

Phone: 480.451.3454 Fax: 480.451.3453  
Robert D. Schulte, M.D  
Board Certified in Child and Adolescent Psychiatry  
Board Certified in Adult Psychiatry  
10478 E Fanfol Lane  
Scottsdale, AZ 85258

**Private & Confidential- Medical Information**

Today's Date \_\_\_\_\_ Referred By \_\_\_\_\_

Patient's Name (Last, First, MI) \_\_\_\_\_

Birth Date \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Age \_\_\_\_\_ Gender: M / F SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Preferred Contact Number \_\_\_\_\_ Secondary Contact Number \_\_\_\_\_

**Email:** (We will use this for reminders unless you specify otherwise) \_\_\_\_\_

Alternate/Emergency Contact \_\_\_\_\_ Preferred Phone \_\_\_\_\_

Primary Physician \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Pharmacy \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Therapist (if applicable) \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Marital Status: \_\_\_\_\_ Married \_\_\_\_\_ Single \_\_\_\_\_ Widowed \_\_\_\_\_ Divorced \_\_\_\_\_ Separated \_\_\_\_\_ #Yrs \_\_\_\_\_

Name of Spouse/Significant Other/Parent(s) \_\_\_\_\_

Names & Ages of Children/Siblings \_\_\_\_\_

**If a patient is a minor please complete the following:**

Mother's Name \_\_\_\_\_ Preferred Phone \_\_\_\_\_

Alternate Phone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Father's Name \_\_\_\_\_ Preferred Phone \_\_\_\_\_

Alternate Phone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**BILLING INFORMATION:**

Party responsible for payment \_\_\_\_\_ Responsible Party phone \_\_\_\_\_

Responsible Party Address \_\_\_\_\_  
Number Street City State Zip Code

Insurance Information (**Please Note:** We gather insurance information for the purpose of expediting coverage for your prescriptions. Some insurance carriers require prior authorization to cover medications and will require us to submit forms on your behalf to secure approval. **We do not contract with insurance for any services.**)

Carrier Name \_\_\_\_\_ Member / Patient ID \_\_\_\_\_

Group ID \_\_\_\_\_ Customer Service # \_\_\_\_\_

**BILLING & ATTENDANCE POLICIES:**

• **ALL PAYMENTS ARE DUE AT TIME OF SERVICE.** While we do not contract with or submit to insurance, we will provide you with a one page "Superbill" with all the necessary information for you to submit to your insurance company for reimbursement upon request.

• Phone consultations will be charged as follows: 5-10 min \$85, 11-20 min \$185, 21-30 min \$290. Multiple calls will be aggregated per 24 hour period.

• **PATIENTS/ GUARANTORS MUST MAINTAIN CURRENT A CREDIT OR DEBIT CARD ON FILE.**

This information will only be used for actual charges incurred, including phone consults, requested reports, and *missed or late-cancelled appointments*. You are always welcome to use an alternate form of payment so long as it is offered at time of service.

• There is a 24 hour cancellation policy for Tuesday through Friday appointments. Monday appointments must be cancelled by 2pm on the previous Friday. **FULL SESSION FEES ARE CHARGED TO YOUR CARD ON FILE FOR ALL MISSED OR LATE-CANCELLED APPOINTMENTS.**

• While we do try to make courtesy reminders, clinical matters take precedence and we are not always able to do so. **PLEASE KEEP TRACK OF YOUR APPOINTMENTS TO AVOID MISSED APPOINTMENT CHARGES.**

• A \$35 fee will be charged for all returned checks. The patient agrees to reimburse this office for any Collection and /or legal charges incurred as a result of patient's failure to honor his/her bill.

***I have read, understand, and agree to abide by the foregoing billing & attendance policies. I understand that the foregoing agreement is binding in the state of Arizona. I hereby give express permission to Robert Schulte, MD (or his staff at his direction) to charge my card on file for charges incurred where I have not previously or simultaneously arranged alternate payment. I understand that I will be emailed a credit card receipt and Superbill detailing said charges within 24 hours after being charged upon request.***

\_\_\_\_\_  
Responsible Party Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

## **PHYSICIAN-PATIENT AGREEMENT**

This agreement serves to inform Dr. Schulte's patients regarding office policies, physician policies, and the Physician-patient relationship. Please read this agreement in its entirety and sign where indicated to acknowledge your understanding of this agreement and to abide by the policies contained therein.

**ATTENDANCE POLICY:** Dr. Schulte requires that all patients taking CII medication (generally, stimulants) be seen every three months and that those taking CIV medications (generally, benzodiazepines) to be seen every 4 months. All others on medication should generally be seen not less than every 6 months. Failure to maintain a regular attendance schedule may affect your ability to receive refills in a timely manner.

**PRESCRIPTION POLICY:** For REFILLS please contact your pharmacy directly; they will initiate the proper procedure.

**\*\*Please make sure to allow sufficient time for processing on all prescriptions, especially on weekends, so that you do not run out of your medication.**

**CONFIDENTIALITY POLICY:** Please see attached "Arizona Notice Form."

**RE: THE MEDICAL INFORMATION BUREAU:** Health insurance policies sometimes require patients to release all encounter information for any service rendered that is claimed against the health care plan. The diagnosis and treatment information required on the claim form is often then forwarded to the Medical Information Bureau (MIB), where it becomes available to other insurance companies without the patient's knowledge or consent. For this reason, Dr. Schulte cautions all patients that the release of any information through the claims filing process *may* present a potential risk that could be personally damaging to unknowing patients should an inappropriate party gain access to the MIB national database.

**MEDICARE PART B ENTITLEMENT POLICY:** While Dr. Schulte will gladly treat patients who are Medicare eligible, he does not participate in the Medicare Part B program. Unfortunately, this means that Medicare eligible patients are not allowed to seek Medicare reimbursement for Dr. Schulte's services and are required by law to sign a "waiver of Medicare Part B entitlement" acknowledging the same. A waiver is included in this packet and will need to be signed prior to receiving services.

**PATIENT/PHYSICIAN RESPONSIBILITIES:** Each patient is responsible for providing accurate contact and billing information. If a patient's telephone, email, or address changes it is the duty of that patient to inform Dr. Schulte's office immediately to avoid disruption of communication. Examination and treatment provided by Dr. Schulte is limited to outpatient psychiatric services. The patient should be aware that this does not necessarily constitute total or definitive psychiatric care, and that further evaluation and treatment may be required in some cases. It is the patient's responsibility to obtain follow up medical care for general health as needed or where when advised to do so by Dr. Schulte. The patient further acknowledges that psychiatry is a specialty within the field of medicine and is not meant to be a substitution for primary medical care.

**TERMINATION POLICY:** Dr. Schulte reserves the right to terminate any patient who violates treatment protocol, is generally non-compliant (with respect to treatment directives or office policies), willfully disregards treatment objectives that are designed to obtain positive clinical outcomes, or is rude or disrespectful to him or his staff. He will continue to treat the terminated patient on an *emergency basis only* for 30 days after termination.

**STORAGE, TRANSFER & ACCESS TO PATIENT RECORDS ON TERMINATION OF THE PRACTICE:**

In the event of the termination of Dr. Schulte’s practice, the doctor (or a designee from his staff) will post two notices in the Arizona Republic, two weeks apart, regarding the close of the practice and information for locating medical records. The doctor or his staff designee will further advise all active clients (by letter or direct verbal communication) where and how they may contact the doctor for purposes of interim/transfer care or to request their records. Patients will be provided either a phone number to contact the doctor directly or with numbers for the Arizona State Psychiatric Association or the Arizona State Medical Board, who will be able to properly direct requests (the doctor will maintain current contact with both associations during the required period for records retention). The doctor will maintain a professional telephone contact number for a period of three to six months, depending on circumstances surrounding the closure of the practice.

To protect personal privacy, the doctor or his staff designee will only provide direct access numbers to active or recent (6 months inactive) patients. *Inactive* patients will be able to direct records requests to the Arizona State Psychiatric Association or the Arizona State Medical Board. The doctor will maintain records at:

North Scottsdale Psychiatric Specialists  
10478 E Fanfol Lane  
Scottsdale AZ 85258

The doctor or his staff designee will respond in a timely manner to patient requests for copies or access to their medical records. Unless prohibited by illness, temporary travel unavailability, or death the doctor will respond within 30 days or other legally or ethically mandated timeframe. The doctor or his staff designee will dispose of unclaimed records after the legally specified time for retention by destroying said records such no confidential information remains in useable form.

In the event that circumstances require, the doctor or his staff designee will forward access and responsibility to another professional who will respond to records requests in accordance with legal and professional standards as set forth by the Arizona State Psychiatric Association and the Arizona State Medical Board.

***I have read, understand, and accept the provisions of this Physician-Patient Agreement, and have no questions about the policies outlined herein. I understand that if I violate any provisions of this agreement my treatment may be terminated. I understand that this agreement is binding in the state of Arizona and that the provisions herein are for my protection and the protection of Dr. Schulte. The original, signed agreement will become part of my private medical record and I am entitled to a copy at my request.***

\_\_\_\_\_  
Patient signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness signature

\_\_\_\_\_  
Date

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**AUTHORIZATION TO RELEASE / OBTAIN INFORMATION**

I, (name of or parent/guardian if a minor) \_\_\_\_\_, hereby authorize Dr. Robert Schulte to obtain information from and release information to:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Patient Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_

Reason for release:

My request  Coordination of Care  Transfer of Care

Other \_\_\_\_\_

**Portion of record to be released:**

All  Diagnostic Evaluation  Verbal Contact  Diagnostic Test Reports

Summary of Contact with Client  Other (specify) \_\_\_\_\_

I understand why this information is needed and I am satisfied that it will be held confidential. Photocopies of this form will be considered as valid as the original. This authorization will remain in effect until revoked by me in writing or upon termination of care with Dr. Schulte.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Witness \_\_\_\_\_ Date \_\_\_\_\_

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Acknowledgement of Receipt of Notice of Psychiatrist's Policies and Practices to Protect the Privacy of Your Health Information:

I, \_\_\_\_\_ acknowledge that I have been given a copy of Dr. Robert D. Schulte's Notice of Privacy Practices. This Notice describes how Dr. Robert D. Schulte may use and disclose my protected health information, certain restrictions on the use and disclosure of my healthcare information, and rights I may have regarding my protected health information. I understand these policies and agree to abide by / give consent for the same.

\_\_\_\_\_  
Signature of patient or representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Relationship to patient

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

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**Waiver of Medicare Part B Entitlement**

I have voluntarily decided to contract privately for services outside the Medicare Part B program. Neither I, nor my family, nor my heirs, nor my estate shall file any Medicare Part B claims or forms. Further, I neither require nor request that Robert D. Schulte, M.D. or his office staff to do so on my behalf. I hereby waive my entitlement to Medicare Part B benefits for all services rendered by Robert D. Schulte, M.D.

\_\_\_\_\_  
Medicare Eligible Patient Name (Printed)

\_\_\_\_\_  
Medicare ID Number (if applicable)

\_\_\_\_\_  
Eligible party Signature

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Witness Name (Printed)

\_\_\_\_\_  
Witness Signature

\_\_\_\_\_  
Date Signed

**Confidential Patient Medical History**

Please provide the following information about your general health and your health history. Circle P for personal history & F for family history.

- |  |   |
|--|---|
| P F ALCOHOL OR DRUG USE                        | P F HERNIA P F WEIGHT PROBLEMS                  |
| P F ALLERGIES; MEDICATIONS                     | P F HIV/AIDS                                    |
| P F ALLERGIES; POLLEN, DUST, ANIMALS           | P F HORMONAL/THYROID/PITUITARY                  |
| P F ANXIETY                                    | P F HYPERTENSION/BP DISORDER                    |
| P F ARTHRITIS; GOUT                            | P F HYSTERECTOMY                                |
| P F ASTHMA; BRONCHITIS                         | P F IMMUNE SYSTEM DISORDER, LUPUS               |
| P F BACK, NECK, SPINE, DISC PROBLEMS/INJUR     | P F INTESTINAL DISORDERS                        |
| P F BIRTH DEFECTS/DEFORMITY                    | P F KIDNEY/URINARY TRACT CONDITION OR INFECTION |
| P F BONE/JOINT CONDITION                       | P F MALE ORGAN IRREGULARITY/IMPOTENCE           |
| P F BLOOD DISEASE; ANEMIA, LUKEMIA             | P F MENSTRUAL PROBLEMS                          |
| P F BREAST DISEASE                             | P F MENTAL: NERVOUS, DEPRESSION                 |
| P F BREAST IMPLANTS (L/R)                      | P F MIGRAINES/HEADACHES                         |
| P F BLOOD VESSEL, CIRCULATION DISORDER         | P F MUSCLE/TENDON DISORDERS                     |
| P F BROKEN BONES/BONE DISEASE                  | P F NERVOUS SYSTEM CONDITIONS                   |
| P F CANCERS OF ANY TYPE                        | P F PROSTATE DISEASE/CONDITION                  |
| P F COLON/CROHN'S DISEASE                      | P F PROSTHETIC IMPLANT/ ARTIFICIAL LIMBS        |
| P F CONCUSSION/HEAD INJURY                     | P F RECONSTRUCTIVE/COSMETIC SURGERY             |
| P F DIABETES                                   | P F SEXUALLY TRANSMITTED DISEASE                |
| P F EAR/NOSE/THROAT DISEASE OR INFECTION       | P F SKIN DISORDERS/LESIONS/CANCER               |
| P F EATING DISORDER; ANOREXIA, BULIMIA         | P F STEROID USE; PREDNISONE/ANABOLIC            |
| P F EPILEPSY/SEIZURE DISORDER, CONVULSIONS     | P F STOMACH                                     |
| P F FEMALE ORGAN IRREGULARITY;<br>ABNORMAL PAP | P F STROKE                                      |
| P F GALLBLADDER DISEASE                        | P F TUMORS, CYSTS, POLYPS, GROWTHS              |
| P F HEART DEFECT OR CONDITION                  | P F ULCERS, DIGESTIVE DISORDERS                 |
| P F HEPATITIS/LIVER DISORDER                   | P F OTHER, EXPLAIN _____                        |

**Current & Past Medications (please indicate by circling past or current med)**

C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	
C	P		C	P	

If you have any history of substance abuse, please indicate:

	Current	Past		Current	Past
Alcohol			Cocaine		
Hypnotics			Anxiety Pills		
Tobacco			Marijuana		
Diet Pills			Sleeping Pills		
Caffeine			Stimulants		
Narcotics/Pain			Others (Specify)		

Do you have any medication allergies/sensitivities? If yes, which medications are you allergic or sensitive to?

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Please list any other substances you have allergies to, such as foods or over-the-counter medications:

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Have you ever been hospitalized? If yes, please state when, where, and why:

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Have you ever had surgery? If so, please state the type of surgery, when, where, and why:

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Has there been any family psychiatric history? If yes, please explain:

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---

Do you have any legal history that may be applicable (arrests, lawsuits, etc.). If so, please describe:

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Please check any of the following areas that you have experienced:

Head injury  Loss of consciousness  Seizures  Convulsions  Other neurological diagnosis

Have you ever smoked? \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, number of years: \_\_\_\_\_ Daily use: \_\_\_\_\_

If female, date of last menstrual period: \_\_\_\_\_ Are you pregnant? \_\_\_\_\_ Yes \_\_\_\_\_ No

Current Height: \_\_\_\_\_ Current Weight: \_\_\_\_\_

Blood Pressure History: \_\_\_\_\_ High \_\_\_\_\_ Normal \_\_\_\_\_ Low BP Range (if known): \_\_\_\_\_

**Confidential Patient Social History**

Highest grade/Degree completed: \_\_\_\_\_ Where? \_\_\_\_\_

How many hours per week do you work? \_\_\_\_\_ Do you enjoy your work? \_\_\_\_\_

If retired, do you engage in activities outside your home? \_\_\_\_\_

What is your household constellation? Do all of your children live with you?

\_\_\_\_\_

How often do you spend time with others? \_\_\_\_\_

\_\_\_\_\_

What precipitated this visit? (Feel free to use the back of this page or request more paper)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please briefly describe your family as you were growing up:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please list any events from your childhood/adulthood that have had a profound effect on your life:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please describe any areas of conflict in your life (e.g.: work, children, spouse):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**If Patient is a Child or Adolescent, please complete the following:**

At what age did problems begin? \_\_\_\_\_

Does the child get along with siblings? \_\_\_\_\_

Describe any difficulties the child has or has had at school \_\_\_\_\_

\_\_\_\_\_

Has the child been held back any grades? Y N      Has the child been in any special classes? Y N

Has any psychological testing been done at school? \_\_\_\_\_

Has the child ever been in legal trouble? \_\_\_\_\_

\_\_\_\_\_

Has the child had issues with drug or alcohol use? \_\_\_\_\_

Did either parent experience any similar conditions as children? \_\_\_\_\_

\_\_\_\_\_

Aside from the condition(s) listed above, has the child ever behaved in any way that seemed especially different or unusual?

\_\_\_\_\_

Please list persons living at home where the child lives (name, age, relationship to child):

\_\_\_\_\_

**Natal Development:**

Describe any problems mother had during pregnancy and / or difficulties with delivery: \_\_\_\_\_

\_\_\_\_\_

Birth weight \_\_\_\_\_ Oxygen needed? Y N      Incubator? Y N      Blood transfusions? Y N

Abnormalities: \_\_\_\_\_ When developmental milestones met?

Verbal: \_\_\_\_\_ Motor: \_\_\_\_\_

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