

Top 10 administrative record keeping tips

The following 10 simple tips are designed to help you establish and maintain an effective administrative record keeping system. They will assist in ensuring your practice is able to access information when required and meet all accountability and compliance business requirements. Links to checklists and templates are also provided.



Plan

Establish what processes are needed and how this will be achieved. Complete the **administrative record keeping** and **electronic administrative record keeping** checklists to evaluate and review your current process and procedures.



Consistency

Make sure information is collected and stored in a consistent way and all staff follow the same policies and procedures. Use the **Medicare billing assurance** and **Medicare billing assurance charter** templates to set out the principles and procedures that support your practice's billing activities under Medicare.



Communicate

Have all your staff made aware of, and ensure they understand, administrative record keeping policies and procedures. By communicating expectations clearly, you will benefit from consistent administrative record keeping standards within the practice.



Training

Know the capabilities of your software and provide appropriate training to staff. Most software used in practices today has capabilities that will make it easier for you to keep accurate administrative records. Training your staff in record keeping will benefit your practice by increasing the reliability and consistency of your practice and patient records.



Allocate appropriate resources

Allocate the appropriate resources needed to maintain your records, for example, staff and physical resources. You may choose to make the **Administrative Record Keeping Guidelines** a part of the range of record keeping guidance tools that you have available for staff in your practice.



Modify

Don't be afraid to modify your record keeping system if you find a more efficient way to achieve results. Regular reviews of your record keeping systems will keep them up-to-date and operating in a way that is beneficial to the practice.



Embrace technology

Regularly investigate if new technology is available that may help improve the efficiency of your administrative record keeping system. Practice staff will appreciate any efforts made to improve the task of keeping records, giving them additional job satisfaction.



Delegation

Nominate your practice champion — delegate responsibility for monitoring administrative record keeping practices to a staff member who will enjoy the challenge, accept responsibility and remain accountable.



Responsibility

Know your responsibilities — what to record, how to maintain records and how long they should be kept. You should also consider your obligations if asked to participate in a health provider compliance audit. Having accurate and reliable records during an audit will allow you to easily confirm that the Medicare payments you received for services were correct.

Know where to get support — [AskMBS](#) responds to enquiries from providers of services listed on the Medicare Benefits Schedule (MBS) seeking advice on interpretation of MBS items (including those for dental, pathology and diagnostic imaging), explanatory notes and associated legislation.



Review

Encourage staff to provide feedback on how the record keeping system is working and how it could be improved.