

## Record Keeping Requirements

*Patient Records* - Upon request, and with consent of the patient, practitioners may be asked to provide a copy of the Patients clinical notes, including: Assessment, Treatment Plan and treatment notes, on request from a Fund, to support a claim for Health Benefits.

### General Guidelines

The following requirements are a minimum for verification purposes only. Further details may be required in keeping with your profession's standards of practice.

#### Clinical Record Keeping

You must make accurate, legible, contemporaneous clinical records of each visit and kept in English. You must clearly identify records as belonging to the patient.

Records should include the following details:

1. **Identifying details:** Each patient record must be labelled with the patient's identifying details, that is:
  - a. Name;
  - b. Address;
  - c. Date of birth; and
  - d. Contact phone number.
2. **Relevant medical and health history:** This includes pregnancy, allergies, medicines used and past illnesses. This also includes a general medical history with more detail on aspects relevant to the presenting condition, including presenting signs and symptoms.
3. **Separate visits:** Each patient must have a relevant medical history taken with details of every visit separately recorded. Each visit's record must include:
  - a. The date of each service.
  - b. The details of each service rendered, e.g. for Massage Therapy: the technique used and parts of the body treated.
  - c. Any advice or instructions given.
  - d. Details of any referrals made.
  - e. The outcome of previous treatment.
  - f. Your signature, initials or electronic signatureYou should periodically review and document the patient's progress in the clinical records. The frequency of a review should be appropriate to the nature of the patient's condition.

#### Accounting Record Keeping

You must keep accurate, legible, contemporaneous accounting records of each visit and kept in English. Each accounting record must be labelled with the patient/clients identifying details including:

- The date of each service.
- The name of the practitioner who provided the service.
- The services provided, including the itemised fee for each service.
- Details of all payments, including the date of the payment.

An itemised receipt must be issued for each payment indicating:

Provider number (where available)

- The date of payment.
- The name of the practitioner who provided the service.
- The address where the service was provided and the contact telephone number.
- The name of the patient who received the treatment.
- The date of the service.
- The treatments provided and the products supplied and the charges for them.
- There can be only one fully itemised original account/receipt. All duplicated accounts/receipts must be endorsed as 'duplicate'.
- All accounts/receipts should be on printed stationery. If they are produced electronically, they should be signed at the time of issue, by the provider of that service, or their representative.