Section 9	Clinical Policies	04/01/90-Originated
Subject 9.2	Patient Records	01/10/13-Reviewed w/ changes -Reviewed w/o changes
Policy 9.2.8	**Medical Record Forms Management**	03/19/13-Effective Health Information Management Department - Author

Medical Record Forms Management

Definition

Medical record form: any UTMB approved paper form filed permanently in the UTMB medical record and identified by an official form number assigned by the Health Information Management Department (HIM). These forms have been approved by HIM, subject matter experts, the Health Information Committee, Legal Affairs, and/or Risk Management.

Document owner: the department initiating a new or revised medical record form.

Policy

The Health Information Management Department (HIM) coordinates the approval process for all paper medical record forms.

Only approved forms will be retained in the UTMB medical record. Forms should be standardized across the Health System and not created for single clinical care locations.

When HIM identifies an unapproved form that has been filed in the medical record or scanned into Epic the form will be sent to the document owner for review and submission to HIM for proper approval. .

Procedures

Requests to create or change a paper medical record form must be submitted to HIM. It is the responsibility of the document owner to notify HIM whenever a new form is created or an existing form is revised. Forms will be produced according to established medical record guidelines for page layout and construction.

Analysis and research of existing forms will be conducted by the document owner so that creation of a redundant new form may be avoided. The document owner will also ensure funding for the form.

All new and revised forms require approval by HIM prior to official use. For most consent forms, HIM will routinely require review and approval by Legal Affairs and/or Risk Management. For all forms, HIM may require proof of review and approval by department representatives and/or subject matter experts.

Forms which have been approved may not be altered in any way without re-submission to HIM for review and approval.

The document owner will work with the forms vendor to coordinate printing of approved medical record forms.

Procedures, continued

HIM will work with the forms vendor to catalog all medical record forms and periodically examine forms being used to determine whether some may be recommended for elimination or combined with other forms.

References

IHOP Policy 9.2.13, UTMB *Medical Record Policy*