



New Patient Checklist

Arrive 15 minutes before your scheduled appointment so you have time to complete any paperwork needed.

Please bring these items to your visit:

- Completed/signed Welcome Registration Packet.
- Completed/signed Financial Policy Agreement
- Completed/signed Advance HealthCare Directive Acknowledgement Form
- Completed/signed Notice of Privacy Practices Acknowledgment Tracking Information
- Completed/signed "Staying Healthy Assessment" Form for all Cal-Optima Patients
Please use the below link to print the "Staying Healthy Assessment" accordingly with your age
<http://www.dhcs.ca.gov/formsandpubs/forms/Pages/StayingHealthyAssessmentQuestionnaires.aspx>
- Copies of Medical Records if not faxed or mailed.
- A list of all current medications, including names and doses, frequency of actual bottles
- Please bring your current Insurance card(s) and photo ID to each visit
- Co-Pays /Deductibles will be collected upon check in at each visit. This includes Commercial Insurance, Medicare, and Medicaid patients (Please look on your insurance card for amount) we accept cash, most Credit Cards.
- Copies of all medical records; progress notes, blood tests, diagnostic screenings and pathology reports or any other tests that might be helpful to your doctor. You can also sign the "Release of Medical Records to Advantage Plus Medical Center" Form and fax/ mail it to your health care providers prior to your visit by reasonable time in order to allow enough time to receive your medical records.