

# Standard Operating Procedure (SOP)

## Medical History and Consent Form Collection

### Purpose

This SOP details the procedure for **medical history and consent form collection**, outlining steps to accurately gather patient medical backgrounds, obtain informed consent prior to treatments, ensure confidentiality and compliance with legal regulations, and maintain proper documentation. The goal is to facilitate safe and effective healthcare delivery by verifying patient information and securing explicit permission for medical interventions.

### Scope

This procedure applies to all healthcare staff involved in collecting, handling, and processing patient medical histories and consent forms.

### Responsibilities

- **Healthcare Providers:** Review medical histories, ensure informed consent is obtained, and answer patient questions.
- **Administrative Staff:** Distribute, collect, and file forms; uphold confidentiality and data privacy regulations.
- **Compliance Officer:** Ensure all procedures comply with legal, ethical, and institutional requirements.

### Procedure

1. **Preparation**
  - Gather up-to-date medical history and consent form templates.
  - Ensure availability of private, comfortable space for patients to complete forms.
2. **Patient Identification and Verification**
  - Request valid identification from patient to verify identity (e.g., photo ID, insurance card).
  - Confirm patient details: full name, date of birth, contact information, and assigned medical provider.
3. **Medical History Collection**
  - Provide patient with the medical history form for completion.
  - Assist patients who need help reading, understanding, or filling out forms.
  - Review completed forms with the patient, clarifying any ambiguous responses and ensuring completeness.
4. **Consent Form Collection**
  - Explain the treatment/procedures requiring consent in clear, non-technical language.
  - Present informed consent form and review each section with the patient.
  - Allow patient to ask questions and provide additional information as needed.
  - Confirm the patient understands and voluntarily agrees before obtaining signature and date.
5. **Documentation and Filing**
  - Date and sign collected forms; record staff facilitator's details.
  - File completed forms securely in patient's confidential medical record (electronic or paper as applicable).
6. **Confidentiality & Compliance**
  - Ensure all forms are stored securely, accessible only by authorized personnel.
  - Adhere to HIPAA (or local equivalent) data privacy regulations at all times.
7. **Review**
  - Periodically review and update forms and procedures for accuracy, legality, and best practice compliance.

### Documentation

Document	Location	Retention Period
Medical History Forms	Patient's Health Record	Minimum 7 years, or as required by law
Consent Forms	Patient's Health Record	Minimum 7 years, or as required by law
Form Revision Logs	Administration Office	Permanent

References

- HIPAA (Health Insurance Portability and Accountability Act), or relevant local privacy laws
- Institutional Policies and Procedures
- Applicable Medical Board or Regulatory Guidelines

Revision History

Version	Date	Changes	Author
1.0	2024-06-10	Initial SOP creation and approval	Compliance Officer