



Welcomes

Let's Get Started

We are delighted you found us and honored that you've chosen to embark on your well-being journey with Robert Schulte, MD. Before we begin, we kindly ask all new patients to complete the attached form, which will only take about **15 minutes of your time**. This will help us understand how Dr. Schulte can best assist you.

Form Filling Instructions:

- **Begin Filling Out:** Tap on any field in the form, follow the blue "Next" arrow for all required fields.
- **Non-Applicable Fields:** If there is information that does not apply to you, please enter "DOES NOT APPLY" or "N/A".

Adding a Signature:

- **Signature Field:** All signature fields are required
- **Initials Requirement:** Ensure the patient's or parent/guardian's initials are included on the Arizona Disclosure and Privacy Notice.

Saving and Submitting the Form:

- **Email your form to:** contact@robertschultemd.com
- **Fax your form to:** (480) 451-3453

Helpful Tips

- **Double Check All Fields:** Before submitting, make sure every required field is filled in.
- **If you need more room to answer or provide additional information, please use page 16. Make sure to reference the question and the corresponding page number when doing so.**
- **Need Help?** If you run into any issues, don't hesitate to contact our administration care team. We're here to assist you! (480) 451-3454

Thank you!



Robert Schulte, MD
 Board Certified Child, Adolescent
 & Adult Psychiatrist

8776 E. Shea Blvd, Ste 106-1024, Scottsdale, AZ 85260
 Phone: (480) 451-3454 Fax: (480) 451-.3453
 Email: contact@robertschultemd.com

NEW PATIENT INTAKE PACKET

Today's Date _____ Referred By _____

Patient's Name (Last, First, MI) _____

Birth Date _____ - _____ - _____ Age _____ Gender: Female SS# _____ - _____ - _____

Address _____ City _____ State _____ Zip _____

Preferred Contact Number _____ Secondary Contact Number _____

Email: (We will use this for reminders unless you specify otherwise) _____

Alternate/Emergency Contact _____ Preferred Phone _____

Primary Physician _____ Phone _____ Fax _____

Pharmacy _____ Phone _____ Fax _____

Therapist (if applicable) _____ Phone _____ Fax _____

Marital Status: Married Single Widowed Divorced Separated #Yrs _____

Name of Spouse/Significant Other/Parent(s) _____

Names & Ages of Children/Siblings _____

If a patient is a minor please complete the following:

Mother's Name _____ Preferred Phone _____
 Alternate Phone _____

Address _____ City _____ State _____ Zip _____

Father's Name _____ Preferred Phone _____
 Alternate Phone _____

Address _____ City _____ State _____ Zip _____



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BILLING INFORMATION:

Party responsible for payment _____ Responsible Party phone _____

Responsible Party Address _____
 Number Street City State Zip Code

Insurance Information (**Please Note:** We gather insurance information for the purpose of expediting coverage for your prescriptions. Some insurance carriers require prior authorization to cover medications and will require us to submit forms on your behalf to secure approval. **We do not contract with insurance for any services.**)

Carrier Name _____ Member / Patient ID _____

Group ID _____ Customer Service # _____

BILLING & ATTENDANCE POLICIES:

- **ALL PAYMENTS ARE DUE AT TIME OF SERVICE.** While we do not contract with or submit to insurance, we will provide you with a one page "Superbill" with all the necessary information for you to submit to your insurance company for reimbursement upon request.
- Phone consultations and or letters/forms will be charged as follows: 5-10 min is \$190, 11-20 is \$290, and half hours are \$340. Multiple calls will be aggregated per 24 hour period. Declined credit card charge is \$140.
- **PATIENTS/ GUARANTORS MUST MAINTAIN CURRENT A CREDIT OR DEBIT CARD ON FILE.** This information will only be used for actual charges incurred, including phone consults, requested reports, and *missed or late-canceled appointments*. You are always welcome to use an alternate form of payment so long as it is offered at time of service.
- There is a 24 hour cancellation policy for Tuesday through Friday appointments. Monday appointments must be canceled by 2pm on the previous Friday. **FULL SESSION FEES ARE CHARGED TO YOUR CARD ON FILE FOR ALL MISSED OR LATE-CANCELLED APPOINTMENTS.**
- While we do try to make courtesy reminders, clinical matters take precedence and we are not always able to do so. **PLEASE KEEP TRACK OF YOUR APPOINTMENTS TO AVOID MISSED APPOINTMENT CHARGES.**

I have read, understand, and agree to abide by the foregoing billing & attendance policies. I understand that the foregoing agreement is binding in the state of Arizona. I hereby give express permission to Robert Schulte, MD (or his staff at his direction) to charge my card on file for charges incurred where I have not previously or simultaneously arranged alternate payment. I understand that I will be emailed a credit card receipt and Superbill detailing said charges within 24 hours after being charged upon request.

 Responsible Party Signature

 Date

 Witness

 Date



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PHYSICIAN-PATIENT AGREEMENT

This agreement serves to inform Dr. Schulte's patients regarding office policies, physician policies, and the Physician-patient relationship. Please read this agreement in its entirety and sign where indicated to acknowledge your understanding of this agreement and to abide by the policies contained therein.

ATTENDANCE POLICY: Dr. Schulte requires that all patients taking CII medication (generally, stimulants) be seen every three months and that those taking CIV medications (generally, benzodiazepines) to be seen every 4 months. All others on medication should generally be seen not less than every 6 months. Failure to maintain a regular attendance schedule may affect your ability to receive refills in a timely manner.

PRESCRIPTION POLICY: For REFILLS please contact your pharmacy directly; they will initiate the proper procedure. ****Please make sure to allow sufficient time for processing on all prescriptions, especially on weekends, so that you do not run out of your medication.****

CONFIDENTIALITY POLICY: Please see attached "Arizona Notice Form."

RE: THE MEDICAL INFORMATION BUREAU: Health insurance policies sometimes require patients to release all encounter information for any service rendered that is claimed against the health care plan. The diagnosis and treatment information required on the claim form is often then forwarded to the Medical Information Bureau (MIB), where it becomes available to other insurance companies without the patient's knowledge or consent. For this reason, Dr. Schulte cautions all patients that the release of any information through the claims filing process *may* present a potential risk that could be personally damaging to unknowing patients should an inappropriate party gain access to the MIB national database.

MEDICARE PART B ENTITLEMENT POLICY: While Dr. Schulte will gladly treat patients who are Medicare eligible, he does not participate in the Medicare Part B program. Unfortunately, this means that Medicare eligible patients are not allowed to seek Medicare reimbursement for Dr. Schulte's services and are required by law to sign a "waiver of Medicare Part B entitlement" acknowledging the same. A waiver is included in this packet and will need to be signed prior to receiving services.

PATIENT/PHYSICIAN RESPONSIBILITIES: Each patient is responsible for providing accurate contact and billing information. If a patient's telephone, email, or address changes it is the duty of that patient to inform Dr. Schulte's office immediately to avoid disruption of communication.

Examination and treatment provided by Dr. Schulte is limited to outpatient psychiatric services. The patient should be aware that this does not necessarily constitute total or definitive psychiatric care, and that further evaluation and treatment may be required in some cases. It is the patient's responsibility to obtain follow up medical care for general health as needed or where when advised to do so by Dr. Schulte. The patient further acknowledges that psychiatry is a specialty within the field of medicine and is not meant to be a substitution for primary medical care.

TERMINATION POLICY: Dr. Schulte reserves the right to terminate any patient who violates treatment protocol, is generally non-compliant (with respect to treatment directives or office policies), willfully disregards treatment objectives that are designed to obtain positive clinical outcomes, or is rude or disrespectful to him or his staff. He will continue to treat the terminated patient on an *emergency basis only* for 30 days after termination.



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STORAGE, TRANSFER & ACCESS TO PATIENT RECORDS ON TERMINATION OF THE PRACTICE:

In the event of the termination of Dr. Schulte’s practice, the doctor (or a designee from his staff) will post two notices in the Arizona Republic, two weeks apart, regarding the close of the practice and information for locating medical records. The doctor or his staff designee will further advise all active clients (by letter or direct verbal communication) where and how they may contact the doctor for purposes of interim/transfer care or to request their records. Patients will be provided either a phone number to contact the doctor directly or with numbers for the Arizona State Psychiatric Association or the Arizona State Medical Board, who will be able to properly direct requests (the doctor will maintain current contact with both associations during the required period for records retention). The doctor will maintain a professional telephone contact number for a period of three to six months, depending on circumstances surrounding the closure of the practice.

To protect personal privacy, the doctor or his staff designee will only provide direct access numbers to active or recent (6-month inactive) patients. *Inactive* patients will be able to direct records requests to the Arizona State Psychiatric Association or the Arizona State Medical Board. The doctor will maintain records at:

North Scottsdale Psychiatric Specialists
 8776 E. Shea Blvd, Ste 106-1024
 Scottsdale, AZ 85260

The doctor or his staff designee will respond in a timely manner to patient requests for copies or access to their medical records. Unless prohibited by illness, temporary travel unavailability, or death the doctor will respond within 30 days or other legally or ethically mandated time frame. The doctor or his staff designee will dispose of unclaimed records after the legally specified time for retention by destroying said records such no confidential information remains in useable form.

In the event that circumstances require, the doctor or his staff designee will forward access and responsibility to another professional who will respond to records requests in accordance with legal and professional standards as set forth by the Arizona State Psychiatric Association and the Arizona State Medical Board.

I have read, understand, and accept the provisions of this Physician-Patient Agreement, and have no questions about the policies outlined herein. I understand that if I violate any provisions of this agreement my treatment may be terminated. I understand that this agreement is binding in the state of Arizona and that the provisions herein are for my protection and the protection of Dr. Schulte. The original, signed agreement will become part of my private medical record and I am entitled to a copy at my request.

 Patient signature

 Date

 Witness signature

 Date



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Arizona Disclosure and Privacy Notice

Notice of Psychiatrists Policies and Practices to Protect the Privacy of Your Health Information

THIS NOTICE DESCRIBES HOW PSYCHIATRIC AND MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

I. Uses and Disclosures for Treatment, Payment, and Health Care Operations

With your consent, I may use or disclose your protected health information (PHI) for treatment, payment, and healthcare operations purposes. Here are some definitions for clarity:

- **PHI:** Information in your health record that can identify you.
- **Treatment, Payment, and Health Care Operations:**
 - **Treatment:** Providing, coordinating, or managing your health care. For example, consulting with another health care provider like your family physician or another psychiatrist.
 - **Payment:** Obtaining reimbursement for your health care. This includes disclosing your PHI to your health insurer to get reimbursement or determine eligibility or coverage.
 - **Health Care Operations:** Activities related to the performance and operation of my practice. Examples include quality assessment, business-related matters like audits, administrative services, and case management and care coordination.
- **Use:** Activities within my office such as sharing, employing, applying, utilizing, examining, and analyzing information that identifies you.
- **Disclosure:** Activities outside of my office, such as releasing, transferring, or providing access to your information to other parties. Int. _____

II. Uses and Disclosures Requiring Authorization

For purposes outside of treatment, payment, or healthcare operations, I will obtain your written authorization before using or disclosing your PHI. An "authorization" is additional written permission for specific disclosures. This is also required for releasing your psychotherapy notes, which are notes from our sessions that are kept separate from your medical record and are given greater protection. You can revoke authorizations at any time in writing, except if I have already relied on that authorization or if it was obtained as a condition of obtaining insurance coverage. Int. _____

III. Uses and Disclosures Without Consent or Authorization

I may use or disclose PHI without your consent or authorization in certain circumstances, such as:

- **Child Abuse:** Reporting PHI to authorities if there's reasonable belief of neglect or abuse of a minor (Arizona Revised Statutes § 13-3620).
- **Adult Domestic Abuse:** Disclosing PHI if an incapacitated or vulnerable adult is believed to be neglected, abused, or exploited (Arizona Revised Statutes § 46-454).
- **Health Oversight Activities:** Disclosing PHI to the Arizona Board of Psychologist Examiners during an investigation upon receiving a subpoena (Arizona Revised Statutes § 32-2081).
- **Judicial and Administrative Proceedings:** Releasing information if involved in a court proceeding, under state law, with written authorization or a court order (Arizona Revised Statutes § 32-2081).
- **Serious Threat to Health or Safety:** If there's an explicit threat of harm or risk of self-harm, I may disclose information to prevent harm, including informing potential victims and the police (Arizona Revised Statutes § 32-2084).
- **Worker's Compensation:** Disclosing PHI as necessary to comply with laws related to worker's compensation (Arizona Revised Statutes § 23-908). Int. _____

IV. Patient's Rights and Psychiatrist's Duties

Patient's Rights

- **Right to Request Restrictions:** Request restrictions on uses and disclosures of PHI (though not guaranteed).
- **Right to Confidential Communications:** Receive PHI communications by alternative means at alternative locations.
- **Right to Inspect and Copy:** Access and copy your PHI in mental health and billing records, with some exceptions.
- **Right to Amend:** Request amendments to PHI in the record.
- **Right to an Accounting:** Receive an accounting of disclosures of PHI.
- **Right to a Paper Copy:** Obtain a paper copy of this notice upon request.

Psychiatrist's Duties

- Maintain PHI and provide notice of legal duties and privacy practices.
- Abide by the terms of the current privacy policy unless notified of changes.
- If I revise my policies and procedures, I will provide a notice to you via mail and require a signature of receipt and understanding to be returned to my office. Int. _____

V. Questions and Complaints

For questions or concerns about your privacy rights, contact my office manager at 480.451.3454. If you believe your privacy rights have been violated, you can file a complaint with my office. Or you may send your report to:

Arizona Board of Psychologist Examiners
1740 West Adams Street, Suite 3403, Phoenix, AZ 85007
Phone: (602) 542-8162 Int. _____

VI. Effective Date, Restrictions, and Changes to Privacy Policy

This notice is effective as of July 1st, 1997

NORTH SCOTTSDALE PSYCHIATRIC SPECIALISTS
8776 E. Shea Blvd, Ste 106-1024, Scottsdale, AZ 85260
PHONE: 480.451.3454 FAX: 480.451.3453
EMAIL: contact@robertschulte.com
WEB: <http://robertschultemd.com> Int. _____

Signature

Date



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AUTHORIZATION TO RELEASE / OBTAIN INFORMATION

I, (name of or parent/guardian if a minor) _____, hereby authorize Dr. Robert Schulte to obtain information from and release information to:

Patient Name: _____ **Date of Birth:** _____

Reason for release:

My request Coordination of Care Transfer of Care

Other _____

Portion of record to be released:

All Diagnostic Evaluation Verbal Contact Diagnostic Test Reports

Summary of Contact with Client Other (specify) _____

I understand why this information is needed and I am satisfied that it will be held confidential. Photocopies of this form will be considered as valid as the original. This authorization will remain in effect until revoked by me in writing or upon termination of care with Dr. Schulte.

Signed _____ Date _____

Witness _____ Date _____



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**Acknowledgment of Receipt of Notice of Psychiatrist's Policies and Practices to Protect the Privacy
of Your Health Information**

I, _____ acknowledge that I have been given a copy of Dr. Robert Schulte's Notice of Privacy Practices. This Notice describes how Dr. Robert Schulte may use and disclose my protected health information, certain restrictions on the use and disclosure of my healthcare information, and rights I may have regarding my protected health information. I understand these policies and agree to abide by / give consent for the same.

Signature of patient or representative

Date

Relationship to patient

Witness

Date



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Waiver of Medicare Part B Entitlement

I have voluntarily decided to contract privately for services outside the Medicare Part B program. Neither I, nor my family, nor my heirs, nor my estate shall file any Medicare Part B claims or forms. Further, I neither require nor request that Robert Schulte, M.D. or his office staff to do so on my behalf. I hereby waive my entitlement to Medicare Part B benefits for all services rendered by Robert Schulte, M.D.

Medicare Eligible Patient Name (Printed)

Medicare ID Number (if applicable)

Eligible party Signature

Date Signed

Witness Name (Printed)

Witness Signature

Date Signed



Confidential Patient Medical History

Please provide the following information about your general health and your health history. Enter **P** for personal history and **F** for family history.

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> ALCOHOL OR DRUG USE ALLERGIES; <input type="checkbox"/> MEDICATIONS <input type="checkbox"/> ALLERGIES; POLLEN, DUST, ANIMALS <input type="checkbox"/> ANXIETY <input type="checkbox"/> ARTHRITIS; GOUT <input type="checkbox"/> BACK, NECK, SPINE, DISC PROBLEMS/INJUR <input type="checkbox"/> BIRTH DEFECTS/DEFORMITY <input type="checkbox"/> BONE/JOINT CONDITION <input type="checkbox"/> BLOOD DISEASE; ANEMIA, LUKEMIA <input type="checkbox"/> BREAST DISEASE <input type="checkbox"/> BREAST IMPLANTS <input type="checkbox"/> BLOOD VESSEL, CIRCULATION DISORDER <input type="checkbox"/> BROKEN BONES/BONE DISEASE <input type="checkbox"/> CANCERS OF ANY TYPE <input type="checkbox"/> COLON/CROHN'S DISEASE <input type="checkbox"/> CONCUSSION/HEAD INJURY <input type="checkbox"/> DIABETES <input type="checkbox"/> EAR/NOSE/THROAT DISEASE OR INFECTION <input type="checkbox"/> EATING DISORDER; ANOREXIA, BULIMIA <input type="checkbox"/> EPILEPSY/SEIZURE DISORDER, CONVULSIONS <input type="checkbox"/> FEMALE ORGAN IRREGULARITY; ABNORMAL PAP <input type="checkbox"/> ALLBLADDER DISEASE <input type="checkbox"/> HEART DEFECT OR CONDITION <input type="checkbox"/> HEPATITIS/LIVER DISORDER <input type="checkbox"/> WEIGHT PROBLEMS | <ul style="list-style-type: none"> <input type="checkbox"/> HERNIA <input type="checkbox"/> HIV/AIDS <input type="checkbox"/> HORMONAL/THYROID/PITUITARY <input type="checkbox"/> HYPERTENSION/BP DISORDER <input type="checkbox"/> HYSTERECTOMY <input type="checkbox"/> IMMUNE SYSTEM DISORDER, LUPUS <input type="checkbox"/> INTESTIONAL DISORDERS <input type="checkbox"/> KIDNEY/URINARY TRACT CONDITION OR INFECTION <input type="checkbox"/> MALE ORGAN IRREGULARITY/IMPOTENCE <input type="checkbox"/> MENSTRUAL PROBLEMS <input type="checkbox"/> MENTAL: NERVOUS, DEPRESSION <input type="checkbox"/> MIGRAINES/HEADACHES <input type="checkbox"/> MUSCLE/TENDON DISORDERS <input type="checkbox"/> NERVOUS SYSTEM CONDITIONS <input type="checkbox"/> PROSTATE DISEASE/CONDITION <input type="checkbox"/> PROSTHETIC IMPLANT/ ARTIFICIAL LIMBS <input type="checkbox"/> RECONSTRUCTIVE/COSMETIC SURGERY <input type="checkbox"/> SEXUALLY TRANSMITTED DISEASE <input type="checkbox"/> SKIN DISORDERS/LESIONS/CANCER <input type="checkbox"/> STEROID USE; PREDNISONE/ANABOLIC <input type="checkbox"/> STOMACH <input type="checkbox"/> STROKE <input type="checkbox"/> TUMORS, CYSTS, POLYPS, GROWTHS <input type="checkbox"/> ULCERS, DIGESTIVE DISORDERS <input type="checkbox"/> OTHER, EXPLAIN _____ |
|--|---|

Current and Past Medications (please list current and past medications)

Current	Past

If you have any history of substance abuse, please indicate:

	Current	Past		Current	Past
Alcohol			Cocaine		
Hypnotics			Anxiety Pills		
Tobacco			Marijuana		
Diet Pills			Sleeping Pills		
Caffeine			Stimulants		
Narcotics/Pain			Others (Specify)		



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Do you have any medication allergies/sensitivities? If yes, which medications are you allergic or sensitive to?

I

Please list any other substances you have allergies to, such as foods or over-the-counter medications:

Have you ever been hospitalized? If yes, please state when, where, and why:

Have you ever had surgery? If so, please state the type of surgery, when, where, and why:

Has there been any family psychiatric history? If yes, please explain:

Do you have any legal history that may be applicable (arrests, lawsuits, etc.). If so, please describe:

Please check any of the following areas that you have experienced:

Head injury Loss of consciousness Seizures Convulsions Other neurological diagnosis

Have you ever smoked? ^{YES} If yes, number of years: _____ Daily use: _____

If female, date of last menstrual period: _____ Are you pregnant? ^{NO}

Current Height: _____ Current Weight: _____

Blood Pressure History: _____ High _____ Normal _____ Low BP Range (if known): _____



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CONFIDENTIAL PATIENT SOCIAL HISTORY

Highest grade/Degree completed: _____ Where? _____

How many hours per week do you work? _____ Do you enjoy your work? ___ Yes ___ No

If retired, do you engage in activities outside your home? _____

What is your household constellation? Do all of your children live with you?

How often do you spend time with others? _____

What precipitated this visit? (Feel free to use the back of this page or request more paper)

Please briefly describe your family as you were growing up:

Please list any events from your childhood/adulthood that have had a profound effect on your life:

Please describe any areas of conflict in your life (e.g.: work, children, spouse):



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IF THE PATIENT IS A CHILD OR ADOLESCENT, PLESAE COMPLETE THE FOLLOWING:

At what age did problems begin? _____

Does the child get along with siblings? _____

Describe any difficulties the child has or has had at school? _____

Has the child been held back any grades? NO Has the child been in any special classes? NO

Has any psychological testing been done at school? _____

Has the child ever been in legal trouble? _____

Has the child had issues with drug or alcohol use? _____

Did either parent experience any similar conditions as children? _____

Aside from the condition(s) listed above, has the child ever behaved in any way that seemed especially different or unusual?

Please list persons living at home where the child lives (name, age, relationship to child):

Natal Development:

Describe any problems mother had during pregnancy and / or difficulties with delivery: _____

Birth Weight _____ Oxygen needed? NO Incubator? NO Blood transfusions? NO

Abnormalities: _____ When developmental milestones met?

Verbal: _____ Motor: _____



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