

Chapter 10

Managing the Office Medical Records

Objectives:

- Describe the equipment and supplies needed for the filing of medical records
- List and describe the various types of filing systems
- Discuss the benefits of each type of system
- Discuss the advantages of color coding the files
- Explain how to set up and use a tickler file
- Describe each of the five steps in the filing process
- Explain the steps to take in trying to locate a misplaced file
- List and describe the basic file storage options and the advantages of each
- Identify criteria for determining whether files should be retained, stored, or discarded

Vocabulary:

- active file
- alphabetic filing system
- closed file
- compactible file
- cross-referenced
- file guide
- inactive file
- indexing
- lateral file
- middle digit
- numeric file system
- out guide
- records management system
- retention schedule
- sequential order
- tab
- terminal digit
- tickler file
- unit
- vertical file

Assignments:

_____ **Read Chapter 10**—pages 200-220 or pages 177-193 (2nd Edition)

_____ Preview Chapter 10 **PowerPoint Presentation**

_____ Complete **Worksheet Pages**—pages 94-101

_____ Complete **Student Tutorial CD**

- **Administrative Practice**
 - Filing Alphabetically
 - How to File
- **E-Mail or Print Progress Report**

Assessment:

_____ **Application Activities #1**—Alphabetic names—page 220

_____ **Indexing and Filing Exercise** (additional sheets)

_____ **Chapter 10 Exam**