



Monterey County Behavioral Health Policy and Procedure

Policy Number	423
Policy Title	Medical Record Purging
References	None
Form	None
Effective	September 15, 1989 Revised: July 26, 1993 Revised: July 31, 2001 Revised: April 6, 2006

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2 **Policy**

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4 Medical records that are too thick may be purged.

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6 **Procedure**

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8 1. Service delivery staff will determine which medical records need to be purged by the clerical staff/Medical
9 Records Technician.

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11 2. Medical records purged will contain a minimum of:

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13 a. Assessment/Community Client Functioning (after July 1, 1993) or Initial Psychosocial
14 Evaluation/Mental Health assessment/ Case Management Evaluation;
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16 b. Most recent annual update.
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18 c. Most recent care plans/coordination plans.
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20 d. At least the recent last three (3) months progress notes.
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22 e. At least the recent six (6) months medication summary.
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24 f. Recent physical exam/assessment.
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26 g. At least the recent twelve (12) months laboratory reports.
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28 h. Consents, i.e., treatment, medication.
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30 i. Client Opening/Closing Episode.
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j. Client Registration Form.

k. Current UMDAP.

l. Other information for which clinician specifically request not to purge.

3. Purged section of the medical records must have identifiers on each page and be filed in another chart with a name and case number and volume number, e.g., Volume 1.

4. The Medical Records Technician or clerical staff must indicate in the front corner of the medical record "Volume ____" of the current chart.