(A) Policy Statement

The legal medical record (LMR) at The University of Toledo Medical Center (“UTMC”) includes the documentation of healthcare services provided to an individual in all delivery settings by our clinical and professional staff. The legal medical record at UTMC is a hybrid record utilizing both paper-based and electronic documents which are captured both manually and via electronic processes. The inpatient LMR is contained within Horizon Patient Folder. The ambulatory LMR is contained within athena ambulatory, as referenced in Policy 3364-101-02-01.

(B) Purpose of Policy

To define and identify the location of the patient’s legal inpatient health record for UTMC in accordance with applicable UTMC policy, federal, state, accrediting and regulatory requirements.

(C) Procedure After an inpatient is discharged, the patient documentation will be found in Horizon Patient Folder and will be considered the patient’s legal medical records. For inpatients discharged prior to utilization of Horizon Patient Folder the paper record will serve as the patient’s LMR.

The LMR will be comprised of scanned images, electronic documentation, and transcribed cold feeds from systems used by UTMC. The Horizon Patient Folder will act as a long-term repository for the patient’s inpatient stay.athenaambulatory.

1. Only individuals authorized to do so by Hospital Administration policy #3364-100-53-18 may make entries into the LMR.

2. The content of the LMR includes:
   a. Patient identification to include demographic and visit information
   b. Admission and discharge date
   c. Advance directives if known
   d. Clinician Documentation as applicable:
      • Admission order by physician
      • Communication records regarding care, treatment and services including telephone calls and emails. This includes external communication
      • Consents for procedures and tests performed for which consent is required
      • Consult reports
      • Discharge summary
      • History and physical
      • Nursing and ancillary department assessments
      • Orders placed
      • Order results
      • Operative and other invasive procedures performed
      • Progress notes
      • Surgical pathology and tissue reports
      • Treatment plans
   e. Medication Documentation as applicable:
      • Medications ordered
3. The LMR may include source data. Examples of source data include treadmill tracings, etc.

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<thead>
<tr>
<th>Approved by:</th>
<th>Review/Revision Date:</th>
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<tbody>
<tr>
<td>Daniel Barbee, RN, BSN, MBA</td>
<td>6/22/2011</td>
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<tr>
<td>Chief Executive Officer - UTMC</td>
<td>6/1/2014</td>
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<td>Date</td>
<td>6/1/2017</td>
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Review/Revision Completed By:
HAS
Health Information Management
Legal Department

Next Review Date: 6/1/2020

Policies Superseded by This Policy: 7-53-06 Legal Medical Record