



Orthodontic Patient Intake Form – Adult

Patient Information

Patient Name: _____ Date: _____
Date of Birth: _____ Age: _____ Sex: _____ Preferred Pronouns *(optional)*: _____
Phone #: _____ Email: _____
Address: _____ City: _____ State: _____ Zip: _____
Occupation: _____ Employer: _____ Marital Status: _____
Who may we thank for referring you to our office? _____

Spouse/Additional Contact Information

Name: _____ Relationship to Patient: _____
Date of Birth: _____ Age: _____ Sex: _____ Preferred Pronouns: _____
Phone #: _____ Email: _____
Address: _____ City: _____ State: _____ Zip: _____
Occupation: _____ Employer: _____

Dental Insurance Information

Insured Name: _____ Insured SS#: _____ Insured Date of Birth: _____
Insurance Company: _____ Insurance Member ID: _____ Group #: _____
Insurance Company Address: _____
Phone: _____ Insured's Employer: _____

(If you have dual coverage, complete section below)

Insured Name: _____ Insured SS#: _____ Insured Date of Birth: _____
Insurance Company: _____ Insurance Member ID: _____ Group #: _____
Insurance Company Address: _____
Phone: _____ Insured's Employer: _____

Medical History Information

Which best describes your general health? *(Circle one)* Excellent Good Fair Poor

Last Dental Visit *(date and reason for visit)*: _____

Name/phone # of your regular dental provider: _____

Name/phone # of your physician: _____

Do you have a history with any of the following systemic conditions? *(Circle one for each)*

- | | | |
|---|--|--|
| <p>1) Heart/Cardiovascular conditions Yes No
 <i>(e.g. heart defect, artificial valve)</i>
 <i>If "Yes," please explain:</i></p> | | <p>10) Renal Dialysis/Kidney Disease Yes No
 11) Arthritis/Painful Joints Yes No
 12) Artificial Joints Yes No
 13) Osteoporosis Yes No
 14) Seizures/Epilepsy Yes No
 15) Numbness/Tingling/Paralysis Yes No
 16) Muscle Weakness/MS Yes No
 17) Depression/Anxiety Yes No
 18) ADD/ADHD Yes No
 19) Cognitive Impairments Yes No
 <i>If "Yes," please explain:</i></p> |
| <p>2) Lung/Respiratory conditions Yes No
 <i>(e.g. Asthma, emphysema)</i>
 <i>If "Yes," please explain:</i></p> | | <p>20) Other Psychiatric Conditions Yes No
 <i>If "Yes," please explain:</i></p> |
| <p>3) Bleeding Disorders Yes No
 4) Immune Deficiency or HIV Yes No
 <i>If "Yes," please explain:</i></p> | | <p>21) Other medical conditions? Yes No
 <i>If "Yes," please explain:</i></p> |
| <p>5) Autoimmune Disease Yes No
 <i>(Rheumatoid Arthritis, Lupus, etc.)</i></p> | | |
| <p>6) Cancer/Radiation/Chemotherapy Yes No
 7) Organ Transplant Yes No
 8) Diabetes Yes No
 9) Liver Disease Yes No</p> | | |

Do you have any of the following allergies?

- | | | | | | | | | |
|-------------|-----|----|---------------|-----|----|-------------------------|-----|----|
| Penicillin | Yes | No | Latex | Yes | No | Other | Yes | No |
| Sulfa Drugs | Yes | No | Nickel/Metals | Yes | No | <i>(please specify)</i> | | |

Have you ever been hospitalized?..... Yes No
If "Yes," please explain:

Do you require antibiotic prophylaxis before dental treatment?..... Yes No

Have you ever taken intravenous bisphosphonate medication, such as Zometa (zoledronic acid), Aredia (pamidronate) or Didronel (etidronate)?..... Yes No

Have you ever taken oral bisphosphonate medication? Such as Fosamax (alendronate), Actonel (risedronate), Boniva (ibandronate), Skelid (tiludronate) or Didronel (etidronate)?..... Yes No

Are you currently pregnant or breastfeeding? Yes No

Please list all current medications: _____

Patient Signature: _____ **Date:** _____

(If someone other than patient is signing) Relationship to Patient: _____

Orthodontic Specific Questions

What are your personal goals for orthodontic treatment and what, if anything, would you like to change about your smile or appearance?

What specific questions/concerns do you want to make sure the doctor addresses today?

Have you had any previous orthodontic treatment?..... Yes No
If "Yes," please explain:

Have you been to another orthodontist for a consultation?..... Yes No
If "Yes," please explain:

Have you had negative experiences in a dental office in the past?..... Yes No
If "Yes," please explain:

Do you have any sensory issues/gag reflex we should be aware of?..... Yes No
If "Yes," please explain:

Do you have a history of orthodontic problems in your family (e.g. underbite, crossbite)?..... Yes No
If "Yes," please explain:

Is there any history of craniofacial anomalies (cleft lip, cleft palate, etc.) in your family?..... Yes No
If "Yes," please explain:

Have you had any injury to the head, neck, jaws, or teeth?..... Yes No
If "Yes" please explain:

Do you have jaw pain or difficulty opening/closing your jaw?..... Yes No

Do you have a history of long-term oral habits (e.g. finger/thumb sucking, biting pens)?..... Yes No

Do you have recurrent poor sleep, snoring, daytime sleepiness?..... Yes No
(If "Yes") Have you ever been diagnosed with Obstructive Sleep Apnea?..... Yes No