Physiotherapy new patient intake procedure

SOP TEMPLATE

Check this template against your local regulations and your own policies before you use it.

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

To make sure every new patient is booked correctly, their funding is confirmed, and their health information is ready before the first appointment.

Scope

Every new patient and every returning patient with a new condition.

Responsibilities

Role	Responsibility
Receptionist	Books the appointment, checks funding, sends forms and explains fees.
Physiotherapist	Reviews the forms, screens for red flags and gets consent.

Procedure

1. **Book the right appointment**

   Ask about the problem and book an initial consultation with enough time.

2. **Check referral and funding**

   Record whether the patient has a referral, private insurance, or a workers' compensation or accident claim, and get the claim details.

3. **Send the forms**

   Send intake, health history and privacy forms to complete before the visit.

4. **Explain fees and cancellations**

   Tell the patient the fee, any gap and the cancellation policy.

5. **Screen for red flags**

   The physio reviews the forms and asks about red flags, such as unexplained weight loss, night pain or loss of bladder control.

   > **Caution:** Refer the patient to a doctor or emergency department straight away if red flags suggest a serious condition.

6. **Get consent**

   Explain the assessment and treatment, and record the patient's consent.

Records

- Intake, health history and privacy forms.
- Referral and claim details.

Related documents

- Patient consent procedure

Revision history

Version	Date	What changed	Approved by