

Title: Medical Records	Policy Number: 1.9
Approved By: Belinda Pettiford, MPH	Program Area: Family Planning
Effective Date: 1970	Revised Date: 7/18/12

Purpose Statement of Policy:

To assure that medical records for every client who obtains clinical services through the Title X Family Planning Clinic are maintained in accordance with accepted medical and State laws with regard to record retention.

Definition:

Defined within the Medical Records policy the following areas must be addressed:

- Records must be complete, legible and accurate, including documentation of telephone encounters of a clinical nature.
- Signed by the clinician and other appropriately trained health professionals making entries, including name, title and date.
- Readily accessible.
- Systematically organized to facilitate prompt retrieval and compilation of information.
- Confidential.
- Safeguarded against loss or use by unauthorized persons.
- Secured by lock when not in use.
- Available upon request to the client.
- Records must contain sufficient information to identify the client, indicate where and how the client can be contacted, justify the clinical impression or diagnosis, and warrant the treatment and end results.
- The record must contain: personal data, medical history, physical exam, laboratory test orders, results and follow up, treatment and special instructions, scheduled revisits, informed consents, refusal of services (declination form), allergies to drugs recorded in a prominent and specific location, clinical findings, diagnostic and therapeutic orders, and documentation of continuing care, referral and follow-up.
- The record must allow for entries by counseling and social service staff.
- A confidentiality assurance statement must appear in the client's record.
- Upon request, clients transferring to other providers must be provided with a copy or summary of their record to expedite continuity of care.

Responsibilities:

It is the responsibility of the local health department and its designated personnel to develop, implement, and ensure compliance among all staff on the administration of the Medical Records Policy in the Title X Family Planning clinic.

Policy:

The local health department will ensure that written policies are in place that address the above required areas in the definition section for provision of medical records being maintained in accordance with accepted medical standards and State laws with regard to record retention.

Legal Authority:

This policy is based on Title X regulations (January, 2001) Section 10.3 concerning medical records for clients served in the Title X Family Planning clinic.

References:

Title X Guidelines can be accessed at:

https://www.grantsolutions.gov/gs/servlet/document.DownloadPdfPublicServlet?document_id=7157

For examples of policies from the local level, please contact your Regional Women's Health Nurse Consultant.