

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

POLICY: Delegate agencies may provide temporary services to family planning clients from other agencies.

GUIDELINES:

A transient client is one that will access contraceptive services on a very limited basis and for whom it may be difficult to provide medical records other than by phone or fax.

Examples of such clients may include:

- traveler passing through the area;
- migrant worker;
- individual displaced because of natural disaster.

When services are requested by clients from other agencies, the following should be done:

1. With the consent of the client, establish status of the client by contacting the agency presently providing services to the client.
2. Additional information requested from the other agency:
 - a. date of last annual exam and any significant findings and result
 - b. date of last pap smear
 - c. weight
 - d. blood pressure
 - e. Hgb/Hct
 - f. method of contraception
 - 1) if oral contraception, number of cycles remaining
 - 2) type of oral contraceptive
 - g. informed consent for method on file
 - h. contraindications to method
 - i. other pertinent information.
3. Obtain information listed above from client if not available from other agency.
4. Client may be given method of birth control after the above has been determined. Only one cycle of oral contraceptives should be given.

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5. The Interagency Client Medical Information Sheet SFN 59154 should be completed (see appendices for form).
 - a. The original form is kept by the agency requesting information.
 - b. A copy is sent to the agency housing the medical record.
6. The agency requesting the information should have the client sign and date the form giving permission for release of medical information. Client signature should be witnessed by a clinic staff.
7. Agencies should develop a system for filing and storing of forms until they can be disposed of. Record retention must be for 7 years following the provision of services.

Reference:

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