

# CHARGE OUT CARDS

## SPOTLIGHT ON RECORDS MANAGEMENT

Gauteng | Ekurhuleni | North | Tembisa Health Care Centre | CHC  
Average Monthly Headcount: 5300



### IMPROVEMENT AREA & AIM

File maintenance is important to ensuring information is available to providers during clinical visits. At THCC, patient files were not always refilled and therefore could not be found at the next patient visit. This caused significant delays and file duplication. According to the Department of Health Ideal Clinic Standards (ICS), all patient files must be refilled daily after data are captured in TIER.Net.

**Our aim** was to refile files retrieved weekly from 0% in April 2019 to 50% in July 2019.



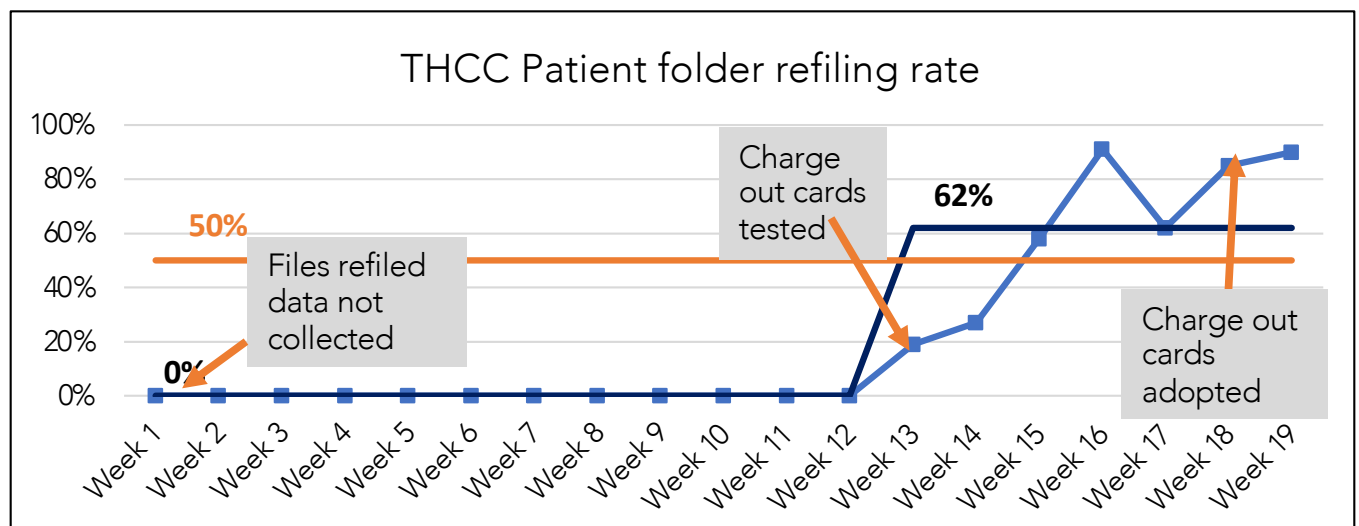
### DESCRIPTION

'Charge out cards' made of laminated A4 coloured paper were used as placeholders for files that had been retrieved from the filing cabinets for the daily patients. Different coloured cards were used for different days or services in the facilities: orange for Monday, yellow for Tuesday, red for Wednesday, etc., and white for tracing, green for consultation, etc. The patient's name, date of birth, service received, and date retrieved were written on the charge out cards in dry-erase marker.



### OUTCOMES

The rate of files returned weekly improved from 0% to 62% in 7 weeks. The facility team expressed how the coloured cards served as a visual marker for files that had still not been refilled, resulting in a smoother and more efficient process.



# STEPS TO IMPLEMENT

## PRE-IMPLEMENTATION

- ❑ Decide on colour coding system such as orange for Monday, yellow for Tuesday, and red for Wednesday, white for tracing, and green for consultation.
- ❑ Create a key for the colour coding system.
- ❑ Hang key in filing room where it can be easily seen.
- ❑ Create charge-out cards by laminating A4 paper in different colours.

## IMPLEMENTATION

- ❑ Retrieves patient file.
- ❑ Retrieves the appropriate coloured card and marks patient details on the card (name, date of birth, service given, and date retrieved).
- ❑ Replaces patient file with charge-out card to signify that a file is out.
- ❑ Collects all files and returns them to the reception area.
- ❑ Refiles patient files by replacing the charge-out card with the corresponding file.

## FACILITATORS

- Made a training video to demonstrate the ease and quick pace of refiling using the charge-out cards to achieve staff buy-in.
- Pairing Filing Clerks with a QI support team member helped FCs take more ownership.
- Collected files from different facility service points to ensure they were all returned to the filing space.

## CHALLENGES & ADAPTATIONS

- The coloured A4 charge-out cards ran out for a few days hampering the implementation of the change → **An average daily headcount was calculated according to streams which enabled the facility to have an idea of how many A4 coloured sheets are required to sustain the change.**
- Initially Filing Clerks viewed this idea as extra administrative work and resisted participation. → **To save time, the coloured paper was inserted in the cabinets without writing patient details.**



## ABBREVIATIONS

- ✓ ICS – Ideal clinic standards
- ✓ QI – Quality improvement
- ✓ THCC - Tembisa Health Care Centre

## RESOURCES

- ✓ Different coloured A4 papers
- ✓ Laminator
- ✓ White board markers

## STAFFING

- ✓ Filing Clerks
- ✓ Operational Manager

## RECOMMENDATIONS & LESSONS LEARNED

This is a very simple and easy change, but requires good planning and communication to be successful.

## IDEA INSPIRATION

The idea for this change idea came from the library loan programme. The library cards list who borrowed the book, on which date, and when it was expected to be returned.

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