

Guidelines for Records Maintenance

- ❑ The patient's name should appear on every page of the health record.
- ❑ The day, month, year and time of day of the appointment should be on all entries. All entries must be permanent (e.g., in ink).
- ❑ Be specific. Avoid generalizations and characterizations.
- ❑ Be objective; use facts only. Record what actually occurred and what is clinically relevant. Personal comments are not appropriate.
- ❑ Double check accuracy, especially of recorded drug doses.
- ❑ Be complete. If in doubt, write it down.
- ❑ Be timely. Do not let charts stack up to be completed at the end of the day because important occurrences may be forgotten.
- ❑ Write legibly; use standard abbreviations. Good records are useless if no one can read them. If you cannot write legibly, dictate your office notes before signing them.
- ❑ Do not skip lines or leave spaces between entries.
- ❑ Make alterations carefully. If you make an error while writing notes, do not erase. Draw a single line through the error, write the correction above it, and date and initial the correction. Never destroy any part of a health record.
- ❑ Be sure to document all patient contacts (phone conversations and conversations in the office) in the health record. Include the date and time of the conversation and document important details.
- ❑ Health records should be organized, color-coded and tabbed.
- ❑ Records within each chart should be in chronological order.
- ❑ Keep contents fastened to the chart. NO LOOSE PAPER!!!
- ❑ Dictated notes must be proofread and initialed.
- ❑ Document missed appointments.
- ❑ Medical history forms must be filled out completely and updated periodically.
- ❑ Record routine exams.
- ❑ Document all patient instructions.
- ❑ Document informed consent, including risks, benefits and refusals.
- ❑ Document all clinical findings.
- ❑ Dated and initialed all laboratory results after reviews.
- ❑ Note prescriptions and refills.
- ❑ Document if educational pamphlets are given to the patients.
- ❑ Document all record requests.