



Chart Assembly and Client Confidential Record Storage

Purpose: To ensure a consistent approach to chart assembly and confidential record storage

Guideline: Upon a client's enrollment into the Lehigh Valley Hospital - Pocono Nurse-Family Partnership (NFP) program, (Consent signed, Client enrolled in ETO system), a consistent approach to chart assembly and record storage will be maintained.

Staff List of Access to the files:



Procedure:

1. A travel chart (colored folder) and office chart will be created by the NHV upon a new client enrollment. Travel Charts will contain these items:
 - Client Contact Record and/or NFP Visit Schedule
 - Medical Assistance Contact Form (except MIECHV funded clients)
 - A flow sheet of facilitators and educational sheets for visits
 - Pink Copy of Completed Home Visit Form
2. The travel chart will be used by the NHV to maintain minimal records while away from the office (client contact record, NFP facilitators and educational sheets, Home Visit Form) and will be used to house required completed documents until they are brought back to the office for data entry and filing.
3. All documents (ETO forms, client checklists, Special Assessments, and Home Visit Forms) should be completed within 24 hours of the client's visit and brought into the office within 5 business days unless prior approval has been received by the nurse supervisor.
4. All completed documents will be turned into the NFP Program Assistant for data entry and/or filing to the permanent office chart. Client identification sticker to be placed on documents upon return to office.
5. All travel charts should be kept locked in the NHV's car or home when not housed in the office.
6. When in the office all travel charts should continue to be secure and locked if the NHV is not actively viewing her files.
7. A 6-part chart will be assembled for all clients. This chart will remain in the office in a locked drawer at all times. Each Chart will contain all completed documents below:
 - Client intake form
 - All consent forms
 - Demographic information
 - Letters or correspondence

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Stroudsburg, Pennsylvania 18360
570-426-1688*

- Completed ETO forms
 - Completed Home Visit forms (white copy)
 - Client Assessments
 - Visit Checklists
8. When client is discharge from the NFP program, travel and office chart will be given to Program Assistant for final data entry and filing into discharged client's cabinet.
 9. After child's second birthday, chart will be scanned to PMC computer and paper chart prepared for confidential shredding.
 10. Client records are filed and stored electronically in PMC data base for at least seven years.

Procedures for accessing the files in terms of court order, police investigation, and /or medical emergencies.

- Clients signed consent for NFP program will be obtained and placed on chart after initial home visit.
- All staff listed above are able to assist with file request as required by court of law, police, and/or medical emergency.
- Contact nurse supervisor/administrator with request.
- Only requested chart information will be released. The entire record may not be released unless specifically requested.
- Additional questions regarding request will be directed to LVH -P Corporate Compliance, 570-476-3534.
- All staff will be oriented to this guideline during orientation and access to both hard and electronic copies.

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