

Topic: *Chart Assembly*

Purpose: *Identify the appropriate order for assembly of papers and reports into a patient's chart.*

Responsibility: *Medical Assistants, Nurses, Reception, Nurse Practitioners*

Right Side of Chart:

Progress Notes:	<p><i>Reverse chronologic order with most recent in front. Name & birthdate should be on each sheet.</i></p> <p>Physical forms: <i>Intermixed with progress notes in reverse chronologic order. Goes on top of review of systems sheet.</i></p> <p>Review of systems: <i>Intermixed with progress notes in reverse chronologic order. Goes after (below) physical exam form.</i></p> <p>WCC forms: <i>Intermixed with progress notes in chronologic order. Goes on top (in front) of progress note regardless of whether or not the progress note is completely written on.</i></p> <p>Developmental Screening Tools: <i>Intermixed with progress notes in reverse chronologic order. Goes below WCC sheets on top of progress note regardless of whether or not the progress note is completely written on.</i></p> <p>Misc: <i>Phone messages from patients, Email messages to and from patients, pharmacy notes, work excuse forms and any other misc patient contact goes on a white sheet of paper in reverse chronologic order. Depression questionnaire (SDS, Zung and PHQ-9) score should be recorded in progress note then questionnaire shredded. The other questionnaires, such as the MDQ and Bipolar Disorder Screening Questionnaire, are place in this section in reverse chronologic order.</i></p>
Lab	<p><i>Outside laboratory results in reverse chronologic order</i></p> <p><i>In office lab tests</i></p> <p><i>Spirometry</i></p> <p><i>Audiometry</i></p>
X-ray	<i>All x-rays and radiologic studies are filed in reverse chronologic order.</i>
EKG	<i>ECG and any study relating to the heart are filed in reverse chronologic order. Neurometrix exam filed in back of section in reverse chronologic order.</i>
Pathology	<i>All pap smear results and any other pathology are filed in reverse chronologic order.</i>
Consult	<i>Consultation notes from specialists with any corresponding referrals are filed in chronologic order.</i>
Misc	<i>Old out of date records from our chart (inactive flow sheet, old med sheets, old problem lists). Records from other offices. Leave the request of records sheet as the top sheet of each group of records.</i>

Left Side of Chart:

Adult database / problem list	<i>This is the top sheet on the L side of the chart.</i>
Flow Sheets	<i>Health maintenance flow sheets</i> <i>Other active flow sheets (diabetes, asthma, etc..)</i>
Medication Sheets	
Immunization Consent Form	
Order Sheet	
History	
Face Sheet	
Insurance	<i>If DSHS coupon, put current month on bottom and keep on file for 1 year.</i>
HIPAA	
Patient Labels	<i>At the bottom</i>

Written: 2001
 Revised: 2/8/2008
 Reviewed: