

TOOL 2

Medical Records Inventory

Purpose: Create a master list of the medical records you currently have so you know what you possess, where it came from, what period it covers, and where your copy is stored.

Inventory first. Analyze later. You do not need to read every page before adding a record. Start by identifying what you have. Later tools will help you understand and organize what those records contain.

Record / File Name	Source / Facility	Record Type	Date or Date Range	Pages (optional)	My Copy Location	Reviewed?
						☐
						☐
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My Copy Location means where you can find your copy now. Examples: PC > VA Records > Imaging; Hard Copy > Medical File Drawer > PT Folder; External Drive > VA Backup.

Preserve your originals. If you highlight, annotate, combine, rename, or otherwise work with a medical document, consider working from a copy while keeping the original source file intact.

Page count is optional. It can be useful when managing large files.

TOOL 2 | MEDICAL RECORDS INVENTORY — CONTINUED

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