

Instructional Scenario

Creating Electronic Client Records



Course/Duty Area: Office Specialist III; Managing Records

Scenario:

Taylor has been hired by a local dentist to create an electronic database of his client records to supplement the large traditional filing system that is in place. Taylor must ensure the correct person is linked and updated electronically. The files must be easily accessed and managed in such a way that once the electronic record is retrieved, the file jacket will be coded and filed in a like manner.

Big Questions:

- What are critical fields to be included in the electronic filing system?
- How will the files be linked?

Focused Questions:

- Will the filing system be indexed by patient last name or patient number?
- What design steps will ensure the lowest possibility of operator error and search flaws?
- What is the time limit for keeping files in both systems before archiving them?
- At what point are patient files no longer kept electronically or in paper?

Project-Based Assessment:

Student will design a database with critical fields that tie to the patient's full history. Fields should be easy to input (e.g., use drop down choices vs. blank text fields) for both speed and accuracy. Student will research the medical rules for record retention and write a procedure for creation, maintenance, archiving, and disposal of patient records.

Instructional scenario submitted by Dana Dingell, Performance Parts Inc.