

Institutional Handbook of Operating Procedures
Policy 09.02.08

Section: Clinical Policies	Responsible Vice President: Senior Vice President, Chief Medical & Clinical Innovation Officer
Subject: Patient Records	Responsible Entity: Health Information Management

I. Title

Medical Record Forms/Document Types Management

II. Policy

The Health Information Management Department (HIM) coordinates the approval process for all [medical record forms and document types \(“doc type”\)](#).

Only approved forms will be retained in the UTMB medical record. Forms should be standardized across the Health System and not created for single clinical care locations.

When HIM identifies an unapproved form that has been filed in the medical record or scanned into Epic, the form will be sent to the document owner for review and submission to HIM for proper approval.

III. Procedures

- A.** Requests to create or change a medical record form/doc type must be submitted to HIM. It is the responsibility of the [document owner](#) to notify HIM whenever a new form/doc type is created or an existing form is revised. Forms will be created according to established medical record guidelines for page layout and construction. Doc types will be created based on need and to avoid redundancy.
- B.** Analysis and research of existing forms will be conducted by the document owner so that creation of a redundant new form may be avoided. The document owner will also ensure funding for the form.
- C.** All new and revised forms/doc types require approval by HIM prior to official use. For most consent forms, HIM will routinely require review and approval by Legal Affairs. For all forms, HIM may require proof of review and approval by department representatives and/or subject matter experts.
- D.** Forms which have been approved may not be altered in any way without re-submission to HIM for review and approval.
- E.** If needed, the document owner will work with the UTMB Print Shop to coordinate printing of approved medical record forms.

- F. HIM will periodically examine forms being used to determine whether some may be recommended for elimination or combined with other forms.

IV. Related UTMB Policies and Procedures

[IHOP - 09.02.13 - UTMB Medical Record Policy](#)

V. Additional References

[Forms & Document Type Management Guidelines March 2024.doc](#)

VI. Dates Approved or Amended

<i>Originated:</i> 04/01/1990	
<i>Reviewed with Changes</i>	<i>Reviewed without Changes</i>
01/10/2013	08/07/2019
08/24/2016	03/30/2022
07/24/24	

VII. Contact

Information HIM

Administration

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