

# Medical Record Forms Management for The Callier Center

## Definition

A **medical record form** is any UT Dallas Callier Center approved form filed permanently in the Callier Center medical record and identified by a document number assigned by the Medical Records Administrator.

A **document owner** is the department initiating a new or revised medical record form.

An **authorized form** is a form that has been approved through the Director of Clinical Operations.

An **unauthorized form** is a form that has not been approved through the Director of Clinical Operations (i.e., bootleg, maverick, or unprocessed department created form).

## Policy

The Director of Clinical Operations is responsible for approval of medical record forms. Any violation of this policy will be reviewed and addressed initially by Director of Clinical Operations with specific actions recommended to the Medical Records Forms Committee.

## Procedure

Requests to add or change a medical record form may be initiated by contacting Director of Clinical Operations (DCO). It is the responsibility of the document owner to notify DCO when a new form is created or an existing form is revised.

Analysis and research of existing forms will be conducted by the document owner so that creation of a new form may be avoided. The document owner will also determine if forms are compatible with required procedures and regulations, and if the form is funded.

All new and revised forms require approval by the DCO prior to official use, unless otherwise stated. Only approved forms will be retained in the Callier Center Medical Record Department. Exceptions will be approved by the DCO.

Representatives from each of the following areas may be contacted by DCO for input on a new or revised form:

- Clinicians
- Division Head or Program Manager
- Compliance Officer
- Security Officer

Once forms have been approved, they may not be altered in any way without re-submission to the DCO for review.

DCO will work with the Medical Record Administrator to catalog all medical record forms and periodically examine forms being used to determine if some may be recommended for elimination or combined with other forms.

The document owner will work with the forms vendor to coordinate printing of approved medical record forms. Only approved forms contained in the official listing maintained by DCO will be authorized for printing. Forms will be produced according to established medical record guidelines and construction.

## **References**

Texas Government Code, Chapter 441 et seq.