

Name Of Procedure: **Archive and Destruction Log**

Procedure Number # \_\_\_\_\_

Created: \_\_\_\_\_

Revised: \_\_\_\_\_

Approved By: \_\_\_\_\_

Date: \_\_\_\_\_

**Purpose:** Record patient records which have been purged and destroyed

**Scope:** All original patient records

**Prerequisites:** Must meet retention requirements

**Materials Needed:** Outdated, inactive patient records

**Performed by:** \_\_\_\_\_

**Start:**

1. Identify patient records that are eligible to be purged and destroyed.
  - a. Retention Schedule: College of Physicians and Surgeons Retention Schedule. Chart destruction 10 years after the end of the year in which the last visit was recorded and at the end of the 20<sup>th</sup> year following birth for records of minors who are no longer patients whichever comes later.
  - b. If purging records in 2009,
    - i. Last visit must be 1999 or earlier and
    - ii. Patient's date of birth must be 1989 or earlier

**If records have patient demographic sheet at the front of the chart,**

2. Scan patient record to ensure that each page in the record belongs to the same patient.
3. Ensure patient demographic sheet has (at minimum) the following:
  - a. First and last name (circle in felt marker)
  - b. Date of birth (circle in felt marker)
4. Remove patient demographic sheet
5. In addition, record (in felt marker at bottom of page):
  - a. The first and last visit date
  - b. The primary physician
  - c. Date purged, initials of staff, and how record was destroyed (this could be pre-printed on computer generated labels for consistency and efficiency)
6. Maintain patient demographic sheets, in alphabetical order by last name, in binder (location details)
7. Look up patients and append a note in the central patient index and add date of destruction.
  - a. Consider – if patient was not previously in central patient index, should it be entered at this time?

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**If records do not have patient demographic sheet at the front of the chart, record the patient information in a separate document (sample attached). To make retrieval of information easier, this could be entered into an excel spreadsheet.**

Last Name	First Name	Other Name	Date of Birth (spell month)	First visit date	Last visit date	Primary physician	Date purged	Initials of Staff	How destroyed

This publication provides general guidance for a Medical Office. Consultation with your Information Systems, Health Records, and Privacy Office is recommended. For additional assistance, contact Information Managers Ltd.