Standard Operating Procedure (SOP): Patient Information Intake and Verification Procedures

This SOP details the **patient information intake and verification procedures**, encompassing the collection of accurate personal and medical data, verification of identity through valid documentation, confirmation of insurance and contact details, and adherence to privacy and confidentiality standards. The procedure ensures thorough and reliable patient information management to support quality healthcare delivery and comply with regulatory requirements.

1. Purpose

To outline standardized procedures for collecting, verifying, and securely managing patient information to ensure data accuracy, confidentiality, and compliance with healthcare regulations.

2. Scope

This SOP applies to all staff involved in patient registration, admission, and healthcare data management within the facility.

3. Responsibilities

- **Front Desk/Registrar:** Collect and enter patient information; verify documents.
- **Healthcare Providers:** Review and confirm medical history and current medications.
- **Billing Staff:** Confirm insurance information and coverage eligibility.
- **Data Protection Officer:** Ensure compliance with privacy and confidentiality requirements.

4. Procedure

1. **Initial Patient Contact/Reception**
   - Greet patient and explain the intake process.
   - Provide patient with required forms (either paper or electronic) for personal and medical information collection.
   - Offer assistance as needed.
2. **Collection of Personal and Medical Data**
   - Gather the following details:
     - Full legal name
     - Date of birth
     - Gender
     - Home address and contact information
     - Emergency contact
     - Medical history and current medications
     - Allergies and existing conditions
3. **Verification of Identity**
   - Request two forms of valid ID (government-issued photo ID preferred).
   - Visually verify details against provided documents.
   - Record document type and number in patient record.
4. **Confirmation of Insurance**
   - Request and copy/scan insurance card.
   - Confirm coverage with insurer if applicable.
   - Document policy number and provider.
5. **Verification of Contact Details**
   - Confirm phone number(s) and email address.
   - Verify emergency contact information.
6. **Review and Patient Confirmation**
   - Review all information for accuracy with the patient.
   - Have patient sign/date to confirm accuracy and consent.
7. **Data Entry and Secure Storage**
   - Enter verified data into the Electronic Health Record (EHR) system securely.
   - Ensure physical documents are scanned (if applicable) and stored in locked cabinets or compliant digital repositories.
8. **Privacy and Confidentiality**
   - Remind patient of privacy practices (provide HIPAA or equivalent notice).
   - Restrict access to patient information to authorized personnel only.

5. Documentation

- Patient Registration Form
- Identity Verification Record
- Insurance Confirmation Sheet
- Patient Consent and Acknowledgment Form
- Data Entry Log

6. Compliance and Review

- Review procedure annually or as required by regulatory updates.
- Provide periodic staff training on data integrity and privacy policies.
- Monitor adherence through internal audits and corrective actions as necessary.

7. References

- Health Insurance Portability and Accountability Act (HIPAA)
- Relevant national/local data protection laws and healthcare regulations
- Internal privacy and security policies

8. Revision History

Version	Date	Description of Change	Approved By
1.0	2024-06-13	Initial template	[Name/Title]