

**THINNING OF DOCUMENTS FROM CLIENT CHARTS IN CLINICAL AREA
- PROGRAM GUIDELINE – ACUTE CARE**

1. The patient chart is reviewed on a regular basis to determine if thinning is required.
2. The following reflects the minimal length of time/date the documents are to be retained in the patient chart.
3. Clinical judgement is required when reviewing the chart for thinning to ensure sufficient patient information to maintain continuity of care and ensure the provider is able to assess patients past medical history.
4. Forms not identified in this guideline may need to be retained on the patient chart. Professional discretion and clinical judgement is required

CLIENT CHART (HEALTH RECORD) ORDER	RECOMMENDATIONS FOR THINNING
ADVANCE CARE PLAN-most current	PERMANENT retain on the current client chart
ADMISSION/LEGAL FORMS	PERMANENT retain on the current client chart
PRESCRIBER ORDERS	MINIMUM 3 MONTHS
Best Possible Medication History (BPMH) and Admission Reconciliation & Order Form	Permanent retain on the current client chart
HISTORY/CONSULTS	PERMANENT retain on the current client chart
Assessments	Permanent retain on the current client chart
Referrals- Medical Correspondence,	Permanent retain on the current client chart
Consultations i.e. Anesthetic	Permanent retain on the current client chart
IPN/CARE MAPS	3 MONTHS
Care Maps	Most current
CHARTING FLOWSHEETS	1 MONTHS
OPERATIVE RECORDS	Permanent retain on the current client chart
BLOOD PRODUCTS	3 MONTHS
Canadian Blood Services (CBS) Requests/Reports	3 months
Cumulative Blood Product Record	3 months
Transfusion Medicine Results Report	Minimum 6 months
LAB	3 MONTHS
Blood, MRSA, Urine, Stool	3 Months
DIAGNOSTICS	3-6 MONTHS
MEDICATIONS	1 MONTH
Medication Administration Record (MAR) Standing orders PRN/Scheduled/Non-recurring,	1 MONTH
FLUID BALANCE FLOWSHEETS	1 MONTH
MISCELLANEOUS	
CONSENTS/ Waivers (excluding surgical consents- file in Operative Record section)	Most current/active
Valuables Envelope	Permanent retain on the current client chart
Signature Record	Permanent retain on the current client chart
KARDEX/Medication kardex, Care Plan/Kardex	Permanent retain on the current client chart
Transfer information from other facilities	Permanent retain on the current client chart
Fax confirmation sheets from the Units	1 Month