



### **Scope**

This policy applies to all University of Western States (UWS) health center employees who are responsible for issuing and documenting the patient's medical history and other important information on the initial visit, including but not limited to clinicians and office management staff.

### **Purpose**

This policy provides guidance regarding the proper recording of the initial patient intake and medical history. It is based on applicable state laws, statutes, and regulations.

### **Policy**

The UWS health center employs best practices to gather required intake information, including ancillary intake information, to ensure that clinicians have all the necessary information to determine the next steps for each patient. HIPAA guidelines are followed to ensure the protection of protected health information (PHI) contained on the intake forms throughout the patient encounter and thereafter.

All new patients complete a standard set of intake forms, which include, but are not limited to, registration, medical history, financial policy, patient rights, and HIPAA acknowledgment. Patients with Oregon Health Plan coverage also complete an OHP Client Agreement. New and existing patients complete additional treatment-specific questionnaires as needed.

A Patient Service Representative reviews forms for completeness and ensures proper entry into the electronic health record (EHR). Clinical forms are provided to the attending clinician for review and returned to the PSR for final upload to maintain accurate and compliant records.

**Related Policies:**    [Policy 1411 Documentation Standards](#)