

## **Patient Medical Record**

### **Standard MOI.03.00**

The hospital initiates and maintains a standardized, accurate medical record for every patient assessed or treated and determines the record's content, format, and location of entries.

#### **Intent of MOI.03.00**

The integrity of the patient medical record is critical to the quality, safety, and continuity of care, as it is the principal tool for communication between health care practitioners.

Every patient assessed or treated in the hospital has a single medical record assigned with unique identifiers, or some other mechanism used to link the patient with their medical record. The unique identifiers used in medical records are uniform throughout the hospital to ensure ease of locating and documenting on care of patients.

Processes ensure that each entry in the patient medical record identifies the author, the date, and the time of entries, such as for timed treatments and medication orders. There is also a process for how entries in a medical record are corrected or overwritten. This applies to any physician, practitioner, or documentation assistant.

Electronic functions in documentation by practitioners is becoming more common practice as electronic health records systems are being adopted. These can include copy-and-paste (the practice of selecting text or data from an original or previous source to reuse in a different location), templates, autofill, and autocorrect.

Electronic functions can have advantages but also pose safety risks of inaccuracy or duplication of information, as in the following examples:

- A health care practitioner may copy their own notes to reuse, copy a note from another practitioner, or copy from a prior admission without updating appropriately.
- A template used for an emergency examination may include data fields for all body systems. When a focused examination is completed, documentation in the template may indicate that a complete examination was performed and was within normal limits. If an examination did not occur, but is documented as normal, patients and health care practitioners may make treatment decisions based on this misinformation.

Hospitals implement processes to ensure the accuracy of data and information in patient medical records, including guidelines for the proper use of copy-and-paste, autofill, autocorrect, and templates in the electronic health record, as well as monitoring their use.

Hospitals also provide training and education on the proper use of electronic documentation functions to all staff who document in the medical record.

When both an electronic and hard copy of medical records are actively in use, hospitals implement processes to ensure consistency of information between sources. The primary medical record, whichever source, should be comprehensive and should not have missing information from the other source. Duplication of information should be avoided to ensure accuracy of the medical record.

Identifiers for patient medical records can include a combination of the following:

- Medical record number
- Patient's name
- Patient's date of birth

The content, format, and location of entries for a patient's medical record is standardized to help promote the integration among health care practitioners and continuity of care. The hospital determines the specific data and information recorded in the medical record of each patient assessed or treated, including the following:

- Patient demographics
- Medications
- Patient diagnoses/problem list
- Assessment/reassessment
- Testing results
- Care plan
- Health maintenance

The medical record needs to present sufficient information to do the following:

- Support the diagnosis.
- Justify the patient's care, treatment, and services.
- Document the course and results of the patient's care, treatment, and services.
- Facilitate the continuity of care.

Monitoring electronic function use in documentation may involve partnering with the electronic health record vendor to develop a way to track information that has been copied-and-pasted or auto-generated (for example, displaying this information in a different font or underlined) or using a manual process to review for copied-and-pasted information.

### **Measurable Elements of MOI.03.00**

1. The patient medical record contains the following:
  - At least two unique identifiers for each item (*See also* IPSG.01.00, ME 1)
  - Author of each entry
  - Date of each entry
  - Time of each entry
2. The specific content, format, and location of entries for patient medical records is standardized and determined by the hospital.
3. The hospital implements a process on the proper use of copy-and-paste, autofill, autocorrect, and templates and provides education and training on the process to all staff who document in the electronic health record.
4. The hospital implements processes to facilitate accurate and complete documentation in patient medical records. (*See also* HCT.01.01, ME 3)
5. There are processes for how entries are corrected, overwritten, reviewed, and authenticated.

### **Standard MOI.03.01**

As part of its monitoring and performance improvement activities, the hospital regularly assesses patient medical record content.

#### **Intent of MOI.03.01**

Each hospital determines the content and format of the patient's medical record and has a process to assess the content and completeness as part of the hospital's performance improvement activities and is carried out regularly.

Patient medical record review is based on a sample representing the practitioners providing care and the types of care provided. The review process is conducted by medical staff, nursing staff, and other relevant health care practitioners authorized to make entries in the patient medical record. The review focuses on the timeliness, accuracy, completeness, and legibility of the record and clinical information. Medical record content required by laws or regulations is included in the review process. The hospital's medical record review process includes medical records of all services provided to both current and discharged patients.