

ANNUAL WELLNESS VISIT QUESTIONNAIRE

NAME _____ D.O.B. ____/____/____

TODAY'S DATE ____/____/____

SPECIALITY PROVIDERS: List all physicians you are currently seeing or known to

ALLERGY _____ ONCOLOGY (CANCER) _____
CARDIOLOGIST (HEART) _____ OPHTHALMOLOGY (EYE) _____
DERMATOLOGY (SKIN) _____ PHYSICAL THERAPY _____
GASTROENTEROLOGY (STOMACH/ LIVER) _____
PODIATRY (FOOT) _____ PAIN _____
ENT (HEAD, NECK, EAR) _____ PULMONOLOGY (LUNGS) _____
ENDOCRINOLOGY (DIABETES, THYROID) _____
NEPHROLOGY (KIDNEY) _____ RHEUMATOLOGY _____
NEUROLOGY _____ UROLOGY (BLADDER) _____
OB/GYN _____ OTHER _____

HOSPITAL STAYS: LIST ANY OVERNIGHT HOSPITALS STAYS IN THE PAST YEAR

DATE	REASON	LOCATION
1. _____		
2. _____		
3. _____		
4. _____		
5. _____		
6. _____		

ALLERGIES: LIST ANY NEW ALLERGIES TO MEDS, MEDICAL SUPPLIES, AND/OR FOOD IN THE PAST YEAR

ALLERGY	REACTION
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____

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MEDICATIONS: LIST ALL CURRENT PRESCRIPTIONS, OVER-THE-COUNTER MEDS, AND SUPPLEMENTS

NAME	STRENGTH	DIRECTION	PRESCRIBED BY
1. _____			
2. _____			
3. _____			
4. _____			
5. _____			
6. _____			
7. _____			
8. _____			

Do you need help taking your medications? ☐ Yes ☐ No

Reminder- It is your responsibility to notify your doctor of all the prescriptions, over-the-counter medications, and supplements that you are taking during each visit. Nonadherence or noncompliance with treatment plans can often increase the exacerbation of disease or risk of death for patients with certain medical conditions like diabetes, hypertension, and heart disease amongst others.

FUNCTIONAL SCREENINGS

1. Do you need help preparing your meals or feeding yourself? ☐ Yes ☐ No
2. Do you need help getting to the toilet, bathing, or showering? ☐ Yes ☐ No
3. Do you need help getting dressed? ☐ Yes ☐ No
4. Do you need help getting from the bed to a chair or climbing stairs? ☐ Yes ☐ No
5. Do you need help walking across a room? ☐ Yes ☐ No
6. Do you use a cane, walker or wheelchair? ☐ Yes ☐ No
7. Do you need help using the telephone? ☐ Yes ☐ No
8. Do you need help shopping or managing your money? ☐ Yes ☐ No
9. Do you need help with transportation? ☐ Yes ☐ N
10. Have you fallen in the past year? ☐ Yes ☐ N If yes, were you injured? ☐ Yes ☐ N
11. Have you had any issues with urinary and/or bowel incontinence? ☐ Yes ☐ N If yes, are you on medications or have you had treatment? ☐ Yes ☐ N Type _____

HOME SAFETY SCREENING

1. Who lives in the home with you? _____
2. Do you have pets? ☐ Yes ☐ No
3. Do you have access to a phone at home? ☐ Yes ☐ No
4. Do you need help using the phone? ☐ Yes ☐ No
5. Are emergency numbers easily accessible? ☐ Yes ☐ No
6. Do you have functioning smoke/carbon monoxide alarms in your home? ☐ Yes ☐ No
7. Do you have non-slip surface and grab bars in the bath/shower? ☐ Yes ☐ No

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MEMORY

IN THE LAST MONTH, HOW OFTEN DO YOU HAVE TROUBLE CONCENTRATING OR FOCUSING ON TASKS?

☐ NEVER ☐ SOMETIMES ☐ USUALLY ☐ ALWAYS

IN THE LAST MONTH, HOW OFTEN DID YOU HAVE TROUBLE REMEMBERING OR THINKING CLEARLY?

☐ NEVER ☐ SOMETIMES ☐ USUALLY ☐ ALWAYS

EXERCISE

HOW MANY DAYS A WEEK DO YOU EXERCISE? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

DURATION: ☐ 30 MIN EACH TIME ☐ < 30 MIN EACH TIME ☐ > 30 MIN EACH TIME

NUTRITION

NUMBER OF SERVINGS OF FRUITS DO YOU HAVE A DAY?

☐ 1-3 ☐ 4-7 ☐ 8-10 ☐ >10 ☐ I DO NOT EAT FRUIT

NUMBER OF SERVINGS OF VEGETABLES DO YOU HAVE A DAY?

☐ 1-3 ☐ 4-7 ☐ 8-10 ☐ >10 ☐ I DO NOT EAT VEGETABLES

DO EAT A LOW SODIUM DIET? ☐ YES ☐ NO

DO EAT A LOW-FAT DIET? ☐ YES ☐ NO

DO YOU EAT A LOW CARB DIET? ☐ YES ☐ NO

PAIN SCREENING

1. DO YOU HAVE PAIN? ☐ YES ☐ NO

2. IF YES, IS YOUR PAIN DAILY? ☐ YES ☐ NO

3. ON A SCALE OF 0 TO 10 (10 BEING THE WORST PAIN) WHAT IS CURRENT LEVEL OF PAIN? ____/10

4. DOES YOUR PAIN LIMIT YOUR DAILY ACTIVITY? ☐ YES ☐ NO

5. HOW ARE YOU TREATING YOUR PAIN? ☐ OPIOIDS ☐ IBUPROFEN/NAPROXEN ☐ TYLENEOL ☐ EXERCISE

☐ STRETCHES ☐ COLD/WARM PACKS ☐ MASSAGE ☐ CHIROPRACTOR ☐ TENS UNIT

☐ OTHER (PLEASE SPECIFY) _____

6. WHICH PROVIDER(S) ARE MANAGING YOUR PAIN? ☐ PAIN MANAGEMENT ☐ ORTHOPEDICS ☐ PCP

☐ OTHER (PLEASE SPECIFY) _____

IMMUNIZATIONS

LAST DOSE

REACTIONS

NEXT DOSE DUE

COVID _____

FLU _____

HEPATITIS B _____

HPV _____

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IMMUNIZATIONS (CONTINUED)

	LAST DOSE	REACTIONS	NEXT DOSE DUE
PNEUMONIA _____			
SHINGLES _____			
TETANUS _____			
RSV _____			

DEPRESSION SCREENING (PHQ-9): OVER THE PAST TWO WEEKS HAVE YOU BEEN BOTHERED BY ANY OF THE FOLLOWING PROBLEMS?

CIRCLE YOUR ANSWER TO EACH QUESTION	NOT AT ALL	SEVERAL DAYS	MORE THAN HALF THE DAYS	NEARLY EVERY DAY
LITTLE INTEREST OR PLEASURE IN DOING THINGS	0	1	2	3
FEELING, DOWN, DEPRESSED, OR HOPELESS	0	1	2	3
TROUBLE FALLING ASLEEP, STAYING ASLEEP, OR SLEEPING TOO MUCH	0	1	2	3
FEELING TIRED OR HAVING LITTLE ENERGY	0	1	2	3
POOR APPETITE OR OVEREATING	0	1	2	3
FEELING BAD ABOUT YOURSELF OR LIKE YOU'RE A FAILURE OR HAVE LET YOURSELF OR YOUR FAMILY DOWN	0	1	2	3
TROUBLE CONCENTRATING ON THINGS SUCH AS READING THE NEWSPAPER OR WATCHING TV	0	1	2	3
MOVING OR SPEAKING SO SLOWLY THAT OTHER PEOPLE COULD HAVE NOTICED? OR OPPOSITE—BEING 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

SCORING _____ + _____ + _____ + _____

= TOTAL SCORE _____

IF YOU CHECKED OFF ANY PROBLEMS, 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?

NOT DIFFICULT
AT ALL

☐

SOMEWHAT
DIFFICULT

☐

VERY
DIFFICULT

☐

EXTREMELY
DIFFICULT

☐

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TOBACCO SCREENING

ARE YOU A? ☐ NEVER A SMOKER ☐ FORMER SMOKER ☐ CURRENT DAILY SMOKER
☐ CURRENT SOMEDAY SMOKER ☐ CHEWING TOBACCO USER ☐ E- CIG USER ☐ VAPOR USER

IF A *FORMER SMOKER*, HOW LONG HAS IT BEEN SINCE YOU LAST SMOKED? ☐ < 1 MONTH
☐ 1-6 MONTHS ☐ 6-12 MONTHS ☐ 1-5 YEARS ☐ 5-10 YEARS ☐ 10-15 YEARS ☐ >15 YEARS

IF A *CURRENT OR FORMER SMOKER*, WHEN WAS YOUR LAST LUNG CANCER SCREENING?
(Adults ages 50 to 80 years who have a 20 pack-year smoking history and currently smoke or have quit within the past 15 years.)

____/____/____

HOW OLD WERE YOU WHEN YOU STARTING SMOKING?

HOW MANY CIGARETTES DO YOU OR DID YOU SMOKE PER DAY?

☐ 5 OR LESS ☐ 6-10 ☐ 11-20 ☐ 21-30 ☐ 31 OR MORE

IF *CURRENT DAILY SMOKER*, ARE YOU INTERESTED IN QUITTING?

☐ READY TO QUIT ☐ THINKING ABOUT QUITTING ☐ NOT READY TO QUIT

PREVENTION SCREENINGS- PLEASE LIST THE DATE OF YOUR LAST SCREENING

AAA (ABDOMINAL AORTIC ANEURYSM) SCREENING (SMOKERS, CURRENT AND FORMER- AGES 65-75 OR

FAMILY HX AAA) _____

COLONOSCOPY/COLOGAURD (AGE 45-75) _____

DENTAL EXAM _____ EYE EXAM _____

DEXA/BONE DENSITY (AGE 50-75) _____

EKG _____

HGB A1C (ANY PREDIABETIC OR DIABETIC) _____ URINE MICROALBUMIN _____

HEARING EXAM _____ LABS _____

LUNG CANCER SCREENING (SMOKING HX IN THE PAST 15 YRS AGES 50-80) _____

MAMMOGRAM (FEMALE AGES 40+) _____

PAP SMEAR/ PELVIC EXAM (FEMALES AGES 21-65) _____

PROSTATE EXAM _____ PSA _____

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ADVANCE CARE DIRECTIVES

DO YOU WISH TO DISCUSS YOUR END-OF-LIFE MEDICAL TREATMENT DECISIONS AND OR/ WHO YOU DESIGNATE TO MAKE DECISIONS FOR YOU IF YOU ARE UNABLE TO SPEAK FOR YOURSELF? ☐ YES ☐ NO

DO YOU HAVE A LIVING WILL? ☐ YES ☐ NO

DO YOU HAVE A DURABLE MEDICAL (HEALTHCARE) POWER OF ATTORNEY? ☐ YES ☐ NO

IF YES, WHO IS IT? _____

IF YOU HAVE A LIVING WILL OR DMPOA, PLEASE PROVIDE COPIES FOR YOUR CHART AS SOON AS POSSIBLE

Staff use- ADVANCED DIRECTIVE FORMS PROVIDED FOR THE PATIENT ☐ YES ☐ NO
DOCUMENTATION REVIEWED AND COMPLETED ☐ YES ☐ NO

INSURANCE REQUESTED DEMOGRAPHIC INFORMATION

1. MARITAL STATUS: ☐ SINGLE ☐ MARRIED ☐ DIVORCED ☐ WIDOWED ☐ CHOOSE NOT TO DISCLOSE
2. SEX: ☐ MALE ☐ FEMALE ☐ OTHER: _____ ☐ UNKNOWN ☐ CHOOSE NOT TO DISCLOSE
3. GENDER IDENTITY: ☐ MALE ☐ FEMALE ☐ FEMALE TO MALE (FTM)/TRANSGENDER MALE/TRANS MAN
☐ MALE TO FEMALE (MTF)/TRANSGENDER FEMALE/TRANS WOMAN ☐ GENDERQUEER/NON-BINARY
☐ ADDITIONAL GENDER CATEGORY OR OTHER, PLEASE SPECIFY: _____
☐ CHOOSE NOT TO DISCLOSE ☐ UNKNOWN
4. SEXUAL ORIENTATION: ☐ STRAIGHT OR HETEROSEXUAL ☐ LESBIAN, GAY OR HOMOSEXUAL ☐ BISEXUAL
☐ SOMETHING ELSE, PLEASE SPECIFY: _____ ☐ DON'T KNOW
☐ CHOOSE NOT TO DISCLOSE ☐ UNKNOWN
5. OCCUPATION: _____ ☐ CHOOSE NOT TO DISCLOSE
6. YEARLY INCOME: _____ ☐ CHOOSE NOT TO DISCLOSE
7. RACE: _____ ☐ CHOOSE NOT TO DISCLOSE
8. RELIGION: _____ ☐ CHOOSE NOT TO DISCLOSE
9. LANGUAGE: _____ ☐ CHOOSE NOT TO DISCLOSE
10. NATIONALITY: _____ ☐ CHOOSE NOT TO DISCLOSE
11. COUNTRY OF ORIGIN: _____ ☐ CHOOSE NOT TO DISCLOSE
12. HIGHEST LEVEL OF EDUCATION: _____ ☐ CHOOSE NOT TO DISCLOSE
13. CHECK ALL THAT APPLY: ☐ MIGRANT ☐ HOMELESS ☐ VETERAN ☐ CHOOSE NOT TO DISCLOSE

STAFF USE ONLY

Orders given to patient for testing and screenings ☐ YES ☐ NO

Follow-up appointments needed in this office for: _____

REVIEWED WITH: _____ DATE ____/____/____

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Erica L. O'Donnell D.O., P.A.
Erica O'Donnell D.O. & Molly Wallis APRN
1400 Hand Ave Suite K
Ormond Beach, FL 32174
Telephone: (386) 671-2771 Fax: (386) 671-6458

Authorization for Discussion of Medical Records

Patient Name: _____ DOB: _____

I have been made aware of the policy and procedures of Erica O'Donnell D.O., P.A. as they relate to HIPAA Requirements.

☐ Yes ☐ No I authorize medical information to be left on the answering machine at the phone number provided by me. Phone: _____

☐ Yes ☐ No I authorize medical information to be sent to the patient portal associated with the e-mail address provided by me. E-mail: _____

☐ Yes ☐ No I authorize Erica O'Donnell D.O., P.A. to discuss my medical history with the following individuals other than my emergency contact:

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Emergency Contact Information

Emergency Contact: _____

Relationship: _____

Home Phone: _____ Cell Phone: _____

Address: ___ Same as Patient _____

City: _____ State: _____ Zip: _____

Patient Signature: _____ Date: _____

This authorization shall remain in effect for one year from the date signed above or until:

☐ _____ (Specify Date; **not to exceed one year**); unless revoked in writing prior to specified dates.

Erica L. O'Donnell D.O., P.A.

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PERSONAL INFORMATION CHANGE FORM

NAME CHANGE: _____

ADDRESS CHANGE: _____

PHONE # CHANGE: () _____

INSURANCE CHANGE: _____

EMAIL CHANGE: _____

SIGNATURE: _____ **DATE:** _____

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Frequency of Visits

Regular follow-up visits are an important part of maintaining your health and ensuring that preventive care, chronic disease management, medication monitoring, and recommended screenings are addressed appropriately.

All patients of **Erica L. O'Donnell, D.O., P.A.** are expected to have routine follow-up visits at least **twice annually**, unless a different schedule is recommended by the healthcare provider based on the patient's individual medical needs.

The frequency of visits may vary depending on your diagnoses, medications, treatment plan, and overall health status. Patients with certain conditions may require more frequent monitoring, including but not limited to:

1. Chronic Conditions Requiring at Least Every 6-Month Follow-Up

Patients with conditions such as:

- Hypertension (high blood pressure);
- Hyperlipidemia (high cholesterol);
- Prediabetes;
- Hypothyroidism or hyperthyroidism;
- Other stable chronic medical conditions requiring ongoing monitoring;

may be required to have follow-up visits at least every six (6) months.

2. Conditions Requiring at Least Every 3-Month Follow-Up

Patients with conditions such as:

- Diabetes;
- Multiple chronic medical conditions or a complex medical history;
- Use of Schedule III-V controlled medications;
- Other conditions requiring closer monitoring as determined by the healthcare provider;

may be required to have follow-up visits at least every three (3) months.

3. Conditions Requiring Monthly Follow-Up

Patients receiving:

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- Chronic pain management;
- Schedule II controlled medications;
- Other medications or treatments requiring close monitoring;

may be required to have monthly follow-up visits or visits at another interval determined appropriate by the healthcare provider.

4. Weight Loss Medication Follow-Up

Patients prescribed weight loss medications are required to have follow-up visits at least every three (3) months unless otherwise directed by their healthcare provider.

These visits allow the provider to monitor medication effectiveness, evaluate safety, assess progress, and review lifestyle changes necessary for achieving and maintaining long-term weight management goals.

5. Forms and Medical Documentation

Patients requesting completion of medical forms or paperwork, including but not limited to disability forms, Family and Medical Leave Act (FMLA) paperwork, work-related forms, school forms, or other documentation, may be required to schedule an appointment.

Appointments allow the healthcare provider to obtain the necessary information and complete documentation accurately based on current medical status.

Failure to maintain required follow-up appointments may result in delays in medication refills, completion of forms, or continuation of certain treatment plans.

By signing below, I acknowledge that I have read and understand the Frequency of Visits Policy. I understand that follow-up requirements are based on my individual healthcare needs and the medical judgment of my healthcare provider.

Patient Name (Print): _____

Date of Birth: _____

Patient/Legal Guardian Signature: _____

Date: _____