



## CHECKING-IN AND CHECKING-OUT CHARTS

### OVERVIEW:

- The Medical Record's Daily Log sheet shall be used for charts **checked-out during normal business hours**.
- Normal business hours are Monday through Friday 7:30 AM until 16:30/4:30 PM excluding Government of Guam holidays.
- If a chart is checked-out during normal business hours, but checked-in afterhours, the corresponding Medical Record's Daily Log sheet (i.e., log sheet for normal business hours) shall be completed, not a new entry on the Medical Record's Afterhours Log sheet.
- All log sheets and reconciliation reports will be kept in an easily accessible binder in Medical Records.

### Requests Made One (1) Day Prior:

1. Go to Medical Records, room 266.
2. Complete the following day's log (i.e., if you go to Medical Records on Monday May 12<sup>th</sup>, you would fill-in Tuesday May 13<sup>th</sup> Log). Fill in:
  - a. Consumer
  - b. Chart Number (if you know it, if you do not Medical Record's personnel will fill this in, although before checking out the record, make sure the chart number is filled in.)
  - c. Picking-up Staff's Name.
    - i. If you are making the request and will be physically picking them up the following day put your name here.
    - ii. If you will send someone else to pick them up the next day you will need to put that person's name here.
    - iii. If you are unsure, leave it blank and the person picking them up can fill it in.
    - iv. Print the name; do not use signatures; do not write a division/discipline. This is not the name of the person who you are retrieving the chart for or the name of the person who will be using it.

### Retrieval of Requests Made One (1) Day Prior:

1. Cross reference the charts you requested to the charts you receive.
  - a. If you requested a chart that you did not receive, you will find that Medical Record's personnel has placed an 'X' in the check-out time column, check-in date column, and check-in time column.
2. Make sure the chart number column is complete.
3. Make sure your name is listed as the picking up staff's name.
4. Fill in the Check-out time, with current time (military time).

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### Requests Made In-Person:

1. Go to Medical Records, room 266.
2. Complete the log for the current day. (Double check as there will always be two logs available for staff to complete). Fill in:
  - a. Consumer
  - b. Chart Number (if you know it, if you do not Medical Record's personnel will fill this in, although before checking out the record, make sure the chart number is filled in.)
  - c. Picking up Staff's Name: Print your name; do not use your signature; do not write a division/discipline. This is not the name of the person who you are retrieving the chart for or the name of who will be using it.

### Retrieval of In-Person Requests:

1. Cross-reference the charts you requested to the charts you receive.
  - a. If you requested a chart that you did not receive, you will find that Medical Record's personnel has placed an 'X' in the check-out time column, check-in date column, and check-in time column.
2. Make sure the chart number column is complete.
3. Fill in check-out time, with current time (military time).

### Requests Made by Telephone:

1. Call Medical Record's personnel at 647-5343/5422.
2. Tell the Medical Record's personnel the name of the consumer and/or chart number.
3. The Medical Record's personnel will simultaneously fill in the consumers name and chart number on the Medical Record's Daily Log sheet.

### Retrieval of Telephone Requests:

1. Cross reference the charts you requested are the charts you receive.
  - a. If you requested a chart that you did not receive, you will find that Medical Record's personnel has placed an 'X' in the check-out time column, check-in date column, and check-in time column.
2. Make sure the chart number column is complete.
3. Fill in your name, in the picking-up staff's name column.
  - a. Write your name; do not use your signature; do not write a division/discipline. This is not the name of the person who you are retrieving the chart for or the name of who will be using it.
4. Fill in check-out time, with current time (military time).

### Returning Charts:

- As a courtesy to Medical Record's personnel, return charts by 16:00/4:00 PM.
- Charts must be turned in by 1630/4:30 PM at the latest.
- Remember if you are returning a chart afterhours but checked-out the chart during normal business hours you must complete the corresponding Medical Record's Daily Log sheet, not create a new entry on the Medical Record's Afterhours Log sheet. You

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1. Find the corresponding Medical Records Daily Log sheet for the charts you are returning.
2. Cross reference that you are completing the information for charts that you are returning and not automatically assuming you have returned all the charts you checked out.
  - a. You cannot auto-fill the check-in date or check-in time.
3. Fill in the check-in date for each chart you are returning.
4. Fill in the check-in time for each chart you are returning with the current time (military time).
5. Place the chart in the designated area in Medical Records and Medical Record's personnel will return the charts to the shelves.

### Before 'Handing-off' Charts to another Staff Member:

- Staff cannot hand-off a chart to another staff member. The returning chart procedure and chart retrieval procedure must be followed.
  - A telephone call notifying Medical Record's personnel of a 'hand-off' does not meet the requirements for returning a chart.
- The staff member, who currently has the chart, must complete the returning chart procedure before another staff member can have the chart.
- Once the staff member has returned the chart, the staff member requesting the chart must complete the chart retrieval process.

### Chart Reconciliation:

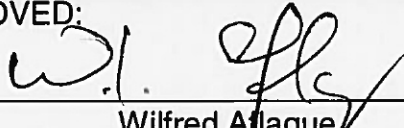

- Medical Record's personnel will do a daily reconciliation of charts that were not returned before 7:30 AM the following day.
  - If staff is staying after 16:30/4:30 PM and still need a chart, they are responsible for returning the chart before leaving the Department.
  - They will follow the returning chart procedure stated above.
- Medical Record's personnel will highlight any rows where staff has not checked-in a chart by the following day. They will send an email to the supervisor if a staff member has two (2) or more past-due charts.
- If the daily reconciliation shows that a staff member has not returned two (2) or more charts, the staff member is not allowed to check-out additional charts until the past-due charts are returned.

### **PROTOCOL:**

- You are ultimately responsible for ensuring the charts you say you checked-in and checked-out match up to the information on the Medical Records Daily Log sheet.
- Staff is required to return charts before going out to the field or leaving the Department.

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- The person physically taking the chart from Medical Records is held accountable for the chart's return.
- Staff cannot 'hand-off' a chart to another staff member. The returning chart procedure and chart retrieval procedure must be followed.
- Charts are given out on a first come, first serve basis.
  - If more than one (1) person requests the chart, whoever requested it first will be given the chart. Staff can converse amongst themselves if there is a discrepancy about who 'needs' the chart.
  - Medication Clinic has the highest priority. Therefore, if Medication Clinic and another staff member(s) have requested a chart, Medication Clinic will receive the chart.
- To improve the efficiency of Medical Records operations, and as a common courtesy to the Medical Record's personnel, make your chart requests one (1) day ahead of time.
- The staff members who request their charts ahead of time will be serviced first. Staff, who waited until the day of, will have to wait until the other staff is serviced.
- It is very important that you do not automatically assume the charts you are handed are the charts you requested. You must double check before completing the log sheet.
  - As long as you have double-checked, you can auto-fill (draw an arrow) in the check-out time column if you are collecting numerous charts at one time.
- It is very important that you do not automatically assume the charts you are returning match up to all the charts you checked-out. You must double check when filling in the check-in date and check-in time.
  - Ensuring the charts you checked out are the same charts you returned is too important to auto fill so you cannot auto-fill (draw an arrow) in the check-in date and check-in time column. You must fill in each row.
- If the daily reconciliation shows that a staff member has not returned two (2) or more charts, they are not allowed to check-out additional charts until the past-due charts are returned.

APPROVED:	Date:
	
Wilfred Allague Director	



MEDICAL RECORD'S DAILY LOG FOR:

MONTH, DAY, YEAR

	Consumer (Last Name, First Initial)	Chart Number	Picking-up Staff's Name (Not Printed Division. Not signature. Person physically picking up the chart)	Check-out Time (Mark with 'X' if request not filled)	Check-In Date	Check in Time	Reconciliation (Completed by Medical Record's Only)
Ex1	Guam, J	12345	Ms. Doctor	8:00	5/17/2012	13:00	
Ex2	Guam, K	6789	Mr. Doctor	X	X	X	
1							
2							
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DAILY PAST-DUE CHART REPORT FOR:

[MONTH], [DAY], [YEAR]

	Picking-up Staff Name	Consumer (Last Name, First Initial)	Chart Number	Date Emailed Supervisor	Mark with 'X' When Chart Returned	0= not able to check- out chart. ⊗ able to check-out chart	Notes
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