

ORTEGA WELLNESS

Direct Primary Care Membership

Terms & Conditions

Effective Date: _____

These Terms & Conditions ("Terms") govern participation in the Ortega Wellness Direct Primary Care ("DPC") Membership Program. By enrolling in a membership, the patient acknowledges that they have read, understand, and agree to these Terms. The purpose of the DPC program is to provide personalized, accessible primary care without many of the limitations associated with traditional insurance-based medicine.

1. Membership Services

Depending on the membership plan selected, membership services include:

- Unlimited scheduled office visits during normal business hours.
- Same-day or next-day appointments when available after appropriate triage.
- Telehealth visits when clinically appropriate.
- Secure messaging with the healthcare team.
- Routine prescription management.
- Sending and refilling prescriptions.
- Coordination of specialist referrals.
- Chronic disease management.
- Preventive care and wellness visits.
- Annual physical examination.

Membership does not guarantee that outside specialists, hospitals, laboratories, imaging centers, pharmacies, or other healthcare providers will waive or reduce their fees.

2. Membership Fees and Automatic Payment

Membership fees are based on the plan selected by the patient.

- Monthly membership dues are automatically drafted on the first day of each month.
- A valid debit or credit card must remain on file at all times.
- Membership fees are non-refundable once processed.
- Patients are responsible for keeping payment information current and notifying Ortega Wellness of changes to payment information.

3. Initial Six-Month Commitment

A minimum six (6) month commitment is required when enrolling in the DPC membership program. If a patient requests cancellation before completing the initial six-month commitment, the patient remains responsible for unpaid membership fees through completion of the six-month term, unless otherwise approved by Ortega Wellness and subject to thirty (30) days' written notice.

4. Controlled Substance Management

Patients who are prescribed controlled substances as part of their treatment plan may be charged an additional monthly Controlled Substance Management Fee of \$20.00 per month. The fee is intended to cover additional clinical monitoring, prescription review, compliance requirements, and state and federal regulatory obligations associated with controlled medications.

Prescription of any controlled substance remains solely within the medical judgment of the treating provider and is never guaranteed.

5. Services and Expenses Not Included

Membership fees do not include:

- Hospitalizations.
- Emergency room visits.
- Urgent care services outside Ortega Wellness.
- Specialist consultation fees.
- Laboratory testing.
- Diagnostic imaging.
- Prescription medication costs.
- Vaccinations.
- Durable medical equipment.
- Procedures not included within the applicable membership.
- Hormone replacement medications.
- Weight-loss medications.
- Peptide medications.
- Services provided outside Ortega Wellness.

Services and expenses listed above may be billed or charged separately to the patient.

6. Insurance

The Ortega Wellness DPC membership is not health insurance. Patients are encouraged to maintain health insurance coverage for healthcare services outside Ortega Wellness, including hospitalization, emergency care, specialty care, surgery, and diagnostic testing.

Ortega Wellness does not bill health insurance for DPC membership services.

7. Patient Responsibilities

Members agree to:

- Treat providers, clinicians, and staff respectfully.
- Keep payment and contact information current.
- Attend scheduled appointments or provide reasonable notice when unable to attend.
- Follow recommended treatment plans and clinical instructions.
- Provide accurate and complete information relevant to their care.
- Follow applicable Ortega Wellness office policies.

Repeated missed appointments, abusive or disruptive behavior, failure to comply with office policies, or other conduct that interferes with the provider-patient relationship may result in termination of membership.

8. Cancellation by Patient

After completion of the initial six-month commitment, a patient may terminate the membership by providing thirty (30) days' written notice. Membership fees paid before the effective cancellation date are non-refundable.

Cancellation does not eliminate any outstanding balance or other amount owed to Ortega Wellness.

9. Termination by Ortega Wellness

Ortega Wellness may terminate a membership for reasons including, but not limited to:

- Non-payment.
- Fraudulent activity.
- Disruptive, threatening, or abusive behavior.

- Failure to comply with office policies.
- Breakdown of the provider-patient relationship.

When termination occurs, Ortega Wellness will provide appropriate notice and assistance with continuity of care as required by applicable law and professional standards.

10. No Guarantee of Specific Medical Services

Membership does not guarantee that a particular medication, controlled substance, treatment, referral, procedure, or other clinical service will be provided. All medical decisions are based on clinical judgment, patient needs, applicable laws, professional standards, and the provider's assessment of what is medically appropriate.

11. Relationship to Other Charges

The membership fee covers the services expressly identified in the applicable membership plan. Costs for excluded services, medications, laboratory testing, imaging, specialty services, and other third-party services remain the patient's responsibility unless expressly stated otherwise in writing by Ortega Wellness.

12. Changes to Terms and Membership Policies

Ortega Wellness may update its membership policies and Terms & Conditions as permitted by applicable law. When a material change affects an existing member's obligations, Ortega Wellness will provide notice in accordance with its policies and applicable requirements.

13. Acknowledgment and Agreement

By signing the DPC Membership Agreement or otherwise enrolling in the membership program, the patient acknowledges that they:

- Understand the DPC membership is not health insurance.
- Understand the minimum six-month initial commitment.
- Authorize automatic monthly payment on the first day of each month using the payment method on file.
- Understand that controlled-substance management may result in an additional monthly fee and that the applicable amount will be identified in the patient's membership agreement.
- Understand which services are included and which services are excluded from the membership.
- Understand that membership does not guarantee any particular medication or treatment.
- Have had an opportunity to ask questions and receive clarification regarding these Terms.
- Agree to comply with these Terms and applicable Ortega Wellness policies.

Patient Information

Patient Name: _____

Date of Birth: _____

Membership Plan: _____

Monthly Membership Fee: _____

Patient Signature: _____ Date: _____

Provider/Practice Representative: _____ Date: _____