



Medical Records Standards Primary Care Practitioners

The medical treatment record shall be current, available, and include all the elements below.

1. An identification sheet that includes:
 - a. Patient's full name
 - b. Date of birth (month/day/year)
 - c. Sex (gender)
 - d. Name of next of kin, responsible person or an emergency contact
 - e. HAP ID must be documented in the HAP patient medical record
2. A health assessment shall be offered to each HAP patient and include:
 - a. Past medical history
 - b. Social history and personal health behaviors
 - c. Family history
 - d. A baseline physical examination or age/sex risk specific screening, or if in for episodic/acute care, recommendation to return for baseline examination or screening
3. Laboratory and radiology reports as ordered.
4. Consultation reports as ordered.
5. Copies of discharge summaries from inpatient health facilities.
6. Clinical/progress notes shall legibly reflect the following information:
 - a. Reason for each encounter/visit
 - b. Objective findings
 - c. Diagnosis/impression
 - d. Treatment plan
 - e. Dated
 - f. Signed
 - g. Legible
7. Allergies (prominently displayed) or notation that patient does not have any known allergy.
8. Immunization record that references historical and current data.
9. An entry in a clinical patient record shall be dated and signed by the provider of the service.
10. The clinical patient treatment record shall be legible and organized and maintained in a manner that facilitates review and reporting of clinical information.
11. An individual record is established and maintained for each patient.
12. A problem/diagnosis list shall be utilized and maintained for each HAP patient.
13. Advanced Directives are addressed with each adult patient and the completed documents are maintained in the patient record. Advanced care planning recommendation, discussion and appropriate information is provided to the patient and documented in the chart accordingly.

In addition, any **Preventive Service Guidelines** pertinent to the delivery of primary care adopted by HAP's Quality Management Committee shall be included for audit.

For care guidelines, visit <https://www.hap.org/providers/provider-resources/guidelines>.