



## INDIANA DEPARTMENT OF CHILD SERVICES CHILD WELFARE POLICY

**Chapter 8:** Out-of-Home Services

**Section 27:** Maintaining Health Records - Medical Passport

**Effective Date:** July 1, 2023

**Version:** 5

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### POLICY OVERVIEW

Maintaining accurate written and/or electronic documentation of health care services received for children in out-of-home care is essential to ensure continuity of care and protect the health and safety of children in out-of-home care.

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### PROCEDURE

The Indiana Department of Child Services (DCS) will maintain written and/or electronic documentation of health care services received by children who are:

1. Under the care and supervision of DCS; and
2. In out-of-home care.

**Note:** A summary of the child's medical history should be included in the child's Case Plan/Prevention Plan.

Each child placed in out-of-home care will be issued a Medical Passport, which must remain with the child and in the possession of the child's resource parent or residential treatment facility throughout all out-of-home placements. The following forms must be included with the Medical Passport and MUST be maintained in hard copy and/or electronically:

1. Statement of Care and Supervision/Authorization for Health Care Card and/or Authorization for Health Care Form;
2. Consent to Release Mental Health and Addiction Records;
3. Record of Medical Treatment; and
4. Log of Medical Treatment.

**Note:** Despite being called a "medical" passport, the child's Medical Passport is intended to be a record for a broad range of health care services the child receives including, but is not limited to: medical, dental, mental health, developmental, vision, hearing, and speech care. Specialized treatments, such as substance abuse, behavioral counseling, and chiropractic therapy are also considered as health care, and must be documented in the child's Medical Passport and/or in the case management system.

Every child's health care records are kept in at least one (1) of two (2) places:

1. In the child's Medical Passport; and/or
2. Electronically in the case management system, in the "Health Information" card on the child's person page. The records in the case management system serve two (2)

functions:

- a. The records enable the Family Case Manager (FCM) to review the child's health care information at any time, and
- b. The records serve as a "backup" in case the Medical Passport is lost.

**Note:** If a child is admitted to a residential treatment facility and the child is prescribed psychotropic medication, the provider will upload a report in KidTraks every 30 calendar days that contains health care information (e.g., medical treatment and psychotropic medication). The residential treatment facility shall obtain this report from the prescribing licensed physician at least every 30 days for each child receiving psychotropic medication. The written report shall state the reasons medication is being continued, discontinued, or changed, as well as any recommended changes in the treatment goals and planning. The report shall be based on the licensed physician's review of reports by staff as well as the physician's actual observation of the child (the physician must actually observe the child at least every 90 days).

The FCM will:

- i. Review the 30-day report and all reports that contain a physician report/update stating the reasons medication is being continued, discontinued, or changed, as well as any recommended changes in the treatment goals and planning; and
- ii. Ensure all reports are uploaded into the case management system noting the "Subject Matter" as "Health Info" and the "Content Type" as "Medication" and add descriptive information about the document (e.g., Psychotropic Medication Review, or 30-day treatment report) in the description box.

**Note:** Medical records may be kept organized in a folder or binder with the child's Medical Passport as an alternative to recording the information directly in the Medical Passport.

The FCM will complete the following steps prior to each placement or as soon as possible thereafter:

1. Review the child's medical history at the initial Child and Family Team (CFT) Meeting (see policy 5.07 Child and Family Team Meetings). Issue a new Medical Passport if one (1) has not yet been issued or the Medical Passport is missing, and gather as much information as possible on the child's health care history from any of the following sources:
  - a. The child,
  - b. Previous health care providers,
  - c. The child's parent, guardian, or custodian,
  - d. Other family members,
  - e. Previous resource parents, and
  - f. Existing electronic medical records.

**Note:** If the FCM is not able to obtain historical health care information about the child prior to the initial visit, the FCM must provide a copy of the information to the resource parent when the historical health care information becomes available. See policy 8.01 Selecting a Placement Option for additional guidance regarding the initial visit.

2. Record any gathered information in the new or existing Medical Passport and/or update the case management system.

**Note:** Ensure documents uploaded in the case management system note the “Subject Matter” as “Health Info” and the “Content Type” specific to the type of document such as “Authorization for Psychotropic Medication, Health record, Immunization record, Medication” and provide descriptive information about the document in the description box.

At the time of placement or within three (3) calendar days of placement, the FCM will:

1. Give the child’s Medical Passport to the resource parent or residential treatment facility;
2. Explain to the resource parent or residential treatment facility:
  - a. The Medical Passport must remain with the child, and
  - b. It is the resource parent’s or residential treatment facility’s responsibility to record all health care information in the Medical Passport and/or ensure the FCM has access to the electronic medical records maintained by the child’s health care provider.

**Note:** The resource parent or residential treatment facility must communicate to the FCM information about every health care visit the child received so the FCM is able to update the child’s health care records in the case management system.

3. Review the information contained in the Medical Passport and/or electronic medical records with the resource parent or residential treatment facility, calling attention to the following:
  - a. Identified issues (e.g., diagnoses and allergies),
  - b. Necessary treatment programs (e.g., psychotropic medications and appointments),
  - c. Pending examinations and appointments, and
  - d. Any existing electronic medical record access information.

**Note:** The FCM may photocopy or take a photo of recent entries made in the Medical Passport and print electronic medical records as a way of capturing the new information so that it may be entered and uploaded in the case management system.

4. Ensure all records are entered in the Medical Passport and/or electronically in the case management system.

Prior to a child’s transfer to a different placement or exit from out-of-home care (e.g., reunification or adoption), the FCM will meet with the current resource parent to review the child’s Medical Passport and/or any electronic medical records to ensure the information is up to date. If needed, the FCM will collect additional health care records from providers and assist with scheduling necessary appointments (see policy 8.29 Routine Health Care).

When the child achieves permanency (e.g., reunification, adoption, guardianship), DCS will ensure the permanent caregiver or the child, if released from out-of-home care after the child’s 18<sup>th</sup> birthday, receives a copy of the Medical Passport and/or electronic medical records and access information for any other electronic medical records (see policy 8.41 Transitioning from Out-of-Home Care).

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## RELEVANT INFORMATION

### Definitions

N/A

### Forms and Tools

- [Authorization for Health Care \(SF54247\)](#)
- Case Plan/Prevention Plan (SF 2956)- Available in the case management system
- [Consent to Release Mental Health and Addiction Records \(SF51128\)](#)
- [Log of Medical Treatment \(SF45091\)](#)
- [Medical Passport \(DCS Pamphlet 036\)](#)- Also available in hard copy
- [Record of Medical Treatment \(SF45092\)](#)
- [Statement of Care and Supervision/Authorization for Health Care \(SF45093\) Card](#)

### Related Policies

- [5.03 Engaging the Family](#)
- [8.26 Authorization for Health Care Services](#)
- [8.29 Routine Health Care](#)

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## LEGAL REFERENCES

- [IC 31-28-0.5: Electronic Records](#)
- [IC 31-28-1: Health Summary Records of Children Receiving Foster Care](#)
- [IC 31-28-2: Medical Records of Children Receiving Foster Care](#)
- [IC 31-28-3: Medical Passport Program for Children Receiving Foster Care](#)
- [465 IAC 2-11-73: Psychotropic medication](#)

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## PRACTICE GUIDANCE – DCS POLICY 8.27

*Practice Guidance is designed to assist DCS staff with thoughtful and practical direction on how to effectively integrate tools and social work practice into daily case management in an effort to achieve positive family and child outcomes. Practice Guidance is separate from Policy.*

### **Medical Passports for Children in Residential Facilities**

It is the policy of DCS to provide a Medical Passport for each child in out-of-home care, including a child admitted to a residential facility. It is the responsibility of the caregiver (including a residential facility) to keep the Medical Passport updated, and the FCM must verify regularly that this occurs.

### **Children Placed in another Indiana County or Out-of-State**

When a child is placed in out-of-home care in a different Indiana county or out-of-state, the same policies and procedures apply. The supervising FCM will work with the resource parent to ensure that the child's Medical Passport is kept up to date and/or the FCM has access to the electronic medical records maintained by the child's health care provider.

### **Updating the Medical Passport at Health Care Appointments**

Each time a child receives a health care examination or treatment, which will not be recorded by the medical provider in an activated electronic medical record account, the child's Medical Passport must be presented to the health care professional who attends to the child. The professional must be asked to complete applicable portions of the child's Medical Passport. If the professional is not willing or able to update the Medical Passport onsite, the FCM or resource parent must obtain a complete briefing on the details of the examination or treatment and complete applicable portions of the Medical Passport.

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