

**Department:** Dental

**Policy Number:** HHS-5129-D

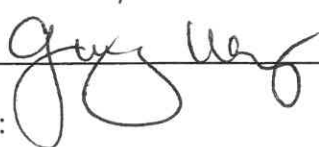
**Attachments:**

**Policy Title:** Office Journal Entries

**Date:** February 2012

**Revised:**

**Approved by:**



**Date:**

5/1/13

**Policy Statement:**

It is the policy of the MLBHHS to provide guidance and procedure for day to day processes.

**Purpose:**

To provide written procedures for staff in office journal entries

**Procedure:**

**Tracking patient contact**

The Office Journal can keep a comprehensive record of contact made between your office and your patients. Office Journal entries can be viewed by patient, family, or by all the journal entries for a specific provider or staff member. Automatic entries are added for appointments, billing statements, letters, payment agreement notes, payments, and privacy requests.

- **Appointments** - The Office Journal will display the following appointment information:
- **Scheduled appointments** - The date, time, appointment provider, and the appointment reason are included.
- **Purged appointments** - When an appointment is purged, the Office Journal will record the original date, time, reason, and provider for the purged appointment.
- **Broken appointments** - When an appointment is broken, the Office Journal will record the original appointment date, time, reason, and provider.
- **Billing statements** - Any time a billing statement is generated for an account, the Office Journal will record the date of the bill, the Account Balance, and the "Please Pay" amount from the statement.
- **HIPAA privacy** - The Office Journal will record when any privacy requests are made through the Family File.
- **Letters** - Any letters generated for patients (using either Quick Letters or Letters from the Office Manager) will be noted in the Office Journal. The entry will include the date, provider, and the name of the letter that was created.

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- **Payment agreement notes** - Any payment agreement notes you have entered can be displayed in the Office Journal, along with the date, provider, and any notes.
- **Payments** - Insurance and patient payments are displayed with the date, provider, and the amount. Guarantor transactions are displayed when viewing a guarantor or an entire family.

There are several items that are required to be documented within the patients Office Journal:

Documentation as follows:

**ASAP:** called from asap list.

**RSCH:** pt or clinic rescheduled an appointment.

**CANCEL:** pt or clinic cancelled appointment.

**Complaint:** pt has complaint.

if an appointment is moved for any reason it is required to be documented in the office Journal.

Example:

Pt scheduled for an appt on 01/21/12, pt needed to rsch due to appt. conflict.  
Rsch appt.to 02/01/12. JBlack

To manually enter data into Office Journal.

- Once the patient is selected you can click on the office journal button.
- The Office Journal will pop up- verify the patients name at the top of Office Journal window.
- Click on edit or the add Journal entry button.
- Select type of communication in the TYPE: dialog box.
- Enter yourself as the staff member making the entry in the PROV/STAFF dialog box.
- Enter event description in the DESCRIPTION dialog box.
- Enter the notes from the event into the NOTE dialog box.
- When notes are completed you are required to enter you **first initial and complete last name** at the end of the note.