

**San Bernardino County
Department of Behavioral Health**

Medical Records Requiring Special Handling Procedure

Effective Date 03/2000
Revision Date 09/21/2015

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Purpose To ensure compliance and inform staff of the procedure for medical records requiring special handling.

Identifying Sensitive Records In order to identify a sensitive medical record, the staff provider will proceed as follows:

Step	Action						
1	Complete a Sensitive Chart form http://countyline.sbcounty.gov/dbh/Forms/COM007.pdf						
2	Place the Sensitive Chart form in the medical record. If the record is not available, give the form to the designated clinic medical records staff to be placed in the medical record.						
	<table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">If chart is ...</th> <th style="text-align: center;">Then, attach on top of ...</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Open</td> <td style="text-align: center;">front of chart</td> </tr> <tr> <td style="text-align: center;">Closed</td> <td style="text-align: center;">yellow Episode cover sheet</td> </tr> </tbody> </table>	If chart is ...	Then, attach on top of ...	Open	front of chart	Closed	yellow Episode cover sheet
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Open	front of chart						
Closed	yellow Episode cover sheet						

Request for Release of Sensitive Records The designated clinic medical records staff will follow instructions provided by the clinical staff for the consumer review or release of the medical record. The clinic medical records staff must contact the Medical Records Supervisor prior to release, at (909) 421-9350 or (909) 421-9355.

If Chart is	Designated Staff is ...
Open	The designated clinic medical record staff member will process the release
Closed	Medical Records Unit will process the release

Note: The release must be completed within fifteen (15) days after receiving the request.

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Medical Records Requiring Special Handling Procedure
Continued

**Handling
Highly
Confidential
Records**

Closed highly confidential medical records are placed in a locked confidential file in the Medical Records Unit.

Open highly confidential medical records are stored in a locked location within the clinic's medical record area.

Note: an out-guide is placed in the clinic's file room and in the Medical Records Unit's file room indicating the record is in the locked confidential file location. Medical Records Unit staff will update the electronic medical record location software to reflect the confidential file location.

**Request for
Release of
Highly
Confidential
Records**

The Medical Records Supervisor:

- Receives the request for release of Highly Confidential records.
 - Determines if the release request is valid and contacts the appropriate medical records staff member to approve or deny the release of information.
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**Related Policy
and/or
Procedure**

DBH Standard Practice Manual:

- [COM0908 - Medical Records requiring Special Handling Policy](#)
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