



Paper Chart Filing System

Paper charts are grouped by year of last service (Example: 2015,2016,2017). If the last service was received more than 3 years prior, those charts may be stored in an offsite facility until they are legally permitted to be destroyed (typically 10 years). You can find the most recent date of service on **CrystalPM**.

If the date of last service is fairly recent, the chart may be located in a department (doctor, optical, contact lens) instead of in the office storage areas (the “wall”).

Paper charts are then grouped by the first letter of the patient’s last name (Example: S for Sanchez). Charts are then further divided by the first letter of the patient’s first name (Example: D for Dean) in a color code.

First name initial color code:	
A-B	RED
C	YELLOW
DEF	PINK
GHI	GREEN
J	WHITE
KL	GRAY
MNO	BLUE
PQR	ORANGE
ST	PURPLE
UZ	GOLD

Example: If you are pulling a chart for a Christina Ernest who was last seen in our office in 2015, you would go to the 2015 wall, look for the section letter E, and look for charts colored Pink to find it. If it is not in this location it may have been misfiled.

Paper Chart System

A patient chart has many different pieces of information that records a patient’s interaction with the practice.

A chart can be identified by stickers in several locations:

1. Ledger Card – found at the top center of the right side of the chart
2. Chart Tab – found at the bottom center of the folder, right side when opened
3. Left Inside Folder – found beneath the doctor notes, against the folder inner wall
4. Exam Note – found in the upper right-hand corner of an exam note, on the left side of the chart

These 4 locations are updated by the use of stickers that are printed at every patient examination visit.

Parts of a chart & document types

The two sides to a patient chart include the Doctor’s Side (Left) and the Office Side (Right).

On the doctor side (left), you will find documents such as patient exam notes, intake history, outside provider notes, contact lens and glasses prescriptions, test results, faxes, letters, and general notes written by doctors.

On the office side (right), you will find the ledge card, fee sheets, insurance information, glasses orders, glasses warranty forms, inter department communication forms (“pink sheet”), insurance orders, contact lens orders, and other forms utilized by non-doctor departments. The ledger card is ALWAYS kept on top of a chart’s right side.