

**SECTION - COMMITTEES  
ADMINISTRATIVE DIRECTIVE NO. 234  
(Replaces AD 234 dated 10/6/2005)**

Effective Date: September 7, 2006

**SUBJECT: HOSPITAL FORMS MANAGEMENT COMMITTEE**

**I. PURPOSE**

The purpose is to monitor, maintain, improve record and forms management in order to oversee, regulate, and communicate information regarding documentation forms/formats involving Individual care and various forms used within the facility.

**II. AUTHORITY**

Government Code, Sections 14740-14772 (State Records Management Act).  
Government Code, Section 6250-6260 (California Public Records Act). Civil Code, Section 1798 et seq. (Information Practices Act of 1977). State Administrative Manual, Sections 1601-1653.1. Special Order No. 507 (Department of Mental Health, dated September 1, 1995).

**III. POLICY**

It is the policy of Coalinga State Hospital (CSH) to have all local forms, new, revised, or pilot projects reviewed and approved by this committee. Original Department of Mental Health (DMH) forms and revisions are brought to the committee after review by the Documentation Committee.

**IV. METHOD**

- A. All forms used by CSH are reviewed and placed in one of the following categories:

**Departmental Forms:**

Forms that are designed to be used within a specific department or unit. They are not filed in the medical record, and that are not routed out of the specific area, will be given an assigned number specific to their department.

**Pilot:** Forms used on a trial basis for a specified time frame (90 days).

**CSH:** Form that are specific to CSH and for which a comparable MH form is not available; forms that are no longer printed by DMH, and have an identified need.

## HEADQUARTERS GENERATED:

These include forms mandated via the Wellness and Recovery system, or mandated via other external factors such as legislation, special orders, or external agencies needs.

- B. All proposed new, revised, or pilot forms must be submitted to the committee for review.
  - a. They will be submitted in electronic format.
  - b. They will have an attached note explaining the intended use, approximate annual usage, and any specifics regarding printing (NCR paper, colored paper, etc.)
  - c. Forms that are intended for use in the chart must be formatted with the addressograph box at the bottom right, and the form title, filing instruction, distribution, confidentiality statement and CSH # on the bottom left.
- C. Forms Management review may result in
  - a. Approval for use
  - b. Approval as a pilot for a specified time frame
  - c. Return to originator: Another form is available and designed for use; more information needed; corrections; clarification; or for suggestions or recommendations to improve the form
- D. If a form is approved as a "pilot," it will be processed with a CSH#, labeled "Pilot - date - time frame." Once the pilot time frame is concluded, the originator will be rescheduled for the committee meeting and will resubmit the piloted form with any needed changes/additions.
- E. Forms specific to given areas of our combined documentation system, must be reviewed by the respective group to provide a mechanism for review of revisions/additions and to allow for input to such recommendations. Currently we have parts of the Mental Health Documentation System, the Wellness and Recovery Model Support System (WaRMSS), and soon the "I CaNotes Electronic Charting System."
- F. The Forms Management Committee monitors local forms to ensure that duplications do not occur, and recommends removal of any local forms, which are superseded by other state or departmental standard forms.

V. MEMBERSHIP

- Chair: Appointed by Executive Director
- Members: Health Information Director
- Documentation Committee Representative
- Unit Supervisor Representative
- Social Work Service Representative
- General Services Representative
- Central Program Services
- Nursing Representative
- Trust Representative
- Medical/Psychiatric Representative
- Standards Compliance Representative

The committee reports to the Executive Director who appoints the chairperson and members. Appointments are permanent unless changed by the Executive Director.

VI. MEETINGS

The committee meets at least quarterly, more frequently if needed, at a time and place designated by the Chair.

VII. MINUTES

Minutes are in standard hospital format and are circulated to members, Departmental Forms Coordinator, and Executive Director.



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W. T. VOSS  
Executive Director