

8.18.1 PURPOSE AND CONTENT OF THE MEDICAL RECORD

Policy: Title X providers must maintain documentation of client care in client medical records. Medical records must be accurate, complete and systematically organized to facilitate prompt retrieval of information.

A medical record is a permanent record of any encounter with a client resulting in the provision of clinical services.

Purposes of the Medical Record:

1. To serve as a basis for planning client care.
2. To serve as a basis for affecting continuity in the evaluation of the client.
3. To furnish documentary evidence of the client's medical evaluation, treatment and change in condition during the period of care or treatment.
4. To document communication between the responsible clinician and any other health professional contributing to the client's care.
5. To serve as the basis for evaluating the quality of medical care.
6. To assist in protecting the legal interest of the client, the clinic and the responsible clinician.

Procedure:

1. The client's medical record 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.
2. The client's medical record should be kept separate from the client's financial information.
3. The required content of the medical record includes, but is not limited, to:
 - a. Personal data
 - b. General consent
 - c. Informed consents
 - d. Health history, physical exam, laboratory test orders and results, clinical findings, plans for care including treatments, follow-up and special instructions
 - e. Refusal of services
 - f. Allergies and untoward reactions to drug(s) recorded in a prominent and specific location
 - g. Problem list that identifies problems and facilitates continued care
 - h. Reports of clinical findings, diagnostic and therapeutic orders
 - i. Counseling and social service staff entries
 - j. Referral, follow-up and continuing care
 - k. Scheduled revisits