

# SOP Template: Patient Demographics Entry and Account Creation

This SOP details the process for accurate **patient demographics entry and account creation**, encompassing the collection, verification, and input of essential patient information, including personal details, contact information, insurance data, and emergency contacts. The goal is to ensure the integrity and confidentiality of patient records while facilitating efficient account setup for seamless healthcare service delivery and billing processes.

## 1. Purpose

To standardize patient demographics entry and new account creation ensuring accuracy, data integrity, and confidentiality.

## 2. Scope

This SOP applies to all staff involved in patient registration, intake, and data management at [Facility/Organization Name].

## 3. Responsibilities

- Registration/Front Desk Staff: Collect, verify, and enter patient demographic data.
- Supervisors: Review and audit entered information for accuracy and completeness.
- IT/Data Management: Ensure secure handling and storage of patient records.

## 4. Procedure

### 1. Patient Arrival/Initiation

- Greet patient and explain the registration process.
- Provide patient with registration form or electronic input device if applicable.

### 2. Collection of Demographics

- Full legal name (First, Middle, Last, Suffix)
- Date of birth
- Gender
- Address and mailing address (if different)
- Primary & secondary phone numbers
- Email address
- Preferred language and communication preferences
- Race & ethnicity (if applicable)

### 3. Insurance Information

- Primary and secondary insurance carrier
- Policy number and group number
- Policyholder's name and date of birth
- Photocopy or scan insurance cards (front and back)

### 4. Emergency Contact Details

- Full name of emergency contact(s)
- Relationship to patient
- Primary phone number
- Alternate phone number

## 5. Verification

- Request two forms of identification (e.g., state ID, driver's license, passport).
- Confirm details with patient and correct errors on the spot.

## 6. Data Entry

- Log into the Electronic Health Record (EHR) or patient management system using secured access.
- Enter all collected data exactly as provided.
- Double-check all information before submission.
- Attach scanned documents and ID to electronic record as applicable.

## 7. Account Creation

- Assign a unique patient ID/medical record number.
- Generate patient portal access credentials if enabled.
- Provide patient with summary of entry and access instructions.

## 8. Confidentiality & Data Protection

- Ensure no unauthorized person can view or access patient information during and after the process.
- Follow all HIPAA and [local/regional regulation] compliance protocols.

## 9. Review and Finalization

- Have supervisor or designated reviewer audit record for accuracy and completeness.
- Correct any discrepancies immediately.

# 5. Documentation & Recordkeeping

- Store all physical forms securely until scanned or entered electronically.
- Backup electronic records according to organization policy.

# 6. Quality Assurance

- Conduct monthly audits of records for data quality and security compliance.
- Provide ongoing staff training on best practices and regulatory updates.

# 7. References

- HIPAA Guidelines
- [Local/Regional Health Data Privacy Regulations]
- Organization Policy Manual

# 8. Revision History

Date	Version	Summary of Changes	Author
[YYYY-MM-DD]	1.0	Initial release	[Name]

Note: Customize fields and steps per your organization's policies and EHR capabilities.