



<p>Team Name: Health Information Services</p> <p>Team Lead: Manager Health Information Services</p> <p>Approved by: Regional Lead – Corporate Services & Chief Financial Officer</p>	<p>Reference Number: ORG.1410.PL.005</p> <p>Program Area: Health Information Services</p> <p>Policy Section: Health Information</p>
<p>Issue Date: October 19, 2022</p> <p>Review Date:</p> <p>Revision Date:</p>	<p>Subject: Thinning of Documents from Client Charts in Clinical Areas/Programs</p>

Use of pre-printed documents: Users are to refer to the electronic version of this document located on the Southern Health-Santé Sud Health Provider Site to ensure the most current document is consulted.

*Words in **bold** can be found in the definitions.

STANDARD GUIDELINE SUBJECT:

Thinning of Documents from Client Charts in Clinical Areas/Programs

PURPOSE:

To provide direction to staff about the **thinning** of chart forms and documents from paper-based **client charts**.

DEFINITIONS:

- Client** – a recipient of health services, which may be called a client, patient or resident.
- Client chart** – refers to the client health record used in the clinical area/program i.e. Acute Care, Home Care, and Personal Care Home (PCH). Upon discharge, the **client chart** may be referred to as the ‘Health Record’ for Health Information purposes.
- Current copy** – is the most recent document/chart form.
- Permanent** – is the document/chart form that remains on the **client chart** indefinitely during the episode of care.
- Thinning** – a process whereby excess documents/chart forms that no longer reflect the current plan of care are removed from the binder containing the **client chart** in the clinical area/program.

PROCEDURE:

1. The **client chart** is reviewed regularly to determine if **thinning** is required.

2. Chart documents/forms within the **client chart** may be thinned according to **client** situation, requirements of the region, to the applicable clinical area/program guideline, and/or available storage. Consultation with the nursing manager/supervisor may be made if additional **thinning** of documents/chart forms is required.
 - ORG.1410.PL.005.SD.01 Thinning of Documents from Client Charts in Clinical Area - Program Guideline – Acute Care
 - ORG.1410.PL.005.SD.02 Thinning of Documents from Client Charts in Clinical Area - Program Guideline - Home Care/Nursing
 - ORG.1410.PL.005.SD.03 Thinning of Documents from Client Charts in Clinical Area - Program Guideline - PCH and Transitional Care Centres
3. Remove (thinned) documents keeping them in chart order and store securely – ie. file folder, clipped together
4. Ensure removed chart documents/forms are kept in as close proximity to the care area. In Acute Care when space does permit storage of thinned documents on the unit, contact Health Information Services Department to discuss options for storage.
5. When the **client chart** is thinned, a notation is made on the front of the **client chart**/binder that states the date the **client chart** was thinned (see ORG.1410.PL.005.FORM.01 Thinning of Documents from Client Charts Tracking Form).

SUPPORTING DOCUMENTS:

ORG.1410.PL.005.FORM.01	Thinning of Documents from Client Charts Tracking Form
ORG.1410.PL.005.SD.01	Thinning of Documents from Client Charts in Clinical Area - Program Guideline – Acute Care
ORG.1410.PL.005.SD.02	Thinning of Documents from Client Charts in Clinical Area - Program Guideline - Home Care/Nursing
ORG.1410.PL.005.SD.03	Thinning of Documents from Client Charts in Clinical Area - Program Guideline - PCH and Transitional Care Centres

REFERENCES:

ORG.1410.PL.001 Client Chart (Health Record) Order