

F. File Maintenance

Filing Records

Filing of patients' records after their visits are only done after the doctors have reviewed them. At the beginning of the day, patient records for the previous day are put on Dr. Harrison and Dr. Wilcox's desk. They will look over them and then put the files in the receptionists' file tray.

Client files are organized alphabetically by the client's last name. In the case of the same last name, they are further filed by owner's first name.

When filing a patient's record, be sure to check that the last name and client number match the folder label. This extra attention helps ensure locating the record the next time it is needed.

File a deceased pet's records in the Inactive Pets file drawer located in the doctors' office unless the client has a balance on the pet's account, in which case the record needs to go in the Accounts Receivable tray located in the Receptionists' area.

Searching for a lost record—try looking in folders immediately before and after the client's folder. Other places to look are in the day's current records, call-backs, doctors' desks (ask the doctor before removing), treatment area (including the medication rack and boarding cabinet over dental sink), pharmacy, and accounts receivable (when the client has a balance due). If the pet is deceased and does not have a balance on the account, the record is usually filed in the doctor's office along with other deceased pets' records (in filing cabinet) .

Making Labels for New Client Folders

Before Making Labels

1. Look at the New Client form to see that all information is complete and input correctly in IntraVet, including how the client found Clinic.

Set Up in FiLeABEL Program

2. To open FiLeABEL Prgram, press Start→Programs→FiLeABEL
3. Once FiLeABEL program opens, press Next-Next-Finish
4. On menu bar at top, select Data→Open Data→choose “folders“ file. Overwrite the information in this file
5. FD1=last name, first name(s) of owner(s)
6. FD2=client number
7. FD3=blank
8. Year field=last 2 digits of year they first came in
9. Go to next line to add another new client
10. If you have a name with an apostrophe or space, do not put the apostrophe or space when making folder label (e.g. D' Alforest would be DAforest).

Printing Labels

11. Position label paper in printer.
12. File-print-properties to set print quality to "Best"
13. You may print by page or labels. There are 6 labels to a page. For best results, print one page (or set of 6 labels) at a time. Either way, remember to start with the subsequent page or label number for the next sheet. If using a partially used label sheet, go to Page Setup in the File menu to select the start point from where the labels should print.

NOTE: Try printing a sample set of labels on a plain piece of paper to make sure the alignment is correct. Alignment can be adjusted under File-Page Setup of the FiLeABEL program.

Setting Up Folders

14. Put label on right side of end-tab folder. Make sure half of label is showing on the front and back of the folder. There is a small guideline on the label to help with this alignment.
15. Place a protector label on top of the printed label to keep the ink from smudging, allowing half of the protector label to cover the front and the back of the label.

Annual File Review

At the beginning of each year, each file folder needs to be reviewed. The objective for reviewing files is to be sure the right patient records are in the correct file folder and the folder is alphabetized correctly and up-to-date with the correct year of the last visit.

Patient records in file folders are kept for 5 years. However, we only keep 3 years actively up front in the filing cabinets. This would be the current new year and the previous two years (i.e. for calendar 2004, this would mean 2004, 2003, & 2002). The 4th year (i.e. 2001) is also kept up front in the bottom filing cabinet drawer in the event the client returns in the current year. If so, then this folder would be updated and moved up into the active files.

There are a number of ways you can review files. Feel free to use whatever system works for you to accomplish the objective as mentioned above. An example system for reviewing files is listed here.

1. Starting with the file letter "A," pull each file.
2. Make sure the patient records inside belong to that file folder.
3. Compare patient records with active patients listed on IntraVet. Move any inactive patient files to the Inactive/Deceased File drawer in the doctors' office filing cabinet.
4. Check Transactions in IntraVet to see the last time the client came in for products or services.
5. Update the file folder with the correct year end-tab sticker based on the client's last visit.
6. Any file folders that are in the 4th year need to be moved down to the bottom filing cabinet drawer. If beyond the 4th year, delete this client from IntraVet, remove the patient records from the file and place them in a storage box. If the file folder is still in good condition, please keep to be reused for new clients.

FYI: For patient records that are out of date, please keep these in the file folder along with other patient records as long as the pet is still listed as active in IntraVet and at least one other pet is current and active in IntraVet. In other words, all pets within a file folder and on IntraVet must be out of date before the client is deleted and patient records are stored.

7. Replace active file folders back in the filing cabinet.
8. Insert a piece of cardboard or other sturdy material to keep your place where you stopped so the next person will know where to continue with the file review.
9. Once completed, label the storage box and place upstairs in the storage closet.

End of Section