

## D. Record Review

- Review records each day
  - Check that patient's record is generally complete.
  - Make reminder cards as needed (see Section E).
  - Check that client's account balance is paid. If not, note any known reason why not paid.
  - Check that RV has tag number written in red
  - Check that HWP highlighted in yellow.
  - Check that test results recorded.
  - Make top sheets as needed (see below).
  
- Top Sheets
  - Client and Pet information.
  - Special Notes (including green-lining an aggressive pet).
  - Picture on file indication (put a **red check mark** in appropriate place).
  - Highlighting heartworm preventative in yellow.
  - Put new client's pet records brought with them in "Special Notes" section.
  - Indicate if reminder cards have been made with RCM (Reminder Card Made).
  - Write down if do call-backs to check on patient progress and put what client says. Write LMOR if Left Message on Recorder.
  - Put special medical needs in "Special Notes" section.
  - Put any discount in "Special Notes" section (i.e., Senior Discount\*).
  - Put if they request a certain doctor in "Special Notes" section in **red**.
  
- Reminder Cards – See next section.

\* See IntraVet User Manual for instructions on applying discounts.

**End of Section**