

# Record Keeping

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**Essential Standard:** Apply proper usage of veterinary practice management procedures

**Objective:** Analyze methods to correctly maintain veterinary medical records

# What is the Purpose of a Medical Record?

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- Provides a diary of an animal's health for the veterinarian
- Allows each veterinarian to easily modify and transfer records to one another

# Medical Records Include:

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- Patient
- Client
- Patient History
- Medical/Surgical Records
- Progress Notes
- Lab Information

# Ethics of Medical Records

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- The medical record is owned and is the property of the **Veterinary Facility**
  - Serves as a legal document that is private and confidential
  - Allows for the **Veterinarian- Client- Patient- Relationship** (VCPR) to be established which provides the opportunity for the veterinarian to make judgments regarding health, diagnosis, how to provide care, and the way records are maintained

# Ethics of Medical Records

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- The medical record is owned and is the property of the **Veterinary Facility**
  - Must remain in the facility for **1-3** years although many hospitals keep records for **7** years after last visit.



# How to Create a Medical Record

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- Files should include the following sections or forms:
  - Client and Patient Information
  - Master problem list with details of a patient's history and previous medical problems, vaccines, or surgeries

# When write the medical record...

- Also make a **cage card** to identify and locate each patient.

Animal's Name: _____	<input type="checkbox"/> Male	Date In: _____	
Owner's Name: _____	<input type="checkbox"/> Female	Date Out: _____	
Home Phone: _____	Emergency Phone: _____		
<input type="checkbox"/> Surgery	<input type="checkbox"/> Medical Exam		
<input type="checkbox"/> Boarding	<input type="checkbox"/> Grooming	<input type="checkbox"/> Dental	
<input type="checkbox"/> Allergies	<input type="checkbox"/> Notes		

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## After treatment is recommended...

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- By the veterinarian an **estimate** sheet will be prepared with **costs** listed
  - Treatment will be reviewed with the client and consent forms signed
  - Care will also be reviewed with the client so the owner can continue to medicate and care for the patient
- The invoice should be placed on top for easy access for all in the veterinary clinic



# INVOICE

## **Breeze Animal Hospital, Inc.**

9222 Back Beach Road  
Panama City Beach, FL 32407  
850-233-7091

"A Commitment To Caring"

**FOR:** Adam Boubede  
2823 Krystal Leigh Ct  
Callaway, FL 32404

**Printed:** 10-21-08 at 5:11p  
**Date:** 10-21-08  
**Folder:** 0  
**Invoice:** 22825932

<b>Date</b>	<b>For</b>	<b>Qty</b>	<b>Description</b>	<b>Net Price</b>
Services by Dr. Byron Ford				
10-21-08	Artemis	1	Comp. Exotic Exam/ Office Visit	53.95
10-21-08		0.50	Ivermectin 1% /mL	15.50
Services by				
10-21-08	#1059		Check payment	-69.45
<b>Old balance</b>	<b>Charges</b>	<b>Payments</b>		<b>New balance</b>
0.00	69.45	69.45		0.00

<b>Patient</b>	<b>Total charges</b>
Artemis	69.45

To better serve our furry friends, we have 24hr emergency service available. Preventing heartworms is easy. One bite from an infected mosquito is all it takes for your cat or dog to contract life-threatening heartworm disease. Heartworm tests should be performed annually on all cats and dogs, even if they are on prevention.

# How to Record Information

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- All information must be recorded in **BLUE** or **BLACK** ink (NEVER in pencil or other ink colors)
- All information should be accurate and legible – if a mistake is made then place a single line through the error and initial the error then place the corrected statement after the entry

# How to Record Information

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- Record all communications with clients in the record and **initial**
- **One** record per patient

# SOAP

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- **SOAP:** *Subjective, Objective, Assessment, and Plan.*
  - **Subjective:** Animal's overall appearance (Demeanor)
  - **Objective:** Vitals- TPR (Temperature, Pulse, Respiration), Weight, and Basic Goals of exam
  - **Assessment:** Veterinary Diagnosis
  - **Plan:** Treatment or Procedure

# Filing Medical Records

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- Paper or Computer records are available
  - Most facilities use a combination of both
    - Records written first then entered into the computer
- Paper Records:
  - Stored in a file folder or manila envelope with pockets or clasps
- Computer Records:
  - Variety of programs exist

# Storage of Medical Records

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- Common Filing Systems:
  - **Alphabetical:**
    - By client's last name with color code and first 2-3 letter of the last name
  - **Numerical:**
    - Client assigned number or each patient assigned a number
    - Each digit is assigned a color and year is clearly identified





# Consent Forms

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- **Consent forms** are used to identify to the client any recommended procedures with prices while patients is under the veterinary facility care
  - Client signs consent form to show agreement of medical care and risks
  - Serves as a **legal agreement**

# Certificates

- **Neuter Certificate:**
  - Provides proof that the pet has been spayed or castrated. No longer sexually intact
- **Rabies Certificate:**
  - Rabies vaccine is legally required. Provides proof animal has had the vaccine if it bites another pet or person.

RABIES TAG # 9182164		LIC TAG #	
ISSUED ONLY WHEN LICENSE PURCHASED AT TIME OF VACCINATION			
DATE OF VACCINATION 05/01/2010	MANUFACTURER (FIRST 3 LETTERS) M E R	VACCINATION EXPIRES 05/01/2011	VACC TYPE/KILLED 1 YEAR
MONTH/DAY/YEAR		MONTH/DAY/YEAR	IM <input type="checkbox"/> SC <input checked="" type="checkbox"/>
BRAND NAME IMRAB 3	VACC LOT #/EXPIRES 12535A 03/18/2011	DATE LIC ISSUED 06/30/2010	1 YEAR
OWNER PHONE # (727) 799-3311			
NAME 247867	BREED DOMESTIC SHORT HAIR	SEX FEMALE	SPAY NEUTER YES
COLOR CALICO	COUNTY SMART	AGE 0 YR 4 MO	WEIGHT 1
CLEARANCE 9 N	761	VET. SIGNATURE/LIC # <i>[Signature]</i> 7634	
ADDRESS/PHONE #			
7) 582-2600			

# Certificates

- **Health Certificate:**
  - Issued if animals are being transported out of state or country
  - Includes:
    - Physical Exam from veterinarian
    - States animal is free of disease
    - Required Vaccines are up to date

CERTIFICATE OF VETERINARY INSPECTION  
TENNESSEE DEPARTMENT OF AGRICULTURE  
Nashville, Tennessee 37243

RECEIVED  
D 600073

THIS ANIMAL WAS VACCINATED  
9-16-12  
BY DR. TONY NEARLING, CERTIFIED LAB  
9-16-12

Miss Meghan Givelle  
Knoxville, TN 37946

# Medical Records as Legal Documents

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- Staff should protect the personal privacy of clients by maintaining **confidentiality**
- All information in a record is private and not discussed without approval
- Client should sign a **waiver** of for release of records

# Invoicing

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- Veterinary Assistant should be able to **invoice** procedures
- Can be completed on paper or with a computer program
  - Recording the procedure and cost of the procedure
  - Totaling the amount (include taxes) and process the accepted methods of payment.

# Invoicing

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- Patient: “Buddy” Jones 8/2/2012
- Procedures:
  - Exam \$50.00
  - Office Fee \$10.00
  - Vaccines \$75.00
  - Total: \$135.00
  - Tax: + \$9.11
  - Grand Total: \$144.11 Method of Payment:  
*Check* (# 112)