

## PRAIRIE RIDGE CDDO

Policy Number: 19

Regarding: Record Retention

Effective Date: March 7, 2013

Revised Date: September 23, 2013; July 1, 2017

Review Date: July 1, 2018; April 25, 2019

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### Policy

All CDDO records shall be retained according to the schedule on the following pages. The Executive Director may give permission to destroy those records and files which are older than indicated by these time limits.

### Implementing Procedures

1. All dated materials may be destroyed during the next calendar year after its expiration. The Executive Director must give authorization to destroy records which have been identified as eligible for non-retention. The Executive Director will give the proper method of destroying records and files. Logs (A109) will be kept, under the Executive Director's discretion, of when records are destroyed.

## **Record Retention**

CDDO: (Log to be kept by CDDO Director)

- Unless otherwise specified, records will be kept 7 Years.
  - Affiliate Choice Form
  - Choice Forms
  - Affiliate Agreements
- Behavior Data for BASIS 1 Years
- BASIS 7 Years
- CDDO Application 10 Years or 1 Year after Death
- Eligibility Documentation 10 Years or 1 Year after Death
- Quality Assurance Reviews 1 Year
- HIPAA Accounting Record 6 Years