

Please note that the insurance portion of this form is critical for a patient to complete themselves, so that we can ensure the information is accurate and thorough. It is the patient's responsibility to ensure that our practice and provider is in-network and that bariatric surgery is covered under your insurance plan. When calling your insurance, you can provide them with Dr. Jayme Stokes NPI (1851504336) if requested, as well as the procedure code(s) (circled below) and diagnosis code of E66.01. This will support you in attaining accurate information regarding coverage from your insurance company. Please submit this information with the rest of the forms, so that we can fully process the surgical request.



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Medical History Questionnaire

Please fill out this questionnaire completely. DO NOT LEAVE ANY QUESTIONS BLANK. If the question does not apply, please put "N/A."

Current Height: _____ Current Weight: _____ BMI: _____

Name: _____ Age: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip: _____ Sex: M / F

Phone: (cell) _____ (work) _____ (home) _____

Email: _____ Occupation: _____

Employer: _____ Full-time/Part-time: FT / PT

Insurance Co.: _____ Phone: _____

Policy # _____ Group # _____

PLEASE ATTACH A COPY OF THE FRONT AND BACK OF YOUR INSURANCE CARD.

2nd Insurance Co. _____ Phone # _____

Policy # _____ Group # _____

Primary Physician: _____ Phone # _____

Address: _____

Other Physicians Seen Recently: _____

Circle procedure most interested in: Gastric Bypass | Gastric Sleeve | Management of Prev. Bariatric Surgery

Signature: _____ Date: _____

PLEASE READ: If you have health insurance, we strongly recommend that you call your insurance company in advance to determine coverage and/or exclusions for weight-loss surgery. If you do not have insurance coverage for weight-loss surgery, you may pay cash or you may secure your own financing (not available through Wilmington Health).

How many years have you been overweight? _____

Diet programs and supplements: Please indicate which of the following diets or programs you have previously attempted.

Program	Dates	Duration	MD supervised?	Pounds Lost
Weight Watchers	_____	_____	_____	_____
Jenny Craig	_____	_____	_____	_____
Metabolife	_____	_____	_____	_____
Medifast	_____	_____	_____	_____
Nutrisystem	_____	_____	_____	_____
Atkins Diet	_____	_____	_____	_____
Herbalife	_____	_____	_____	_____
SlimFast	_____	_____	_____	_____
Grapefruit Diet	_____	_____	_____	_____
Liquid Diets	_____	_____	_____	_____
Pritikin Diet	_____	_____	_____	_____
Optifast	_____	_____	_____	_____
T.O.P.S.	_____	_____	_____	_____

List any other physician-supervised weight-loss attempts:

Weight-Loss Medication History: Please indicate if you have taken any of the following medications for the purpose of losing weight.

Medication:	Dates	Duration	MD supervised?	Pounds Lost
Sibutramine (Meridia)	_____	_____	_____	_____
Phen-Fen	_____	_____	_____	_____
Amphetamines	_____	_____	_____	_____
Phentermine (Adipex, Fastin, Pondimin)	_____	_____	_____	_____
Dexfenfluramine (Redux)	_____	_____	_____	_____
Xenical (Orlistat)	_____	_____	_____	_____
Other Diet Medications:	_____	_____	_____	_____

Non-Dietary Therapies: Please indicate if you have tried any of the following weight-loss therapies.

Therapy:	Dates	Duration	MD supervised?	Pounds Lost
Exercise	_____	_____	_____	_____
Hypnosis	_____	_____	_____	_____
Behavior Modification	_____	_____	_____	_____
Acupuncture	_____	_____	_____	_____

List any other weight-loss methods you have previously tried:

Previous Weight-Loss Surgery: Have you ever had surgery for the purpose of losing weight?

_____ No _____ Yes If yes, please answer info below:

Surgery Type	Date	Surgeon	Pounds Lost
_____	_____	_____	_____
_____	_____	_____	_____

Obesity-Related Medical History:

Do you have, or have you had, any of the following illnesses or symptoms?

	Yes	No
Heart Disease		
If yes, year of diagnosis: _____		
Do you have, or have you had:		
Angina	Yes	No
Heart attack or myocardial infarction	Yes	No
Coronary bypass surgery	Yes	No
Palpitations (abnormal heart beat)	Yes	No
Heart valve problems	Yes	No
Pulmonary hypertension	Yes	No
Congestive Heart Failure	Yes	No
If yes, year of diagnosis: _____		
High Blood Pressure	Yes	No
If yes, year of diagnosis: _____		
Elevated Cholesterol	Yes	No
If yes, year of diagnosis: _____		
Elevated Triglycerides	Yes	No
If yes, year of diagnosis: _____		
Diabetes	Yes	No
If yes, year of diagnosis: _____		
Juvenile onset	Yes	No
Gestational (pregnancy-induced)	Yes	No
Adult onset	Yes	No
Diet controlled	Yes	No
Oral medications	Yes	No
Insulin	Yes	No
Asthma	Yes	No
If yes, year of diagnosis: _____		
Shortness of Breath	Yes	No
If yes, you can walk _____ blocks and		
climb _____ flights of stairs		
Have you been diagnosed by a physician with sleep apnea?	Yes	No
If yes, do you use a CPAP or BiPAP machine?	Yes	No
Have you had corrective surgery?	Yes	No
Has anyone told you that you stopped breathing while sleeping?	Yes	No
Sleep difficulties: Snoring	Yes	No
Awakenings at night	Yes	No
Daytime drowsiness	Yes	No
Observed apnea spells	Yes	No
Morning headaches	Yes	No

Reflux/Heartburn/Esophagitis/Hiatal Hernia	Yes	No
If yes, year of diagnosis: _____		
Prescription medications:	Yes	No
Over-the-counter medications:	Yes	No
Frequency of use: _____		
Endoscopy:	Yes	No
Venous Stasis	Yes	No
Leg or ankle swelling/edema	Yes	No
Leg ulceration	Yes	No
Leg skin color change or thickening	Yes	No
Pain or Arthritis of Ankles/Knees/Hips	Yes	No
Limits ability to walk or exercise	Yes	No
Prescription medications	Yes	No
Over-the-counter medications	Yes	No
Low Back Pain/Sciatica	Yes	No
Limits ability to walk or exercise	Yes	No
Prescription medications	Yes	No
Over-the-counter medications	Yes	No
Urinary Incontinence (leakage of urine)	Yes	No
With coughing/sneezing/straining	Yes	No
Number of times per week: _____		
Migraine Headaches	Yes	No
Frequency: _____		
Prescription medications	Yes	No
Over-the-counter medications	Yes	No
Deep Venous Thrombosis (blood clots in legs)	Yes	No
If yes, year of diagnosis: _____		
Pulmonary embolism	Yes	No
Blood thinning medication	Yes	No
Abdominal Wall Hernia	Yes	No
Incisional	Yes	No
Umbilical (belly button)	Yes	No
Number of hernia repairs and dates: _____		
Hernia currently present	Yes	No

Past Medical History:

Please list all medical conditions or illnesses not previously mentioned in this questionnaire:

Please list all non-surgical hospitalizations you have experienced as an adult:

Reason	Hospital	Date
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Past Surgical History:

Please list all surgical procedures or operations you have had:

Procedure	Reason	Hospital	Date
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Do you have allergies to any medications? ☐ Yes ☐ No

If yes, please list medications and reactions (e.g., rash, difficulty breathing, shock, etc.):

Have you ever received a blood transfusion?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever had hepatitis?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever been exposed to HIV/AIDS?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever abused intravenous (IV) drugs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Medications: Please list all medications you currently use, including non-prescription medications, vitamins, dietary supplements, and herbal remedies.

Name of Medication	Dosage & Frequency	Reason

Family History:

Please indicate which **family member** has had any of the following illnesses:

<input type="checkbox"/> Obesity	<input type="checkbox"/> Lung disease or emphysema	<input type="checkbox"/> Kidney disease
<input type="checkbox"/> High blood pressure	<input type="checkbox"/> High cholesterol	<input type="checkbox"/> Diabetes
<input type="checkbox"/> Heart disease	<input type="checkbox"/> Breast cancer	<input type="checkbox"/> Blood disorder
<input type="checkbox"/> Stroke	<input type="checkbox"/> Other cancers	<input type="checkbox"/> Bleeding tendency

Is your mother still alive? ☐ Yes ☐ No

If not, what was the cause of death and age at death? _____

Is your father still alive? ☐ Yes ☐ No

If not, what was the cause of death and age at death? _____

Social History:Marital Status: ☐ Single ☐ Married ☐ Separated ☐ Divorced ☐ WidowedChildren: ☐ Yes ☐ No If yes, how many? _____

Occupation: _____

Do you use tobacco? ☐ Yes ☐ No If yes:

Cigarettes: Number packs per day: _____ Years of tobacco use: _____

Cigars: Number per day: _____ Years of tobacco use: _____

Pipe: Number times per day: _____ Years of tobacco use: _____

Smokeless: Number times per day: _____ Years of tobacco use: _____

Do you use alcohol? ☐ No ☐ Yes Amount and frequency: _____Do you use recreational drugs? ☐ No ☐ Yes Frequency: _____Have you ever been treated for depression? ☐ Yes ☐ NoAre you currently in treatment? ☐ Yes ☐ No

If yes, please indicate the name of your physician or therapist/counselor:

Have you ever been hospitalized for mental illness? ☐ Yes ☐ No

If yes, please indicate date(s) and reason(s):

Review of Body Systems:

Please circle any of the following you currently experience or have experienced in the past:

General

Fever	Fatigue
General weakness	Tiredness
Memory loss	Recent weight loss
Easy bruising	Night sweats
Abnormal bleeding	
Other _____	

Head/Neck

Trouble with vision	Trouble with ears	Sinus trouble
Persistent hoarseness	Severe headaches	Dizziness
Fainting spells	Loss of smell	Sore throat
Difficulty swallowing	Pain when swallowing	Lump in neck
Other _____		

Chest/Heart/Lungs

Shortness of breath	Poor exercise tolerance	Chest pain or pressure attacks
Fluttering of heart	Frequent cough	Wheezing
Coughing up blood	Swollen ankles	Night sweats
Heart attack	Pain in arms or neck	Heart pounding
Palpitations	Heart murmur	Abnormal heart beats
Low blood pressure	Stroke	Cold feet
Pain in legs	Asthma	Loss of pulses
Emphysema	Pneumonia	Bronchitis
Difficulty sleeping flat	Waking at night short of breath	
Other _____		

Stomach/Intestines/Abdomen

Poor appetite	Indigestion or heartburn	Difficulty swallowing
Nausea or vomiting	Vomiting blood	Abdominal pain or cramps
Abdominal swelling	Diarrhea	Constipation
Change in bowel habits	Pass blood from rectum	Black, tar-like bowel movements
Jaundice	Hepatitis	Cirrhosis
Heartburn	Abdominal pain	Pain with bowel movements
Change in stool size	Hemorrhoids	Irritable bowel
Colitis		
Other _____		

Kidneys/Urinary

Kidney stones	Blood in urine	Pain/burning while urinating
Difficulty passing urine	Difficulty controlling urine	Getting up at night to urinate
Frequent urination	Leakage of urine	Kidney infection
Bladder infection	Pelvic examination/PAP smear within past year	
Other _____		

Bones/Joints

Weakness in arm or leg	Painful joints	Gout
Loss of muscle strength	Swollen joints	Back pain
Lump or swelling in muscle	Arthritis	Muscular aches
Pain in knees	Pain in hips	Pain in feet
Pain in ankles	Sciatica	Low back pain
Numbness in feet or legs	Herniated disk	Abnormal lumps or masses
Other _____		

Endocrine

Hyperthyroid	Low thyroid	Goiter
Previous radiation	Diabetes	Adrenal gland tumor
Swollen glands	Cold when others are not	Hot when others are not
Persistent thirst	Previous steroid (corticosteroids, cortisone) use or injections	
Other _____		

Skin

Changing mole	Rash	Burns
Skin cancer		
Other _____		

Muscular/Nervous System

Seizures	Convulsions	Fainting
Dizziness	Light headedness	Falling
Muscle weakness	Numbness	Tremors
Loss of consciousness	Strokes	
Other _____		

Psychological

Depression	Nervousness	Suicidal thoughts
Suicide attempts	Schizophrenia	Anorexia
Bulimia	Binge eating	Mental health counseling
Hospitalization for emotional problems		

How would you describe your life?	Unsatisfactory / Satisfactory	Boring	Other
Do you: Cry easily?	Feel anxious or upset?	Have difficulty with sleep?	
Other _____			

Females only

Breast lump	Discharge from nipple	Hot flashes
Possibly pregnant	Irregular periods	Mammogram within past year
Vaginal discharge	Vaginal bleeding or spotting (between periods)	
Other _____		

Males only

Prostate trouble	Discharge from penis	Sores on penis
Lump in testicles	Difficulty having erections	
Other _____		



BARIATRIC SURGERY INSURANCE VERIFICATION FORM

KEEP A COPY OF THIS WORKSHEET FOR YOUR REFERENCE

Submit the completed insurance verification form with the medical history questionnaire.

This worksheet provides helpful information to you when calling your insurance company to determine that your insurance policy provides bariatric surgery coverage. Your employer has the OPTION of providing this benefit to their employees through an insurance rider added to their plan. Be sure to ask the specific questions below.

Your insurance I.D. card should provide a telephone number to call their member service representatives to verify coverage. The representative will ask for the following information, so have it readily available:

- Patient's name and Date of Birth
- Insurance ID number and Group Number
- Subscriber/Policy holder's name

*Tell the representative that you are calling to verify your policy's benefits/rider for bariatric weight loss surgery. Be sure to write down the representative's name and the date that you call.

Representative's Name: _____ Date of Call: _____

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BARIATRIC SURGERY INSURANCE VERIFICATION FORM

Questions to ask:

1. Do I have a bariatric rider and/or weight loss surgery coverage? YES_____ NO _____
 - If the representative asks for a diagnosis code using for billing: Morbid Obesity (E66.01)
 - If the representative asks for surgical procedure codes:
 Gastric Bypass: 43644 Gastric Sleeve: 43775 Lap Band Removal: 43774
2. Is NHRMC in-network? YES_____ NO_____
 - If the representative asks for the hospital address:
2131 S 17th Street, Wilmington, NC 28401
 - If the representative asks for the hospital's Tax ID number: 85-3777599
 - If the representative asks for the hospital's NPI number: 1376139139
 - Is the provider: Dr. Jayme Stokes (NPI # 1851504336) in network under my policy?
YES_____ NO_____
3. Does my policy require that I complete a medically supervised weight loss program with documentation of a diet/exercise program for any length of time? YES_____ NO_____
4. Does my policy contain a pre-existing clause?
YES_____NO_____ If YES, how long? _____
5. Does my primary care physician need to issue a referral for me to see a specialist for consultation and treatment? YES_____ NO _____
6. Does my insurance company require me to participate in a state sponsored pre-surgery program such as Bariatric Resource Services (United Healthcare policies) or My Active Health (Anthem Blue Cross Blue Shield and Aetna CovaCare policies)? YES_____ NO_____
7. Does my insurance require that I go to a designated Center of Excellence such as Aetna IOQ (for Aetna policies), Blue Distinction facility (Anthem Blue Cross Blue Shield policies) or Optum COE (United Healthcare policies)? YES_____ NO_____

***IF YOU DO NOT HAVE BARIATRIC COVERAGE FOR SURGERY, PLEASE
CONTACT OUR OFFICE FOR SURGERY SELF-PAY OPTIONS ***

Please note that the completion of this form does not guarantee your approval for surgery or payment for medical services. Surgical pre-approval can only be obtained after necessary documentation is provided to your insurance provider. Should your health insurance deny payment for services, you will be responsible for those charges. We cannot be held liable for any incorrect information provided to you by your insurance provider.

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