

## Administrative Policy

- 1 OPTIONS recognizes the need to maintain accurate and comprehensive records for all operations. To ensure the maintenance of accurate records, the following individuals will be responsible for the following records with corresponding record retention schedule:
- 1.1 Chief Executive Officer
    - Board Records 7 yrs
    - Administrative Records 7 yrs
    - Strategic Planning Records 7 yrs
  
  - 1.2 Chief Operating Officer
    - Program Descriptions 3 yrs after it closes
    - Incident Reports 7 yrs
    - Reports for Regulatory Bodies 7 yrs
  
  - 2.3 Chief Financial Officer
    - Financial Records 7 yrs
    - Payroll Records 7 yrs
    - Insurance Information/Records 7 yrs
  
  - 2.4 Human Resource Director
    - Personnel Files 7 yrs after termination
    - Staff Schedules 1 yr
    - Staff Evaluations 7 yrs after termination
    - Training Schedules & Records 7 yrs after termination
    - In-Service Records 3 yrs
  
  - 2.5 Director of Programs
    - Register of Supported Person 7 yrs
    - Safety Records 7 yrs
    - Q/A Records 3 yrs
  
  - 2.6 Information Services Manager
    - Sub-Contractors 7 yrs after termination
    - Health Insurance Information & Records 7 yrs after termination
  
  - 2.7 Program Managers
    - Supported Person Files 7 yrs after discharge
    - Staff Meeting Minutes 1 yr
    - Supported Person Meeting Minutes 3 yrs
    - Duty Roster 1 yr
    - Food Account Records 7 yrs
    - Maintenance Checks 7 yrs
    - Data Collection for ISP & Monthly Reports 7 yrs after discharge

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Specific Program Safety Records 7 yrs

2.8 Program Supervisors  
Medication Log 7 yrs after discharge  
Mileage Log (Van) 3 yr  
Weekly Menus 1 yr

2 Medical records will be kept in locked file cabinet, or in a storage area secured by a locking door. The file cabinet or storage area will safeguard against loss, destruction, or unauthorized use.

4 Supported person records will be transferred to archival storage 12 months from the date a person is discharged from OPTIONS. Files may be purged with records a year or older placed in archives. Administrative records will be transferred to archival storage 12 months after the end of each fiscal year.

5 When records are destroyed it will be by either shredding or burning. Confidentiality of records will be maintained at all times. No individual or organization will be allowed to view any record maintained by OPTIONS without proper authorization and/or signed release statements from the person whose information is contained in the record, or from that person's authorized representative.

6. Supported persons shall have the right to view their own records.

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