

DAI 500.50.06 – Management of DOC Health Care Record
Attachment A – Movement of HCR Checklist
Effective Date: 12/12/12

GATHER ALL PARTS OF HCR (Circle the "NA" when part does not exist)			
<input type="checkbox"/>		Medical Chart (gray/green cover)	Include all volumes of multi-volume Chart
<input type="checkbox"/>	NA	Medical Chart (STIA) (orange cover)	Include all volumes of multi-volume Chart
<input type="checkbox"/>	NA	Infirmary Chart (blue cover)	Include all volumes of multi-volume Chart. Only used during 2007-2008.
<input type="checkbox"/>	NA	Hemodialysis Chart (red cover)	Include all volumes of multi-volume Chart: Only maintained in Dialysis Units (DCI/FLCI)
<input type="checkbox"/>	NA	Medications Record (blue envelope)	DOC-3469 (males) or DOC-3469A (females)
<input type="checkbox"/>		Patient Request Folder	Manila folder
<input type="checkbox"/>		Psychological Records – Copies (white envelope)	DOC-3370 (males) or DOC-3370B (females)
<input type="checkbox"/>	NA	Patient Medication Profile	DOC-3034: if kept outside of Chart
<input type="checkbox"/>	NA	Medical Appointments-Off-Site	DOC-3347: if kept outside of Chart
<input type="checkbox"/>		Health Summary	DOC-3003: completed for releases
<input type="checkbox"/>		Dental Record (single pocket jacket or multi-section chart)	DOC-3041 (males) or DOC-3041A (females)
<input type="checkbox"/>		Psychological Service Unit (PSU) Record (yellow envelope or multi-sectioned green chart)	Envelope: DOC-3370A (males) or DOC-3370C (females)
COMPLETE THE FOLLOWING TASKS			
<input type="checkbox"/>	File all loose documents in HCR in accordance with DAI Policy 500.50.02 – Attachments A/AA.		
<input type="checkbox"/>	Medical Chart	Label volumes properly. Write date of transfer, release, death or escape in pencil on front cover of current Chart volume.	
<input type="checkbox"/>	Medical Chart (STIA)	Write date of transfer, release, death or escape in pencil on front cover of Chart. See HS P/P 500:02.01.	
<input type="checkbox"/>	Hemodialysis Chart	Does not move with HCR upon transfer if patient no longer undergoing hemodialysis. Send to CMR/IW/MR when hemodialysis completed. See HS P/P 500:02.03.	
<input type="checkbox"/>	Dental Record	Write date of transfer, release, death or escape in pencil on proper line on front of jacket/chart.	
<input type="checkbox"/>	Patient Medication Profile	Upon transfer, form may be placed inside front cover of Chart. Upon release, death or escape, tight file per DAI Policy 500.50.02 – Attachments A/AA.	
<input type="checkbox"/>	Medical Appointments-Off-Site	Upon transfer, form may be placed inside front cover of Chart. Upon release, death or escape, tight file per DAI Policy 500.50.02 – Attachments A/AA.	
<input type="checkbox"/>	Health Summary	Tight file form in Chart per DAI Policy 500.50.02 – Attachments A/AA.	
<input type="checkbox"/>	PSU Record	Upon transfer, release, death or escape, write date in pencil on outside of envelope/chart.	
<input type="checkbox"/>	Rolodex cards	Shred in confidential manner.	
<input type="checkbox"/>	<u>Transfers</u> : Place medications in medications bag, NOT in records bag.		
<input type="checkbox"/>	<u>Transfers</u> : Send all components of HCR to receiving facility with patient, including temporary holds.		
<input type="checkbox"/>	<u>Releases and escapes</u> : send all components in one mailing within one week of release to CMR/IW/MR.		
<input type="checkbox"/>	<u>Death</u> : Send all components to BHS Central Office on first business day following death.		