



Checklist for Physical Therapy

- Completed Intake Paperwork
- Previous OT/PT Information
- Allergy Notification
- Current school patient attends _____
- Current copy of IEP for patients 3 years and older
- Check here if patient does not have an IEP
- Copy of Insurance/Medicaid Card



_____ is scheduled for

a(n) OT / PT / Speech Evaluation on _____

at _____ with _____.

DIRECTIONS TO OUR CLINICS

Please print, complete fully, and bring this new patient packet with you to the evaluation.
Please bring your child's insurance and/or Medicaid card with you.
Please bring a copy of your child's IEP, if applicable.

*****Please bring any past evaluations your child may have.****

PLEASE FOLLOW THE DIRECTIONS BELOW! (MapQuest and GPS are not always accurate in locating our offices!)

MOORESVILLE, NC LOCATION

From Charlotte: Take I-77 North to exit 36. At top of ramp, turn right onto Hwy. 150 East.

From Statesville: Take I-77 South to exit 36. At top of ramp, turn left onto Hwy. 150 East.

You will go past the Walmart on the right, and Belk and Kohl's on the left.

At next traffic light, turn left onto Corporate Center Dr. (by Zaxby's).

At stop sign, go straight onto Upper Crest into Talbert Pointe Business Park.

At stop sign turn left onto Overhill Drive (by AcroFitness).

Turn right onto Infield Court. We are located at the bottom of the cul de sac

134 Infield Court, Mooresville NC 28117

CHARLOTTE, NC LOCATION

2520 Whitehall Park Drive Suite 350

Charlotte, NC 28273

SALISBURY, NC LOCATION

Our office is adjoined to/in the same building as Salisbury Pediatrics.

129 Woodson Street Salisbury, NC 28144

**Please see the next page for more details about this location.

IMPORTANT: ALL PAPERWORK MUST BE COMPLETED BEFORE YOUR CHILD'S EVALUATION!

704-799-6824 Fax: 704-799-6825 www.pediatricadvancedtherapy.com

SALISBURY LOCATION

DETAILS

Please enter through the
main lobby door
at Salisbury Pediatrics and wait
in the far left lobby (near the
pharmacy) for your therapist to come
out and greet you.
You do not need to check in with the
Salisbury Pediatrics staff.

****Please do not enter through
the side door as treatment
may be in session.**



INSURANCE PAYMENT ESTIMATES:

The benefits quoted to us by your insurance are as follows*:

You are financially responsible for:

\$_____ Individual Deductible

\$_____ Family Deductible

****The evaluation will cost approximately \$_____. If you have NOT yet met your deductible (either individual or family), treatment sessions will approximately be \$_____ until the deductible is met. Once met, each visit should be about \$_____ per session.****

Self-pay rates (if not filing to insurance): \$95.00 for evaluation and \$80.00 per treatment session.

\$_____ Co-pay

_____ % Co-insurance

\$0 due because your child has Medicaid

Your plan is limited to _____ visits per _____.

No visit limit.

Other:

Payment is expected at the time of service.

We accept cash, check, discover, visa or mastercard.

Notice of Privacy Practices is on the back side of this sheet for your records.

** This information was given to us by your insurance company. You should also call your insurance company to verify your benefits. Discrepancies should be taken up with your insurance company, not PAT. These are just estimates and until we receive the Explanation of Benefits from your insurance company, we are unable to predict exact payments.*

IMPORTANT: ALL PAPERWORK MUST BE COMPLETED BEFORE YOUR CHILD'S EVALUATION!



Dear Parent(s) or Guardian(s),

Pediatric Advanced Therapy is committed to providing you and your family with the best possible care. Please understand that our office policies are in place to ensure that we are able to continue to provide excellent care to all of our patients. Your understanding of these policies is a vital piece to your child's progress in treatment, and we invite you to ask if you have any questions at any time.

As a courtesy for our patients' families, we will call your insurance carrier before treatment begins to verify coverage and benefits. The information we obtain is not a guarantee of payment; your insurance will process the claims based on your specific policy, medical necessity, and any exclusions or limitations attached to your plan. It is important that you understand that you will be responsible for any charges not covered by your insurance plan including—but not limited to—deductible, co-insurance, and co-payments. In addition, many insurance plans have a maximum number of therapy visits covered per year, with anything in addition being the responsibility of the patient. We do have a reduced, self-pay rate that we will apply if/when this occurs.

I have read and understand the financial policy for Pediatric Advanced Therapy, and agree to be responsible for any charges accrued on my account. I agree to keep my account current by either paying at the time of service or within 30 days of invoice. I understand that a member of the office staff will always be available to answer any questions I may have regarding my account.

Attached you will find the information we received from your insurance company, with a quote of expected benefits and patient out-of-pocket portions.

Printed Name

Signature

Date

IMPORTANT!

**Please arrive 15 minutes
before your scheduled
appointment.**

**ALL paperwork must be
completed prior to your
appointment and turned in
at the window upon arrival.**

What to Expect During the Evaluation

- Please arrive 15 minutes before your scheduled appointment with all of your paperwork completed.
- Our front office staff will discuss your insurance with you upon arrival if it has not already been discussed over the phone.
- Your evaluating therapist will review your paperwork and come greet you in the lobby.

During the evaluation:

- Parents are welcomed to come back into the treatment rooms during the evaluation to speak with the evaluating therapist.
- Please share your concerns for your child, medical and developmental history as well as challenges that occur within your daily routine. It is helpful to know how they do in a variety of settings as well, not just at home with you, i.e. school, play dates etc.
- Please share any precautions or limitations your child may have with regard to physical movement, environmental or food allergies.
- The evaluating therapist will complete structured and unstructured clinical observations of your child's movement patterns, sensory processing and age appropriate skills.
- The evaluating therapist will most often provide questionnaires for you to complete during your time and at this point may ask you to fill these out in the lobby while they complete additional standardized testing in a small room at a table (where appropriate). Parents are always welcome to stay for the duration if they prefer and with younger children and infants, that is typical.
- At the end of the evaluation, your therapist will share with you deficits that have been noted and decide whether or not your child requires skilled therapy intervention.
- If therapy is required, it is best to discuss days and times with the office staff before you leave so that they can begin working to find you an appointment time.
- Before you leave, you will receive educational handouts about what to expect from treatment as well as basic information regarding your child's specific difficulties.
- Your therapist will compile test scores and a written report with treatment goals.
- You can expect a report to be mailed to you within 2 weeks or sometimes it will be given to you at your next appointment.

If you have any questions, please feel free to call and ask prior to your appointment, or you can ask the evaluating therapist or office staff upon arrival. We look forward to working with you and your child to help them reach their full potential!

Sincerely,
The PAT Staff

Date: _____

NEW CLIENT INFORMATION

Referred by: _____

Welcome to Pediatric Advanced Therapy (formerly Integrative Therapy Concepts)

We look forward to working with your child. Please provide us with the following information:

Client's Name: _____
First M Last

Client prefers to be called: _____ Date of birth: ____/____/____

Parents' names(s): _____

Home phone: _____ Cell phone: _____ Work phone: _____

Email address: _____

Home address: (if using a PO Box, you must also list a physical address) _____

City: _____ State: _____ Zip Code: _____

Patient's School Name & Current Grade: _____

Emergency contact: _____ Phone#: _____

Relationship to client: _____

Pediatric Physician & Practice: _____ Phone#: _____

ACKNOWLEDGEMENT and ASSUMPTION of RISK

I acknowledge and agree to have my child (or the child under my care), receive occupational therapy services from Pediatric Advanced Therapy. I acknowledge that there is some risk inherent in the use of the therapy equipment and I agree to assume such risk and indemnify and hold Pediatric Advanced Therapy and its staff, harmless from any and all losses and claims for any injuries or other damages occurring to myself, my child or our belonging.

MEDICAL TREATMENT RELEASE:

In the event of an emergency situation at Pediatric Advanced Therapy, I give the staff of PAT my permission to initiate emergency medical services for the child listed above if I am not present during the emergency. My hospital preference is _____, however I acknowledge that Pediatric Advanced Therapy will not be held responsible for hospital or EMS providers designated.

Please note: If your child has any of the following conditions it is mandatory that you remain on the premises during his or her therapy session. These conditions include: Seizures, severe allergies, significant behavioral issues, and any condition that requires medicine to be controlled. This is for the safety of your child and the protection of our staff.

(1) PRIMARY INSURANCE COMPANY: _____ Phone #: _____

ID# _____ Group #: _____

Policy Holder: _____ Date of birth: ____/____/____ Employer: _____

(2) SECONDARY INSURANCE COMPANY: _____ Phone #: _____

ID# _____ Group #: _____

Policy Holder: _____ Date of birth: ____/____/____ Employer: _____

ASSIGNMENT OF INSURANCE TO PEDIATRIC ADVANCED THERAPY:

I authorize direct payment of medical benefits to Pediatric Advanced Therapy. The benefits referred to herein would be payable to me (policy holder) if I did not make assignment and include Major Medical Insurance. **I understand that I am personally responsible to Pediatric Advanced Therapy for any and all payments not covered by the insurance companies, such as co-payments, co-insurance, deductibles and denied services. All payments are due at the time of service.**

The attending therapist is authorized to release any medical information required in the administering of applications for financial coverage for service required. He/she may also send the results of the evaluation and recommendations to my referring physician for coordination and continuity of care. I have carefully completed this form and to the best of my knowledge it does not contain any false, incomplete or misleading information.

Signature: _____ Date: _____

PLEASE COMPLETE THE BACK SIDE/NEXT PAGE!

POLICIES & PROCEDURES

2/4/2015

Revised

The privacy of your medical information is important to us. We understand that your medical information is personal and we are committed to protecting it. We create a record of the services you receive at Pediatric Advanced Therapy. We are required by law to inform you of the "class of persons" who will have access to your medical information in order to carry out their job duties. This would include our therapy staff, administrative & billing staff and management. We may use and disclose your medical information for the purpose of treatment, payment and health care operation activities.

All evaluations usually last for one hour. It is the responsibility of the parent/guardian to bring all pertinent information to the evaluation. This includes your completed paperwork, insurance card, Medicaid card, and any medical history and/or past evaluations your child has received. You will need to be present for the first 20 minutes of the evaluation so that the therapist can ask you some questions. The remainder of the evaluation time will include clinical observation and in most cases, standardized testing. For liability reasons, we can only allow the children who are being treated into the gym and therapy rooms. **Siblings MUST stay in the lobby, NO EXCEPTIONS.**

Occupational and Physical Therapy sessions last for 50 minutes. Following the session is a 10 minute window to discuss your child's therapy with the therapist. It is mandatory that you are in the lobby during this 10 minute time frame. Please have your child use the restroom prior to the treatment session. Speech Therapy evaluations last for one hour and treatment sessions are 30 minutes.

If you leave the clinic while your child is in session, you **MUST** leave a phone number where you can be reached. You must return to the clinic before your child's session ends. This allows time for the therapist to speak with you regarding your child's treatment and progress, and also keeps the next client's session on schedule. **Please note: If your child has any of the following conditions it is mandatory that you remain on the premises during his or her therapy session. These conditions include: Seizures, severe allergies, significant behavioral issues, and any condition that requires medicine to be controlled. This is for the safety of your child and the protection of our staff.** If you arrive late for your session, your appointment will still end at the original end time.

Please try to give 24 hour notice when cancelling an appointment. (Occasional last minute emergencies are understood.) If you call after hours, please leave a message on our answering machine. Frequently cancelled appointments (3 within a 6 week period) will be basis for removal from our permanent schedule. When we establish a treatment plan for your child, we base our goals on the child having consistency. If your child misses appointments, they will not meet their goals as quickly, and your child will have to be enrolled in therapy for a longer period of time. The success of our treatment sessions depends on consistency. Medicaid and insurance companies require us to report attendance and show progress towards goals. In the event that you do have to cancel, we strongly encourage you to schedule a make-up appointment, even if it is with another therapist. It is often beneficial for your child when another therapist treats him or her because it gives the regular attending therapist another opinion or ideas for your child. Our staff is always in close communication with each other.

In the event that the therapist needs to cancel, we will reschedule your child with another therapist for continuity of treatment.

Failure to cancel or to appear for an appointment is considered a "NO SHOW." We will charge a \$25.00 fee for "NO SHOW" appointments. After 3 "NO SHOW" appointments or late cancellations your appointment spot will be terminated. Please see our attached cancellation policy for further details.

At Pediatric Advanced Therapy, we will file with your insurance company as a courtesy. It is important for you to understand that when we contact your insurance company to verify benefits, they are only providing us with a quote. You should also call your insurance company to verify your benefits and check your benefits in your plan booklet. Many insurance plans have a limited number of visits for outpatient therapies. It is your responsibility to keep track of the number of visits your child has used. **Verification of coverage is NOT a guarantee of payment. Benefits and payment will be determined by your insurance company once the claims are received.** Any payments not covered by insurance or Medicaid will be the sole responsibility of the parent/guardian.

All payments are due at the time of service. We are required under contractual agreements with insurance companies to collect co-payments at the time of service. If you have a deductible that has not been met you should be prepared to pay the full allowable amount at each visit until your deductible is met. (For example, if you have a \$500 deductible, this means that your insurance company will not pay any money towards your medical expenses until YOU, the member, have spent \$500 of your own money towards medical expenses.)

- ⇒ **I understand that I MUST return 10 minutes before my child's session ends.** _____ (please initial here)
- ⇒ **I understand that I will be billed for "NO SHOW" and late cancellation appointments.** _____ (please initial here)
- ⇒ **I agree to the payment terms listed above.** _____ (please initial here)

I have read the Policies & Procedures listed above and have received a Notice of Privacy Practices from Pediatric Advanced Therapy.

Signature of parent/guardian: _____ Date: _____

BACKGROUND INFORMATION and OCCUPATIONAL HISTORY

(This form is intended to be completed by the child's parents or primary caregivers)

FAMILY INFORMATION

Child's Name: _____ Today's Date: _____
Birth date: _____ Age: _____ years _____ months Home Phone: _____
Address: _____
County: _____ Email Address: _____
Mother's Name: _____ Age: _____ Occupation: _____
Office/Cell Phone: _____
Father's Name: _____ Age: _____ Occupation: _____
Office/Cell Phone: _____
Other: Caregivers/Foster parents: _____ Cell Phone: _____
Child resides with: _____

REFERRING INFORMATION

Who **referred** this child for an evaluation? _____
Reason for referral: _____

When did you first have those **concerns**? _____

What do you see as your child's **strengths**? _____

In one sentence, how would you **describe your child**? _____

List all **concerns** that you may have: _____

List concerns that arise out of your child's daily routine: (Including morning routine, school, eating, sleeping, dressing) _____

What are our primary **goals** regarding therapy? _____

Did your child receive Occupational Therapy services in the past: (Yes/No) _____

At what age? _____ Duration: _____

SCHOOL HISTORY

Hand preference: _____ Current school placement: _____

Present grade: _____ Have any grades been repeated? _____

Is your child in the EC program or receiving any support services? (specify) _____

What does the teacher say about your child? _____

Does your child receive any therapy at school? (i.e. Speech Therapy, Occupational Therapy, Physical Therapy)

MEDICAL HISTORY

Any difficulties or illnesses during pregnancy? (specify) _____

Length of pregnancy: _____

Birth was: Normal [] Caesarian [] Breech [] Twins or more []

Birth weight: _____ Did baby require assistance in starting to breathe? Yes [] No []

Remarks: _____

Were there any complications/problems in early infancy? Yes [] No [] (please specify)

Were there any feeding difficulties in early infancy? Yes [] No [] (please specify)

Does your child have a diagnosis? _____

Diagnosed by whom? _____ Date: _____

Does your child have now or in the past had significant health problems?

Surgery? Explain _____ Hospitalization? Explain _____

Respiratory, Lung, or Bronchial difficulties? _____ Cardiac Problems? _____

Seizures? (when and how often) _____

Allergies? _____

Emergency plans? (i.e. EpiPen) _____

Ear Infections? _____

Is your child currently on any medications? Yes [] No []

If yes, please give a list and state reasons) _____

Previously tried medications: _____

Physical limitations/precautions to be aware of: _____

Does your child use any specialized equipment? (Explain) _____

INTERVENTION HISTORY

Has your child had a hearing evaluation? Yes [] No []

By whom: _____ Date: _____

Has your child had a vision evaluation? Yes [] No []

By whom: _____ Date: _____

Has your child had a psychological evaluation? Yes [] No []

By whom: _____ Date: _____

Has your child had a neurological evaluation? Yes [] No []

By whom: _____ Date: _____

Others (please specify) _____

DEVELOPMENTAL HISTORY

Children sometimes act or appear younger than their chronological age. What age do you think best describes your child and why? _____

Developmental Milestones:

Sitting: _____ months Crawling: _____ months Walking: _____ months
Babbling: _____ months 1st word: _____ months Combining words: _____ months

Self-Help: (Circle yes/no)

Dressing

Put on shirt independently Y/N
Button independently Y/N
Zips independently Y/N
Ties shoes Y/N
Snaps independently Y/N
Dress self independently Y/N

Grooming

Bathing independently Y/N
Combing hair Y/N
Toilet trained Bowel Y/N
 Bladder Y/N
Toileting independently Y/N

Hand Function

Reaching for objects Y/N
Finger Feeding Y/N
Using Knife for cutting Y/N
Eating with spoon Y/N
Drawing a circle Y/N
Cutting with scissors Y/N

Does your child have difficulty learning new motor skills? _____

How does your child communicate? _____

Daily Routines:

How well does your child do the following? (Circle yes/no) Explain if needed.

Sleeping: Wake up during the night: yes/no _____

Difficulty falling asleep: yes/no _____

Does your child have a difficult time to wake up in the morning: yes/no _____

Sleep in own bed: yes/no _____

Take naps during the day: yes/no _____

Describe your child's bedtime routine: _____

Eating: Picky eater: yes/no

Avoid certain textures: yes/no

Gags at/on foods or utensils: yes/no

Avoids food that requires lots of chew: yes/no

Explain: _____

Toileting: Independent with toileting: yes/no

Following toilet training routine: yes/no

Explain: _____

Playing: Difficulty playing alone: yes/no

Duration of play: 1-2 min _____ 5-10 min _____ more _____

Difficulty with pretend play: yes/no

Difficulty using playground equipment: yes/no

Does your child avoid certain types of toys (i.e. textured toys): yes/no Does your child avoid any messy play (i.e. sand, paint, glue, etc): yes/no

Difficulty playing with other children: yes/no Explain: _____
Explain: _____

Behavior:

Does your child exhibit tantrums: yes/no Frequency: ___ times/day or ___ times/week

What triggers the tantrums? _____

Duration of tantrum: _____

What strategies do you use to calm your child during a tantrum? _____

What do you do that works the best to obtain cooperation from your child? _____



**Physical Therapy Screening Tool (“Red Flags”).
Check all that apply.**

Children → All Ages

- Seems clumsy or uncoordinated (taking longer than expected to learn motor skills, bumps into other people or objects in the environment, falls often, etc)

- Difficulty following verbal directions or completing steps of daily routines

- Avoid movement activities such as swings, slides, hesitates on curbs or uneven surfaces, etc

- Uses more movements and time than necessary to accomplish a task consistently

- Appears to be in constant motion, fidgety, difficult time sitting still

- Overly rough when playing

- Difficulty imitating actions

- Unsafe in community or at home

- Fall more than peers or constantly have bruises or scrapes or injuries

- Disruptive behaviors-impulsive, limited attention, resistive to new activities/changes in routine, difficulty moving from one activity to another, gives up easily, difficulty calming self

- Look or tilt their head always to one side and/or have flattening of back or side of the head

- Walk in a way that is different from other kids their age



Physical Therapy Screening Tool (“Red Flags”) – Age Specific

Birth- 6 months <ul style="list-style-type: none"><input type="checkbox"/> Not turning head or lifting head when held or placed on tummy for play<input type="checkbox"/> Does not roll side to back<input type="checkbox"/> Does not hold body up with arms on stomach<input type="checkbox"/> Does not roll over back to side<input type="checkbox"/> Brings toys and hands to mouth and middle of body together<input type="checkbox"/> Does not roll back to and from tummy or push chest off floor when on tummy to initiate roll (should be developed 4-6 months)<input type="checkbox"/> Does not sit when placed for even a few seconds (6 months with hands down in front)	7 month- 1 year <ul style="list-style-type: none"><input type="checkbox"/> Does not get on hands and knees<input type="checkbox"/> Does not attempt to army crawl on floor pulling body with arms and using legs to assist<input type="checkbox"/> Does not crawl on hands and knees (around 9 months)<input type="checkbox"/> Does not catch self with balance loss forward, or side to side (developed fully by 9 months)<input type="checkbox"/> Is not able to sit without support or get into sitting for more than 1 minute<input type="checkbox"/> Is not interested in standing or does not stand without hands on waist<input type="checkbox"/> Is not attempting to step with or without support<input type="checkbox"/> Does not stand without support for even a couple seconds<input type="checkbox"/> Does not engage with rolling or flinging small ball
1-2 years old <ul style="list-style-type: none"><input type="checkbox"/> Does not catch balance loss in sitting backwards (by 1 year)<input type="checkbox"/> Does not stand well without support<input type="checkbox"/> Does not attempt to get up steps (may crawl or walk with hand hold near 2 years)<input type="checkbox"/> Is not able to stand up from floor with squat pattern<input type="checkbox"/> Is not walking with more steadiness or change direction with walking without balance loss.<input type="checkbox"/> Is not able to climb onto couch, chairs or into seat in car and turn to sit<input type="checkbox"/> Is not able to kick or step on ball without fall<input type="checkbox"/> Is not able to walk backwards or carrying toy<input type="checkbox"/> Is not able to throw ball overhand	2-3 year olds <ul style="list-style-type: none"><input type="checkbox"/> Does not run or jump without balance loss (by 2 years old)<input type="checkbox"/> Does not walk up and down steps without handrail (can put both feet on same step)<input type="checkbox"/> Does not throw small ball with close to target aim underhand pattern.<input type="checkbox"/> Does not stand on one foot for 1-2 seconds (about 2.5 years old)<input type="checkbox"/> Does not walk on tip toes<input type="checkbox"/> Does not throw overhand pattern (2.5 years old)<input type="checkbox"/> Does not jump down large step with feet together without balance loss (around 2/5 years old)
3- 4 years old <ul style="list-style-type: none"><input type="checkbox"/> Is not able to jump down/forward feet together<input type="checkbox"/> Does not walks up stairs without handrail or 2 feet on same step<input type="checkbox"/> Does not attempt to pedal tricycle<input type="checkbox"/> Is unable to avoid obstacles with path change<input type="checkbox"/> Is unable to kick ball 5-6 feet or catch a ball thrown to them<input type="checkbox"/> Is unable to stand on one foot for 5 seconds or on tip toes in place<input type="checkbox"/> Unable to walk narrow line without fall or step off<input type="checkbox"/> Unable to throw ball over and underhand with target contact	5-6 years old <ul style="list-style-type: none"><input type="checkbox"/> Is unable to do summersault/tumble over ground<input type="checkbox"/> Is unable to skip or gallop with model of pattern<input type="checkbox"/> Is unable to hit a target with ball thrown 12 feet<input type="checkbox"/> Does not catch small or bounced ball with hands only<input type="checkbox"/> Is unable to stand on one foot >10 seconds<input type="checkbox"/> Is unable to complete pushups or sit ups (form not important but clearing part of upper body)<input type="checkbox"/> Is not able to walk on tip toe 15 feet or more. <p>** by 7-12 years old the child should move and walk very similarly in pattern to an adult and demonstrate smooth movements with tasks like bike, jumping jacks and ball skills.</p>



Cancellation Policy

Please note that we have updated our cancellation policy effective 7/13/15.

Pediatric Advanced Therapy aims to provide the highest quality of care to all patients. In the interest of all of our patients, we are implementing a 24 hour cancellation policy effective July 13th. All cancellations require 24 hour notice to avoid a cancellation fee. By implementing this policy, we will have the ability to replace cancelled appointments with patients in need and provide the best care for our collective patients.

Our policy is as follows:

1. Patients that cancel with more than 24 hour notice will not be subject to a cancellation fee. If a patient cancels more than 3 times in a 10 week period, they are subject to being removed from the permanent schedule.
2. Any patient that no shows for an appointment without a prior call will immediately be subject to a \$25 cancellation fee.
3. Any patient cancelling with less than 24 hour notice will be allowed 2 "free passes" per 12 month period. We understand that emergencies and illnesses do happen. After 2 free passes, any cancellation with less than 24 hour notice will be subject to a \$25 cancellation fee.

If a patient schedules and attends a make-up session within the week of (or the week following) the cancellation, the cancellation fee or free pass usage will be waived.

If you have questions or would like to discuss your scheduling needs, please call 704-799-6824.