



**FAMILY PLANNING PROGRAM
POLICY AND PROCEDURE MANUAL**

SECTION: Medical Records Administration
SUBJECT: Medical Record Transfer
Between Agencies

POLICY: Agencies of the North Dakota Family Planning Program may transfer the medical records of clients within the program.

GUIDELINES:

1. The client will be asked to sign the Medical Records Release Form SFN 51939 (see appendices for forms).
2. The original Medical Records Release Form will be kept with the medical record of the referring agency.
3. The copies of the following forms may be transferred: *
 - a. History and History Update
 - b. most recent exam (initial or annual)
 - c. most recent pap smear (pathology report)
 - d. Problem Sheet
 - e. rubella titre results
 - f. most recent contraceptive prescription
 - g. specifically requested information
 - h. Release of Information Form.
4. Upon transfer of records, the client will be considered an active client only of the agency receiving the records.
5. The client may receive a one month supply of her prescriptive contraceptive (if necessary) from the new agency prior to the transfer of records following the procedure described below:
 - a. Obtain written consent from the client for release of information.
 - b. Telephone contact between delegate agencies, confirming prescription and date of most recent general examination may be made with the client's consent. Documentation of such consent must be included in the medical record.
 - c. Obtain interim history from client with emphasis on method specific questions.
 - d. Schedule appointment for general examination (based upon date of most recent exam).
 - e. Schedule appointment for a supply visit in 2-3 weeks (allowing for transfer of records).
6. Supply visits must comply with Program Guidelines.

* Clients may take their own records to the new delegate agency if they desire to do so.

Reference:

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

