Best Practices: A Healthy Patient Records System

Creating an efficient filing system for managing health records for patients is not as difficult as it may seem. Using the basic principles of all Smead Organomics filing solutions, simply examine and optimize each of the three main components of the filing system:

1. The Finders
2. The Keepers
3. The Storage

A number of factors need to be considered to determine the best solution for your practice or clinic. An assessment should be made of your current situation, and a set of objectives for the new system should be defined. Once you have these parameters outlined, you can address each of the system components.

The Finder

One of the first decisions to make is how files will be identified. HIPAA regulations call for steps to be taken to restrict access to Protected Health Information or PHI. Review the HIPAA guidelines and your clinic's privacy procedures to determine if you can index charts using a patient's name, or if a numeric system is appropriate using assigned patient numbers.

Whether you choose alphabetic or numeric indexing, be sure to use color-coding on your labels to help find charts more quickly, and to reduce the risk of misfiled records.

The Keeper

Patient charts accumulate a lot of documents over time. Health care demands that doctors and care providers have immediate access to complete patient information. Most clinics use a set of chart dividers to subdivide papers inside the chart so specific medical information can be found quickly. Many times, custom dividers are used with standard forms printed on them to provide for easy documentation, or to give instructions to care givers and administrative staff.

The Storage

Your choice of filing equipment will determine the tab placement of the Keepers, on top for drawer filing, and on the side or end for shelf filing. When deciding on the Storage for your system, consider how your situation is affected by these factors:

- Physical storage space available
- Number of files to be stored
- Convenience of access by users of the system
- Projected growth
- Security and confidentiality issues
- Legal requirements
- Existing filing equipment
- Budget for new equipment and supplies

In general, most clinics use end-tab shelf filing systems to store patient charts. Shelf systems are the easiest to use, save the most space and are the least expensive to set up and maintain. However, if your total number of patients is relatively small, traditional drawer filing cabinets may be the right choice.

Smead Organomics offers a variety of filing solutions for managing patient charts. Choose the Team Organomics button to find out which one is best for your business. If you need more help, consult your office supplier or request a free onsite analysis by a Smead professional.