

**FAMILY PLANNING PROGRAM****SECTION:** Medical Records Administration**POLICY AND PROCEDURE MANUAL****SUBJECT:** Client Records

**POLICY:** Delegate agencies must establish medical records for every client who obtains medical, laboratory, and counseling services.

**GUIDELINES:**

1. Medical records must be:
  - a. readily accessible.
  - b. systematically organized to facilitate retrieval.
  - c. secured by lock when not in use.
  - d. available upon request to client with a signed release of information.
  - e. safeguarded against loss or use by unauthorized persons.
  
2. The required content of the medical record must include:
  - a. personal data (name, date of birth, etc.).
  - b. indicate where and how client can be contacted.
  - c. medical history, physical exam, laboratory tests ordered, results, and follow-up  
- reports of clinical findings, diagnostic and therapeutic orders, and documentation of continuing care, referral and follow-up.
  - d. justify clinical impression or diagnosis.
  - e. treatment and special instructions.
  - f. scheduled revisits.
  - g. counseling sessions.
  - h. consent for services.
  - i. method specific consent(s).
  - j. refusal of services.
  - k. allergies and untoward reactions to drug(s) recorded in a prominent and specific location.
  
3. Agencies must utilize a problem list, i.e., Flow Sheet SFN 8618 or Problem Sheet SFN 8619 (see appendices for forms), in the front of the chart to:
  - a. list identified problems.
  - b. facilitate continued evaluation and follow-up.
  
4. A confidentiality statement must appear on the client's record. The signed consent for services may be used to meet the requirement.

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5. If client financial information is included in the medical record, it should not be a barrier to access client services.
6. Each agency shall establish a policy on chart order.
7. A system must exist to create a mechanism for updating names, addresses, or other related identification data changes.

## References:

1. Program Guidelines for Project Grants for Family Planning Services, January 2001, p. 28-29, Section 10.3, Medical Records.