

8.18.5 RECORD SECURITY

Policy: Montana Title X clinics must assure that all medical records are confidential and safeguarded against loss or use by unauthorized persons.

Procedure:

1. Only personnel authorized by the clinic director may have access to chart and filing areas.
2. All medical records must be secured by lock when not in use.
3. Laboratory reports or other sections of a medical record temporarily out of the medical record will be provided the same security and will be under the direct supervision of the personnel using such records. Laboratory records and other records will be secured under the direct supervision of the personnel using such records.
4. Medical records must not be placed in areas of public access, unless in the possession of or monitored by staff personnel.
5. All lists, rosters, extracts or other documents bearing client names or other identifying information must be provided security.
6. Client records must be de-identified if a portion of a chart is copied for educational use, chart audits or any other purpose.
7. Medical records must not be removed from the clinic site unless absolutely necessary. Clinics finding it necessary to remove medical records from the clinic site must follow the Montana Title X Family Planning Administrative Manual Policy 8.18.7 *Record Transport*.
8. Access to electronic health records (EHRs) must be protected by staff specific identification (ID) and password.
9. Staff is not allowed to share EHR IDs and passwords.
10. Clinic using the EHR software must adhere to the manufacturer security process.