

## RIM Guidance for Communication Books

The lifecycle of a departmental communication book is determined by its purpose. Consider the following questions to determine how it should be handled:

1. **Who** documents in these books?
  2. **What** is documented and how is it used?
    - *Is it documented anywhere else?*
  3. **Why** is it important to document?
- ❖ Communication Books belonging to HPEI executive positions are excluded from this guidance. Contact RIM for further information.

### A Communication Book is a RECORD when:

- Information is not documented anywhere else, and the book is the *only* source of that information.
- Entries support legal, regulatory, business, or care/treatment decisions (e.g., documentation relied on for compliance or accountability).
- Entries trigger or authorize actions (e.g., follow-up tasks, decision-making).
- Staff reference the book to perform duties or make decisions (ongoing operational value).
- When the book is used to verify payroll or scheduling, it becomes a payroll record and must be processed with payroll records.

### A Communication Book is TRANSITORY when:

- All information is fully documented elsewhere in a record (e.g. patient/resident chart, personnel file, etc).
- Entries do not influence decisions, actions, or obligations.
- Information only serves as short-term reminders or convenience notes and holds no lasting business value.

### Final Decision when the Communication Book is full or no longer referenced:

- ❖ When it is a record, contact RIM @ [healthpeirim@ihis.org](mailto:healthpeirim@ihis.org).
- ❖ When transitory, place into confidential shred.
- ❖ If the book is referenced, consider retaining it until no longer referenced.