

Standard Operating Procedure (SOP)

Patient Intake and Registration Procedure

Purpose:

This SOP details the **patient intake and registration procedure**, covering the steps for welcoming patients, verifying personal and insurance information, collecting medical history, obtaining consent forms, and entering accurate data into the healthcare management system. The procedure aims to streamline patient processing, ensure data accuracy, enhance patient experience, and comply with privacy regulations for efficient clinical operations.

Scope:

Applies to all administrative and clinical staff responsible for patient check-in and registration at the healthcare facility.

Responsibilities:

- Front desk staff: Patient greeting, info collection, data entry, form distribution
- Medical assistants/nurses: Medical history collection, initial assessments (if applicable)
- Practice manager: Oversight, compliance, troubleshooting

Procedure:

- 1. Welcoming and Identifying Patients**
 - Politely greet the patient on arrival.
 - Request a government-issued photo ID to verify the patient's identity.
- 2. Verification of Personal and Insurance Information**
 - Request and verify insurance card or information.
 - Confirm patient contact details (address, phone, email).
 - Update any changes in the healthcare management system (HMS).
- 3. Collection of Medical History**
 - Provide medical history forms for the patient to complete, or collect verbally.
 - Review the completed history for missing/unclear information and clarify as needed.
- 4. Obtaining Consent Forms**
 - Present consent forms (treatment, privacy/ HIPAA, financial, etc.) for signature.
 - Answer questions regarding the documents before obtaining signatures.
- 5. Data Entry into Healthcare Management System**
 - Accurately enter or update all patient information, medical histories, and scanned forms into the HMS.
 - Double-check all records to ensure accuracy and completeness.
- 6. Completion and Next Steps**
 - Inform the patient of the next steps (waiting area, nurse/physician will call, etc.).
 - Securely store all physical documents (if used) according to privacy policies.

Documentation:

- Patient registration forms
- Medical history forms
- Consent/authorization forms
- Copies of ID and insurance cards
- Electronic patient records

Compliance:

- HIPAA and other applicable privacy/confidentiality regulations
- Internal policies for records management and data security

Revision History:

Date	Version	Description	Author
2024-06-26	1.0	Initial template draft	Your Name