

# RECORDS AND FORMS MANAGEMENT

## 5.0

### Clinical Records -- 5.1

#### Central Patient Records -- 5.1.a

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**Date** December 31, 1998

**Issued:**

**Date Last** March 23, 2011

**Revised:**

**Signature:**

A handwritten signature in black ink that reads "Cathy R. Taylor, DrPH, MSN, RN". The signature is written in a cursive style and is centered within a light gray rectangular box.

**By:** Cathy R. Taylor, DrPH, MSN, RN  
Assistant Commissioner  
Bureau of Health Services

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#### **POLICY**

A central patient medical record\* system will be established at all locations where patient records are maintained.

#### **APPLICABILITY**

This policy applies to Local Health Department and Regional Office personnel.

#### **PURPOSE**

To readily access all the records of an individual patient from a central patient record system, whether paper or electronic.

#### **PROCEDURE**

The central patient record system for the non-electronic portion of active records must utilize color coded file folders which are filed numerically.

Records may be considered inactive if three (3) years have passed since the date of last service or if the patient is deceased or has moved away, unless the records are for children under seven (7) years of age or CSS patients. CSS

patient records must remain active as long as current certification is maintained and must remain on-site until the patient is 22 years of age. Records of children under seven (7) years must remain active until there is no contact for three (3) years after the child reaches seven (7) years of age.

Any record that is removed from the central patient record system for an off-site visit or for review/entries by a provider (other than the provider seeing the patient in clinic that day) must be signed out to the person removing that record. An outguide must be completed and inserted into the record's location in the central record system to document the location of the record and the provider who has removed the record. A completed *outguide* is not necessary when a record is removed from the central patient record system for a clinic visit that day.

There shall be a central location to which all records will be returned for filing and all records should be returned within 48 hours from the time checked out.

**OFFICE OF PRIMARY RESPONSIBILITY**

Office of the Director, Bureau of Health Services, (615)741-7305

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\* A patient medical record is defined as patient information on paper, printed forms, cards, tape, disk or any information-transmitting media.