



# Patient Onboarding -

## The Big Print

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Patient paperwork can feel overwhelming. Many people understandably skim forms and miss the points that actually matter.

This “big print” introduction gives a plain-language overview of the documents in Dr. Weyrich’s patient packet, why each one is included, and what you should pay special attention to before signing.

This introduction is only a summary. It is intended to help you find and understand the important parts of the packet, rather than to replace the actual forms, consents, acknowledgments, or agreements. The detailed documents supersede this summary, and are the controlling documents.

### Demographics (required)

**Purpose:** This is the most important document. It tells the practice who you are, how to contact you, where you live, what communication methods you prefer, and which people you list as contacts or authorized persons.

**Pay attention to:** Contact methods, message permissions, and the roles or activities you authorize for listed contacts. Roles and activities may overlap, multiple people may be listed, and this form does not revoke or limit authority that may exist under separate documents.

### Demographics-Add (optional)

**Purpose:** This optional document lists additional people that you authorize to act in various ways on your behalf.

**Pay attention to:** Roles and activities of additional people have the same meanings as on the **00-Demographics**.

### Legacy Records Transfer (optional, if applicable)

**Purpose:** Allows Dr. Weyrich to locate, access, copy, scan, index, maintain, and use complete available legacy practice records from listed former practices, if those records still exist and can reasonably be retrieved.

**Pay attention to:** This is mainly for former patients of the listed legacy practices. Some records may no longer be available, and requests to limit or specially handle old paper records may not be feasible.

### Case-Review-Consent (required)

**Purpose:** Describes the limited-scope Case Integration Review, the initial professional-review process, what the review can and cannot do, and when the engagement begins and ends.

**Pay attention to:** This is the general framework for Case Integration Review. The Work Order (below) customizes the specific task, required inputs, deliverables, fee, timeline, and included follow-up for the individual patient. If a Work Order changes a term of this consent, the change must be stated clearly in writing.

## **Work-Order (required – individualized)**

**Purpose:** This document describes the specific task, required inputs, deliverables, fee or pricing basis, timeline, and included follow-up for the specified patient (you). General payment and insurance terms are contained in Document 04.

**Pay attention to:** What Dr. Weyrich agrees to do, what you must provide or do so the work can be completed, the fee structure, expected timeline, deliverables, and any project-specific limits or exclusions.

Once accepted, this is the project-specific agreement for the Case Integration Review. A subsequent Work Order or written amendment may be used for follow-up activities such as evaluation, management, or treatment only if those activities are separately accepted and supported by any required additional consent, intake, or evaluation.

## **Payment-Insurance (required fine print)**

**Purpose:** Explains professional fees, direct-pay status, insurance and government-program limitations, third-party costs, and restricted-network or specialty-benefit arrangements.

**Pay attention to:** Your coverage may affect whether Dr. Weyrich's services, orders, prescriptions, referrals, or recommendations are recognized or reimbursed, and you may need to work with a participating clinician for covered services.

## **Communications-Privacy (required fine print)**

**Purpose:** Explains location requirements, electronic communication, privacy, medical records, and provider availability.

**Pay attention to:** Patient-specific services may require current physical location and callback information; communication methods have different privacy risks; substantive communications may be incorporated into the medical record.

## **Safety-and-Red-Flag-Screening (form required by Work Order)**

**Purpose:** Screens for current or recent symptoms, events, and background factors that may require clarification, prompt local evaluation, or postponement of the requested project.

**Pay attention to:** This is a limited safety screen, not emergency monitoring or medical clearance. Do not wait for Dr. Weyrich to review the form if urgent or emergency care may be needed.

## **Current-Medications-Supplements (form required by Work Order)**

**Purpose:** Maintains a current list of prescription medications, over-the-counter medications, and dietary supplements, including recent starts, stops, or changes.

**Pay attention to:** Review existing entries for errors or changes, add anything missing, and include the dose, route, frequency, purpose, and who prescribed or recommended each item.