

SOP Template: Documentation and Electronic Health Record (EHR) Entry

This SOP defines the process for accurate **documentation and electronic health record (EHR) entry**, ensuring that all patient information is recorded in a timely, precise, and confidential manner. It covers data entry protocols, verification steps, error correction procedures, patient privacy compliance, and regular auditing of records to maintain integrity and support quality patient care.

1. Purpose

To establish standardized procedures for timely, accurate, and secure documentation in the EHR system, supporting quality patient care and legal compliance.

2. Scope

Applicable to all healthcare providers, administrative staff, and authorized personnel responsible for patient data documentation and EHR management.

3. Responsibilities

Role	Responsibility
Healthcare Providers	Document all patient interactions, assessments, and care provided in the EHR promptly and accurately.
Administrative Staff	Assist with data entry, appointment records, and administrative documentation as per guidelines.
EHR Administrators	Maintain system integrity, user access, and conduct regular audits.

4. Procedure

- Data Entry Protocols**
 - Log in with authorized credentials before accessing EHR.
 - Enter patient data immediately after the encounter or as soon as feasible.
 - Use standardized terminology and approved abbreviations only.
 - Ensure documentation is clear, concise, and factual.
- Verification of Entries**
 - Review entries for completeness and accuracy prior to saving.
 - Confirm patient identifiers (name, DOB, medical record number) before adding or editing records.
- Error Correction Procedure**
 - If an error is found, use the EHR's correction/ amendment functionality. Do not delete original entries.
 - Document reason for correction; sign and date all amendments.
- Patient Privacy Compliance**
 - Adhere to all applicable HIPAA regulations and organizational privacy policies.
 - Access only records required for assigned duties.
 - Do not share login credentials or leave sessions unattended.
- Regular Auditing**
 - EHR administrators conduct periodic audits to ensure compliance and identify discrepancies.
 - Non-compliance and data breaches must be reported and addressed per policy.

5. Documentation

- All EHR entries must be signed and dated electronically.
- Maintain logs of corrections and user access for auditing purposes.

- Preserve all documentation following retention policies and legal mandates.

6. References

- HIPAA Privacy Rule
- Organization's Health Information Management Policy
- Local and Federal EHR Regulation Guidelines

7. Revision History

Version	Date	Description	Author
1.0	2024-06-01	Initial SOP Creation	Compliance Team