

Policy & Procedure Manual

**ASSEMBLY ORDER OF CENTRALIZED
RESIDENTIAL CLIENT RECORDS – RR-I-10**

POLICY:

All client records held centrally shall be assembled in the order listed below at the time of discharge or death or annual file purging .

PURPOSE:

To ensure that all filing of information on records is done in a consistent manner.

PROCEDURE:

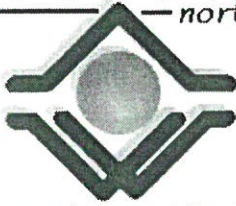
ASSEMBLY ORDER:

Section I

Autopsy Report
Proof of Death
Release Slip
Authority For Autopsy
Admission/Discharge Summary
Physician's Discharge/Expired Summary
Application For Admission
Consent(s) For Surgery
Physician's Progress Notes
Medical Visit Record
Consults, Psychological Assessments, Procedures
Physician's Orders & Progress Notes
Lab Reports
X-Rays, Scans, ECG's EEG's

Section II

Seizure Records
Seizure Records - Diagnostic
Vital Signs Records
Record of Restraint
Dietary Records



Personal Support Services

ASSEMBLY ORDER:
Section II (continued)

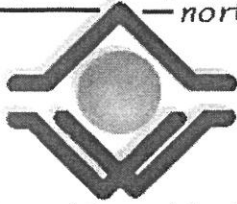
Medication Records
PRN Medication & Treatment Records
Treatment Records
MAR's

Section III

Nurse's Notes/Client Notes
Monthly Nurse's Notes Summaries
Nursing History & Assessment of Client
Personal History
Transfer Records
Ambulance Records
Immunization Records
Hot Weather Precautions

Section IV*

Multidisciplinary Notes
Action Plans (A, B, C)
Individual Program Plans
Individual Program Plan Follow-ups
Social Work Notes/Reports
Client Profiles
Occupational Therapy Notes
Psychometry Notes/Reports
Recreation Notes/Reports
Physiotherapy Notes/Reports
Respiratory Therapy Notes/Reports
Educational Assessments/Report Cards
Individual Training Programs
Individual Training Programs - Progress Notes
General Activities
P.T. Application For Temporary Guardianship
Certificate of Incompetence, Continuance &
Cancellation
Financial Statement
Application for Family Benefits
Consent in Inspect Assets
Other Financial Information



Personal Support Services

POLICY: RR-I-10
DEPARTMENT: Records
CATEGORY: Records Administration
EFFECTIVE DATE: April 2006
SUPERSEDES VERSION DATED: January 1998
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ASSEMBLY ORDER (continued):

Section V*

Correspondence - Post Discharge/Death
Information re: Prepaid Funeral Arrangements
Authorizations
Correspondence

***THESE TWO SECTIONS MAY BE IN ONE FILE FOLDER IF THE INFORMATION IS NOT TOO BULKY.**

RECOMMENDED BY: Manager of Finance

APPENDICES: 0

OPERATIONAL ACCOUNTABILITY: Administration, Finance, Client Services
Administration, Client Services

ORIGINAL POLICY DATE: March 1987

AUTHORIZED BY: Executive Director

SIGNATURE:

