

# OREGON STATE HOSPITAL

PORTLAND – SALEM

## POLICIES AND PROCEDURES

---

**SECTION 2:** Clinical Support Services

**POLICY:** 2.009

**SUBJECT:** Medical Record Forms Management

---

**POINT PERSON:** JONI DETRANT  
DIRECTOR, HEALTH INFORMATION

**APPROVED:** GREGORY P. ROBERTS  
SUPERINTENDENT

*G. Roberts*  
**DATE:** FEBRUARY 6, 2013

---

### I. POLICY

- A. It is the policy of Oregon State Hospital to initiate and maintain a forms management program that assures standardization, effective communication, and efficient review and adoption procedures for medical record forms used at Oregon State Hospital (OSH).
- B. The Medical Records Committee is established and defined by the OSH Manual of Standing Committees and Sub-Committees, and is advisory to the Medical and Allied Health Professional Staff Executive Committee. Membership is appointed for a term of one year. The Medical Records Committee shall assure that proposed medical record forms and medical record form revisions are promulgated, reviewed, and implemented in a manner consistent with Oregon State Hospital Policies and Procedures, state government standards and rules, and The Joint Commission and Centers for Medicare and Medicaid Services standards.
- C. All committees and subcommittees dealing with the development, dissemination, and implementation of electronic and paper forms shall make every effort to assure adequate user participation, eliminate outdated and redundant practices.
- D. Forms implemented or revised outside the procedures listed below and without the approval of the Medical Records Committee and the President of the Medical and Allied Health Professional Staff organization shall be considered invalid.

### II. DEFINITIONS

- A. "Form" means any piece of paper or electronic document template with field spaces requiring specific data to be entered or completed with fill-in

information. This shall include, but is not limited to, electronic health record output, letters, memorandums, identification tags, or similar items.

- B. "Medical Record Form" means a form used to collect observations and facts by health care professionals concerning a particular patient that identifies the patient, justifies the diagnosis, documents the treatment and response to treatment, and that is filed in the patient's medical record.
- C. "Other State Agency Form" means the same as "form," except a state agency form is promulgated by a state agency other than Oregon State Hospital. State agency forms may be included in the medical record if the form has been approved for use by the Medical Records Committee and the President of the Medical and Allied Health Professional Staff Executive Committee.
- D. "Clinical Document Report" means documents generated by the electronic medical record or Health Information Services transcription for dissemination within the hospital and/or to external stakeholders.
- E. "Product Owner" means the person who maintains responsibility for the electronic medical record form and any necessary changes or updates.

### III. PROCEDURE

- A. Medical record form adoption:
  - 1. Prior to initiating or revising a medical record form, the form initiator shall notify the Health Information Department and the electronic health record product owner.
  - 2. All proposed medical record forms or form revisions shall receive clinical review, and shall be approved by the relevant clinical discipline and program/department director prior to being presented to the Medical Records Committee.
  - 3. Medical Record forms containing clinical documentation shall be reviewed by the Medical Records Committee for recommendation to the President of the Medical and Allied Health Professional Staff Executive Committee.
  - 4. All new medical record forms and major revisions to clinical content of existing forms shall be approved by the Medical and Allied Health Professional Staff Executive Committee before being adopted as an official Oregon State Hospital medical record form.

5. When a new paper medical record form is approved, Health Information Department shall review the form with the Material Distribution Center, obtain a form number, and notify the form initiator to add the form number and date to the final original for printing.
6. When a new electronic medical record form is approved, Technology Services shall build it into the electronic health record, and shall enter it into the electronic health record update release schedule.
7. All adopted medical record forms shall have a standard uniform format established and approved by the Medical Records Committee, and maintained by the Health Information Department.

**B. Form requisition and/or duplication:**

1. A sample copy of all medical record forms shall be kept on file at the Material Distribution Center.
2. A list of medical record forms stocked by, and which may be requisitioned from, the Material Distribution Center is included as a separate section of the Warehouse Catalog. A copy of the catalog may be obtained from the Material Distribution Center.
3. Program or discipline-specific medical record forms shall be stocked in the Material Distribution Center for distribution. Exceptions can be made through Medical Records Committee.
4. An approved pilot medical record form can be reproduced at any one of the hospital's photocopy machines.
6. Printing request for medical record forms shall be processed through the Medical Records Committee Chairperson. Printing requests for jobs other than reproduction such as: binding, punching more than three holes, padding, stapling more than 30 sheets, multiple-copy NCR, etc., shall be made on a Request for Purchase and submitted to Procurement Services with a camera-ready sample. The request for purchase must include pertinent instructions, i.e., copy back to back, collate, staple, etc. In addition, a completed DHS 1001, Forms Design and Printing Request must accompany the purchase order.
7. Procurement Services shall determine whether to send non-warehouse stocked medical record forms to State Printing or to the Copy Center. Printing jobs meeting the definition for "Forms" and

stocked in the Material Distribution Center, shall be routed there for assignment of form number and processing. High priority jobs requiring a faster turnaround may be made for an additional "rush" charge.

8. Before making photocopies of copyrighted materials, all Oregon State Hospital employees shall ensure they are not violating copyright laws or regulations.

#### **IV. REFERENCES**

Mental Health and Developmental Disability Services Division Directive 7.012.  
DHS Policy & Procedure AS-050-004, Forms – Creating and Distributing

Replaces Oregon State Hospital Policy and Procedure 2.009, *Forms Management*, dated 7/12/2005.