

## FILING PATIENT RECORDS – BIOINFORMATICS

### Course

Health Science

### Unit XI

Occupationally  
Specific  
Knowledge and  
Skills

### Essential Question

How do health  
care skills help  
to promote  
health and  
prevent  
disease?

### TEKS

130.204 (c) 5A,  
8I

### Prior Student Learning

Understanding  
of the alphabet  
and sequential  
thinking.

### Estimated time

1.5 – 3 hours

### Activity Web page:

<http://www.uen.org/Lessonplan/preview.cgi?LPid=4992>

### Rationale

Managing health care information involves accurate filing and organization of patient records as part of bioinformatics.

### Objectives

Upon completion of this lesson, the student will be able to:

- organize and arrange patient records according to standard rules for alphabetical and numerical filing.

### Engage

Birthday Line (Estimated time: 10 minutes)

- To help students focus and concentrate.
- To explore communicating without talking.

This game demands that the students work together to solve a problem without talking at all. It is very important to emphasize that talking is not allowed, and that students must find alternate ways of communicating necessary information about when everyone's birthdays are.

- Have all of the students get in a line in order of their birthdays. The trick is that the students cannot communicate verbally to accomplish the goal.
- You may help the students by telling them where the first person born in January and the last person born in December should stand, but make sure they do not talk!

If the students cannot line up by birthdays, stop the game and ask them for suggestions about how they could accomplish the task.

- Using their fingers to indicate which month they were born in and the date of that month works well. Don't be surprised if some students ask you which number corresponds to their month.

### Key Points

- I. Filing is a systematic, orderly arrangement of papers, cards, or other materials for future reference.
- II. Filing systems
  - A. Alphabetical
    1. Most common
    2. Alphabetized A-Z like a telephone directory
  - B. Numerical
    1. Filed by assigned number
    2. Requires a cross-index or cross-reference list, i.e. index

card file with patient's name and number. The index card file is filed alphabetically

- C. Geographic
    - 1. Filed according to location
    - 2. Cities, states, or countries are used as key units
    - 3. Charts are filed by area and alphabetized
  - D. Subject - Material is filed by subject or topic, i.e. diabetes then alphabetized
- III. Cross-indexes or cross-references
- A. Helps prevent lost and misplaced records
  - B. Index cards/Separate files
  - C. Colored Paper - Example - A child with a different last name from financially responsible party.
- IV. Color-coded indexing
- A. Folders are marked with a series of colors according to the letters in a patient's name or assigned number.
  - B. A series of two to eight colors are used
  - c. Misplaced folders stand out
- V. Procedures for alphabetical filing
- A. Names are indexed - place last name first, followed by first name and then middle name or initial
  - B. Names of organizations and businesses are usually filed in the same order as they are written.
    - 1. Exception is when the owner's initials form part of the name; then the last name is filed first.
    - 2. Words such as "of, and, at, the, on, a, and an" are not counted as indexing units. Place them next to the word to which they belong, but put in parenthesis.
  - C. Alphabetizing Rules
    - 1. If last names are the same check the first letter of the first name.
    - 2. Single names come before plural names, i.e. Brook before Brooks
    - 3. Prefixes are treated as part of the name, not separated; O'Hara is not O and then Hara
    - 4. Hyphenated names are considered as one unit
    - 5. Familiar abbreviations are treated as though the word was spelled out in full, i.e. St. would be Saint, Mt. Would be Mount
    - 6. Geographic locations are used for filing purposes if 2 or more individuals have the exact same name. Geographic order uses state first, then city and finally street address last
    - 7. Titles or degrees are usually not considered in filing. They are placed in parenthesis at the end of the name for identification purposes.

8. Terms of seniority such as Jr., Sr., II, are used as the last indexing unit, but not considered when filing
  9. Numbers are indexed as though the number is spelled out. Example: 2nd Street Supply House would be Second Street Supply House
- D. Steps for alphabetical filing
1. Names are checked to ensure accurate indexing.
  2. Cards and folders are separated alphabetically
  3. Begin with A and proceed through the alphabet
  4. Check for accuracy
- VI. Numerical filing Rules
- A. Numbers proceed from small to large
  - B. Zeroes preceding the number are usually disregarded when filing. Example: 00230 would be filed before number 231
  - C. Terminal or last digit numbering is a system that categorizes charts by their last number. Example 02-41-54,08-92-54,18-99-54, and 19-34-54
  - D. Recheck all files for accuracy

### **Activity**

- I. Complete [Filing Techniques Activity](#).
- II. Divide the class into 5 groups. Teacher will distribute blank file folders and ask each group to organize and label files according to their group assignment from the worksheet.
- III. Teacher will take all files and place on a table at the front of the class. Randomly call out a patient's name or number and see if a student can locate the chart. Then reverse the activity and have the student file the chart in the correct drawer. Activity can be expanded to include color-coded indexing.

### **Assessment**

Accurate filing

### **Materials**

[Filing Techniques Activity](#)

[Filing Techniques Activity Key](#)

Blank file folders

Small boxes for file drawers

### **Accommodations for Learning Differences**

For reinforcement, the student will practice filing technique.

For enrichment, the student will interview medical records personnel to

discover a method to locate misplaced files. Report to class.

### **National and State Education Standards**

HLC08.02 Ethics and Legal Responsibilities

Health care workers will understand accepted ethical practices with respect to cultural, social, and ethnic differences within the health care environment.

They will perform quality health care delivery.

### **TEKS**

130.204 (c)(5)(A) describe document formats; and

130.204 (c)(8)(I) perform skills specific to a health science professional such as medical assistant, dental assistant, emergency medical technician-basic, phlebotomy technician, and pharmacy technician.

### **Texas College and Career Readiness Standards**

English Language Arts

II. B. Understand new vocabulary and concepts and use them accurately in reading writing and speaking.

III. B. Develop effective speaking styles for both group and one on one situations.

IV. A. Apply listening skills as an individual and as a member of a group in a variety of settings.

### **Mathematics**

I. A. 1. Compare real numbers.

## Filing Techniques

Alphabetical Filing: For each group of names below, index each name in the space provided. Then place the indexed names in correct filing order.

Group 1	Indexing Order	Filing Order
Judy Sainer		
Stacy St. John		
John S. Stacy		
Jill Stadler		
Joseph St. Clair		
Michael Scott		
Lois Scanlon		
Bob Scodova		
Frederick C. Set		
Mike M. Sanborn		
John Stanton		
Mike Sanborn		

Group 2	Indexing Order	Filing Order
Henry Russ		
Rupert C. Rush		
Herbert Rusk		
Henry C. Russ		
Orville D. Rush		
Tom D. Rush, Sr		
Robert A. Russell		
Barbara D. Russell		
Tom Dean Rush, Jr		
Michael Rurals		
Brent T. Rusiska		
Bonnie F. Russell		
Kenneth K. Russell		
Lennie L. Ruster		
Mable M. Rustert		
Florence C. Rusher		
Connie S. O'Rush		
Mary Russell-Brown		

Group 3	Indexing Order	Filing Order
Third Street Ambulance Supplies		
EMS Supply Corporation		
4 <sup>th</sup> Street Medical Supplies		
Mike Smith, DDS, Miami, Florida		
American Medical Association		
American Nurses Association		
A.M. Albion Company		
Dr. John's Foot Pads		
Mike Smith, MD, Lakeland, Florida		
Mike A. Smith, ATR, Arcadia, Florida		
The Company for Medical Supplies		
M.A. Smith Pharmacy		
Smith Medical Equipment of Miami Florida		
2 <sup>nd</sup> Avenue Pharmacy		

Group 4      Numerical Order:    Place the following numbers in numerical order.  
 Start with the left hand answer column from top to bottom and then use the right  
 column.

05820	50
0582	0062
5822	555
0058	005821
0005	00555
0085	082
008	080
0850	00088
0567	85200

Group 5.      Terminal Number System: Below are two systems of numbers. Divide  
 the numbers into two separate systems (using terminal digits) and then place each  
 system in correct numerical order.

	System 1	System 2
5862-77	5682-77	
4657-77	4004-77	
4328-65	4328-77	
3333-65	0333-65	
0324-65	3245-65	
2435-65	3425-65	
3891-77	0020-77	
0002-77	0002-65	
0200-77	0033-65	
0020-65	5865-77	

## FILING TECHNIQUES KEY

### GROUP 1.

#### Indexing order

Sainer, Judy  
St. John, Stacy  
Stacy, John S.  
Stadler, Jill  
St. Clair, Joseph  
Scott, Michael  
Scanlon, Lois  
Scodova, Bob  
Set, Fredrick C.  
Sanborn, Mike M.  
Stanton, John  
Sanborn, Mike

#### Filing Order

Sainer, Judy  
St. Clair, Joseph  
St. John, Stacy  
Sanborn, Mike  
Sanborn, Mike M.  
Scanlon, Lois  
Scodova, Bob  
Scott, Michael  
Set, Fredrick C.  
Stacy, John S.  
Stadler, Jill  
Stanton, John

### GROUP 2

#### Indexing order

Russ, Henry  
Rush, Rupert C.  
Rusk, Herbert  
Russ, Henry C.  
Rush, Orville D.  
Rush, Tom D., Sr.  
Russell, Robert A.  
Russell, Barbara D.  
Rush, Tom, Dean, Jr.  
Rurals, Michael  
Rusiska, Brent T.  
Russell, Bonnie F.  
Russell, Kenneth K.  
Ruster, Lennie L.  
Rustert, Mable M.  
Rusher, Florence C.  
O'Rush, Connie S.  
Russell-Brown, Mary

#### Filing Order

O'Rush, Connie S.  
Rurals, Michael  
Russell, Robert A.  
Rush, Orville D.  
Rush, Rupert C.  
Rush, Tom D., Sr.  
Rush, Tom Dean, Jr.  
Rusher, Florence C.  
Rusiska, Brent T.  
Rusk, Herbert  
Russ, Henry  
Russ, Henry C.  
Russel, Kenneth K.  
Russell, Barbara, D.  
Russell, Bonnie F.  
Russell-Brown, Mary  
Ruster, Lennie L.  
Rustert, Mabel M.

### **GROUP 3**

#### **Indexing order**

Third, Street, Ambulance, Supplies  
EMS, Supply, Corporation  
Fourth, Street, Medical, Supplies  
Smith, Mike, (DDS) (Miami, Florida)  
American, Medical, Association  
American, Nurses, Association  
Albian, A., M., Company  
Dr., John's, Foot, Pads  
Smith, Mike, (MD) (Lakeland, Florida)  
Smith, Mike, A., (ATR) (Arcadia, Florida)  
Company, (The), Medical (For), Supplies  
Smith, M.,A., Pharmacy  
Smith, Medical, Equipment, Miami (of),Florida  
Second, Avenue, Pharmacy

#### **Filing order**

Albian, A., M., Company  
American, Medical, Association  
American, Nurses, Association  
Company (The), Medical (for), Supplies  
Dr., John's, Foot, Pads  
EMS, Supply, Corporation  
Fourth, Street, Medical, Supplies  
Second, Avenue, Pharmacy  
Smith, M.A., Pharmacy  
Smith, Medical, Equipment, Miami (of), FLA  
Smith, Mike, (MD) (Lakeland, Florida)  
Smith, Mike, (DDS) (Miami, Florida)  
Smith, Mike, A.,(ATR) (Arcadia, Florida)  
Third, Street, Ambulance, Supplies

### **GROUP 4**

0005	555
008	00555
50	0567
0058	0582
0062	0850
080	05820
082	005821
0085	5822
88	85200

### **GROUP 5**

#### **System 1**

0002-65  
0020-65  
0033-65  
0324-65  
0333-65  
2435-65  
3245-65  
3333-65  
3425-65  
4328-65

#### **System 2**

0002-77  
0020-77  
0200-77  
3891-77  
4004-77  
4328-77  
4657-77  
5682-77  
5862-77  
5865-77