

**PATIENT AGREEMENT**  
**CAROLINA HEALTH DPC, LLC**

This is an Agreement entered into on \_\_\_\_\_, 20\_\_\_\_, between Carolina Health DPC, a South Carolina Limited Liability Company, and \_\_\_\_\_ (Patient or You).

**Background**

The CLINIC is a Direct Pay primary care practice (DPC), which delivers primary care services through its , Dr Cliff W. Bowers, DO and associates (collectively “Physicians”), at 700 Squires Point, Suite B, Duncan, SC 29334. In exchange for certain fees, the CLINIC, agrees to provide You with the Services described in this Agreement on the terms and conditions contained in this Agreement.

**Definitions**

**1. Patient.** In this Agreement, “Patient” means the persons for whom the Physicians shall provide care, and who have signed this agreement or are listed on the document attached as Appendix 1, which is a part of this agreement.

**2. Services.** In this Agreement, “Services”, means the collection of services offered to you by US in this Agreement. These Services are listed in Appendix 1, which is attached and a part of this Agreement.

**Agreement**

**3. Term.** This Agreement will last for one year, starting on \_\_\_\_\_.

**4. Renewal.** The Agreement will automatically renew each year on the anniversary date of the agreement, unless either party cancels the Agreement by giving 30 days written cancellation notice.

**5. Termination.** Regardless of anything written above, You always have the right to cancel this agreement. Either party can end this agreement at any time by giving the other party 30 days written notice.

**6. Payments and Refunds – Amount and Methods.** In exchange for the Services (see Appendix 1), You agree to pay a monthly fee in the amount that appears Appendix 3, which is attached and is Part of this Agreement.

a) This monthly fee is payable when you sign the Agreement, and is due no later than the last business day of each month thereafter.

b) The Parties agree that the required method of monthly payment shall be through either automatic payment, through a credit card, debit card, or automatic bank draft.

c) If this Agreement is cancelled by either party before the Agreement ends, We will review and settle your account as follows:

- (i) We will refund to You the unused portion of your fees on a per diem basis; or
- (ii) If the Value of the Services you received over the term of the Agreement exceeds the amount You paid in membership fees, You shall reimburse the CLINIC in an amount equal to the difference between the value of the services received and the amount You paid in membership fees over the term of the Agreement. The Parties agree that the value of the services is equal to the CLINIC's usual and customary fee-for-service charges. A copy of these fees is available on request.

**7. Non-Participation in Insurance.** Your initials on this clause of the Agreement acknowledges the Patient's understanding that neither the CLINIC, nor its Physicians, participate in any health insurance or HMO plans or panels and have opted out of Medicare. Neither make any representations that the fees paid under this Agreement are covered by the Patient's health insurance or other third party payment plans. It is the Patient's responsibility to determine whether reimbursement is available from a *private, non-governmental* insurance plan or HSA and to submit any required billing. \_\_\_\_\_ **(Initial)**

**8. Medicare.** This agreement acknowledges the Patient's understanding that Medicare cannot be billed for any services performed for the Patient by the Physicians. The Patient agrees not to bill Medicare or attempt to obtain Medicare reimbursement for any such services.

**9. This Is Not Health Insurance.** Your initials on this clause of the Agreement acknowledges Your understanding that this Agreement is not an insurance plan or a substitute for health insurance. The Patient understands that this Agreement does not replace any existing or future health insurance or health plan coverage that Patient may carry. The Agreement does not include hospital services, or any services not personally provided by the CLINIC, or its employees. The Patient acknowledges that the CLINIC has advised the patient to obtain or keep in full force, health insurance that will cover the Patient for healthcare not personally delivered by the CLINIC, and for hospitalizations and catastrophic events. \_\_\_\_\_ **(Initial)**

**10. Communications.** The Patient acknowledges that although the CLINIC shall comply with HIPAA privacy requirements, communications with the Physicians using e-mail, facsimile, video chat, cell phone, texting, and other forms of electronic communication can never be absolutely guaranteed to be secure or confidential methods of communications. As such, **Patient expressly waives the Physicians' obligation to guarantee**

**confidentiality with respect to the above means of communication.**

Patient further acknowledges that all such communications may become a part of the medical record.

By providing an email address on the attached Appendix 2, the Patient authorizes the CLINIC, and its Physicians to communicate with him/her by email regarding the Patient's "protected health information" (PHI).<sup>1</sup> The Patient further acknowledges that:

- (a) E-mail is not necessarily a secure medium for sending or receiving PHI and, there is always a possibility that a third party may gain access;
- (b) Although the Physicians will make all reasonable efforts to keep e-mail communications confidential and secure, neither the CLINIC, nor the Physicians can assure or guarantee the absolute confidentiality of email communications;
- (c) At the discretion of the Physicians, e-mail communications may be made a part of Patient's permanent medical record; and,
- (d) You understand and agree that email is not an appropriate means of communication in an emergency, for time-sensitive problems, or for disclosing sensitive information. **In an emergency, or a situation that You could reasonably expect to develop into an emergency, You understand and agree to call 911 or the nearest Emergency room, and follow the directions of emergency personnel.**
- (e) Email Usage. **If You do not receive a response to an e-mail message within 24 hours, You agree that you will contact a CLINIC Physician by telephone or other means.**
- (f) Technical Failure. Neither the CLINIC, nor the Physicians will be liable for any loss, injury, or expense arising from a delay in responding to Patient, when that delay is caused by technical failure. Examples of technical failures (i) failures caused by an internet service provider, (ii) power outages, (iii) failure of electronic messaging software, or e-mail provider (iv) failure of the CLINIC's computers or computer network, or faulty telephone or cable data transmission, (iv) any interception of email communications by a third party which is unauthorized by the CLINIC; or (v) Patient failure to comply with the guidelines for use of e-mail described in this Agreement.

**11. Change of Law.** If there is a change of any relevant law, regulation or rule, federal, state or local, which affects the terms of this Agreement, the parties agree to amend this Agreement to comply with the law.

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<sup>1</sup> as that term is defined in the Health Insurance Portability and Accountability Act (HIPAA) of 1996 and its implementing regulations.

**12. Severability.** If any part of this Agreement is considered legally invalid or unenforceable by a court of competent jurisdiction, that part will be amended to the extent necessary to be enforceable and the remainder of the contract will stay in force as originally written.

**13. Reimbursement for services rendered.** If this Agreement is held to be invalid for any reason, and the CLINIC is required to refund fees paid by You, You agree to pay the CLINIC an amount equal to the fair market value of the medical services You received during the time period for which the refunded fees were paid.

**14. Amendment.** No amendment of this Agreement shall be binding on a party unless it is in writing and signed by all the parties. Except for amendments made in compliance with Section 11, above.

**15. Assignment.** This Agreement, and any rights You may have under it, may not be assigned or transferred by You.

**16. Legal Significance.** You acknowledge that this Agreement is a legal document and gives the parties certain rights and responsibilities. You also acknowledge that You have had a reasonable time to seek legal advice regarding the Agreement and have either chosen not to do so or have done so and are satisfied with the terms and conditions of the Agreement.

**17. Miscellaneous.** This Agreement shall be construed without regard to any rules requiring that it be construed against the party who drafted the Agreement. The captions in this Agreement are only for the sake of convenience and have no legal meaning.

**18. Entire Agreement.** This Agreement contains the entire agreement between the parties and replaces any earlier understandings and agreements whether they are written or oral.

**19. No Waiver.** In order to allow for the flexibility of certain terms of the Agreement, each party agrees that they may choose to delay or not to enforce or the other party's requirement or duty under this agreement (for example notice periods, payment terms, etc.). Doing so will not constitute a waiver of that duty or responsibility. The party will have the right to enforce such terms again at any time.

**20. Jurisdiction.** This Agreement shall be governed and construed under the laws of the State of [state]. All disputes arising out of this Agreement shall be settled in the court of proper venue and jurisdiction for the CLINIC in [city], [state].

**21. Service.** All written notices are deemed served if sent to the address of the party written above or appearing in Appendix 2 by first class U.S. mail.

The parties may have signed duplicate counterparts of this Agreement on the date first written above.

CAROLINA HEALTH DPC, LLC

By: \_\_\_\_\_

Print: \_\_\_\_\_

\_\_\_\_\_  
Signature of Patient

\_\_\_\_\_  
Name of Patient (printed)

\_\_\_\_\_  
Date

## **APPENDIX 1 SERVICES**

1. **Medical Services.** Medical Services under this agreement are those medical services that the Physicians are permitted to perform under the laws of the State of [state], are consistent with the Physicians' training and experience, are usual and customary for a family medicine physician to provide, and include the following:<sup>2</sup>

- Acute and Non-acute Office Visits
- Well-Woman Care/ Pap Smear
- Electrocardiogram (EKG)
- Blood Pressure Monitoring
- Diabetic Monitoring
- Breathing Treatments (nebulizer or inhaler with spacer)
- IUD Removals
- Urinalysis
- Rapid Test for Strep Throat
- Removal of benign skin lesions/warts\*
- Simple aspiration/injection of joint\*
- Removal of Cerumen (ear wax)
- Wound Repair and Sutures\*
- Abscess Incision and Drainage
- Basic Vision/Hearing Screening
- Drawing basic labs. Labs and testing that cannot be performed in-house will be offered at a discounted rate through select vendors.\*
- The convenience of access to many commonly prescribed prescription medications and DME at greatly reduced prices, dispensed on premises.\*\*

\*Patient is responsible for all fees associated with any procedures, laboratory testing, and/or specimen analysis.

\*\*Prescription medications dispensed and/or DME provided by Carolina Health DPC is subject to an additional charge, for which the Patient is responsible.

The Patient is also entitled to a personalized, annual in-depth "wellness examination and evaluation," which shall be performed by a CLINIC Physician, and may include the following, as appropriate:

- Detailed review of medical, family, and social history and update of medical record;
- Personalized Health Risk Assessment utilizing current screening guidelines;
- Preventative health counseling, which may include: weight management, smoking cessation, behavior modification, stress management, etc.;

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<sup>2</sup> As deemed appropriate and medically necessary by Physician.

- Custom Wellness Plan to include recommendations for immunizations, additional screening tests/evaluations, fitness and dietary plans;
- Complete physical exam & form completion as needed.

2. **Non-Medical, Personalized Services.** CLINIC shall also provide Patient with the following non-medical services (“Non-Medical Services”):

- After Hours Access.** Patients shall have direct telephone access to a CLINIC Physician seven days per week. Patient shall be given a phone number where a patient may reach a CLINIC Physician directly for guidance regarding concerns that arise unexpectedly after office hours. Video chat and text messaging may be utilized when a CLINIC Physician and Patient agree that it is appropriate.
- Physician Absence.** From time to time, due to vacations, illness, or personal emergency, a CLINIC Physician may be temporarily unavailable to provide the services referred to above in this paragraph one. In order to assist Patients in scheduling non-urgent visits, CLINIC will notify Patients of any planned Physician absences as soon as the dates are confirmed. In the event of a CLINIC Physician’s unplanned absences, Patient’s will be given the name and telephone number of an appropriate provider for the Patient to contact. Any treatment rendered by a non-CLINIC Physician, but instead by a substitute provider, is not covered under this contract, but may be submitted to the Patient's health plan.
- E-Mail Access.** **Patient shall be given the Physicians’ e-mail addresses** to which non-urgent communications can be addressed. Such communications shall be dealt with by the Physicians or staff member of CLINIC in a timely manner. **Patient understands and agrees that email and the internet should never be used to access medical care in the event of an emergency, or any situation that Patient could reasonably expect may develop into an emergency.** Patient agrees that in such situations, when a Patient cannot speak to a CLINIC Physician immediately in person or by telephone, that Patient shall call 911 or the nearest emergency medical assistance provider, and follow the directions of emergency medical personnel.
- No Wait or Minimal Wait Appointments.** Reasonable effort shall be made to assure that Patient is seen by a CLINIC Physician immediately upon arriving for a scheduled office visit or after only a minimal wait. If the Physicians foresee a minimal wait time, Patient shall be contacted and advised of the projected wait time.
- Same Day/Next Day Appointments.** When Patient calls or e-mails the Physicians prior to noon on a normal office day (Monday through Friday) to schedule an appointment, every reasonable effort shall be made to schedule an appointment with a CLINIC Physician on the same day. If the patient calls or e-mails the Physicians after noon on a normal office day (Monday through Friday) to schedule an appointment, every reasonable effort shall be made to schedule Patient’s appointment with a CLINIC Physician on the following normal office day. In any event, however, CLINIC shall make every reasonable effort to schedule an appointment for the Patient on the

same day that the request is made.

- f. **Visitors. Non-Medicare** family members temporarily visiting a Patient from out of town may, for a two-week period, take advantage of the services described in subparagraphs (a), (c), and (d) of this paragraph. Medical services rendered to Patient's visitors shall be charged on a fee-for-service basis.
  
- g. **Specialists Coordination.** CLINIC and Physicians shall coordinate with medical specialists to whom Patient is referred to assist Patient in obtaining specialty care. **Patient understands that fees paid under this Agreement do not include and do not cover specialist's fees or fees due to any medical professional other than the CLINIC Physicians.**



**APPENDIX 2**  
**PATIENT ENROLLMENT – MEDICAL AGREEMENT FORM**  
**CAROLINA HEALTH DPC, LLC**

Annual fees as set out below shall apply to the following Patient(s), who by signing below agree to the terms and conditions of the CAROLINA HEALTH DPC Medical Agreement Form.

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Printed Name	Date of Birth (MM/DD/YYYY)	Age
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Street Address	City, State, Zip
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Home Phone	Work Phone	Cell Phone	Preferred email
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Spouse Name	Date of Birth (MM/DD/YYYY)	Age
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Home Phone	Work Phone	Cell Phone	Preferred email
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***Child/Children to Whom this Agreement Applies:***

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Print Name	Date of Birth (MM/DD/YYYY)	Age
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Print Name	Date of Birth (MM/DD/YYYY)	Age
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Print Name	Date of Birth (MM/DD/YYYY)	Age
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Name	Date of Birth (MM/DD/YYYY)	Age	Print
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**Preferred Payment Method\***

- Yearly (Credit/Debit Card)
- Monthly (Credit/Debit Card/Check)
- Employer \_\_\_\_\_

\*All patients must have a credit or debit card on file to cover the cost of membership and any incidentals not covered under the Agreement.

I certify that I have read, understand, and agree to the terms set forth in [CLINIC NAME] Medical Agreement Form. I further certify that I have received a copy of this form.

Signature: \_\_\_\_\_

**APPENDIX 3  
FEE ITEMIZATION**

Subscriptions	
Individuals	\$70
Families (2 adults, 2 children)	\$200
Single Parent +2 children	\$130
Additional children	\$10

Procedures

**Medicare Exclusion Status of Physicians**

Beneficiary understands that Physicians have not been excluded from participation under the Medicare program under section 1128, 1156, 1892, or any other sections of the Social Security Act.

**Duration of the Contract**

This contract becomes effective on \_\_\_\_\_, 20\_\_\_\_, and will continue in effect until \_\_\_\_\_, 20\_\_\_\_. Either party may terminate treatment with reasonable notice to the other party, as provided in the agreement. Notwithstanding this right to terminate treatment, both Physicians and Beneficiary agree that the obligation not to

pursue Medicare reimbursement for items and services provided under this contract will survive this contract.

**Successors and Assigns**

The parties agree that this agreement will be fully binding on their heirs, successors, and assigns.

Physicians and Beneficiary intend to be legally bound by signing this agreement on the date set forth below.

\_\_\_\_\_  
Name of Beneficiary (printed)

\_\_\_\_\_  
Signature of Beneficiary

\_\_\_\_\_  
Date

CAROLINA HEALTH DPC, LLC

By: \_\_\_\_\_

Print: \_\_\_\_\_

Date Signed by Physician and LLC:

\_\_\_\_\_, 20\_\_\_\_.