J. C			years 00:	.080		
	sical examination				P.I. Please do not w	rite in this	space	Э	
Please list all Sympton  1.	ms ·								
2.			-						
3.									
4.									
5.									
Routine check-up	p—no symptoms 🗆								
*	if Livin	ıg			Deceased	Has	anv blo		se encircle
·	Age H	eaith		Age of death	Cause	rela	any blo tive eve	- E V	or no Who
Father							ncer	Yes	<del></del>
Mother		· ·					bercul		s No
Brother or Sister							betes		
	2.						art Tro		3 NO
	<u>3.</u>					'	ssure Ssure		s No
	5.					<u> </u>	oke		s No
Husband or Wife							ilepsy		s No
Son or Daugher		-	_				anity	Yes	
our or ourginer	2.	-					icide	Yes	s No
	3.					NOTE	: This	is a confidential reco	ord of your medical history
	4.					and w	ili be l	cept in this office. Info	ormation contained here
	5.					will no	t be r	eleased to any person	n except when you have
	6.					autho	rized u	is to do so.	
PERSONAL HIS	TORY							1	
ILLNESSES Have					Blood Pressure				
PLEASE ENCIRO	CLE ALL ANSWERS		No	10-000000000000000000000000000000000000	her Bowel Disease				Yes No
		Yes	No		s or any Rectal Disease _			1	Yes No
	8		No		akdown	Ye			Yes No
		Yes Yes	No No		ical or Drug Polsoning _ Asthma			Type	
Whooping Coug	.h	Voc	No	1.00	ema	Ye		Type	Year
	Scarlentina	Yes	No		ections or Boils			.,,,,	
			No		isease			Have you ever been a	dvised to have
•			No		re you allergic to			any surgical operation	on which has
			No	Penicillin or	Sulfa	Ye	s No	not been done	Yes No
Influenza		Yes	No	Aspirin, Cod	eine or Morphine	Ye	s No	Have you been hospit	alized
Pleurisy		Yes	No	Mycins or ot	her Antibiotics	Ye	s No	for any illness	Yes No
Rheumatic Feve	r or Heart Disease	Yes	No	Merthiolate o	or Mercurochrome	Ye	s No	Give Details:	
Arthritis or Rheu	matism	Yes	No		rug		s No		. \
Any Bone or Join	nt Disease		No					V Dlago	se complete) side *
	algia		No		pe			1/ 2 Ligas	e compared
	or Lumbago		No		r Other Cosmetics			(\ Other	´Side ★ ´
=	itis		No		toxim or Serums	Ye	s No	ľ	
	yphilis		No No	I .	e you had any racked Bones	Ye	s No		
	9886		No		Tacked Bolles			1	1
	3430		No	1 -				1	
			No	1				Į.	
	)		No		s or Head Injuries			1	
			No		nocked Unconscious		s No	1	
Migraine Heada	ches	Yes	No	WEIGHT now	one year ago _				
Tuberculosis		Yes	No	Maximum _	when			1	
			No		NS Have you ever had			1	
			No	-	sma Transfusion	Ye	B No	1	Printed in U.S.A

DO YOU NOW HAVE OR HAVE YOU HAD WITHIN THE PAST YEAR:			Lose urine on coughing or sneezing	_			Yes	No
Frequent or Severe Headaches	Yes	No	Discharge from penis				Yes	
Fainting Spells	Yes	No	Recurrent back pains				Yes	No
Dissiness on change of position	Yes	No	Backaches				Yes	No
Unconscious Spells	Yes	No	Joint pains				Yes	No
Biurred Vision	Yes	No	Swelling of any joints				Yes	No
Double vision	Yes	No	Redness or heat of any joint				Yes	No
Spots before eyes	Yes	No	Tingling or weakness of hands or f	eet			Yes	No
Infected Eyes	Yes	No	Muscle spasms				Yes	No
Pain Behind Eyes	Yes	No	Loss or change in sensation of han	ds and feet _			Yes	No
Any changes in vision	Yes	No	Trembling of any extremity				Yes	No
Do you wear glasses	Yes	No	Growth in neck or throat				Yes	No
When were they last checked			Hot flashes				Yes	No
Earaches	Yes	No	Tiredness without apparent reason				Yes	No
Discharge from ears	Yes	No	Brittleness of nails				Yes	No
	Yes						-	
Ringing in ears		No	Dryness of skin				Yes	No
Decrease in hearing	Yes	No	Easy bruising				Yes	No
Recurrent nose bleeds	Yes	No	Inability to stand heat				Yes	No
Recurrent head colds	Yes	No	Inability to stand cold				Yes	No
Sinus trouble	Yes	No	Change in hair texture				Yes	No
Hay Fever	Yes	No	Change in skin texture				Yes	No
Strange persistant odors	Yes	No	Any skin rash				Yes	No
Strange taste or loss in taste	Yes	No	X-RAYS: Have you ever had X-rays	of				
Persistent hoarseness	Yes	No	Chest				Yes	No
Difficulty swallowing	Yes	No	Stomach or colon				Yes	
Enlarged Glands	Yes	No	Gallbladder				Yes	No
Recurrent sore throats	Yes	No	Extremities				Yes	No
Recurrent sores in mouth	Yes	No	Back				Yes	No
Soreness or bleeding of gums on brushing	Yes	No	Teeth				Yes	
Chest pain	Yes	No	Other				Yes	
Angina Pectoris	Yes	No	EKG: Have you ever had an electron	cardiogram _			Yes	No
Coughed up blood	Yes	No	IMMUNIZATIONS: Have you had					
Pain in arm(s)	Yes	No	Smallpox vaccination within last	7 years			Yes	No
Night Sweats	Yes	No	Tetanus shots (not antitoxin which				Yes	No
Chronic or frequent cough	Yes	No	Polio shots within last 2 years				Yes	No
Chronic or frequent cough on laying down	Yes	No	DRUGS: Laxatives	never 🗆	occ 🗆	freq		daily O
Wake up night short of breath	Yes	No	Vitamins	never 🗆	occ 🗆	freq		daily $\square$
How many bed pillows do you use	105	140	Sedatives	never 🗆	occ 🗆	freq		daily O
Shortness of breath on:		••	Tranquilizers	never 🗆	occ 🗆	freq		daily O
Walking several blocks	Yes	No	Sleeping pills,etc.	never 🗆	occ 🗆	freq		daily 🗆
One flight of stairs	Yes	No	Aspirin, etc.	never 🗆	occ 🗆	freq	0	daily 🗆
On laying down	Yes	No	Cortisone Acht	never 🗆	occ 🗆	freq		daily 🗆
Purple lips or fingers	Yes	No	Thyrold	never 🗆	yes, in pas	st, none	now	
Palpitations or fluttering of heart	Yes	No		daily 🗆	now on _		;	gr daily
High Blood Pressure	Yes	No	Vitamins	never 🗆	occ 🗆	freq l		daily 🗆
Swelling of hands, feet or ankles	Yes	No	Have you ever been treated for d	rua habits			Yes	No
At what time of day			Have you ever taken insulin or ta				Yes	No
Leg cramps on walking at night	Yes	No	Have you ever taken Hormone ta				Yes	No
Enlarged veins in legs	Yes	No	SEX: Entirely satisfactory				Yes	No
Recurrent stomach pains	100 100 100		SEX. Eliuloly saustactory				103	140
	Yes	No						
Belching or heartburn	Yes	No	WOMEN ONLY	- MENSTRUA	LHISTORY			
Relieved by food or medication	Yes	No .	Age at onset					
Apetite - Good  Fair  Poor			Regular?: Yes □ No □					
Nausea or vomiting	Yes	No	Cycle: days (from start t	o start)				
Vomited blood	Yes	. No	Flow: Heavy   Medium	Light 🗆				
Avoid some foods	Yes	No	Number of pads used per period _					
What kinds			Any clots passed				Yes	No
Avoid spices	Yes	No	Pain or cramps				Yes	
Avoid spicesAbdominal cramping	Yes	No	Date of last period				. 00	.10
Color of bowel movement	163	NO						
			Date of last pelvic exam					
Any blood in BM	Yes	No	Date of last pap test					
Rectal pain with bowel movement	Yes	No	Results: Neg 🗆 Pos 🗅					
			Any discharge from vagina				Yes	No
			If so, color					
DO YOU NOW HAVE OR HAVE YOU HAD WITHIN THE PAST YEAR:			Amount					
Changes in size, shape or texture of BM	Yes	No	Any itching of vaginal area				Yes	No
Describe			Do you take birth control pills				Yes	No
Pain on urinating	Yes	No	How long have you taken them					
Difficulty in starting urination	Yes	No	Pregnancies:			10		
			How many children born alive _					
Do you get up at night to urinate		No	now many children born alive _					
How many times	Yes		Mose mone still blate.					
			How many still births					
Urinate more than before	Yes	No	How many premature births					
Urinate less than before	Yes Yes	No No	How many premature births How many Cesarean Sections _			_		
Urinate less than before Any blood in urine	Yes	No	How many premature births How many Cesarean Sections _ How many miscarriages					
Urinate less than before	Yes Yes	No No	How many premature births —— How many Cesarean Sections — How many miscarriages —— Any complications with pregnancy			_	Yes	No
Urinate less than before Any blood in urine	Yes Yes	No No	How many premature births How many Cesarean Sections _ How many miscarriages			_	Yes	No

Name:	Date:

# PATIENT HEALTH QUESTIONNAIRE-9 (PHQ-9)

Over the <u>last 2 weeks</u> , how often have you been bothered by any of the following problems?  (Use """ to indicate your answer)	Not at all	Several days	More than half the days	Nearly every day
Little interest or pleasure in doing things	0	1	2	3
2. Feeling down, depressed, or hopeless	0	1	2	3
3. Trouble falling or staying asleep, or sleeping too much	0	1	2	3
4. Feeling tired or having little energy	0	1	2	3
5. Poor appetite or overeating	0	1	2	3
<ol><li>Feeling bad about yourself — or that you are a failure or have let yourself or your family down</li></ol>	0	1	2	3
<ol><li>Trouble concentrating on things, such as reading the newspaper or watching television</li></ol>	0	1	2	3
8. Moving or speaking so slowly that other people could have noticed? Or the opposite — being so fidgety or restless that you have been moving around a lot more than usual	0	1	2	3
Thoughts that you would be better off dead or of hurting yourself in some way	0	1	2	3
		-	Total Score:	
If you checked off <u>any</u> problems, how <u>difficult</u> have these work, take care of things at home, or get along with other		ade it for	you to do y	our/
Not difficult Somewhat at all difficult	Very difficult □		Extreme difficul	

	Question	Response
1	Have there been at least 6 different periods of time (at least 2 weeks) when you felt deeply depressed?	☐ Yes ☐ No
2	Did you have problems with depression before the age of 18?	☐ Yes ☐ No
3	Have you ever had to stop of change your antidepressant because it made you highly irritable or hyper?	☐ Yes ☐ No
4	Have you ever had a period of at least 1 week during which you were more talkative than normal with thoughts racing in your head?	☐ Yes ☐ No
5	Have you ever had a period of at least 1 week during which you felt any of the following: unusually happy; unusually outgoing; or unusually energetic?	☐ Yes ☐ No
6	Have you ever had a period of at least 1 week during which you needed much less sleep than usual?	☐ Yes ☐ No

## **Mood Disorder Questionnaire**

nd self or you	YES	NO
	YES	NO
self or you		
ating or		
friends in		
t were		
ver		
	friends in t were  work;	friends in

### Are you living with Adult ADHD?

The questions below can help you find out.

Many adults have been living with Adult Attention-Deficit/Hyperactivity Disorder (Adult ADHD) and don't recognize it. Why? Because its symptoms are often mistaken for a stressful life. If you've felt this type of frustration most of your life, you may have Adult ADHD – a condition your doctor can help diagnose and treat.

The following questionnaire can be used as a starting point to help you recognize the signs/symptoms of Adult ADHD but is not meant to replace consultation with a trained healthcare professional. **An accurate diagnosis can only be made through a clinical evaluation.** Regardless of the questionnaire results, if you have concerns about diagnosis and treatment of Adult ADHD, please discuss your concerns with your physician.

This Adult Self-Report Scale-VI.I (ASRS-VI.I) Screener is intended for people aged 18 years or older.

#### Adult Self-Report Scale-VI.I (ASRS-VI.I) Screener

from WHO Composite International Diagnostic Interview
© World Health Organization

#### **Date**

es

Check the box that best describes how you have felt and conducted yourself over the past 6 months. Please give the completed questionnaire to your healthcare professional during your next appointment to discuss the results.	Never	Rarely	Sometin	Often	Very Oft
I. How often do you have trouble wrapping up the final details of a project, once the challenging parts have been done?					
2. How often do you have difficulty getting things in order when you have to do a task that requires organization?					
3. How often do you have problems remembering appointments or obligations?					
4. When you have a task that requires a lot of thought, how often do you avoid or delay getting started?					
5. How often do you fidget or squirm with your hands or feet when you have to sit down for a long time?					
6. How often do you feel overly active and compelled to do things, like you were driven by a motor?					

Add the number of checkmarks that appear in the darkly shaded area. Four (4) or more checkmarks indicate that your symptoms may be consistent with Adult ADHD. It may be beneficial for you to talk with your healthcare provider about an evaluation.

The 6-question Adult Self-Report Scale-Version I.1 (ASRS-VI.I) Screener is a subset of the WHO's 18-question Adult ADHD Self-Report Scale-Version I.1 (Adult ASRS-VI.I) Symptom Checklist.

## **General Anxiety Disorder (GAD-7)**

NAME

Over the last 2 weeks, how often have you been bothered by the following problems?	Not at all sure	Several days	Over half the days	Nearly every day
Feeling nervous, anxious, or on edge	□ o	□ 1	□ 2	□ 3
Not being able to stop or control worrying	О	□ 1	□ 2	□ 3
Worrying too much about different things	□ o	□ 1	□ 2	□ 3
Trouble relaxing	□ o	□ 1	□ 2	□ 3
Being so restless that it's hard to sit still	□ o	□ 1	□ 2	□ 3
Becoming easily annoyed or Irritable	□ o	□ 1	□ 2	□ 3
Feeling afraid as if something awful might happen	□ o	□ 1	□ 2	□ 3
Add the score for each column				
TOTAL SCORE (add your column scores)				
	Not difficult at all	Somewhat difficult	Very difficult	Extremely difficult
If you checked off any problem on this questionnaire so far, how difficult have these problems made it for you to do your work, take care of things at home, or get along with other people?	□ o	□ 1	☐ 2	Пз



Name:	Date of birth:

# FEMALE HEALTH ASSESSMENT

Which of the following symptoms apply to you currently (in the last 2 weeks)? Please mark the appropriate box for each symptom. For symptoms that do not currently apply or no longer apply, mark "none".

Symptoms	None (O)	Mild	Moderate (2)	e Severe \	/ery severe
Hot flashes					
Sweating (night sweats or increased episodes of sweating)					
Sleep problems (difficulty falling asleep, sleeping through the night or waking up too early)					
Depressive mood (feeling down, sad, on the verge of tears, lack of drive)					
Irritability (mood swings, feeling aggressive, angers easily)					
Anxiety (inner restlessness, feeling panicky, feeling nervous, inner tension)					
Physical exhaustion (general decrease in muscle strength or endurance, decrease in work performance, fatigue, lack of energy, stamina or motivation)					
Sexual problems (change in sexual desire, sexual activity, orgasm and/or satisfaction)					
Bladder problems (difficulty in urinating, increased need to urinate, incontinence)					
Vaginal symptoms (sensation of dryness or burning in vagina, difficulty with sexual intercourse)					
Joint and muscular symptoms (joint pain or swelling, muscle weakness, poor recovery after exercise)					
Difficulties with memory					
Problems with thinking, concentrating or reasoning					
Difficulty learning new things					
Trouble thinking of the right word to describe persons, places or things when speaking					
Increase in frequency or intensity of headaches or migraines					
Hair loss, thinning or change in texture of hair					
Feel cold all the time or have cold hands or feet					
Weight gain or difficulty losing weight despite diet and exercise					
Dry or wrinkled skin					
Total score					

Severity score: Mild: 1-20 / Moderate: 21-40 / Severe: 41-60 / Very severe: 61-80



Name:	Date of birth:

# MALE HEALTH ASSESSMENT

Which of the following symptoms apply to you currently (in the last 2 weeks)? Please mark the appropriate box for each symptom. For symptoms that do not currently apply or no longer apply, mark "none".

	None	Mild	Modorate	Covoro V	ery sever
Symptoms	(O)	(1)	(2)	(3)	(4)
Sweating (night sweats or excessive sweating)					
Sleep problems (difficulty falling asleep, sleeping through the night or waking up too early)					
Increased need for sleep or falls asleep easily after a meal					
Depressive mood (feeling down, sad, lack of drive)					
Irritability (mood swings, feeling aggressive, angers easily)					
Anxiety (inner restlessness, feeling panicked, feeling nervous, inner tension)					
Physical exhaustion (general decrease in muscle strength or endurance, decrease in work performance, fatigue, lack of energy, stamina or motivation)					
Sexual problems (change in sexual desire or in sexual performance)					
Bladder problems (difficulty in urinating, increased need to urinate)					
Erectile changes (weaker erections, loss of morning erections)					
Joint and muscular symptoms (joint pain or swelling, muscle weakness, poor recovery after exercise)					
Difficulties with memory					
Problems with thinking, concentrating or reasoning					
Difficulty learning new things					
Trouble thinking of the right word to describe persons, places or things when speaking					
Increase in frequency or intensity of headaches/migraines					
Rapid hair loss or thinning					
Feel cold all the time or have cold hands or feet					
Weight gain, increased belly fat, or difficulty losing weight despite diet and exercise					
Infrequent or absent ejaculations					
Total score					

Severity score: Mild: 1-20 / Moderate: 21-40 / Severe: 41-60 / Very severe: 61-80



## CONTROLLED SUBSTANCE POLICY

The use of medications classified by the Drug Enforcement Agency (DEA) as controlled substances has the potential to cause addiction and/or abuse. They are closely regulated and monitored by the authorities, and misuse by either patient or prescriber may result in serious legal consequences.

#### I have been informed by my prescriber and/or their staff that:

- If I drink alcohol or use street drugs while taking this medication, I risk personal injury.
- I may get addicted to this medicine, especially if I or anyone in my family has a history of drug or alcohol problems.
- If I need to stop this medicine, I must do it properly under the guidance of my prescriber or I may experience withdrawal effects.

#### Due to the aforementioned risk, the following agreements will apply:

- I will not share medication with family members or friends.
- I will not get controlled medications from other doctors unless it is clearly communicated to our office and the other doctor that this has been done.
- I will not use illegal drugs while taking these medications.
- I will maintain the visit schedule as per my prescriber's instructions.
- I will submit to routine urine drug screens as part of my treatment plan to assess for compliance and the presence of other medications/drugs.

#### **Prescription & Refills**

All prescriptions for controlled substances will be sent electronically directly to my pharmacy, as required by the State of Connecticut. Refill requests must be submitted at least 2 business days prior to when they will be needed in order to allow for adequate time to complete the request. Any changes to my prescription will require an office visit for thorough review with my prescriber. My prescription may not be replaced if it is lost, stolen, or used up sooner than prescribed.

#### **Termination of Agreement**

If I violate any of the above rules, or if my prescriber determines that the medication is hurting me more than helping me, the medication may be discontinued by my prescriber in a safe way. Additionally, termination from the practice may be considered following serious or repeat violations.

have discussed this agreement with my prescriber and/or their stabove rules.	ff, and I understand and agree to the
Patient's Signature	Date
Prescriber or Designee's Signature	