Balancia

Patient Forms – Setup Guide

This guide is designed to help you prepare and customize the essential patient forms for your chiropractic or wellness practice.Each form serves a specific purpose and ensures that your patients are informed, comfortable, and ready for care.

1. New Patient Intake Form

Purpose:
Collects basic personal, contact, and appointment information for first-time patients.

What to include:
- Patient’s full name, date of birth, address, phone, and email
- Emergency contact information
- Reason for visit and main areas of concern
- Preferred communication method (email, phone, text)

Tip:
Keep it short and clear — most clinics fit this on one page for quick completion.

2. Health History Form

Purpose:
Helps the practitioner understand the patient’s medical background and identify any contraindications for care.

What to include:
- Past and current medical conditions (e.g., surgeries, chronic illnesses, medications)
- Lifestyle habits (exercise, work activity, sleep, stress)
- Pain areas or symptoms with intensity charts (1–10 scale)
- Previous chiropractic or physical therapy treatments

Tip:
Add body diagrams so patients can mark areas of pain or stiffness.

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3. Consent to Treat & Privacy Policy

Purpose:
Informs patients of their rights, treatment expectations, and how their information will be used or protected.

What to include:

- Statement of informed consent for chiropractic, massage, or physical therapy treatment
- Outline of possible risks and benefits
- HIPAA-compliant privacy policy summary
- Patient signature and date

Tip:
This form protects both the clinic and the patient — make sure it's reviewed by your legal or compliance team before use.

4. Insurance & Billing Information

Purpose:
Ensures accurate processing of claims and transparency around patient billing.

What to include:

- Insurance provider name, policy number, and group number
- Primary policyholder's name and date of birth
- Authorization for the clinic to bill insurance directly
- Acknowledgment of patient financial responsibility for uncovered services

Tip:
Many practices include a credit card authorization section for convenience.

Best Practices for Using These Forms

✅ Always review forms with new patients during their first visit
✅ Offer digital versions (fillable PDFs or online forms) when possible
✅ Store completed forms securely and in compliance with HIPAA standards
✅ Update your forms annually or whenever clinic policies change