

**FILING IN HEALTH CARE RECORD**

**GUIDE TO ATTACHMENTS**

This attachment directs the filing of documents in the Medical Chart (regular gray/green, orange STIA), Hemodialysis Chart (red), Dental Record, Medications Record – Medical Chart (blue envelope), Psychological Records (Copies) – Medical Chart (white envelope), Patient Request Folder, and Psychological Services Unit (PSU) Record.

See Attachment AA for an Excel Grid that lists all documents included in Attachment A in addition to historical and out-of-state documents. The grid lists documents with an assigned number in numerical order followed by documents without an assigned number in alphabetical order.

**Filing Instructions**

File documents behind each divider in the order described for each section.

Consult with Central Medical Records prior to filing in any component of the Health Care Record any document not listed in Attachment A or Attachment AA. This applies to documents received from outside of the DOC that do not seem to be listed in the appendices, and DOC documents that are non-approved (bootleg) documents; i.e., document without a DOC form number in the upper left corner. Fax questionable documents to 920-324-6369, or scan documents to Central Medical Records mailbox at [DOCDALDCICentralMedicalRecords](mailto:DOCDALDCICentralMedicalRecords).

Some DOC forms are issued in an English and Spanish version. They have the same numerical number with a “S” at the end. File the Spanish versions in the same location in the Health Care Record as the English version.

**Filing Key**

DOC = Department of Corrections Forms

DPH = Division of Public Health Forms

F = forms used at Wisconsin Resource Center – formally DDE. NOTE: All F-2##### forms were historically a DDE form and have kept the same number.

**FILING IN MEDICAL CHART AND ENVELOPES**

**MEDICAL CHART**

**Front Cover**

- Advanced Directives Label
- Court Order Expires Label
- Deceased Label
- Guardianship of Person Label
- Medical Alert Label
- Multi-Volume Chart Label
- Name Alert Label
- Patient Has A Blue Infirmary Chart Label
- Patient has a Red Hemodialysis Chart Label
- Temporary File Label

**Left Inside Cover**

- Advance Directive: DNR, POA Declaration to Physician Label
- Allergies Medical Condition Label
- Anti-Coagulant Therapy Medical Condition Label
- Cardiac Care Medical Condition Label
- Diabetic Medical Condition Label
- Dyslipidemia Medical Condition Label
- Hard of Hearing Medical Condition Label
- Hypertension Medical Condition Label
- Limited Vision Medical Condition Label
- Pregnant Medical Condition Label
- Premedicate Medical Condition Label
- Respiratory Condition Medical Condition Label
- Seizure Disorder Medical Condition Label

**Right Side in front of Problem List Divider – File in the order listed below.**

- Medical Imaging Sleeve with Medical Imaging CD's
- Medical Appointments Off-site, DOC-3347
- Onsite Appointment List
- Emergency Care/Do Not Resuscitate Order (DNR), DPH-4763
- Activation/Deactivation of a Declaration to Physicians, DOC-3391
- Court Documents and Orders: Guardianship, Ch. 51 Commitment, Orders for treatment, etc. (only Orders in effect; move expired/terminated Orders to Miscellaneous Section)
- Letters of Guardianship
- Notification Regarding Guardianship of the Person, DOC-3563
- Power of Attorney for Health Care, DPH-00085
- Advanced Directives Log, DOC-3391A
- Living Will (Declaration to Physicians), DPH-00060
- Signature Verification, DOC -3326
- Offender name labels - sheet

**Problem List Section- File in the order listed below.**

- Problem List, DOC-3020 (current)
- Medical Summary, DOC-3613
- Biopsychosocial Problem List, F-00879

**Patient Care Plans Section – File like documents together, intermixed, with most recent on top.**

- Assessment - Asthma, F-26141A
- Asthma Self-Management Care Plan, DOC-3446 or F-26141B
- Asthma Treatment Care Plan, DOC-3444 or F-26141
- Care Plan – Hunger Strike, F-20657B
- Care Plans: Other

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- Chronic Condition Treatment Care Plan, DOC-3702
- Chronic Pain Treatment Care Plan, DOC-3564
- COPD Treatment Care Plan, DOC-3565
- Coronary Heart Disease (CHD) Score Sheet for Men
- Diabetes Mellitus Treatment Care Plan, F-26139
- Diabetes Treatment Care Plan, DOC-3439
- Diabetic Annual Foot Examination, DOC-3439A or F-26139A
- Diabetic Education Care Plan, F-26139B
- HBV Evaluation and Review Care Plan, DOC-3551
- HCV Treatment Evaluation Care Plan, DOC-3428 or F-26138
- HIV Care Plan Management, DOC-3536
- Hunger Strike Care Plan, DOC-3451
- Hunger Strike Initial Assessment, DOC-3450
- Hunger Strike PSU Assessment, DOC-3450A
- Hypertension Treatment Care Plan-Adolescent, DOC-3467
- Hypertension/Dyslipidemia Treatment Care Plan Adult, DOC-3468 or F-26142
- Infirmiry Nursing Care Plan - DCI
- Infirmiry Patient Care Plan, PHS 70054
- Infirmiry Patient Kardex, DOC-3645
- Inhaler Need Assessment, DOC-3584
- Initial Treatment Learning Plan, F-25596B
- Lab Monitoring Psychotropic Medication, DOC-3667
- Levothyroxine & TSH Monitoring Patient Care Plan, DOC-3678
- Lipid Profile
- Palliative Care Program Interdisciplinary Team (IDT) Care Summary, DOC-3587
- Patient Care Plan, DOC-3510
- Patient Care Conference Record, DOC-3411
- Physician's Chronic Care Clinic Seizures, PHS 70069
- Release Transfer Summary, F-25596D
- Respiratory Care Plan, DOC-3621
- Risk for Falls, F-26108A
- Seizure Disorder Treatment Care Plan, DOC-3586
- Sickle Cell Disease Treatment Care Plan, DOC-3676
- Sleep Study Evaluation Tool, DOC-3643
- Treatment Learning Plan-Inmate F-25596C
- Warfarin Anticoagulation Monitoring Care Plan, DOC-3459

**Data Base Section – File documents in the order listed below.**

- Record of Immunization, DOC-3218A
- Annual Tuberculosis and Health Maintenance Screening, DOC-3286
- Wisconsin Immunization Registry (print-out from the website)
- Influenza Vaccination Screening Questionnaire, DOC-3611 or DOC-3611S
- Annual Report for Known Positive TB Skin Test, F-20135
- TB Summary Report – WRC
- Discharge Summary: Infirmiry, DOC-3573, or equivalent
- Health Service Unit Admission Data Base, DOC-3405
- Medical Admission Evaluation, F-25237
- Admission History and Physical Examination – Infirmiry, DOC-3589
- Transplant Evaluation Log, DOC-3718
- **Note: file screenings listed below in chronological order keeping like documents together.**
  - ✓ Initial Entrance Screening, F-25644
  - ✓ Inmate Medical Screening Form - Jail Contract
  - ✓ Jail Contract: Medical/Booking Questions
  - ✓ Transfer Screening, DOC-3532

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- **Note: file histories listed below in chronological order keeping like documents together.**
  - ✓ Assessment-Admitting Physician, F-25507A
  - ✓ Data Base – Medical, F-21248
  - ✓ Initial Health Assessment and Medical History, F-24013B
  - ✓ Intake Screening/Medical History, DOC-3018 or DOC-3018S
  - ✓ Intake Medical Clearance Questionnaire, DOC-3636
- **Note: file assessments listed below in chronological order keeping like documents together.**
  - ✓ Assessment – Cardiovascular Risk, F-26142A
  - ✓ Asthma Assessment, DOC-3443
  - ✓ Folstein Mini-Mental State Exam (MMSE), DOC-3539
  - ✓ Initial Nursing Assessment, F-21250
  - ✓ Nursing Admission Assessment – Infirmary, DOC-3635
  - ✓ Nutrition History and Assessment (if Dietician Consult ordered), F-21097
- **Note: file physical exams listed below in chronological order keeping like documents together.**
  - ✓ Annual Review
  - ✓ Physical Exam (Male), DOC-3019 or F-24013A
  - ✓ Physical Exam - Female, DOC-3019A
  - ✓ Primary Care- Initial Physical Exam, F-00578A
- **Note: file medical classifications listed below in chronological order keeping like documents together.**
  - ✓ Health Services Classification
  - ✓ Medical Classification Report, DOC-3050
  - ✓ Medical Clearance Assessment for Challenge Incarceration Program (CIP), DOC-3500
  - ✓ Medical Clearance for County Jails, DOC-3500A
  - ✓ Medical Clearance for Treatment Alternative Program (TAP), DOC-3500B
- **Note: file diets listed below intermixed in chronological order.**
  - ✓ Diet Flow Chart (if special diet ordered), F-21095
  - ✓ Diet Order Acknowledgment – Female, DOC-1836A
  - ✓ Diet Order Acknowledgment - Male, DOC-1836
  - ✓ Medical Diet Orders
  - ✓ Medical Nutrition Therapy- Progress Notes, DOC-F-00600
  - ✓ Modified Diet Consent/Refusal, DOC-3341 or DOC-3341S
  - ✓ Modified Diet Order, DOC-3334 or F-25944
- Food Allergy/Intolerance Diet Interview, DOC-3518
- WCCS Offender Intake TB Screening Tool, DOC-3425
- Audiogram, DOC-3149
- Offender Hepatitis B Vaccination Medical History, DOC-3400
- History and Evaluation for Individuals with Significant Reaction to PPD's, DOC-3029
- Tuberculosis Questionnaire
- Dyskinesia Identification, F-24214

**Progress Notes Section – File documents in any order with most recent on top.**

- Assessment-Pain Scale Brief Inventory F-2227B
- Chest Pain Assessment Encounter, DOC-3424
- Chronic Care Clinic Follow-Up - Jail Contract
- Dental Pain/Swelling/Bleeding Encounter, DOC-3648
- Dermatological Assessment, DOC-3424C
- H1N1 Screening Questionnaire, DOC-3606
- Health Services Progress Notes, F-25672
- Infirmary Progress Notes, DOC-3022
- Medical Emergency Report, F-20960
- Mental Health Assessment Encounter, DOC-3541
- Musculoskeletal Evaluation, DOC-3495
- Nurse's Telephone Consultation, DOC-3437
- Nursing Encounter Protocols, DOC-3639

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- Physician's Telephone Consultation, DOC-3415
- Progress Note, F-045J
- Progress Note – Primary Care, F-00578
- Progress Notes, DOC-3021
- Progress Notes – Nursing Report, F-20457i

**Prescriber's Orders (Physician Orders) Section – File documents in any order with most recent on top.**

- Discharge Orders: Infirmiry, DOC-3574
- Infirmiry Medication Reconciliation Record, DOC-3631
- Medication Administration Record Colonoscopy Prep Orders, F-00215A
- Palliative Care Admission Orders, DOC-3023T
- Prescriber's Orders, DOC 3023
- Prescriber's Orders – Infirmiry Admissions, DOC-3023C
- Prescriber's Orders – ((Venlafaxine ER Conversion))-Nursing Delegated Standard Orders, DOC-3023J
- Prescriber's Orders – (Omeprazole to Pantoprazole Conversion) – Nursing Delegated Standard Orders, DOC-3023U
- Prescriber's Orders – Lantus Insulin (glargine) to NPH Conversion – Nursing Delegated Standard Orders, DOC-3023V
- Prescriber's Orders - PCA Infirmiry, DOC-3023K
- Prescriber's Orders -Standard Admission Orders, DOC-3023A
- Prescriber's Orders -Standard Orders- Alcohol Withdrawal, DOC-3023H
- Prescriber's Orders -Standard Orders- ATR/FDOAFP Admission, DOC-3023F
- Prescriber's Orders –Standard Orders- For Suspected MRSA Infection, DOC-3023Q
- Prescriber's Orders -Standard Orders- Opiate/Methadone Withdrawal, DOC-3023G
- Prescriber's Orders -Standard Orders- Short Term Admission, DOC-3023E
- Prescriber's Orders-Standard Orders-Youth, DOC-3023B
- Prescriber's Orders –Standing Orders for Suspected H1N1 – DOC-3023R

**Consultations Section – File documents in any order with most recent on top.**

- Ambulance Report, DPH-7119
- Authorization for Chronic Opioid Use, DOC-3661
- Change of Consultant Recommendations, DOC-3528
- Consultation Note – Medical Clinic, F-26010
- Documents/reports received from a DOC-3335 Request for PHI for Ongoing Treatment
- Documents/reports received from a DOC-3335A Request for PHI Regarding Death of a Patient
- Documents/reports generated from completed DOC-3001
- Documents/reports related to an in-patient hospitalization
- Holter Monitor
- MRI Pre-Screening Form
- Off-Site Service Request and Report, DOC-3001
- Ophthalmology Consultation Request and Report, DOC-3385
- Physical/Occupational Therapy Discharge Summary, DOC-3561
- Physical/Occupational Therapy Progress Notes, DOC-3560
- Physical/Occupational Therapy Initial Evaluation, DOC-3559
- Prior Authorization for Therapeutic Level of Care, DOC-3436A
- Request for Additional Physical/Occupational Therapy, DOC-3562
- Review Summary (for Class III-electronically) (McKesson)
- Speech therapy Progress Notes, DOC-3022A

**Psychiatric Services Section – DOC-3021B should always be on top followed by other documents intermixed with most recent on top.**

- Psychiatric Progress Notes, DOC-3021B or F-20556 or F-20556D
- Psychiatric Report – Discharge, F-20556C
- Psychiatric Report – Update Note, F-20556B
- Abnormal Involuntary Movement Scale (AIMS), DOC-3494
- Conference Summary, F-20179
- Discharge Summary, F-25819

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- Drug Utilization, F-25491
- General Medical and Psychiatric Discharged Checklist, F-21271
- Hep. C Treatment Candidate, Psychiatrist Review, DOC-3453 or F-26138A
- Initial Assessment, F-25820
- Initial Psychiatric Assessment, F-25507B
- MJTC Transfer Summary Psychiatrist, F-25610A
- Nursing Progress Notes, F-20557
- Psychiatrist Consultation for Pride Referrals- copy, DOC-2273
- Psychiatric Report, DOC-3496 or original, typed & signed document

**Laboratory Results Section – File documents in any order with most recent on top.**

- Biopsy
- Communicable Disease Division
- Culture/Susceptibility Request/Report, F-20059
- Cytology/Tissue Requisition
- Hematology Request/Report, F-20063
- Lab results relating to urine/blood/stool/cell/tissue (non-numbered forms/reports)
- Laboratory Procedures, DOC-3143 or 3143A
- Laboratory Reports from Dynacare and other laboratories including off-site such as UWHC
- Laboratory Reports related to completed DOC-3001
- Miscellaneous Chemistry Request/Report, F-20058
- MRSA Case Tracking and Reporting DOC-3505
- Therapeutic Drug Assay Request/Report, F-20057
- Urinalysis Request/Report, F-20056

**Medical Imaging Section - File documents in any order with most recent on top.**

- AED Use Summary
- Barium studies
- Bladder scans
- Body Composition Analyzer
- Cardiac Catheterization Procedure
- Catheterization and Coronary Arteriography
- Colonoscopy
- CT Scans
- Echocardiology and Doppler Echo Report
- EKG/ECG reports
- Electroencephalogram Report, F-21212
- EMG
- Mammogram
- Medical Imaging reports related to completed DOC-3001
- MRA reports
- MRI reports
- Nuclear medicine reports
- Perfusion Study/Scans
- PET scans
- Polysomnogram Report – UW
- Pulmonary Function (FV)
- Spirometry Test
- Trans-Telephonic Arrhythmia Monitor Report
- Ultrasound reports
- X-ray Report
- X-ray Report Patient, F-21211

**Flow Sheets Section – File documents in any order with most recent on top.**

- Assessment - Neurological Check Flow sheet, F-25512A

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- Assessment - Patient Health in Mechanical Restraints, F-25975
- BPH/Prostate Symptom Flowsheet, DOC-3665
- BPH/Prostate Symptom Score Sheet, DOC-3665A
- Diabetic Log, DOC-3441 or F-26139C
- Flow Sheet, DOC-3024
- Flow Sheet – Vitals, DOC-3374 or F-26142B
- Growth Charts
- Headache Diary Flow Sheet, DOC-3424E
- Health & Psychological Rounds in Segregation/Security Log, DOC-3388
- Health Assessment of Patient in Mechanical Restraints, DOC-3338
- Hepatitis C (HCV) Treatment Flow Sheet, F-26138C
- Hepatitis Monitoring Flow Sheet, DOC-3430
- HIV Positive Flow Sheet, DOC-3378 or F-26140
- Infirmary PCA Flow Sheet , DOC-3479
- Infirmary Restorative Flowsheet, DOC-3690
- INH and RPT Treatment Flow Sheet, DOC-3032
- INH Chemoprophylaxis Flow Sheet, F-25636
- Insulin Record, DOC-3121
- IV Flow Record, DOC-3407
- Mini Mental Status Exam Flow Sheet, DOC-3539A
- Neurological Assessment Flow Sheet, DOC-3424F
- Nutritional Monitor, DOC-3527
- Nutritional Monitor, F-20646
- Opioid Withdrawal Assessment, DOC-3464
- Paraplegia/Quadriplegia Flow Sheet, DOC-3620
- Patient Assessment, DOC-3394
- Patient Care Flow Sheet, DOC-3395
- Patient Care Plan for Volunteers, DOC-3707
- Patient Special Procedure Flow Sheet, DOC-3395A
- Protective Restraint Flow Sheet, DOC-3373
- Record of Intake and Output - DCI Infirmary, DOC-3410
- Selective Severity Assessment (SSA), DOC-3465
- Sleep Record, F-23792A
- Sleep/ Rest Pattern Disruption, F-26108
- Therapy Vitals Sheet, DOC-3421
- Vaccine Fahrenheit Temperature Log, F-42024
- Vision/Hearing Screening, DOC-3588
- Vital Signs/ Height/ Weight Record, F-25194
- Weight/Height Record, F-23211A
- Wound Care Flow Sheet, DOC-3024B
- Wound Care Initial Assessment, DOC-3024A

**Medication Section – File documents in the order listed below keeping documents with the same DOC form number together with most recent on top.**

- Discharge Medication Request, DOC-3397 or DOC-3397S
- Controlled Medication Non-Adherence, DOC-3537A
- IV Administration Record, DOC-3026A
- Patient Medication Profile, DOC-3034
- Medication Education Log, DOC-3538
- Non-Formulary Drug Request (Other than Psychotropics), DOC-3482 or F-24384
- Non-Formulary Psychotropic Drug Request, DOC-3482A
- PRN Medication Notes, DOC-3393
- Quetiapine and Olanzapine Drug Request, DOC-3482B
- Staff Administered Insulin Log, DOC-3441A

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- Stimulant and Atomoxetine Drug Request, DOC-3482C

**Miscellaneous Section - File documents in any order with most recent on top.**

- Acknowledgement of Revocation of Declaration to Physicians, DOC-3616 (file on top of revoked DPH-00060, when present)
- Acknowledgement of Revocation of Power of Attorney for Health Care, DOC-3615 (file on top of revoked POAHC, when present)
- Activation/Deactivation of a Declaration to Physicians, DOC-3391 (deactivated)
- Activation/Deactivation of Power of Attorney for Health Care, DOC-3614 (deactivated)
- Affidavit of Extraordinary Health Condition, DOC-3612
- Affidavit of Terminal Conditions, DOC-3554
- Court documents and Orders terminated by court or expired
- Dietary Teaching and Learning Record, F-21818A
- Disclosure of PHI Without Patient Authorization, DOC-3342
- Emergency Care/Do Not Resuscitate Order (DNR), DPH-4763: (revoked)
- Jail Documentation - when **prior** to incarceration
- Living Will (Declaration to Physicians), DPH-00060 (revoked)
- Paternity Court Order
- Patient Revocation of Declaration to Physicians, DOC-3617 (file on top of revoked DPH-00060, when present)
- Patient Revocation of Power of Attorney For Health Care, DOC-3618 (file on top of revoked POAHC, when present)
- Placement/Review of Offender in Observation - for medical observation, DOC-27 (medical)
- Power of Attorney for Health Care, DPH-00085 (revoked)
- Problems List (not current), DOC-3020
- Retrieval/collateral Information from off-site providers from **prior** to incarceration/commitment: all documents including authorization/release form and laboratory/medical imaging reports.
- Seclusion/ Restraint Assessment Notes, F-25693J (used at Sand Ridge)
- Seclusion/ Restraint Justification and Authorization, F-25693 G (used at Sand Ridge)
- Seclusion/ Restraint Progress Note, F-25393 I (used at Sand Ridge)
- Seclusion/ Restraint Progress Note, F-25693 K (used at Sand Ridge)
- Seclusion/ Restraint Status Checks, F-25693H (used at Sand Ridge)

**Consents/Refusals Section - DOC-1163A, or equivalent, CURRENTLY IN EFFECT should always be on top followed by other documents intermixed with most recent on top.**

- Authorization for Use and Disclosure of Protected Health Information, DOC-1163A, or any other valid Consents/authorizations/releases from outside entities (attorneys, Disability Determination Bureau, SSA, etc.)
- Acknowledgement of Not Eating or Drinking Information, DOC-3452
- Acknowledgment of Receipt of Notice of DOC Privacy Practices, DOC-3491
- Admission Care and Confidentiality Information, F-2589
- Adult Informed Consent Psychotropic Medication – Clozaril, DOC-3544
- Authorization for Medical and/or Surgical Treatment, DOC-3028
- Certification of Records, DOC-2309
- Consent - Treatment/Surgical Procedure, F-20289
- Consent for DNA Testing in Paternity Case, DOC-3226
- Consent for Electronic Recording of Protected Health Information (PHI), DOC-3483A
- Consent/Refusal for Recording & Imaging of PHI, DOC-3483
- Consent/Refusal Hepatitis C Treatment, DOC-3429
- Consent/Refusal Hepatitis C Treatment Genotype 1, DOC-3429A
- Consent/Refusal to Test for HIV Antibody, DOC-3263
- Fee for Copies of Health Care Records (file w/Authorization form), DOC-3011
- Hepatitis C Treatment Consent, F-26138B
- Informed Consent for Psychotropic Medication, DOC-3401
- Informed Consent for Medication, F-24277
- Medical Alert Wristband Acceptance/Refusal, DOC-2074
- Medication Storage Consent/Refusal – MSDF, DOC-3591
- Narcotic (OPIOID Analgesic) Chronic Pain Management Agreement, DOC-3590
- Notarized Statement for Access to Health Information Regarding a Deceased Person, DOC-3508
- Notice of Need for Interpreter- For Off-Site Medical Care, DOC-3695



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- Palliative Care Program Patient Bill of Rights, DOC-3534 or DOC-3534S
- Patient Consent for Palliative Care Program and Request to Discontinue, DOC-3535
- Patient HIV Testing Consent/Denial, F-23386
- Patient Participation in Treatment Planning Session Acknowledgment, F-25692
- Physical/Occupational Therapy Service Agreement, DOC-3558
- Property Receipt/Disposition, DOC-0237
- Record Assembly Request, F-00775
- Record Request Response, DOC-1160
- Refusal of Recommended Health Care, DOC-3220 or DOC-3220S or F-20075 or PHS-70032
- Revocation of Authorization for Use and Disclosure of Protected Health Information, DOC-1163R
- Vaccine Administration Record – DPH 4702 or F-44702

**Correspondence Section - File documents in any order with most recent on top.**

- Acknowledgment of Receipt of CPAP, BIPAP, AUTOPAP, DOC-3680A
- Acute and Communicable Disease Case Report, F-44151
- After Care Plan on Discharge/Extended Home Visit, F-26025
- Agent Notification of Tuberculosis Infection or Disease (copy), DOC-3359
- AIDS Case Report, F-44264
- Bureau of Health Services Request for Restriction Approval, DOC-3475
- Canteen Items Ordered
- Central Pharmacy Level 1 Drug Interaction Notice
- Challenge Incarceration Program (CIP) Exercise Injury Rehab Instructions, DOC-3660
- Clinical Restriction Notification
- Confidential Memo DCI Primary Care Health Service Unit
- Consideration for Special Handling – Memo
- Correspondence regarding patient between HSU/PSU/Central Pharmacy staff (not addressed to patient)
- Correspondence to patient from HSU/ PSU/ Central Pharmacy (not in response to correspondence from patient)
- Discharge Instructions, F-25605
- Health Recommendations Upon Release/Discharge of Female Youth, DOC-3640
- Health Screening (DJC), DOC-3387
- Health Summary, DOC-3003
- Health Summary - DJC, DOC-3314
- Health Transfer Summary, DOC-2077 or F-25908
- Infection Control: Patient and Employee Precautions, DOC-3504
- Inmate Patient Orientation to DCI Infirmary – Unit 25
- Inmate/Patient Health Care Monitoring/ Intervention Notification, F-2159
- Medical Memos between DOC health care providers
- Medical Restrictions/Special Needs, DOC 3332B or F-20159
- Medication Information Form - Memo
- Memo from Health Service Unit Practitioner to Patient, DOC-3670 (not in response to correspondence from patient)
- MJTC Transfer Summary – Nursing, F-25610C
- New Psychiatric Referral, DOC-2112
- Order/Return CPAP BIPAP AUTOPAP, DOC-3680
- Patient Care Information, F-22750 or F-22750A
- Patient Communication, DOC-3622
- Physical/Occupational Therapy Discontinuance, DOC-3568
- Physician Consultation: PRIDE Referrals - copy, DOC-2272
- Potential Drug Interaction
- Pregnancy Status Notification, DOC-3151
- Psychiatric Services Referral
- Reasonable Modification/Accommodation Request, DOC-2530
- Referral for On-Site Medical/Mental Health Services, DOC-3183
- Request by Former Patient for Amendment/Correction of PHI, DOC-3484A

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- Request by Former Patient for Restriction on Use/Disclosure of PHI, DOC-3487A
- Request for Accounting of Disclosures of PHI, DOC-3489 or 3489S
- Request for Alternative Communication of PHI, DOC-3488 or DOC-3488S
- Request by Current Patient for Amendment/Correction of Protected Health Information PHI, DOC-3484
- Request for PHI for Ongoing Treatment, DOC-3335
- Request for PHI Regarding Death of a Patient, DOC-3335A
- Request by Current Patient for Restriction on Use/Disclosure of PHI, DOC-3487 or DOC- 3487S
- Review of Placement of Offender in Restraints, DOC-0111
- Safety/Security Precautions, F-20148D or F-20148
- Sexually Transmitted Diseases Morbidity and Epidemiologic Case Report, DPH-4243
- Special Needs
- Telemedicine Appointment Notice/Refusal, DOC-3431
- Tinea Versicolor-Teaching Sheet
- TransCor Medical Transportation Information Sheet
- Transfer of Care Referral and Report, DOC-3619
- Wisconsin Anti-tuberculosis Therapy Program Initial Request for Medication (copy), DPH-4000
- Wisconsin Human Immunodeficiency Virus (HIV) Infection Confidential Case Report, DPH-4338

**Optical Section – File DOC-3054 on top followed by other documents intermixed with most recent on top. Place documents smaller than 8 ½ by 11 inches in Optical Sleeve (see below).**

- Eyecare Examination, DOC-3054
- Optometric Examination Record, F-25641
- Chronological Record of Eyecare Case Management, DOC-3054A
- Glasses receipt form signed by inmate
- Vision Screening (Juveniles)
- Visual Field Charts

**Optical Sleeve (sheet protector) – Place sleeve directly behind the Optical Divider for filing documents smaller than 8 ½ by 11 inches.**

- Glasses Order Forms Copies from Contract Vendors
- Optical Prescription. DOC-3200

**“MEDICATIONS RECORD- MEDICAL CHART” (BLUE) ENVELOPE (DOC-3469/3469A) - File documents in any order with most recent on top.**

- Medication Administration Record (CPS)
- Medication Treatment Record, DOC-3026
- On Unit Medication Record For Individual, F-20106
- Protime/ Coumadin Record, F-21026

**“PSYCHOLOGICAL RECORDS (COPIES)- MEDICAL CHART” (WHITE) ENVELOPE (DOC-3370/3370B) - File documents in any order with most recent on top.**

- Assessment Packet-Admission, F-21506
- Behavioral Management Plan, DOC-3642 or DOC-3642A
- General Population Treatment Plan, DOC-3663
- Intake Screening – Juvenile Correctional Institution, DOC-2145
- Mental Health Screening Interview, DOC-3472
- Mental Health Screening Interview – Taycheedah Correctional Institution, DOC-3472A
- Monarch Special Management Unit (MSMU) Discharge Plan, DOC-3641
- Monarch Special Management Unit (MSMU) Treatment Plan, DOC-3632
- Monarch Special Management Unit Referral, DOC-3540
- Placement/Review of Offender in Observation, DOC-0027
- PSU Treatment Plan, DOC-3511
- Psychological Services Clinical Contact, DOC-3473
- Psychological Services Clinical Contact (Monitoring), DOC-3473A
- Psychological Services Session Note, DOC-3506

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- Psychological Services Report, DOC-0223 or equivalent psychological report prepared/signed by a PSU staff member.
- Psychotropic Review – Report on Youth Progress, DOC-2115
- Self Harm Assessment, DOC-3480
- Short Term Absence Screening – Lincoln Hills School, DOC-2170
- Transporting Officer Questionnaire (TOQ), DOC-2144

**“PATIENT REQUEST FOLDER” (MANILA) FOLDER - File documents in any order with most recent on top.**

- Correspondence (Letters/Notes) FROM patient TO health staff, and response by health staff to the correspondence received FROM the patient, i.e., not correspondence initiated by health staff to patient. See NOTE below.
- DJC Health Service Request, DOC-3035A (and old bootleg equivalents)
- Health Service Requests and Copayment Disbursement Authorization, DOC-3035
- Health Service Requests – County Jails
- Health Service Requests – WRC, F-25513
- Interview/Information Request (when responded to by HSU), DOC-0643
- Medication/Medical Supply Refill Request, DOC-3035C or DOC-3035CS
- Psychological Service Requests (when responded to by HSU), DOC-3035B

NOTE: Memos/notes FROM health staff TO inmates that are NOT in response to correspondence from patient shall be filed in Medical Chart, Correspondence Section, NOT in PRF.

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**FILING IN THE DENTAL SERVICES RECORD**

500.50.02 Attachment A-updated July 2014

- File the documents listed below in the Dental Services Record which may consist of a single pocket jacket or a multi-section chart labeled Dental Record. It is identified as DOC-3041 (males) or DOC-3041A (females).
- File documents in the multi-section chart in the order as described below.
- Consult with the Dental Director before filing documents in the Dental Services Record that are not listed below.
- Dodge Correctional and Taycheedah Correctional Institutions shall set up a multi-section chart upon admission or re-admission of a patient.
- Dental Units in all facilities shall convert a single pocket jackets to the multi-section chart whenever there is downtime, when the existing jacket is wearing out or whenever the contents of the jacket need organization.

**INSIDE FRONT COVER POCKET** – File documents intermixed, most recent on top.

- Panoramic films
- X-rays stored mounted, or in coin envelopes

**MEDICAL HISTORY SECTION (Prong Inside Front Cover)** - File documents by type in the order listed below and in date order with most recent on top within each type.

- DOC-3018B Health History for Dental Practice
- DOC-3018A Health History Update
- DOC-3018 Intake Screening/Medical History
- **LEGAL:** DOC-3563 Notification Regarding Guardianship of the Person
- DOC-3614 Activation/De-Activation of Power of Attorney for Health Care, (copy)
- DOC-3615 Acknowledgment of Revocation of Power of Attorney for Health Care, (copy)
- F-00879 Biopsychosocial Problem List

**ORAL EXAMINATION SECTION (Prong Front Side of Divider #1)** – File documents intermixed, most recent on top.

- DOC-3042 or F-2286 DENTAL EXAMINATION

**TREATMENT NOTES SECTION (Prong Back Side of Divider #1)** – File documents intermixed, most recent on top.

- DOC-3040 or F-20284 TREATMENT NOTES  
Also placed on DOC-3040 or F-20284:
  - DOC-3040X Extraction Label
  - DOC-3040H Hygiene Label
  - DOC-3040R Restorative Label
- DOC-3648 Dental Pain/Swelling/Bleeding Encounter (copy)
- Periodontal Screening Examination
- DOC-3183 Referral for On-Site Health Services,
- SLEEP APNEA:
  - DOC-3626 Dental Evaluation for Obstructive Sleep Apnea
  - DOC-3628 TAP-3 Oral Appliance Delivery Checklist
  - DOC-3629 TAP-3 Oral Appliance Follow-Up Questionnaire
- DOC-3392, 3392S or F-26143 Dental Service Request and Copayment Disbursement Authorization

**DENTAL SERVICE REQUESTS SECTION (Prong Front Side of Divider #2)** – File documents intermixed, most recent on top.

- DOC-3392, or 3392S or F-26143 Dental Service Request and Copayment Disbursement Authorization

**CORRESPONDENCE SECTION (Prong Back Side of Divider #2)** – File documents intermixed with most recent on

- DOC-3052 Dental Classification Report
- DOC-3436 Prior Authorization for Non-Urgent Care

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- DOC-3001                      Off Site Service Request and Report
- Limited Exam/Consultation (DCI Surgeon)
- DOC-3523                      Class III Request for Partial Dentures
  
- Any other Inmate Correspondence
- PHI Forms:
  - DOC-3484A                      Request by Former Patient for Amendment/Correction of PHI
  - DOC-3487A                      Request By Former Patient For Restriction On Use/Disclosure Of PHI
  - DOC-3484                      Request by Current Patient for Amendment/Correction of PHI
  - DOC-3335                      Request for Protected Health Information for Ongoing Treatment
  - DOC-3335A                      Request for PHI Regarding Death of a Patient
  - DOC-3489 or 3489S              Request for Accounting of Disclosures of PHI
  - DOC-3488 or 3488S              Request for Alternative Communication of PHI

**CONSENT/AUTHORIZATIONS.DJC DOCUMENTS SECTION (Prong Inside Back Cover) - File documents by type in order as listed below and in date order with most recent on top within each type.**

**NOTE: Keep all DJC documents together with Red cover sheet.**

- DOC-3367 or 3367S              Authorization and Consent to Surgery and Drug Administration
- DOC-3414 or 3414S              Authorization and Consent for Root Canal Treatment (Endodontics) and Drug Administration
- DOC-3442 or 3442              Authorization and Consent for Dental Treatment
- F-21504                      Consent/Refusal for Dental Services
- DOC-3593 or 3593S              Informed Consent Relating to Risks Associated with use of Oral Bisphosphonate
- DOC-3627 or 3627S              Informed Consent for the Treatment of Obstructive Sleep Apnea with Oral Appliances
- DOC-3402 or 3402S              Consent for Orthodontic Treatment for Adults
- DOC-3417 or 3417S              Authorization and Consent to Surgery and Drug Administration for Juveniles
- DOC-3416 or 3416S              Authorization and Consent for Root Canal Treatment (Endodontics) and Drug Administration-Juveniles
- DOC-3403 or 3403S              Consent for Orthodontic Treatment for Juveniles
- DOC-3404 or 3404S              Consent for Referral of Orthodontic Treatment

**Laboratory/Miscellaneous Section (Pocket Inside Back Cover) – File documents intermixed, most recent on top.**

- Dental Laboratory Work Authorizations
- DOC-3475                      BHS Request for Restriction Approval
- Sheets of labels: Patient Name/DOC number labels
- Any other miscellaneous documents

**FILING IN PSYCHOLOGICAL SERVICES UNIT RECORD**

- All documents shall be filed in date order with the most recent on top within each section of a hard cover multi-sectioned PSU Record.
- Documents shall be filed in a DOC-3370A/3370C yellow envelope for patients without a hard-cover multi-sectioned PSU Record.

**Psychological Reports Section**

- Hunger Strike PSU Assessment, DOC-3450A
- Inmate Worker Abilities and Limitations, DOC-3689
- PSU Treatment Plan, DOC-3511
- Psychological report prepared/signed by a PSU staff member
- Psychological Services Chronological File Entry, DOC-0654
- Psychological Services Report or equivalent report, DOC-0223 or unnumbered
- Psychological Test Results and Reports (do not file copyrighted test instrument here unless it cannot be separated from results/report)
- Treatment Summaries
- Documents from a stay in a DJC facility; stapled together between lime green cover sheets

**Referrals/Screening/Contact Section**

- Behavioral Management Plan, DOC-3642 or DOC-3642A
- CES-D Scale
- Domestic Violence Counseling Evaluation
- Family Therapy Referral, DOC-2540
- Health & Psychological Rounds in Segregation/Security Rounds Flow Chart, DOC-3388
- Intake Screening – Juvenile Correctional Institution, DOC-2145
- Intake Suicide History Questionnaire, DOC-2469
- Inter-Institution Transfer Summary, DOC-1980
- Mental Health Assessment Encounter, DOC-3541
- Mental Health Brief Notes, DOC-3659
- Mental Health Group Progress Notes, DOC-3658
- Mental Health Pre-Release Summary, DOC-3585
- Mental Health Screening Interview, DOC-3472
- Mental Health Screening Interview – Taycheedah Correctional Institution, DOC-3472A
- Monarch Special Management Unit (MSMU) Discharge Plan, DOC-3641
- Monarch Special Management Unit (MSMU) Treatment Plan, DOC-3632
- Monarch Special Management Unit Referral, DOC-3540
- Offender Visitor Review Removal/Denial/Approval, DOC-2427
- Professional contact Questionnaire – Mental Health, DOC-3594
- Psychological Services Clinical Contact, DOC-3473
- Psychological Services Clinical Contact (Monitoring), DOC-3473A
- Psychological Services Intake File Review, DOC-3503
- Psychological Services Session Note, DOC-3506
- Psychologist Minimum Security Recommendation, DOC-3474
- Psychology Input for Hearing Officers, DOC-3509
- Psychology Input for Security Decisions – TCI, DOC-3509A
- Psychology Progress Notes – Taycheedah Correctional Institution, DOC-3021C
- Psychology Progress Notes (Non-contact), DOC-3021D
- Psychotropic Review – Report on Youth Progress, DOC-2115
- PTSD Screen, DOC-3694
- Referral for On-Site Medical/Mental Health Services, DOC-3183
- Review of Mental Health Placement, DOC-1479
- Short Term Absence Screening – Lincoln Hills School, DOC-2170
- Sleep Log, DOC-3531
- Transporting Officer Questionnaire (TOQ), DOC-2144
- Treatment Plans/Multidisciplinary Notes/Other progress Notes

**Psychiatric Reports Section**

- Copies of Initial, Segregation and Follow-Up Psychiatric Reports, DOC-3496, or unnumbered

**Inmate Correspondence Section**

- Inmate Letters
- Psychological Services Request, DOC-3035B
- Request by Current Patient for Restriction on Use/Disclosure of PHI, DOC-3487 or DOC-3487S
- Request by Former Patient for Restriction on Use/Disclosure of PHI, DOC-3487A
- Request by Current Patient for Amendment/Correction of Protected Health Information (PHI), DOC-3484
- Request by Former Patient for Amendment/Correction of PHI, DOC-3484A
- Request for Accounting of Disclosures of PHI, DOC-3489 or DOC-3489S
- Request for Alternative Communication of PHI, DOC-3488 or DOC-3488S
- Request for PHI Regarding Death of a Patient, DOC-3335A
- Youth Request for Psychological Services, DOC-3035D

**Observation/Restraint/Seg Reviews Section**

- Daily Self-Harm Assessment, DOC-1770
- Initial Placement in Observation Status & Notice of Rights and Appeal, DOC-2098
- Notice of Review for Continued Observation, DOC-2099
- Notice of Review of Observation Status, DOC-0028
- Placement/Review of Offender in Observation, DOC-0027
- Review of Placement in Observation Status, DOC-2148
- Review of Placement of Offender in Restraints, DOC-0111
- Review of Offender in Segregation/Disciplinary Separation/Administrative Confinement, DOC-0030
- Self Harm Assessment, DOC-3480 or DOC-2097

**SOT/Ch. 980**

- Brief Sexual History Questionnaire, DOC-2474
- End of Confinement Review Board (ECRB) Case Review Summary and Disposition, DOC-1490
- Informed Consent: Sex Offender Treatment Evaluation, DOC-2465
- Minnesota Sex Offender Screening Tool – (MnSOST-R), DOC-2296
- Sex Offender Assessment Program (SOAP) Re-Evaluation Request Differing Opinions Review Process (DORP), DOC-2380
- Sex Offender Assessment Program (SOAP) Re-Evaluation Request: SOAP Response Differing Opinions Review Process (DORP), DOC-2381
- Sex Offender Assessment Report, DOC-1577
- Sex Offender Assessment Report – Abbreviated, DOC-1577A
- Sex Offender Assignments
- Sex Offender Program Report, DOC-1423
- Sex Offender Session logs and homework assignments
- Sex Offender Treatment Contract, DOC-2508
- Sex Offender Treatment Evaluation: Attitudes Questionnaire, DOC-2473
- Sex Offender Treatment Interview Decision, DOC-2464
- Sex Offender Treatment Progress Notes, DOC-2510
- Sex Offender Treatment Reoffense Prevention Plan SO2 Programs, DOC-2456A
- Sex Offender Treatment Reoffense Prevention Plan SO4 Programs, DOC-2456
- Special Purpose Evaluation, DOC-2295
- Static-99/Rapic Risk Assessment for Sexual Offense Recidivism (RRASOR) Scoring Sheet, DOC-2364
- Victim disclosures (Preparation for Polygraph), DOC-3693

**Legal Documents/Consents/Outside Records Section**

- Agreement for Coping Skills Program at WRC, F-00038
- Assessment-Initial/Social Services Patient (copy), F-25674A
- Assessment Packet-Admission, F-21506
- Authorization for Use/Disclosure of PHI or other authorization to disclose PHI, DOC-1163A
- Biopsychosocial Problem List, F-00879

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- Certification of Records, DOC-2309
- Ch. 980 Authorization for Disclosure of AODA Information, DOC-1163K
- Conference Summary, F-20179
- Confidential Psychological Information
- Consent for Electronic Recording of Protected Health Information (PHI), DOC-3483A
- Consent for Psychological Assessment and Evaluation, F-20549
- County Jail Report – DCI Sheriff Letter (Revision date before 8/2007), DOC-0618
- Court Ordered Evaluation/Treatment (in effect)
- DDES Progress Notes (WRC)
- Discharge Summary, F-25819
- Disclosure of PHI Without Patient Authorization, DOC-3342
- Fee for Copies of Health Care Records, DOC-3011
- Individualized Treatment Plan – Problem Identification and Long-term Goals, F-20148
- Informed Consent for Psychological Services Provided by Intern-Student, DOC-3498
- Informed Consent Sex Offender Treatment, DOC-2507
- Initial Treatment Learning Plan (copy), F-25596B
- Letters of Guardianship (in effect)
- Limits of Confidentiality Regarding Information Rendered to Treatment Staff, DOC-1923
- Notarized Statement for Access to Health Information Regarding a Deceased Person, DOC-3508
- Notification Regarding Guardianship of the Person, DOC-3563
- Primary Program Status – Participation/Refusal/Withdrawal, DOC-2439
- Program Participation Evaluation, F-25623B
- Program Participation Evaluation Performance Notes, F-25623
- Progress Notes - Psychological, F-20556
- Psychiatric Report – Discharge, F-20556C
- Psychiatric Report – Progress Notes, F-20556D
- Psychiatric Report – Update Note, F-20556B
- Psychological Admission Summary, F-25665
- Psychological Assessment Report, F-25666
- Psychological Brief Discharge Summary, F-24954
- Psychological Progress Notes (copy), F-25669A
- Refusal of Recommended Health Care, DOC-3220 or DOC-3220S
- Request for Protected Health Information for Ongoing Treatment, DOC-3335
- Release Transfer Summary (copy), F-25596D
- Retrieval information
- Review for Mental Health Placement – WRC Response, F-2715
- Revocation of Authorization for Use and Disclosure of Protected Health Information, DOC-1163R
- Special Purpose Evaluation Notice of Examination, DOC-3497
- Vocational Workshop Program Participation Evaluation Performance Notes, F-21500
- WRC Participation Agreement, F-00069

**Restricted Access Section**

- Adult Conduct Reports (copy), DOC-9
- Conduct Report – DJC, DOC-1843
- Incident Reports (copy)
- Incident Report – DJC, DOC-1846
- Legal Correspondence
- Mental Health Screen for WSPF, DOC-2056
- Police reports (copy)
- Pre-sentence Investigation Reports (copy)
- Psychological test instruments (copyrighted/proprietary) (Note: patient has access to results/reports, but not copyrighted instrument that has no patient information entered upon it)
- Victim Statements (copy)



**FILING IN THE HEMODIALYSIS RECORD: BINDER AND CHART**

**Instructions**

- Behind each divider in the Hemodialysis Binder or Chart, file documents in the order described for each section.
- Not all patients will have all documents in their Hemodialysis Record.
- Forms listed are only specific to the Hemodialysis Record, but the Hemodialysis Record is not limited to these documents.
- See “Filing in Medical Chart and Envelopes” above for filing location of other documents used in the Hemodialysis Record.
- While a patient is receiving Hemodialysis, the working binder may reach capacity. See 500:02.03, Hemodialysis Record, for guidance on maintenance of the working binder during Hemodialysis.

**Right Side in front of Problem List Section - File in the order listed below.**

- Dialysis Access History Log, DOC-3449

**Problem List Section - File keeping like documents together with most recent on top.**

- Dialysis Program Patient Care Conference Summary Evaluations, DOC-3519

**Data Base Section – File documents in the order listed below.**

- Admission Data Base, Hemodialysis, DOC-3405A

**Progress Notes Section - File documents in any order with most recent on top.**

- DCI Hemodialysis Monthly Summary, DOC-3486
- Dialysis Progress Notes, DOC-3021A
- Peritoneal Dialysis Monthly Clinic Visit, DOC-3684

**Prescriber’s Orders Section- File documents in any order with most recent on top.**

- Peritoneal Dialysis Prescription Form, DOC-3683
- Prescriber’s Orders - Standard Orders-Hemodialysis, DOC-3023D
- Prescriber’s Orders – Standard Orders – Peritoneal Dialysis, DOC-3023W

**Consultations Section- File documents in any order with most recent on top.**

- Hemodialysis Access Referral – New Access, DOC-3555
- Hemodialysis Access Referral – Existing Access, DOC-3556
- Renal Transplant Evaluation Dialysis Program, DOC-3422

**Laboratory Results Section - File documents in any order with most recent on top.**

- Hemodialysis Laboratory Summary, DOC-3512

**Flow Sheets Section – DOC-3423 should always be on top followed by other documents intermixed with most recent on top.**

- Hemodialysis Treatment, DOC-3423
- Anemia Management, DOC-3685
- CRIT-Line Monitor Flowsheet, DOC-3687
- Fall Assessment Tool, DOC-3664
- Hemodialysis Exercise Flow Sheet Pedal Cycle, DOC-3679
- Peritoneal Dialysis Daily Flowsheet, DOC-3677

**Medication Section – File documents in the ORDER LISTED BELOW keeping like documents together with most recent on top.**

- Hemodialysis Medication List, DOC-3513
- Medication Administration Record (MAR) (CPS)
- Medication/Treatment Record, DOC-3026

**Miscellaneous Section - File documents in any order with most recent on top.**

- CAPD Training Check List, DOC-3700
- CCPD Cyclor Training Check List, DOC-3701
- End Stage Renal Disease Medical Evidence Report –Medicare Entitlement and Patient Regulations, DHFS 2728
- Hemodialysis Kardex, DOC-3413
- Hemodialysis Patient Orientation, DOC-3520
- Liberty Cyclor Training Test, DOC-3682

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- Manual Exchange Dialysis Quiz, DOC-3681
- Patient Instruction And Provider Documentation Hemodialysis Graft/Fistula, DOC-3530
- Peritoneal Dialysis CAPD Training Release Form, DOC-3698
- Peritoneal Dialysis CCPD Training Release Form, DOC-3699
- Peritoneal Dialysis Cell Visit Checklist, DOC-3697

**Consents/Refusals Section- File documents in any order with most recent on top.**

- Consent to Follow Hemodialysis Rules, DOC-3696