

We are pleased to welcome you as a new patient!

Mission: To provide you with comprehensive and compassionate natural health care.

How: Dr. Sousa Cardoso will develop a personalized treatment plan for you which may include lab tests, a physical exam, nutritional supplements, botanical medicines, or diet and lifestyle changes.

At the end of your appointment Dr. Sousa Cardoso will ask to see you again for a follow up about 2-6 weeks later.

It may take a few office visits to find the appropriate protocol for you, and for you to start feeling better. It is important for you to realize the commitment and effort needed to achieve your potential.

Things to bring with you:

- Filled out paper work
- Medications
- Supplements
- Any labs/imaging other tests from the last 12 months

If you need to cancel or reschedule your appointment, please call our office 24 hours in advance at 203.431.1688.

Dr. Sousa Cardoso looks forward to meeting with you!



General Information:	Today's	s Date:		
Patient Name:	DOB:	Age:	Sex: M	F
Address:	City:	State:_	Zip code:	
Telephone: Email:				
In the event you do not answer your contact phone num	nber, Dr. Sousa Cardoso MAY	MAY NOT	leave a voicemai	l message.
Emergency Contact:				
Have you seen a naturopathic physician before?: YES No	O When? Name of ND):		
How did you hear about Dr. Sousa Cardoso?:				
Insurance Information:				
Insurance Company: Prima	ry Insured:		DOB:	
Relationship to Patient:Ins	surance ID #:	(Group #:	
Assignment and Release: I hereby authorize and direct my that I am financially responsible for any and all non-covered signature on all insurance submissions. Dr. Sousa Cardoso rabove- named insurance company and their agents for the or the benefits payable for related services.	d services provided to me by Namary use my health care informate	turopathic He tion and may	aling. I authorize th	e use of my nation to the
Patient/Guardian Signature				
Do you have a primary care physician?: YES NO	Are you seeking adj			
Name of PCP:				
Phone Number:				
Can Dr. Sousa Cardoso contact this provider?: YES NO	Can Dr. Sousa Card	oso contact t	his provider?: YES	NO
Reason for your visit:				_
When did this condition/symptom start?:				_
What expectations do you have for your visit today?:				
When was the last time you felt really well?:				-
Medical History:				
Date of last physical examination:	Reason for visit:			
What is your blood type: Not Sure?				
List all prescription and over the counter medications ar	nd supplements you take and the	heir dose:		



List all allergies to the following and describe the reaction: Medications: Foods: Environmental: List any hospitalizations with approximates dates and reason: List any surgeries with approximates dates and reason: List any recent (last 3 years) exams/imaging including approximate date and result (X-Rays, MRI, CT Scan, EKG, EEG, bone density scans, mammograms, colonoscopy, ultrasound etc): Describe any major losses, violence, traumas or accidents you have experienced: List all past and current medical diagnoses: Have you ever had a psychiatric diagnosis? (When and what): Have you ever taken antibiotics?: Yes No If yes, when was the last time you took antibiotics and for how long?: If yes, how often have you taken antibiotics?: Unsure More than 5 times Infancy & childhood: Less than 5 times ___Less than 5 times ____More than 5 times Adulthood: ___Unsure ___Rubella (German measles) Childhood illness (Check off any that you had, add approximate date/age): ___Chicken pox ___Roseola ___Asthma Measles ___Mumps ____Diphtheria ____Scarlet fever _ Eczema Polio Whooping cough Ear infections Rheumatic fever Check off which, if any immunizations you have received: Unsure, probably all of them Rotavirus ___Diphtheria/tetanus/pertussis (DTap) Hib Hep B ___Influenza ____Measles/mumps/rubella (MMR) ___Polio Pneumococcal ___Varicella/chicken pox ___Hep A ___Meningococcal ___HPV ___Other:____ COVID-19: Brand and Dates Did you have any adverse effects or reactions from any immunizations?: Yes No I don't know If yes, please explain: Your birth: Were you born: Naturally C-section I don't know Term: ___Full term ___Premature ___Late term ___I don't know Were you breastfed? Yes No I don't know If yes, for how long?: _____ If no, what was the source of nutrition?: _____ Any significant complications during the pregnancy/delivery?:



Diet History:	
Foods avoided:	Why?:
Food cravings:	
Number of meals eaten a day:	Number of meals eaten out a week:
What have you eaten in the last 24	hours?:
Breakfast:	
Lunch:	
Snack:	
Dinner:	
Cups Water/day: Alcohol	ic Drinks/week:Coffee/caffeinated beverages/day:
What is your biggest challenge to b	ouying, preparing and eating healthy foods?:
	hours of eating? (belching, bloating, sneezing, etc): Yes No after which kinds of foods/meals:
Do you have delayed (24 hours+) sy	ymptoms after eating certain foods?: Yes No
If yes, describe the symptoms, appr	roximate amount of delayed time, and food(s) associated with this:
Do you have <i>any</i> history of food po	isoning? If yes, describe approximately when:
	ovement?
	wel movement?Soft & well formedDifficult to passLoose
DiarrheaAlternating	
Sleep History:	
	ped and wake up?:
	PoorFairGoodVery GoodExcellent
Do you feel rested in the morning?	
Do you suffer from insomnia?: Yes	
If yes, What keeps you up at night?	
	substances to help you fall asleep?: Yes No
-	e and how often:
	s or nightmares?:
Social History:	
Check one:SingleMarried (how long)Divorced (When)Widowed (When) Other:
Do you have any history of abuse?	Yes No
Children, if any: Names and ages: _	
Occupation/Hours worked per wee	k:
	Middle SchoolHigh SchoolCollegeGraduate School
With whom do you live with?:	
How would vou describe your moo	



What triggers changes in your	mood?:		
On a scale from 1-10 how is y	our stress on a typical day? (Cir	cle one answer):	
No stress what so	o ever 15	-678910 Extremely ov	er whelmed
What triggers your stress?:			
How do you cope with stress?	·		
	our energy on a typical day? (Ci		
No energy 12	2345678	910 Very energetic	
Exercise: Yes No Sometimes	Types:	Frequency:	
Do you smoke?:			
No, never Former s	smoker: cigarettes a day:	years: quit:	-
Yes, I smoke cigar	ettes a day foryears. I	How many times have you attempted	to quit?:
Do you use recreational drugs	? Yes No If yes, what and hov	v often?:	
Do you have any pets or farm	animals?: Yes No If yes, please	describe:	
Are you spiritual or religious?	Yes No Religion:		
Does your religion have any sp	pecific dietary requirements?: _		
Do you have any problems sw	allowing pills or capsules?: Yes	No	
In the last 3 years have you tr	aveled outside of the US?: Yes	No	
If yes, to where and when:			
Have you or do you serve in the	ne military?: Yes No If yes whe	re and when?:	
What do you enjoy most in life	e?:		
What are your hobbies?:			
Do you watch TV? Yes No If y	es, how many hours/day?:		
Environmental			
Which of the following might	have you been exposed to:	Non-stick/Teflon Cookware	Pesticides
Mercury /other metals	Garden chemicals	Aluminum cookware	Mold
Toxic fumes/chemicals	Second hand smoke	Dry cleaning chemicals	Solvents
Well	City Water	Bottled Water	Other
Do you use a water filter?: Yes	s No		

Review of Systems: Circle all that apply to you currently

GENERAL

Chills
Fatigue
Fever
Lighthead

Lightheadedness Loss of sleep Night sweats Numbness

Weight gain or loss

HEAD/NECK

Brain fog/memory loss Goiter/enlarged thyroid Hair loss Headaches Head Injury

Migraines Pain or stiffness in neck Poor concentration TMJ problems/jaw clicks

Swollen glands

EYE

Cataracts
Blurred vision
Double vision
Eye tearing
Eye dryness
Glaucoma
Glasses/contacts
Visual floaters

EAR/NOSE

Earache
Ear discharge
Excessive earwax
Ear infection
Hay fever/allergies
Hearing loss
Nosebleeds
Ringing in the ears
Sinus infection
Stuffy or runny nose

MOUTH/THROAT

Bad breath
Bleeding gums
Cold sores
Difficulty swallowing
Dry mouth
Fillings

Hoarseness Root canal

CARDIOVASCUALR

Anemia
Arrhythmia/murmur
Blood clots
Chest pain
Cold hands/feet
Deep leg pain
Easy bruising
Palpitations
High cholesterol
High/low blood pressure
Swelling in hands/feet
Varicose veins

RESPIRATORY

Asthma
Bronchitis
Coughing up blood
Emphysema
Pain with breathing
Persistent cough
Pneumonia
Shortness of breath
Sputum
Wheezing

GASTROINTESTINAL

Abdominal pain
Blood in stool
Change in appetite
Constipation
Diarrhea
Eating disorder
Foul odor in stool/gas
Gas/Bloating/Belching
Gallbladder disease
Hemorrhoids
Ingestion/heartburn
Liver disease
Nausea/vomiting
Ulcer

GENITO-URINARY

Blood in urine Change in urine odor Decreased stream Frequent urination Frequent UTI Incontinence Kidney Stones Painful urination

ENDOCRINE

Excessive Thirst
Excessive Hunger
Hypothyroid
Hyperthyroid
Low blood sugar
PCOS
Metabolic syndrome

NEUROLOGIC

Anxiety
Depression
Dizziness/vertigo
Fainting
Nervousness
Loss of balance
Loss of coordination
Seizures/epilepsy
Suicidal thoughts

MUSCULOSKELETAL

Gout
Joint pain
Joint stiffness
Joint swelling
Muscle pain/weakness
Osteoporosis/ osteopenia
Paralysis/weakness

SKIN

Acne
Brittle nails
Dandruff
Eczema
Hives
Nail fungus
Psoriasis
Rash
Sores/ulcers

MALE CONDITIONS

Breast lumps
Difficulty with erections
Ejaculation problems
Libido changes
Lump in testicles
Pain with intercourse

Penile discharge Sore penis Date of last Prostate exam:

FEMALE CONDITIONSAbnormal PAP smear

Bacterial vaginosis Breast changes/pain **Endometriosis** Heavy or excessive flow Herpes Hot flashes Infertility Lack of menses Loss of libido Mid-cycle bleeding Menstrual clotting Nipple discharge Pain with intercourse Painful menses Vaginal discharge Vaginal dryness Vaginal pain Yeast infection Do you perform selfbreast exams? Y N How often?: Age of menarche:

Age of menarche:
Duration of bleed:
Are cycles regular? Y N
Length of cycle:
Age of last menses:
Are you pregnant?: Y N
Total# of pregnancies:
Total# vaginal births:
Total# C-sections:
Total# of miscarriages:
Total# of abortions:
Number of children
Breast-feeding? Y N
Any hormones or birth
control pills?: Y N
Tampon Use? Y N

period ______PAP smear: ______ Mammogram or Thermogram: ______

Dates of last: Menstrual



Family History: List if any family members that have/have had: diabetes, stroke, heart attack, Alzheimer's disease, high blood pressure, high cholesterol, cancer (type), gastrointestinal disease, alcoholism, skin disease, thyroid problems, mental illness, genetic disorders and any other significant health conditions.

	Age if alive	Age at Death	Health problems/cause of death
Mother			
Father:			
Sisters:			
Brothers:			
Diotners.			
Children:			
Maternal			
Grandmother:			
Grandfather:			
Paternal			
Grandmother:			
Grandfather:			
Is there any oth	er information	you would like to add?	
<u>-</u>	aking your time	=	
			n information that is accurate and complete. I understand that it is my
responsibility to	injorm the phy.	siciari in charge of my o	care if I ever have a change in health.
Patient Signatu	re		Date



Informed Consent for Treatment

l,	, co	nsent to be treated by Dr. Sousa	sa Cardoso.	
	•	disease I may have, any prescri nt or am breastfeeding. Initials	ription or over the counter medications I am taking and	if
			t of her ability and results are not guaranteed. I do not as and complications. Initials	
treatment. It is re		onsult with my PCP and/or spec	are to my primary care physician (PCP) and/or specialist ecialist to obtain information about all of the conventior	
			stopping or tapering down of prescriptive medications n cause serious consequences. Initials	
another licensed to take any natur any naturopathic	health care provider al remedy and will no medicines while taki	s, and that I am at liberty to see ot hold Dr. Sousa Cardoso liable	Sousa Cardoso may be different from those offered by ek other care. I assume the responsibility for the decision e for any side effects or interactions that arise from taking all prescriptive and over the counter medications and ts immediately. Initials	ing
consent to treatmer for my	nent with the modali y present condition a	ties described above. I intend th	nd have had an opportunity to ask questions and that I this consent form to cover the entire course of treatme for which I seek treatment. I understand that I am free edures at any time.	
Patient/Guardian	Signature	Relationship to Patient	 Date	
Privacy rules s			nation to Family Members/Friends Du with family, friends and other people who are involve	ed
scheduling info	ormation, lab and te		n about your medical care. This includes appointment ar g information. You have the right to revoke this consent iance on your prior consent.	
1.		Relatio	ion to patient:	
		Relation	ion to patient:	
3		Relation	ion to patient:	
Patient/Guardian	Signature	Relationshin to Patient	 Date	



Authorization and Consent to Participate in Telemedicine Consultation

Purpose and Benefits: The benefits of telemedicine include facilitating care to patients unable to attend office visits in person, reducing the expenses of traveling to see a physician and expanding patients' accessibility to healthcare services.

- Some states or insurance plans place restrictions on where the patient can receive virtual care.
- Residence within Connecticut is required for telemedicine consultations with Dr. Sousa Cardoso. Residence/location will be verified prior to scheduling appointments.
- This service is only available to established patients; first office visits must be in-office (face- to –face).
- In-office appointments are required once a year.

Patient/Guardian Signature

Risks and Consequences: Some people find telemedicine difficult or uncomfortable initially. The use of video technology to deliver healthcare and educational services may not be equivalent to direct patient to physician contact. Not all patient situations will be appropriate for telemedicine. Following your telemedicine consultation, Dr. Sousa Cardoso may recommend an in-office visit, or a visit to a hospital, urgent care, or your primary care doctor for further evaluation.

Confidentiality: Reasonable and appropriate efforts will be made to eliminate any confidentiality risks associated with the telemedicine consultation. To maintain your privacy, it is recommended that you use headphones, meet in a private area, and do not share any log in credentials with anyone. All existing confidentiality protections under federal Connecticut state law apply to information disclosed during the telemedicine consultation (HIPAA). All existing laws regarding your access to medical information and copies of your medical records apply to this telemedicine consultation. Additionally, dissemination of any patient-identifiable images or information from this telemedicine interaction to other entities shall not occur without your consent, unless authorized under existing confidentiality laws.

Rights: You may withdraw your consent to telemedicine consultations at any time without affecting your right of future care or treatment. You have the option to consult with Dr. Sousa Cardoso in at her office.

Nature of the consultation: The telemedicine consultation will be similar to a routine medical office visit, except interactive video technology will allow you to communicate with Dr. Sousa Cardoso at a distance. During this telemedicine consultation, details of you and/or your child's medical history, examination, imaging results, and/or lab tests will be discussed as well as individualized, integrative treatment plan is discussed. *Dr. Sousa Cardoso does not use a platform that records the consultation*. Dr. Sousa Cardoso will make notes on the consultation in your medical record.

Financial Agreement: You and/or your insurance company will be billed at in office rates. Please see office policies.

Relationship to Patient

Date



This form acknowledges your receipt of the *Notice of Office Policies* and the *Notice of Privacy Practices* and will be retained in your medical record.

I have received the Notice of Office P	olicies and have be	een provided an op	portunity to review it. Initials
health information except the follow disclosed), for the purposes of treating authorization is valid from the date of the right to refuse to sign it. I unders service. I understand that I have the	ing ng, billing, resolvir if my signature be tand that my refus right to cancel this sa Cardoso, its em	ng claims, health be low. I understand t sal to sign will not a s authorization by p ployees, or agents	and affiliates, employees, and agents to release (any information not to be enefit coverage issues, as stated above. This hat this authorization is voluntary and that I have affect my eligibility or benefits for coverage of providing a written notice to Dr. Sousa Cardoso prior to receiving my written notice cannot be evided an opportunity to review it.
Patient/Guardian Signature	 Relationsh	nip to Patient	
	, give		n ing LLC permission to charge my credit card ons fees, missed appointment fees, laboratory
fees, supplement purchases, shipping	g and handling fee	s and/or other cha (Today's date	
Type of card: □Mastercard Name on credit:			
Number on card: Va Expiration date: Va			
 is desired, it must be provide If the credit card on file is lost Healing and providing an add 	rvice es rendered will be ed at the time of s st, stolen, compro ditional form of pa	e charged to the cre cheduled appointn mised, or canceled ayment.	edit card listed above. If another form of payment
Patient/Guardian Signature	Relationsh	ip to Patient	Date



Notice of Office Policies

Financial Policy: I accept full responsibility for any fees incurred during treatment and I understand that payment is expected in full at time of service. Accepted forms of payment include cash, personal checks, and credit cards. There is a \$30 fee for bounced checks. I may request the fees for various procedures before they occur to include that information in my healthcare decision-making process. Telemedicine consultations are billed the same as in office appointments. Effective May 1, 2021: New patients who have rescheduled their new patient visit more than two (2) times will be required to leave a non-refundable deposit in the amount of \$50. This deposit will be collected via credit card over the phone or via a Square invoice.

In Network Insurance: Dr. Sousa Cardoso currently participates with Aetna, Anthem BCBS, Cigna, Connecticare, First Health Network, Husky, Oxford. It is the patient's responsibility to ensure coverage and naturopathic medicine is covered by their plan. Accurate and complete information is required at your first visit. If you have a co pay, you are required to make payment at the time of service. If your insurance changes during the course of treatment, you must provide this information prior to being seen at your next appointment. Many insurance companies require authorization that will not be backdated for any reason. If there is a time lapse between the effective date of your new policy and informing the clinic of your new insurance company you will be responsible for any claims that are denied for any reason including lack of referral and/or authorization.

Medicare: Medicare (and Medicare Advantage plans) **DOES NOT** recognize naturopathic medicine and will **NOT** cover any appointments or supplements. If the patient has a secondary insurance company that will provide coverage, it the patient's responsibility to submit all claims. Dr. Sousa Cardoso will provide the patient with all necessary codes.

Out of Network Insurance/No Insurance: If we do not participate with your insurance company, or you are not insured, you will be considered a self-pay patient and you will be responsible for payment in full at the time of service. Ask for a Good Faith Estimate.

Payment Fee Schedule for Self-Pay Patients 2025

First Office Visit Establishing Care (60-74 mins)	225	Forms (each)	25
First Office Visit Establishing Care (45-59 mins)	195	Blood Draw/Finger Prick (15 mins)	25
First Office Visit Establishing Care (30-44 mins)	165	Constitutional Hydrotherapy (30-45 mins)	75
First Office Visit Establishing Care (15-29 mins)	135	Contrast Hydrotherapy (15 mins)	25
Return Office Visit Continuing Care (40-54 mins)	165	Combination/special order remedy	12
Return Office Visit Continuing Care (30-39 mins)	125	Nasosympatico	15
Return Office Visit Continuing Care (20-29 mins)	95	Single remedy	5
Return Office Visit Continuing Care (10-19 mins)	65	Special order remedy	15

Tardiness Policy: I understand that a late arrival may be subjected to an abbreviated visit charged at the full visit fee.

Missed Appointment/ Cancelation Policy: I am aware that I will be charged a 25\$ late cancellation fee for cancellations with less than 24 hours' notice. And I will be charged 50\$ for missing an appointment. This payment is expected before any further treatment will be rendered. This is a patient responsibility and will not be billed to your insurance company.

Email Policy: Email is used for established patients in non-emergent situations, for clarification of ongoing treatment or treatment received in the last 30 days. No new health concerns will be addressed via email. If Dr. Sousa Cardoso receives an email about a condition that in her opinion cannot be properly assessed without an office visit, the patient will be notified by return email to schedule an appointment. In this case, no treatment advice will be given by email. Dr. Sousa Cardoso will respond to emails within 24-48 hours, Monday through Friday only. If you have emailed Dr. Sousa Cardoso and have not received a response within these parameters, please call the office and leave a message stating your question or concern. Please keep in mind that communications via email over the Internet are not secure and Dr. Sousa Cardoso does not use an encrypted email. Although it is unlikely, there is a possibility that information you include in an



email can be intercepted and read by other parties besides the person to whom it is addressed. By emailing Dr. Sousa Cardoso you acknowledge that you are comfortable with having an email relationship with Dr. Sousa Cardoso knowing that Dr. Sousa Cardoso's email is not encrypted. If you do not wish you use email as a form of communication, please call the office when you have a concern to schedule an appointment.

Supplement Policy: All supplements are priced individually. All sales are final. No refunds, credits or exchanges are allowed on supplement(s), herb(s), homeopathic remedy/remedies, vitamins and nutritional supplements dispensed in office. Once these items have been shipped, purchased or left the office they cannot be brought back under any circumstance. All containers and bottles are inspected when they come in and leave the office for integrity of all safety and health seals. I understand that all supplements, vitamins, medical grade food, nutritional powders, botanicals, homeopathic remedies, and cell salts are not covered by insurance. For all items purchased through the online dispensary, please refer back to their return/exchange policy.

Notice of Privacy Practices



This notice describes how medical information about you may be used and disclosed, and how you can get access to this information. Please review it carefully.

The privacy of your medical information is important to Dr. Sousa Cardoso. She understands that your medical information is personal and is committed to protecting it. She keeps a record of the care and services you have received to provide you with quality care and to comply with certain legal requirements.

The federal Health Insurance Portability and Accountability Act (HIPPA) of 1996 states the following: You have rights to:

- Receive a copy of your health information
- Correct your medical records if you believe that some information of your health is incorrect or incomplete
- Request confidential communication by asking Dr. Sousa Cardoso to contact you via a specific way: email, cell phone, mail.
- Ask Dr. Sousa Cardoso to not use or share certain health information about you for the purposes of treatment, payment, or operations.
- Get a list of whom Dr. Sousa Cardoso shared your health information with, date shared, and why.
- Get a copy of this privacy notice.
- Choose someone to represent you: parent, legal guardian, or someone whom you've given medical power of attorney.
- File a complaint if you feel that your privacy rights have been violated. You can file with the US Department of Health and Human Services Office for Civil Rights:
 - 200 Independence Avenue, S.W. Washington, D.C 20201.
 - Or call 1-877-696-6775. Or visit: www.hhs.gov/ocr/privacy/hipaa/complaints/

You have a choice to:

- Allow Dr. Sousa Cardoso to share information with your family, close friends, and other's involved in your care.
- Allow Dr. Sousa Cardoso to share your health information in a disaster relief situation
- Allow Dr. Sousa Cardoso to include your information in a hospital directory.
- If you are unable to tell Dr. Sousa Cardoso your preference, for instance if you are unconscious, she may go ahead and share your information if she believes it is in your best interest, or if your health and safety is in imminent threat.

In the following cases, your information is never shared without written permission to do so:

- Marketing,
- Sale of your information
- Sharing of psychotherapy notes
- Fundraising

Our Uses and Disclosures of your information:

Dr. Sousa Cardoso is allowed to use and share your information in the process to: treat you, run her facility, bill for your services, help with public health and safety issues, do health research, comply with the law, respond to organ and tissue donation requests, work with a medical examiner or funeral director, respond to lawsuits and legal actions, and to address worker's compensation and other governmental requests.

Dr. Sousa Cardoso is required by law to maintain privacy and security of your protected health information, and will let you know promptly if breach of privacy occurs. She will not use or share your information other than as described above, unless you tell her in writing. If you change your mind at any time, please let her know in writing.

Changes to the Terms of This Notice: Dr. Sousa Cardoso can change the terms of this notice and the changes will apply to all information she has about you. The new notice will be available upon request, in office.