bocafertility

Cheri Margolis, M.D. • Leah Roberts, M.D. • Jaclyn Kwal, M.D. • Daniela Diego, M.D.
Phone: 561-368-5500 • **Fax:** 561-368-4793 • **bocafertility.com**
Boca Raton • Fort Lauderdale • Miami

Welcome to Boca Fertility!

We are pleased to welcome you to our clinic and to take part in your fertility journey. At Boca Fertility, we believe your fertility future is bright, and we are here to ensure you have the best experience possible.

To save time at your initial appointment, please complete your **New Patient Form** packet prior to arriving at the clinic.

You may bring the completed forms with you to your first appointment, or you may scan and email them to **frontdesk@bocafertility.com.**

If you need to reschedule or cancel your appointment, please call the office 2 business days in advance.

We look forward to seeing you soon.

Thank you,

Boca Fertility Team

Want to know what to expect at your first appointment?
Scan to view our FAQs and helpful advice for your initial visit.

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Insurance & Billing Authorization

Thank you for choosing Boca Fertility as your health care provider. We are committed to the success of your treatment. The following form is a statement of our Insurance and Billing Policy, which we require you to read, initial and sign prior to any treatment.

Boca Fertility will bill your insurance for covered charges incurred in our office. Your deductible and co-payment are due at the time of your visit. We accept cash, MasterCard, Visa or Discover. Patients paying cash should note that we do not keep change in our office.

Boca Fertility verifies your insurance benefits with your insurance company prior to your appointment. Please be advised that it is only an estimation of benefits; it is not guaranteed by the insurance company and is subject to change by your insurance's approval. You will be responsible for all charges not paid by your insurance company. We will do everything in our power to appeal an unpaid charge; however, you are responsible for payment for your services rendered.

I agree to have Boca Fertility bill my credit card automatically on my account balance for any charges_____
Initial

Some services provided by our office may be non-covered. If we have been informed that the service is not covered, you will be responsible for payment in full at the time of the visit. Otherwise, we will file the claim and bill you if it denied.

It is important to note that many insurance policies do not cover infertility; therefore, your expenses at our office may or may not be covered. If your insurance coverage is terminated or you switch policies, it is your responsibility to let us know prior to receiving further services.

It is possible at some point your insurance company may request a copy of your records to determine if your treatment is for a non-covered or pre-existing condition. Unfortunately, this is a matter we have no control over. We cannot withhold or alter records.

For surgery, ovulation induction therapy and in vitro fertilization, we will bill your insurance; subject to verification of coverage and pre-payment of your expected out-of-pocket expenses. You will be billed for all charges not paid by your insurance. Patients with accounts sent to an outside collection agency are responsible for all collection costs and legal fees.

The medical personnel in our office, including Dr. Margolis and Dr. Roberts are devoted exclusively to your medical care. Please direct all matters relating to fees, billing and insurance only to the business personnel.

I understand I am responsible for payment of all my services and agree to all of the above. _____
Initial

I hereby authorize the release of medical information to my insurance company and authorize the payment of benefits to Boca Fertility.

Print Patient Name: _____

Signature of Patient: _____ Date: _____

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Fee Policy

At Boca Fertility, we value transparency about your treatment program and included fees. Please review and sign below to acknowledge your understanding and acceptance of our fee policies.

Insurance

Boca Fertility will bill your insurance for coverage charges incurred in our office. Your deductible and co-payment are due at the time of your visit. Some services provided by our office may be non-covered. If we have been informed that the services is not covered, you will be responsible for payment in full at the time of the visit. Otherwise, we will file a claim and bill you if its denied. You will be held responsible for any charges not paid by the insurance company, regardless of the reason.

If your insurance coverage is terminated or if you switch policies, it's your responsibility to let us know this prior to undergoing further services.

It is possible that, at some point, your insurance company may request a copy of your file in order to determine whether your treatment is for a non-covered or pre-existing condition. This is a matter over which we have no control; we cannot withhold or alter records. There is a nominal handling fee for making those copies.

Payment Schedule

Payment is due at the time of service. If you wish to know the fee for any service in advance of scheduling, please feel free to ask the receptionist.

We accept cash, check, MasterCard, Visa, or Discover. We also offer our patients the option of applying for credit with a medical finance company. If you will be paying cash, please note that we do not keep change in our office. (If you do not have the exact amount, we can credit your account for the overpayment or mail you a check.)

Returned Checks

A $30.00 charge is applied to any check returned by the bank. Past due accounts are assessed a 1% monthly late charge. Accounts sent to an outside collection agency are responsible for all legal fees and collection costs.

☐ By checking this box and signing below, you agree to accept the terms of our fees policies.

Print Patient Name: _____

Signature of Patient: _____ Date: _____

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Credit & Refund Policy

Effective April 2025

We understand that plans can change, and we want to be transparent about what happens if a treatment cycle is canceled or not completed. Please review the following policy carefully.

Refunds are not provided. Instead, a credit will be applied toward future services based on the timing and stage of your treatment. All credits are handled on a case-by-case basis.

If your cycle is canceled immediately after payment:
- A clinical management fee will be applied, and the remaining balance will be issued as a credit toward future services.

If your cycle is canceled after stimulation has begun but before egg retrieval:
- One-third (1/3) of the fee will be retained to cover monitoring and clinical care.
- Two-thirds (2/3) of the fee will be credited toward a future cycle.

If your cycle is canceled after egg retrieval but before any lab work is done:
- Two-thirds (2/3) of the fee will be retained.
- One-third (1/3) of the fee will be credited toward a future cycle.

If egg retrieval and laboratory services (e.g. fertilization or embryo development) have begun:
- No credit will be issued for the cycle.

If additional services (such as biopsy) were paid for but not performed:
- These services will be fully refunded.

Patient Acknowledgment

By signing below, I confirm that I have read and understand the **Credit & Refund Policy** outlined above. I acknowledge that no refunds will be issued, and that any credits toward future services will be applied in accordance with this policy. I understand that I may contact a financial counselor at the clinic if I have any questions or need further clarification.

_____
Patient Name (Print)

_____ _____
Patient Signature Date

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Notification of Privacy Policy

(1 of 4)

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

Introduction

At Boca Fertility, we are committed to treating you and using protected health information about you responsibly. This Notice of Health Information Practices describes the personal information we collect, and how and when we use or disclose that information. It also describes your rights as they relate to your protected health information. This notice applies to all protected health information as defined by federal regulations.

Understanding Your Health Record/Information

Each time you visit Boca Fertility, a record of your visit is made. Typically, this record contains your symptoms, examination and test results, diagnoses, treatment, and a plan for future care or treatment. This information, often referred to as your medical record, serves as a:

- Basis for planning your care and treatment,
- Means of communication among the many health professionals who contribute to your care,
- Legal document describing the care you received,
- Means by which you or a third-party payer can verify that services billed are actually provided,
- A tool in educating health professionals,
- A source of data for medical research,
- A source of information for public health officials charged with improving the health of this state and the nation,
- A source of data for our planning and marketing,
- A tool with which we can assess and continually work to improve the care we render and the outcomes we achieve.

Understanding what is in your record and how your health information is used helps you to: ensure its accuracy, better understand who, when, where, and why others may access your health information, and make more informed decisions when authorizing disclosure to others.

Your Health Information Rights

Although your health record is the physical property of Boca Fertility, the information belongs to you. You have the right to:

- Obtain a paper copy of this notice of information practices upon request,
- Inspect and copy your health record as provided for in 45 CFR 164.524,
- Amend your health record as provided for in 45 CFR 164.528
- Obtain an accounting of disclosures of your health information as provided for in 45 CFR 164.528
- Request communications of your health information by alternative means or locations,
- Request a restriction on certain uses and disclosures of your information as provided by 45 CFR 164.522, and revoke your authorization to use or disclose health information except to the extent that action has already been taken.

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Our Responsibilities

Boca Fertility is required to:

- Maintain the privacy of your health information
- Provide you with this notice as to our legal duties and privacy practices with respect to information we collect and maintain for you,
- Abide by terms of this notice,
- Notify you if we are unable to agree to a requested restriction, and
- Accommodate reasonable requests you may have to communicate health information by alternative means or at alternative locations.

We reserve the right to change our practices and to make the new provisions effective for all protected health information we maintain. Should our information practices change, we will mail a revised notice to the address you have supplied us, or if you agree, we will email the revised notice to you.

For More Information or to Report a Problem

For questions or more information, you may contact our clinic at frontdesk@bocafertility.com.

If you believe your privacy has been violated, you can file a complaint with the practice's Privacy Officer or with the Office for Civil Rights, US Department of Health and Human Services. There will be no retaliation for filing a complaint. The address for the OCR is:

Office for Civil Rights
U.S. Department of Health and Human Services
200 Independence Ave, SW
Room 509F, HHH Building
Washington, D.C. 20201

Examples of Disclosures for Treatment, Payment, and Health Operation

We will use your health information for treatment

For example: Information obtained by a nurse, physician, or other members of your health care team will be recorded in your record and used to determine the course of treatment that should work best for you. Your physician will document in your record his or her expectations of the members of your health care team, who will then record the actions they took and their observations. In that way, the physician will know how you respond to the treatment.

We will also provide your physician or a subsequent health care provider with copies of various reports that should assist him or her in treating you once you are discharged from this practice.

We will use your health information for payment

For example: A bill may be sent to you or a third-party payer. The information on or accompanying the bill may include information that identifies you, as well as your diagnosis, procedures, and supplies used.

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We will use your health information for regular health operations.

For example: Members of the medical staff, the risk or quality improvement manager, or members of the quality improvement team may use information in your health record to assess the care and outcomes in your case and others like it. This information will then be used in an effort to continually improve the quality and effectiveness of the healthcare and service we provide.

Business associates: There are some services provided in our organization through contacts with business associates. Examples include physician services in the emergency department, anesthesiology, radiology, and certain laboratory tests. When these services are contracted, we may disclose your health information to our business associates so that they can perform the job we have asked them to do and bill your third-party payer for services rendered. To protect your health information, however, we require the business associate to appropriately safeguard your information.

Notification: We may use or disclose information to notify or assist in notifying a family member, personal representative, or another person responsible for your care, your location, and general condition.

Communication with family: Health professionals, using their best judgment, may disclose to a family member, other relative, close personal friend or any other person you identify, health information relevant to that person's involvement in your care or payment related to your care.

Research: We may disclose information to researchers when their research has been approved by an institutional review board that has reviewed the research proposal and established protocols to ensure the privacy of your health information.

Marketing: We may contact you to provide appointment reminders by mail, answering machine messages, or your voicemail, or to provide information about treatment alternatives or other health- related benefits and services that may be of interest to you.

Public Health: We may disclose your health information to public health or legal authorities charged with preventing or controlling disease, injury, or disability as required by law.

Worker compensation: We may disclose health information to the extent authorized by and to the extent necessary to comply with laws relating to workers compensation.

Law enforcement: We may disclose health information for law enforcement purposes as required by law or in response to a valid subpoena.

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ACKNOWLEDGEMENT OF RECEIPT OF PRIVACY NOTICE

I have been presented with a copy of Notice of Privacy Policies detailing how my information may be used and disclosed as permitted under federal and state law. I understand the contents of the Notice, and I request the following person(s) to obtain information about my care including laboratory results:

☐ Spouse Name: _____

☐ Other Name(s):_____

I have the right to change these restrictions and have the most recent authorization used.

Patient's Signature: _____ **Date:**_____

If not signed by the patient, please indicate your relationship to the patient (e.g. spouse).

Relationship: _____

Witnessed by (employee): _____

Privacy officer/designee signature: _____

Restriction accepted: ☐ Yes ☐ No

Patient notified of acceptance/denial: ☐ Yes ☐ No

For office use only:

If patient refuses to sign, indicate your attempt to obtain a signature below.

☐ Patient refused to sign this acknowledgement.

Reason: _____

_____

Employee Name: _____ Date: _____ Time: _____

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Authorization for Disclosure of Confidential Information

Patient's Name: _____ Chart #: _____

Address: _____

Date of Birth: _____

I hereby authorize and request:

Doctor's Name:_____

Address: _____

Phone: _____ Fax: _____

To release the following information to:

Boca Fertility
875 Meadows Road, Suite 334
Boca Raton, FL 33486

Check All That May be Released:

- ☐ Infertility notes & relevant studies only
- ☐ Other (Please specify): _____

Purpose of Disclosure:

- ☐ Infertility evaluation
- ☐ Other (Please specify): _____

This authorization shall be valid for 120 days from the date of signature. The patient can revoke this authorization in writing any time prior to the expiration date.

Patient's Signature: _____ Date: _____

Witness: _____

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Medical Record Release Authorization

Patient's Name: _____ D.O.B_____

Address: _____

City: _____State: _____ Zip: _____

Before signing authorization for the release of my medical record, I acknowledge the following:

- I understand that there will be a charge for labor and material cost in photocopying my medical record ($25 for the first 20 pages and $0.50 for each additional page). I will be notified of the total amount and will pay this fee before my record is released.
- I understand that my medical record will be mailed within one week after payment is received.

I have read and agreed with the above conditions and authorize

Boca Fertility and ☐ Cheri Margolis, M.D. ☐ Leah Roberts, M.D. ☐ Jaclyn Kwal, M.D. ☐ Daniela Diego, M.D.

to release the following information to:

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: _____

Check all that may be released: ☐ Entire record

☐ Infertility notes & relevant studies only

☐ Other (Please specify): _____

This authorization shall be valid for 120 days from the date of signature. The patient can revoke this authorization in writing any time prior to the expiration date.

Patient's Signature: _____ Date:_____

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Consent for Purposes of Treatment, Payment and Healthcare Operations

I consent to the use or disclosure of any protected health information by Boca Fertility for the purpose of diagnosing or providing treatment to me, obtaining payment for my healthcare bills or to conduct healthcare operations. I understand that my diagnosis or treatment may be conditioned upon my consent as evidenced by my signature in this document.

I understand I have the right to request a restriction as to how my protected health information is used or disclosed to carry out treatment, payment or healthcare operations to the practice. Boca Fertility is not required to agree to the restrictions that I may request. I have the right to revoke this consent, in writing, at any time, except to the extent that Boca Fertility has taken action in reliance on this consent.

My "protected health information" means health information including my demographic information, collected from me or received by Dr. Margolis or Dr. Roberts through another health care provider, a health plan, my employer or a health care clearinghouse. This protected health information relates to my past, present or future physical or mental health or condition and identifies me, or there is a reasonable basis to believe this information may identify me.

I understand I have a right to review Boca Fertility's "Notice of Privacy Practices" prior to signing this document. Boca Fertility's "Notice of Privacy Practices" has been provided to me. The Notice of Privacy Practices describes the types of uses and disclosures of my protected health information that will occur in my treatment, payment of my bills or in the performance of health care operations of Boca Fertility. This Notice of Privacy Practices also describes my rights and Boca Fertility's duties with respect to my protected health information.

Boca Fertility reserves the right to change the privacy practices that are described in the "Notice of Privacy Practices." I may obtain a revised notice of privacy practices by calling the office and requesting a revised copy be sent in the mail or asking for one at the time of my next appointment.

Communication with Spouse / Family:

Health professionals, using their best judgment at your request, may disclose to your spouse, family member, or any other person you identify, health information relevant to that person's involvement in your care or payment related to your care. We will give you an opportunity to revoke your decision in writing at any time.

Print Name:	**Relationship:**
_____	_____
_____	_____
_____	_____
_____	_____

Please initial where applicable:

____ OB/GYN ____ Family member ____ Psychologist ____ Attorney ____ Intended parents ____ Gestational carrier ____ Donor agency

_____ _____

Signature of Patient Date

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Communication Consent Form

By providing your cell phone number and email address, you agree that Boca Fertility may contact you regarding treatment alternatives, appointment reminders, and other information regarding your care by text message or email communications. This signature provides confirmation that you understand there is a risk of third parties reading text messages or unencrypted emails.

You are responsible for updating your phone number and email address with Boca Fertility. You may update your consent to receive text messages and/or emails at any time.

_____
Patient Name (Print)

_____
Patient Signature

_____
Date

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Media Consent Form

I, _____ (Patient Name), authorize the use of my patient testimonies, Google reviews, and photographs for marketing materials across Boca Fertility and Fertility Specialists Network channels.

I understand that I will not receive any compensation, financial or otherwise, for the use of these materials.

_____ _____
Patient Name (Print) Date

_____ _____
Patient Signature Date

Notes:

Patient would like Photos released after_____(Date).

Patient Phone #_____

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Name of Notifier:_____

Patient Name:_____ MRN#:_____

Advance Beneficiary Notice of Non-Covered Services (ABN)

You have requested we bill your insurance for some/ all fertility services. Your insurance may not offer coverage for some/all services, even though your health care provider advises these services are medically necessary and justified.

If your insurance doesn't pay for rendered services, you may have to pay.

WHAT YOU NEED TO DO NOW:

- Read this notice, so you can make an informed decision about your care.
- Ask us any questions that you may have after you finish reading.
- Choose an option below about whether to receive the services as above.
- **Note**: If you choose Option 1 or 2, we may help you to appeal to your insurance company for coverage.

OPTIONS:

Check only one box. We cannot choose a box for you:

☐ **OPTION 1**. I want the services listed above. I may be asked to be paid now, but I also want my insurance billed for an official decision on payment, which is sent to me as an Explanation of Benefits. I understand that if my insurance does not pay, I am responsible for payment, but I can appeal to the insurance carrier. If the insurance carrier does pay, you will refund any payments I made to you, less co-pays or deductibles, upon discharge from the clinic. Please note it will take about 60 days from the discharge date to receive the refund.

☐ **OPTION 2**. I want the services listed above, but do not bill my insurance company. I will be asked to be paid now as I am responsible for payment.

☐ **OPTION 3.** I do not want the services listed above. I understand with this choice I am not responsible for payment.

Additional Information:

This notice gives our opinion, not a denial from your insurance company. If you have other questions on this notice, please reach out to the billing team, or the physician before you sign below.

Signing below means that you have received and understand this notice. You may also receive a copy.

Signature: _____ Date: _____

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Patient Code of Conduct

(1 of 2)

Our Commitment
At Boca Fertility, we provide compassionate, respectful, and high-quality fertility care. We recognize that fertility treatment can be emotionally, physically, and financially challenging, and we strive to support every patient with empathy, professionalism, and dignity.

To maintain a safe, respectful, and healing environment for all patients, physicians, staff, and visitors, we ask that everyone adhere to the following standards of conduct.

Mutual Respect
We are committed to treating all patients with courtesy, compassion, and respect. In return, we expect patients, family members, partners, and visitors to treat our physicians, nurses, embryologists, administrative staff, and other team members with the same respect.

Expected Behavior
Patients and visitors are expected to:

- Communicate respectfully with physicians, staff, and other patients.
- Follow clinic policies and procedures.
- Arrive on time for appointments or provide appropriate notice if an appointment must be canceled or rescheduled.
- Provide accurate and complete medical and personal information.
- Respect the privacy and confidentiality of other patients.
- Maintain appropriate behavior in the clinic, waiting areas, and during all communications, including phone calls, emails, text messages, patient portal messages, and social media interactions.

Unacceptable Behavior
The following behaviors will not be tolerated:

- Verbal abuse, harassment, intimidation, or threats directed toward any physician, staff member, patient, or visitor.
- Profanity, discriminatory remarks, hate speech, or offensive language.
- Aggressive, hostile, or disruptive conduct.
- Physical violence, threatening gestures, or any behavior that causes concern for the safety of others.
- Sexual harassment or inappropriate comments or actions.
- Repeated excessive, abusive, or inappropriate communications with staff.
- Recording staff members or clinical interactions without consent is not prohibited.
- Damage to clinic property or theft.
- Posting false, defamatory, or knowingly misleading statements about staff or the practice.

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Patient Code of Conduct

(2 of 2)

Communication Expectations
Our team is committed to responding to patient inquiries as promptly as possible. We ask patients to communicate professionally and understand that medical recommendations, scheduling decisions, treatment protocols, and financial policies are based on clinical judgment, regulatory requirements, and practice standards. Disagreement with a recommendation or decision does not justify abusive or disrespectful behavior toward physicians or staff.

Safety and Well-Being of Our Team
We have a responsibility to provide a safe workplace for our employees and physicians. Any behavior that threatens the safety, well-being, or ability of our team to provide care may result in immediate action.

Consequences of Violations
If a patient, visitor, or representative engages in behavior that violates this Code of Conduct, the practice may take one or more of the following actions:

- Provide a verbal or written warning.
- Limit methods of communication.
- Require future communications to occur through designated channels.
- Request that a visitor leave the premises.
- Reschedule non-urgent appointments.
- In severe or repeated cases, the patient-provider relationship terminates in accordance
- with applicable laws, regulations, ethical obligations, and continuity-of-care requirements.
- Contact law enforcement when necessary to protect the safety of patients, staff, or physicians.

Commitment to Respectful Care
We believe that the best outcomes occur when patients and healthcare professionals work together in an environment of mutual respect, trust, and professionalism. We appreciate your partnership in helping us maintain a safe, supportive, and respectful fertility practice for everyone.

Thank you for choosing Boca Fertility!

_____
Patient Name (Printed)

_____ _____
Signature of Patient Date