BrienHoldenVisionInstitute

# RECORD KEEPING AND REFERRAL LETTERS

## THINK

It is impossible to remember all the details of every person that you examine.

Even if you could remember everything, you need to make sure that all the information is recorded – so that somebody else who might examine the person's eyes in future will know exactly which tests you performed and what results you obtained.

Also, if we want to refer a person to an ophthalmologist or other medical practitioner, we need to inform them of the information we obtained during the eye examination.

Therefore, we always write down all tests performed during an eye examination, and record the results of each test.

## WHAT YOU WILL LEARN

When you have worked through this unit you should be able to:

- Describe the importance of good record keeping
- List the details that should be recorded during an eye examination
- Write a referral letter.


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## RECORD KEEPING

- A record is a document that provides information about a person's eye test
- Records are important as they allow you to keep a permanent copy of what happened each time the person visits your clinic
- When the person has their eyes examined again in the future, the examiner will know if the person's eyes are getting better or worse – because they can compare the results to what was recorded before
- It is important that the information that is recorded is written neatly and can be easily understood
- A record card is a piece of paper or cardboard which you record information on during the eye examination, that can be kept in a folder with the person's other record cards (from previous eye examinations)
- Anyone who looks at a person's record card should be able to know what the person's eye problems were and what (if anything) was done about them
- Record cards can be filed by the person's surname so that they can be found easily in the future
- Records cards contain confidential information and should be kept in a safe place.

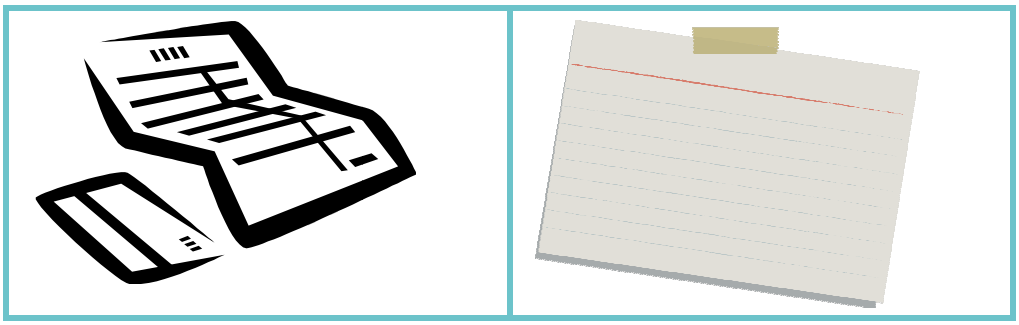

***Figure 25-1: Record cards can be specially printed (or photocopied) so that the layout of all the cards is identical, or they can be blank so that you can write whatever you like***


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## WHAT INFORMATION DO WE NEED TO RECORD?

| | |
|---|---|
| PERSONAL DETAILS: | • The person's full name<br>• The person's date of birth (if known)<br>• Male or female<br>• Contact details (address, phone number)<br>• Where you saw the person (name of hospital, clinic or other location)<br>• The date of each occasion when you see the person. |
| CASE HISTORY: | • A summary of what the person told you<br>  ○ Chief complaint and history<br>  ○ General health and medication<br>  ○ Eye health and family history<br>  ○ Visual needs. |
| VISUAL ACUITY: | • At distance and near<br>  ○ With their own spectacles (aided)<br>  ○ Without spectacles (unaided). |
| EXAMINATION: | • Which tests or procedures were performed<br>• The result(s) for each procedure performed<br>• Details of the person's eye health. |
| PLAN: | • What the person's eye problem is and what can be done about it<br>• Spectacles and/or medication prescribed<br>• Referral (to whom and why)<br>• Any other advice given to the person. |
| ADVICE: | • What you told the person, the advice you gave them<br>• Explanation of their symptoms / what you found<br>• Medication / treatment and why<br>• When and how to use any medication/spectacles prescribed<br>• Do they need to be referred / where to / why<br>• When they need to return for a follow-up visit. |

**RECORD ALL INFORMATION – EVEN IF WHAT YOU SEE IS NORMAL:**

- **Recording all information confirms that you have done all the necessary tests**
- **If a box has been left empty on the record form, this means the test was not done**
- **You should write down positive details as well (e.g. distance vision is good or cornea is clear) – do not only record negative or abnormal findings.**


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# REFERRAL LETTERS

- Sometimes when you examine a person's eyes, you will find a problem that you cannot treat yourself → this person needs to be referred to someone who specialises in that problem
- When a person is referred you must send a referral letter with them, to explain what you have found and why you are referring the person
- The referral letter is addressed to the medical practitioner or eye care provider who will examine the person, and should include the following information:
  - the reason that you are referring the person
  - the parts of the case history and test results that are relevant to the problem
  - any advice or treatment (including spectacle prescriptions) that the person has received
- Referral letters can be written on blank or letterhead paper, or can be written on a specially made referral form.

## DETAILS TO INCLUDE IN THE REFERRAL LETTER:

- Date that the letter is written
- Name (if possible) and address of the medical practitioner or eye care provider that you are referring the person to
- Name and date of birth/age of the person being referred
- Address of the person (or name/address of nearest relative)
- Main problem (and other problems if relevant)
- Relevant case history
- Visual acuity
- Relevant test results
  - Remember to specify which eye has the problem
- Complete details of any treatment given to the person (by yourself or someone else)
  - Spectacle prescription
  - Drug names and dosages (if relevant)
  - Any other advice or treatment provided
- A polite request for advice and treatment
- Your name, address and other contact details, signature, and official title.


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# SUMMARY – RECORD KEEPING & REFERRAL LETTERS

## RECORD KEEPING

- Permanent copy of what was done during the eye examination
- An accurate summary of all the information the person gives you, and the results of all tests performed.

## DETAILS TO RECORD

- Personal details:
  - Date, name, date of birth, sex, contact details, where you saw them
- Case history:
  - Chief complaint and other symptoms, vision and health history, family history
- Visual acuity (VA):
  - Unaided VA
  - Aided VA
  - Near VA
- Examination results:
  - Tests performed and results, eye health
- Plan:
  - Identification of problem, treatment, referral, when to return for a check-up, what the person agreed to
- Advice:
  - Explanation of their symptoms / what you found / the advice you gave the person to address their problem.

## REFERRAL LETTERS

- You need to refer people who have a problem that you cannot treat or manage yourself
- You must write a referral letter for every person whom you refer
- Referral letters must contain:
  - date
  - name of the person/hospital that you are referring to
  - name, date of birth, address of the person
  - details of the problem that you are referring the person for
  - relevant case history
  - VA and any other relevant test results
  - details of any eye treatment that the person has already received (including spectacles)
  - polite request for advice and treatment
  - your name, address, signature, and official title
- A referral must be typed or carefully handwritten, or you can use a referral form letter.


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## TEST YOURSELF QUESTIONS

1. **Why is it important to keep good eye examination records?**

_____
_____
_____

2. **Why is it important that the information on the record card be written neatly?**

_____
_____
_____

3. **What information do we need to record during an eye examination?**

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_____
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_____

4. **List all the details that need to be included in a referral letter:**

_____
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