



Dean S Reynolds, OD
Mario Andreatta, OD
Lisa M Edwards, OD, FFAO
Christi Blood-White, OD
Tracy Ho, OD.

4025 Jackie Road SE: Rio Rancho, New Mexico 87124
P: 505.892.8411 F: 505.891.5497 cov@swcp.com

TYPES OF DOCUMENTATION IN PATIENT CHARTS

BACKGROUND

Accurate and detailed documentation on patient care services are medico-legal records of a patient's interaction with City of Vision Eye Care. Records are critical to the quality of care delivered to the patient, reimbursement by insurances, and protection against malpractice allegations.

All records are the property of City of Vision Eye Care and are retained for a minimum of 10 years. This policy applies to all organization employees, management, contractors, student interns, and volunteers.

TYPES OF DOCUMENTATION

PRESCRIPTION FOR GLASSES AND/OR CONTACT LENSES, FEE SHEETS

A copy of these records is provided to the patient at the completion of services and materials rendered. City of Vision is required to provide copies of patient prescription and receipts.

A formal request is not required to provide a patient with a copy of these records

INTAKE FORM, EXAM FORM, SPECIAL TESTING

These records are completed by doctors, contact lens staff, and the patient. These records contain all pertinent information on the patient care. Should the patient request medical records for transfer of care, these forms are traditionally sent. At the doctor's discretion, a request for these records may be denied or a clinical summary provided instead.

REFERRALS TO / RECORDS FROM OUTSIDE PROVIDERS

These records primarily serve as a communication vessel between providers. Typically, these records are used to enhance patient care as well as provide protection against legal action.

These records are not included in a record request. If the patient wishes to obtain a copy of their exam results from an outside provider, they are encouraged to contact that provider and make a formal request to them.

REQUESTED COMPLETION OF FORMS FROM PATIENT OR OUTSIDE REPRESENTATIVE

These records include MVD forms, application for disability, requests for medical records, school verification of eye exams, etc. These requested records should be reviewed and authorized by the doctor.

The original forms are to be distributed to the requesting party and a copy kept in the chart. These records are generally not included in record requests unless otherwise specified.



Dean S Reynolds, OD
Mario Andreatta, OD
Lisa M Edwards, OD, FAAO
Christi Blood-White, OD
Tracy Ho, OD.

4025 Jackie Road SE: Rio Rancho, New Mexico 87124
P: 505.892.8411 F: 505.891.5497 cov@swcp.com

GLASSES/CONTACT LENS MATERIALS ORDER, INSURANCE AUTHORIZATIONS, BILLING

These records are typically completed by City of Vision Eye Care staff members to record the exchange of monetary funds for materials and services.

These records are generally not included in record requests unless otherwise specified.

INCIDENT REPORTS / PINK SHEETS

These records are completed by various members of City of Vision Eye Care staff and are used to communicate between staff members at City of Vision Eye Care. These records contain summaries of phone call communications, order status changes, injuries sustained in office, violations of City of Vision Eye Care patient conduct policy, or conflicts.

Alternatively, notes may be logged in CrystalPM system under the notes tab of the patient account.

These records are generally not included in record requests unless otherwise specified.

RECORDS REQUEST PROCEDURE

Patients may obtain a copy of their records by completing a records release form. All sections of the form must be completed by the patient or authorized party. If form is incomplete, City of Vision Eye Care reserves the right to deny the records request. Upon approval from City of Vision Eye Care doctors, City of Vision Staff will complete the records request within 7-10 business days.

Only the patient, guardian, or power of attorney may authorize a record request. If the patient wishes to authorize someone other than themselves to receive the requested records, it must be noted on their records request form.