



Title: Policy and Procedure

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Section: 5 Care & Record Management

Date: June 1, 2018

Policy: HH5-1A.01 Clients Records

Replaces: December 1, 2017

Client Records

Policy: Written policy and procedures that established and implemented relating to the required content of the client record. An accurate record is maintained for each client/patient.

Procedure:

Family and Friends Office Manager is the primary person responsible for making sure that all clients records are stored in a locked file cabinet. The Office Manager has the master key to the file cabinet and keeps the master key locked in a locked key box located within the office. The Marketing Department is responsible for maintaining the Client Records documents for paper file (loading the documents into ClearCare Electronic Client File) and ensure that all forms have been obtained per the checklist. (See Client Admission Checklist)

- Identification data
- Names of family/legal guardian/emergency contact
- Name of primary caregiver(s)
- Source of referral
- Name of physician responsible for care
- Diagnosis
- Physician's orders that include medications, dietary, treatment and activity orders, (as appropriate to the level of care/service the client/patient is receiving)
- Signed release of information and other documents for Protected Health Information (PHI)
- Admission and informed consent documents
- Initial assessments
- Signed and dated clinical and progress notes
- Signed notice of receipt of Client/Patient Rights and Responsibilities statement
- Initial plan of care
- Updated plan of care
- Evidence of coordination of care/service provided by the PD with others who may be providing care/service, if applicable
- Ongoing assessments, if applicable
- Assessment of the home, if applicable
- Copies of summary reports sent to physicians, if applicable
- Client/patient response to care/service provided
- A discharge summary, if applicable
- Advance Directives, if applicable
- Admission and discharge dates from a hospital or other institution, if applicable

Departments Involved in Development: Board of Directors, Compliance Committee, Legal Counsel
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All previous versions are obsolete