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## CREATE OR REVISE A CLINICAL FORM

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1. Prepare a draft of the new form or revision. There are three categories of forms:
  - a. Clinical form for inclusion in the medical record
  - b. Customizable information for the patient (e.g. discharge instructions)
  - c. Patient education materials
2. Ensure that the form does not contain Unapproved Abbreviations, which may be located at <http://www.healthsystem.virginia.edu/pub/his/intranet/unapproved-abbreviations.html>
3. Complete the Documentation Request Form #031031, available at <https://hit.healthsystem.virginia.edu/departments/health-information-services/records-management-scanning-and-clinical-forms/him-s-document-type-request/> or by request at 924- 2196. Provide as much detail as possible about the use and formatting of the form. A rough draft or the form is sufficient to show the general layout and substance of the form. If the form needs to go to P&CS there will be an hourly fee and you must provide a PTAO.
4. Fax the Documentation Request form and draft to Health Information Services (HIS) at 924-2883.
5. The HIS Administrative Specialist will contact you to schedule your form presentation at the next monthly meeting. At the meeting, committee members will review your form, make recommendations and/or ask questions, and either approve or deny the form request. If the form is similar to another approved form or the documentation functionality exists in Epic, the committee will not approve the form request.
6. If the form is approved, a draft of the form in accordance with established guidelines will be created. A .pdf proof will be sent to the requestor for approval or corrections.
7. Once the form is finalized, the document will post to the UVAHS's Forms Website, located at <http://www.healthsystem.virginia.edu/docs/manuals/forms/clinicalforms>
8. There is no cost for the development of forms. When forms are ordered through the website or at the Copy Center, a PTAO is required. Forms must not be photocopied but ordered from the Copy Center or printed from the Clinical Forms website to ensure it is the most current version and to retain clarity of the form and bar code for scanning.
9. For more detailed information, please see the HIS website under "Records Management, Scanning, and Clinical Forms" at <http://hit.healthsystem.virginia.edu/index.cfm/departments/health-information-services/records-management-scanning-and-clinical-forms/>
10. Contact the Health Information Services (HIS) with questions at 924-2196