# Disclosure and Retention of Public Records

	Louisiana	Department of Health (LDH)
	Policy Number	42.2
	Content	LDH Policy on Disclosure and Retention of
DEPARTMENT OF HEALTH		Public Records
-	Effective Date	October 10, 2014
	Inquiries to	Office of the Secretary
		Bureau of Legal Services
		P.O. Box 3836
		Baton Rouge, Louisiana 70821-3836
		(225) 342-1112 FAX (225) 342-2232

LDH is committed to fostering, cultivating and preserving a culture of equity, diversity and inclusion. Our human capital is the most valuable asset we have. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities and talent that our employees invest in their work represents a significant part of not only our culture, but our Department's reputation and achievement as well.

If there is a discrepancy between an LDH Policy and a Program Office or facility policy, the LDH policy shall govern/overrule/supersede the conflicting section within the Program Office or facility policy.

# **I. POLICY STATEMENT**

- A. In accordance with the Louisiana Public Records Act ("PRA") (R.S. 44:1 *et seq.*, it shall be the policy of the Louisiana Department of Health (LDH) that all records are subject to disclosure under the PRA, with the exception of certain records specified in this policy, as provided by the statutory exceptions to the PRA as set forth in R.S. 44:1 or 44:4.1 or in other applicable state or federal law.
- B. As mandated by the PRA, any person of the age of majority shall have the legal right to inspect, copy, reproduce or obtain a reproduction of any public record.
- C. The PRA shall be liberally interpreted so as to extend rather than restrict access to public records by the public.
- D. All public records shall be preserved for at least the period of time specified for

such records in formal records retention schedules developed and approved by the State Archivist and Director of the Division of Archives, Records Management and History, of the Department of State. However, in all instances in which a formal retention schedule has not been executed, a public record shall be preserved and maintained for a period of at least three years from the date on which it was made. In LDH, records shall be retained for at least the periods of time shown on the office or facility's Records Retention Schedule of this policy. Documents related to services in a time of disaster shall be retained for 3 years after the disaster is closed out.

E. Examination of public records shall be conducted during regular office or work hours.

# II. PURPOSE

- A. The purpose of this policy is to provide guidelines for the custodians of public records within LDH for the release of information from LDH records and for the retention of such records in conformity with legal requirements. This policy is strictly limited to the disclosure and retention of information contained in records of LDH offices, divisions and/or facilities.
- B. The basic purpose of the PRA is to implement the inherent right of the public to be reasonably informed as to what public records contain and to the manner, basis, and reasons upon which governmental affairs are conducted, while at the same time balancing that right against the necessity for the custodian of the public records to act in the public interest by protecting and preserving public records against unreasonable dangers of loss or damage, or acts detrimental to the integrity of public records.

# **III. APPLICABILITY**

This policy shall apply to all documents, records, and information pertaining to LDH unless specifically exempted by statute as outlined in this policy.

# **IV. EFFECTIVE DATE**

The effective date of this revised policy is October 10, 2014.

# **V. EXCEPTIONS**

The PRA subjects all records of LDH to disclosure unless they are specifically excepted from disclosure by one of the identified exceptions set forth in R.S. 44:4 or 44:4.1 or in other applicable state or federal law.

# **VI. RESPONSIBILITIES OF THE RECORDS CUSTODIAN**

The custodian shall provide copies of public records to persons who request them. It shall be the responsibility of the custodian to abide by the statutory provisions of the PRA. As defined by the PRA, the custodian is the "public official or head of any public body having custody or control of a public record, or a representative specifically authorized by him to respond to requests to inspect any such public records".

In LDH, the custodian of records shall be designated by the appointing authority for each office and facility at which public records are maintained.

- a. Requests for public records preferably should be made in writing, should include the date of the request and the signature of the requester, and should identify the records being requested as specifically as possible. Verbal requests, whether made in person or by telephone, may be accepted as well, but the custodian should strongly encourage the requester to put the request in writing in order to protect the rights of LDH and of the requester.
- b. Immediately upon receipt of a public records request, the custodian or any other member of LDH staff should forward the request to the LDH Bureau of Legal Services, using email or fax if necessary. The Bureau of Legal Services will send a letter to the requester acknowledging receipt of the request by LDH and stating the date upon which it was received by LDH. The letter will also identify any potential confidentiality or legal privilege issues that are likely to be raised with regard to the records being requested.
- c. The custodian must extend reasonable comfort and facility to persons exercising the right of reviewing records; however, nothing contained herein shall prevent the custodian from protecting the records from alteration or defacement while they are being examined. The custodian or a designee must accompany the person reviewing a record at all times while they have the record so as to protect it against removal or alteration of any part of the record.
- d. The custodian should not question the person requesting examination of

a public record as to the purpose of the request. The fact that the person may volunteer the purpose does not constitute detailed inquiry by the custodian or by the court into the person's motive.

- e. The custodian shall inquire from persons applying for a public record their age and identification and request that they sign a register. If the request is not made in writing or does not include the date of the request, the register should indicate the date of the request.
- f. If any file contains information that is not part of the public records, the custodian must separate the nonpublic information before making the record available for examination. If any record responsive to a public records request contains information which is considered confidential under the PRA and/or other applicable law, such confidential information must be thoroughly redacted before the record is disclosed. If there is any doubt as to the confidentiality of any information contained in a responsive record, the LDH Bureau of Legal Services should be consulted to assist with that determination.
- g. A fee may be charged for copies of public records according to the Uniform Fee Schedule adopted by the Commissioner of Administration (LDH Policy No. 74.1). The Fee Schedule at present is 25 cents per page. Copies may be furnished without charge or at a reduced charge to indigent citizens of the state or to persons whose use of such copies is limited to a public purpose, including but not limited to use in a hearing before any governmental regulatory commission.
- h. Should information be requested which the custodian questions as to whether or not it is public, the custodian shall, within three days of receipt of the request for such information, exclusive of Saturdays, Sundays, and legal public holidays, notify the person making such request of his determination and the reasons therefore in writing. Assistance in determining whether a document is a public record may be obtained by contacting the LDH Bureau of Legal Services. A legal opinion may be required in such a determination; therefore, prompt attention to requests is important.
- i. If a record is not immediately available because of its active use at that time, the custodian shall certify this in writing to the person and further fix a day and hour within three days, exclusive of Saturdays, Sundays, and legal public holidays, for the exercise of the right granted by the law.
- j. Any person who has been denied access to a public record may institute proceedings for the issuance of a writ of mandamus, injunctive or

declaratory relief, together with attorney's fees, costs and damages, in the district court for the parish in which the office of the custodian is located. Further details outlining the enforcement and penalties upon violation of the PRA are found in R.S. 44:37, and may be obtained through the Division of Human Resources, Training and Staff Development.

# **VII. DISCIPLINARY ACTIONS**

Violations of this policy may result in disciplinary action up to and including dismissal.

# **VIII. REFERENCES**

LDH- Policy #74 – Uniform Fee Schedule for Copies of Public Records

# **IX. REVISION HISTORY**

Date	Revision
July 1, 1991	Policy created
April 4, 2011	Policy revised
October 10, 2014	Policy revised
January 29, 2020	Policy reviewed
May 29, 2024	Policy reviewed

### **ATTACHMENT A- Human Resources**

# **Records Retention Schedule**

Agency No	os.louisiana.gov Agency / Division / Section					T	1.	-	Indicate Use of Form _X_ORIGINAL SUBMISSION
	Dept. of Health & Hospitals / Office of Managerr Training and Staff Development	ent & Finance	/ Human Re	sources,			s Center		RENEWAL REPLACEMENT PAGE
item Number	Records Series Title	R	etention Pe	riod	~	-	Records		ADDENDUM PAGE
		In Office	In Storage	Total Retention	Security	Archival	State R	Vital	Remarks
1	Employee Personnel File	ACT + 70CY		ACT + 70CY	M	R	N	v	Active = until separation
2	Performance, Planning & Review (PPR)	ACT + 5CY		ACT + 5CY	c	5	N	1,	Active = until separation
3	PPR Request for Review	ACT + 5CY		ACT + 5CY	c	S	N	t,	Active - until separation
4	Confidential Files	ACT + 5CY		ACT + 5CY	C	S	N	l v	Active = until separation
5	Reports & Supporting Documentation	ACT + 5CY		ACT + 5CY	P	5	N	t u	Active = installend of Cy created or
6	Employee Grievances/Complaint/Appeals	ACT + 5CY		ACT + 5CY	c	S	N	1	Active = Until final decision rendered
7	EEO/Affirmative Action/Complaints	ACT + 5CY		ACT + 5CY	c	S	N	1	Active = until end of cy created a
8	EEO/Affirmative Action Reports	2 CY		2 CY	P	S	N	U	
9	I-9 Employment Eligibility Verifcation w/supporting documentation	ACT + 3CY		ACT + 3CY	с	S	N	1	Active = until separation
10	Medical Files (including Workers Comp)	ACT + 30CH		ACT + 300	y c	5	N		Active = until separation
ACT – Active F Y- Fiscal Yea CY – Calendar	ention Period Abbreviations Period (when used define term in remarks column) r (July 1- June 30) Year (Jan 1 – Dec 31)	Security Status P – Public Record M – May Contain C – Confidential I	d Confidential li	nformation	State Re Use Y – Yes N - No	cords	r Center		Agency Abbreviations EEO = Equal Employment Op
FY - Federal	: Year (Aug 1 - July 31) Fiscal Year (Oct 1 - Sept 30) WK - Week DY - Day(s) anent	Archival Process A – Transfer to St R – Retain in Age S – Review by St O – Other (Specif	ate Archives ancy Archives ate Archives		Vital Rec dentifica V= Vital I = Impoi J= Usefu	tion C tant	odə		

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item Number	Records Series Title	4	etention Pe			-	Records		ADDENDUM PAGE
		In Office	In Storage	Total Retention	Security	Archival	State R Center	Vital	Remarks
11	Leave Slips	5cr	1	504	с	S	N	U	
12	Drug Testing (forms/results/invoices)	3CY		3CY	с	5	N	1	
13	Group Benefits Invoices	70CY	1	7DCY	С	5	N		
14	Disclosure of Outside Employment	3CY	*	3CY	M	S	N	ú	
15	Vacancy & promotional announcements. Certificates of Eligibles SF9s. Applications	зсү	•	зсу	M	S	N	u	· · · · · · · · · · · · · · · · · · ·
16	FMLA	ACT + 5CY	- 4	ACT + 5CY	c	S	N	1	Active = until closed
17	CS Job Studies	5CY		5Cy	P	5	N	U	
18	CS Audit Files	5CY		5CY	Р	5	N	υ	
19	Job Descriptions	ACT + 5CY		ACT + 5CY	Р	S	N	υ	Active = until and of the cy aboushed
20	Policies & Procedures	PERM		PERM	Р	R	N	v	0
CT - Active I Y- Fiscal Yea	tention Period Abbreviations Period (when used define term in remarks column) ar (July 1- June 30) ir Year (Jan 1 – Dec 31)	Security Status P – Public Recor M – May Contain C – Confidential	d Confidential I	nformation	State Re Use Y - Yes N - No	cords	Center		Agency Abbreviations CS = Civil Service FMLA = Family+ Medical Leave Aet
FY - Federal	Ic Year (Aug 1 - July 31) I Fiscal Year (Oct 1 - Sept 30) WK - Week DY - Deyts) hanent	Archival Proces A – Transfer to S R – Retain in Age S – Review by St O – Other (Speci	sing Codes itate Archives ency Archives late Archives		Vital Rec Identifica V= Vital I = Impor U= Usefu	tion C	ode		leane Act

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	Human Resources Trains	ng + Stat	f Devel	apment			stds		REPLACEMENT PAGE
Item Number	Records Series Title	R	etention Pe		- E	MA	Records		_ADDENDUM PAGE
		In Office	In Storage	Total Retention	Security	Archival	State Centa	Vital	Remarks
21	Delegated Authority Documents	PERM		PERM	P	R	N	v	
22	Life insurance covered by OGB	ACT + 5CY		ACT + 5CY	c	S	N	,	Active - until separation
23	Life Insurance not covered by OGB	AC7 + 70CY		ACT + 70CY	с	S	N	1	Active = until separation
24	Payroll Records (timesheets)	+ ACT + 5C Y		ACT + 5CY	M	5	N	10	Active unoi the end of cy in which the
25	Supervisors file	ACT + 2CY		ACT + 2CY	M	S	N	10	Active = until supervision ends
26	Position Descriptions (SF-3s)	ACT + 5CY		ACT + 5CY	Р	S	N	1	Active = until employee separates from agency
	Emails (based on content for the same duration as records of similar content) IAW Retention Schedule								
ACT - Active	tention Period Abbreviations Period (when used define term in remarks column) ar (July 1- June 30)	Security Status P – Public Reco M – May Contain	rd	Information	State Re Use Y - Yes	cords	Center		Agency Abbreviations OGB = Office of Group Benefic
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	ic Year (Aug 1 – July 31) I Fiscal Year (Oct 1 – Sept 30)	Archival Proces			Vital Rec Identifica		ode		
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Agency	Approval	Date Signed	1	Secretary of	State,	State	Arch	ives	& Records Services Date Approved
		U							2

# Human Resources Record Disclosure Guidelines

The following items found in a personnel record have been deemed confidential and should not be released for examination:

- A. Records Excepted by Statute
  - 1. Medical/health records, claim forms, life insurance applications, requests for payment of benefits and all other health records of an employee and their dependents enrolled in the State Employees Group Benefits Program (R.S. 44.12).
  - 2. All medical records of an employee, all records of payment of compensation to an employee or his dependent, records with respect to the rehabilitation of an injured employee, employer reports of injury, claims by an employer or his dependent and other records which would ascertain the identity of the injured employee or his dependent in a Worker's Compensation action (R.S.23:1293).
  - 3. Personnel evaluation reports/comments used by the supervisor/employer to determine rating (R. S. 44.31). The fact that a rating is satisfactory, unsatisfactory or needs improvement is not considered to be covered under privacy provisions, but the actual written documents containing the rating comments are protected.
  - 4. Home address and telephone number of an employee if they have requested that the information be confidential.
- B. Records Deemed to be Protected by the Louisiana Constitution
  - 1. An employee's W-4's, L-4, or other tax withholding forms
  - 2. Garnishments/wage assignments
  - 3. Loan applications
  - 4. Payroll deductions
  - 5. Designated beneficiaries for life insurance and retirement benefits
  - 6. Applications for employment for persons who are not appointed to positions in the public service
  - 7. Any and all other information of a personal nature which has no bearing on state business
  - 8. Any medical records furnished by or to the Department to establish an applicant's or employee's fitness for employment.

- C. There are conditions under which the records listed in Articles A and B above may be released. These conditions are listed below:
  - 1. The records specified in Articles A and B above may be released to persons other than the affected employee with the written consent of the employee or as required by law or the courts.
  - 2. Information relating to dependents and beneficiaries may be provided to the dependents and beneficiaries of deceased employees. Requests for such information may be required to be in writing.
  - 3. In all cases, an employee shall have unlimited access to any and all information contained in or pertaining to their own personnel record. 42.1

### Attachment B- Office of Behavior Health

	Al Ater				2006 -C Division of Archives, Records Management and Histor
	Secretary of State				Fiorent Hardy, Jr., PhD
					State Archivist and Director
					P.O. Box 94125
					Baton Rouge, LA 70804-4125
			Reco	rds Retentio	n Schedule
	-				
	Department: Department of H	ealth and Hosp	oital - HR		
em	Agency: Office for Addictive I	Disorders	1-		-
lo.	Series Title	In Office	Records	Destroy	
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1	Job Descriptions	ACTIVE + 5CY		ACTIVE . SO	
		T		ACTIVE + 50	Y Active=until position is abolished
2	Audit Files	5CY		5CY	
	Crvil Service Certificates of				
-	Eligibles/SF9s/Applications	3CY		3CY	
4	Civil Service Job Studies	5CY			
		307		5CY	
	Confidential Files	ACTIVE + SCY		ACTIVE + SC	Y Active=until employee separates from apancy
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- 9	EEO/AAP Reports	2CY		207	
]	Employee Grievance/ComplainUAppea				
-4	File	ACTIVE + SCY		ACTIVE + 5C1	Y Active=until final decision on grievance
1	Employee Personnel Files	10700		ACTIVE +	
1	- population nes	ACTIVE + 70CY		70CY	Active=until employee seperates from agency
9	Family Medical Leave Act Files	ACTIVE + SCY		ACTIVE + SCV	Active=until closed
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10	Stoup Benefil Invoices	70CY		70CY	
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Ŧ	9s with supporting documentation	ACTIVE + 1CY		ACTIVE + 1CY	Active = Until employee seperates from agency
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C F Fiscal Year (July 1 - June 30)

Date Agency DHH C ive Disorders -HR  $r_{1}$ L E Secretary of Slate. Archives and Records Services Date

Unsigned Schedules will be Returned to Agency

Al Ater

Secretary of State

Division of Archives, Records Management and History Florent Hardy, Jr., PhD. State Archivist and Ovactor P. D. Box 64126 Baron Rouge, La. 72604-4125 www.bard.burd.en.co.

www.aps.louis.ana.gov **Records Retention Schedule** Department: Department of Health and Hospitals Agency: Office of Addictive Disorders Item Records Destroy No. Series Title In Office Center After Disposition and Remarks Poderal Grant Records includes proposels and awards) Achive + 1 CY 3 CY AcU+e • 4 CY Active = unsi gram is crosed or proposal is rejected. Budget Records (includes requests, working papers and tracking charts) 1 GY 3 CY CY Client Case Files (includes outpatient and inpationi records, progress notes, medical inisiony shedid, montal status eports, treatment plans, client data sheed, service fickets, status changelevaluation shaets, medication order sheals, consent to bearment form, consent to use Social Security number for Chont ID, flow sheets declarations of patient righte and dischärge summanes) Acive + 1 CY 0 CY Active + 7 CY Active > until case is cideed/integiment ends. Non-medical Client Case Files Active + 1 CY 3 GY Active + 4 C Y Active = un3i case is closed/treatment ends Infection Control Plans Pamaneni Pormananel Fire, Disesser and Loss Prevention Planc Permaneni Permananat Staff Meeting Notes 10 C.V 10 CY Client Referrais (Non-Admits) 3 CY з СҮ Litigation Files Active + 1 CY Antiue + 1 CY Active - Uniti eless is ingetion is resulted Accounting Files ( including, third party billing to private insurance companies, requisitions, journal sheets direct eervice lickels, ladger cards on crosed out chents, travel investees Nysican's requesi for paymont of fees purchase proofs, /eceiving reports, and telephone bills; CY 3 64 4 CY Contract Files (Includes supporting documentation and related correspondences Active + 1 CY 3 CY Active +4 CY Active + until constact expines State Office Directives from Health and Hospitals Active + 1 CY 3 C Y Active + 4 GY Active = Unit superseded State Office Directives from Office of Addictive Oleorders armanaci Permananak Reports (including program activities, elimative action, state vehicles and 4 neligblic patient fees CY зсү 4 CY Admission Books (including mase istings of patience names and data of Admission] t CY 3 CY 4 CV 6 Medicald/Medicare Cost Reports a CY 3 ÇY 6 C Y 17 Records Management Files Section's Time Sheets/ Leave Slips Permanen Permatianes 10 Overtime Approval ADUVE + 1 CY 4 CY 6 CY Active = unN employee separates from agoncy FY = Fiscal Year (July 1 - June 30) ce of Artifice Disorders Approval hard CY = Calendar Year (Jan 1 - Dec 31) NOTE: Records of deceased cilents follow same retantion as records series listed above. Oale Agency DHI Date Secretary of Stare, Archives and Records Service's SS ARC 932 Unsigned Schedules will be Returned to Agency

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	Secretary of State				Division of Archives, Records Management and History
					Florent Hardy, Jr., PhD. State Archivist and Director
					P.O. Box 94125
					Baton Rouge, LA 70804-4125
_					www.sosjouslana.gov
			Reco	rds Retentio	n Schedule
	Participation of the second seco				
	Department: Louisiana Depart Agency: Office of Mental Hea	rtment of Heal	th & Hospita	als.	
terr	Agency, once of mental ries	1	Records		
ło,	Series Title	In Office	Center	Destroy After	Disposition and Remarks
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	Correspondence	1 FY	2 FY	3 FY	
7	Consumer Complaints	Active + 3 FY		Active = 3 FY	Active = until resolved.
1	Continuing Education	3 14		2.5%	
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	Contracts	Active +1 FY	2 FY	Active + 3 FY	Active - until contract expires.
5	Fiscal Files	3 FY	7 FY	10 FY	
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7	Human Resource Files	Aclive + 70 FY		Active + 70 FY	Active = unteramployed separates from agency
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14	Program Files	1 FY	2 FY	3 FY	1
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Agency - DHH/Office of Mental Health Date 6101 (0/3/ Date

Unsigned Schedules will be Returned to Agency

	Al Ater				Division of Archives, Records Management and Histor
	Secretary of State				Florent Hardy, Jr., PhD
					State Archivist and Director
					P.O. Box 94125
					Balon Rouge, LA 70604-4125
			Beco	rds Retention	Http://www.sec.state_la.us
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	Department: Louisiana State Agency: Office of Mental Hea	Department of	Health & He	ospitals	
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	East Louisiana Mental Health System								X_ORIGINAL SUBMISSION	
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	Adult Medical Records (Civil)	ACT	10 FY	ACT+ 10 FY	1	c c	z	>	ACT=Until the end of the Fiscal Year in which patient is discharced	
	Adult Medical Records 9 (Forensic)	ACT	10 FY	PERM	0	er er	z	>	ACT=Until the end of the Fiscal Year in which patient is discharged Microfilm after ACT+ 10 FY	
	Non admitted client referrals	ACT	6 Mo.	Act + 6 Mo	0	0	z		Act = Until then and of the Month in which referral has expired.	
	Administrative Correspondence	Perm	Perm	Perm	×	~	z	>		
	General Correspondence	ACT+1FY	4 FY	ACT+ 5 FY	Σ	s s	z	-	ACT= until the end of the FY in which the record is created or received.	
	Correspondence/Memoranda/Policy Making	Perm	Perm	Perm	Z	~	z	>		
	TQM Surveys & Reports	ACT+1FY	9 FY	ACT+ 10 FY	0	so l	z	>	ACT= until the end of the FY in which the record is created or received	
	In Service Training	Act	3 FY	Act + 3 FY	Σ	0	z	-	Act = Until the end of the FY in which the employee separates from agency.	
	Annual Reports	Perm	Perm	Perm	۵.	۳	z	>		
	Cooperative agreements with other agencies	Act + 10 FY		Act + 10 FY		S	z	>	Act = Until the end of the FY in which the agreement expires or is terminated.	
ed Reta	Permitted Retention Period Abbreviations ACT – Active Period (when used define term in remarks column)	Security Status Codes	tus Codes	S	State F	Record	State Records Center Use	5	Agency Abbreviations	
cal Year	FY-Fiscal Year (July 1-June 30)	M - May Con	M - May Contain Confidential Information		Y - Yes	40			TQM = Total Quality Management	
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Date Approved

Secretary of State, State Archives & Records Services

Date Signed

Agency Approval

**Records Retention Schedule** 

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Attachment C- East Louisiana Mental Health System

Post Office B Agency No	Post Office Box 94125, Baton Rouge, LA 70804 Agency No Agency / Division / Saction				Http://	www.s	Http://www.sos.la.gov	8	rage z o o Indicate Use of Form
S Other and Services									Y ODICIVAL CLIDNICCION
	East Louisiana Mental Health System								
Item Number	Records Series Title	Ř	Retention Period	poi	£	ie.	spiose		
		In Office	In Storage	Total Retention	Securit	svidərA	State R Center	letiV	Remarks
11	Deeds/Mortgages	Perm	Perm	Perm	٩	œ	z	>	
12	Affirmative Action Reports/Guidelines and Plans	Act + 1 FY	Perm	Perm	٩	œ	z	>	Act = Until the plan is superseded.
13	State Vehicles Reports	Act + 2 FY	7 FY	Act + 9 FY	Σ	s	z	-	Act = Until end of the FY in which resolution of fitigation has been reached.
14	Ineligible Patient Fee Reports	Act + 1 FY	4 FY	Act + 5 FY	٩	ŝ	z	-	Act = Until end of the FY in which the record has been Audited
15	Policies and Procedures	ACT	Perm	Perm	٩	۲	z	>	Act = Until policy/procedure updated
16	Admission Log Books	ACT	PERM	PERM	U	۲	z	>	ACT= until the end of the FY in which the record was created or received.
17	Client Accident/Injury Reports	ACT	9 FY	10 FY	Σ	s	z	>	ACT= Until the end of the FY in which the matter was closed.
18	Employee Accident /Injury Reports	ACT+ 2FY	7 FY	Act + 9 FY	s	s	z	-	ACT= Until the end of the FY in which the matter is closed.
6	Staff Meetings Notes	ACT	9 FY	ACT+ 10 FY	۵.	s	z	>	Act = Until end of the FY in which the meeting was held.
20	Blue Prints	Perm	Perm	Perm	Σ	۲	z	>	
Permitted Ret ACT – Active P FY- Fiscal Year CY – Calendar	Permitted Retention Period Abbreviations ACT – Active Period (when used define term in remarks column) FY- Fiscal Year (July 1- June 30) CY – Calendar Year (Jan 1 – Dec 31)	Security Status Codes P - Public Record M - May Contrain Confidential Information C - Confidential Information	Confidential In Confidential In		State Records Center Use Y – Yes N – No	ords (	enter		Agency Abbreviations
AY – Academic Yea FFY – Federal Fisca MO – Months VIK - PERM – Permanent	r (Aug 1 – July 31) I Year (Oct 1 – Sept 30) - Week DY - Day(s)	Archival Processing Codes A - Transfer to State Archives R - Retain in Agency Archives S - Review by State Archives 0 - Other (Specify in Remarks)	Ing Codes ate Archives hcy Archives te Archives in Remarks)	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Vital Record Identification Code V= Vital I = Important U= Useful	ant C	ąę		

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	East Louisiana Mental Health System				-				_X_ORIGINAL SUBMISSION
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Number	Records Series Title	2		0	λı,	je/			ADDENDUM PAGE
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21	Garnishments	Act + 1	4 FY	Act + 5 FY	Σ	S			Act = Until the end of the FY in which the garnishment
22	Equipment Contracts	Act + 1	9 FY	Act + 10 FY	٩	s	z	>	Act = Until the end of the FY in which the equipment's useful if is reached
23	Professional Services Contracts	Act + 2 FY	7 FY	Act + 9 FY	s	s	z	-	Act = Until the end of the FY in which the contract excites or is terminated
24	Grants	Act +1 FY	5 FY	Act + 6 FY	٩	s	z	-	Act = Until the end of the FY in which the grant expires or is terminated
25	Volunteer Records	Act + 1 FY	4 FY	Act + 5 FY	N	s	z	-	Act = until the end of the FY in which the volunteering
26	Personnel Files	Act + 1CY	69 CY	Act + 70 CY	W	s	z	>	Act = until the end of the CY in which the employee separates.
27	Unsuccessful Applicants	Act	2 FY	Act + 2 FY	υ	ы	z	5	Act = until the end of the FY in which a successful applicant is hired or position is closed.
28	Evaluation and Performance Reviews	Act	4 FY	Act + 4 FY	z	ŝ	z	-	Act = Until the end of the FY in which the employee separates from agency.
29	Grievance Records	Act	10 FY	Act + 10 FY	×	s	z	-	Act = Until the end of the FY in which the matter has been resolved or case closed.
30	Employee Exposure and Medical Records	Act	Perm	Реш	U	œ	z	>	Act = Until the end of the FY in which the employee separates from agency.
Permitted Rei ACT – Active F	Permitted Retention Period Abbreviations ACT – Active Period (when used define term in remarks column)	Security Status Codes	odes	State	State Records Center Use	ords C	enter	È	Agency Abbreviations
FY- Fiscal Yea CY - Calèndar	FY- Fiscal Year (July 1- June 30) CY - Calendar Year (Jan 1 - Dec 31)	M - May Contain Confidential Information C - Confidential Information	Confidential In formation		Y - Yes N - No				
AY - Academi FFY - Federal	AY – Academic Year (Aug 1 – July 31) FFY – Federal Fiscal Year (Oct 1 – Sent 30)	Archival Processing Codes	ing Codes	Vit	Vital Record	ind Con Co	ę		
MO - Months	MO - Months WK - Week DY - Day(s)	R - Retain in Agency Archives	ate Archives hcy Archives	=>	V= Vital				
PERM - Permanent	anent	S - Review by State Archives O - Other (Specify in Remarks)	te Archives in Remarks)	- 5	I ≈ Important U= Useful	ant			
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Secretary of State, State Archives & Records Services Date Approved

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	ction				Vog.Br.sos.sos.dov	ww.so	s.ia.go	<u> </u>	Indicate Use of Form
	ntal Health System								_X_ORIGINAL SUBMISSION
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JOD Announcements		ACT+ 1 FY	1 FY	ACT+2FY	•	ر در ا	z	>	ACT= until the end of the FY in which records was
Application for Employment	ment	ACT+ 1 FY	1 FY	ACT+2FY	Σ	s	z	-	ACT= until the end of the FY in which records was created or received.
Employee Payroll		ACT+1FY	4 FY	ACT+ 5 FY	۵.	s	z	>	ACT= until the end of the FY in which records was created or received
Departmental Annual Reports	Reports	ACT+5FY	PERM	PERM	Σ	ĸ	z	>	ACT= until the end of the FY in which records was created or received
Pharmacy Records		Act + 1 FY	9 FY	Act + 10 FY	o	s	z	>	Act = Until end of FY in which patient is discharged
Narcotic Records		Act	5 FY	Act + 5 FY	0	s	z	>	Act = Until end of FY in which patient is discharged
Medication Logs		Act + 1 FY	9 FY	Act + 10 FY	U	s	z	>	Act = Until enc of FY in which patient is discharged
ACT - Active Period (when used define term in remarks column)	rm in remarks column)	Security Status Codes	Codes	0	tate Rec	Orde	enter	1	Anoneu Abbaniatione
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AY - Academic Year (Aug 1 - July 31)		C - Confidential Information	nformation		N - No				
FFY - Federal Fiscal Year (Oct 1 - Sept 30)	0	Archival Processing Codes	sing Codes	>	Vital Record	p			
MU - Months WK - Week DY - Day(s) PERM - Demonont		A – Transfer to State Archives	ate Archives	2 3	Identification Code	ion Co	ę		
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Records Retention Schedule ģ Louisiana Secretary of State Division of Archive

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Item Number	Records Series Title	ŭ	Retention Period	riod			ecords		REPLACEMENT PAGE ADDENDUM PAGE
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38	Fiscal Files	ACT +2 FY	8 FY	ACT+ 10 FY	S	S	z	>	ACT= until the end of the FY in which records was created or received.
39	Quarterly, Monthly, Semi-Annual Budget Reports	Act + 2 FY	7 FY	Act + 9 FY	Σ	S	z	-	ACT= until the end of the FY in which records was created or received.
40	Vendor Files	Act + 2 FY	7 FY	Act + 9 FY	×	s	z	>	ACT= until the end of the FY in which records was created or received.
14	Requisitions	Act + 2 FY	7 FY	Act + 9 FY	Σ	s	z	>	ACT≈ until the end of the FY in which records was created or received.
42	Cancelled Checks	Act + 2 FY	7 FY	Act + 9 FY	Σ	w	z	-	ACT= until the end of the FY in which records was created or received.
43	Bank Statements	Act + 2 FY	7 FY	Act + 9 FY	Σ	S	z	>	ACT= until the end of the FY in which records was created or received.
45	Purchase Orders	Act + 2 FY	7 FY	Act + 9 FY	Σ	s	z	>	ACT= until the end of the FY in which records was created or received.
46	Receiving Reports	Act + 2 FY	7 FY	Act + 9 FY	Ξ	s	z	>	ACT≋ until the end of the FY in which records was created or received.
47	Medicare & Medicaid Files	Act + 2 FY	7 FY	Act + 9 FY	U	s	z	>	ACT= until the end of the FY in which records was created or received.
48	Workers Compensation Records	Act	5 FY	Act + 5 FY	U	S	z	>	Act = Until the and of the FY in which the claim is resolved.
ACT - Active P	ACT – Active Period (when used define term in remarks column)	Security Status Codes	codes	0.	state R	ecords	State Records Center		Agency Abbreviations
CY - Calendar	r - riscar rear (Jury 1- June 30) CY - Calendar Year (Jan 1 - Dec 31)	P - Public Record	Confidential In		Use Y - Yes				
AY - Academic	AY - Academic Year (Aug 1 - July 31)	C - Confidential Information	formation		N- N				
FFY - Federal F	FFY - Federal Fiscal Year (Oct 1 - Sept 30)	Archival Processing Codes	ing Codes	>	Vital Record	cord			
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PEKM - Permanent	nent	R – Retain in Agency Archives	ncy Archives	> '	V= Vital				
		S – Review by State Archives	te Archives		I = Important	ortant			
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		In Office	In Storage	Total Retention	Securi	Archiv	State R Center	Vital		
64	Food Inventory	ACT+ 1 FY	2 FY	ACT+3FY	٩	s	z	ACT= until the end of the FY in which records was created or received.	which records was	
2 20	ORM Safety Audits	ACT+1 FY	9 FY	ACT+ 10 FY	υ	s	z	V ACT= until the end of the FY in which records was created or received.	which records was	
5	Menus	ACT+1FY	5 FY	ACT+ 6 FY	×	- 0	z	U ACT= until the end of the FY in which records was created or received.	which records was	+
76	Nutritional Assessments	ACT	6 FY	ACT+ 6 FY	N	s	z	<ul> <li>ACT= until the end of the FY in which records was created or received.</li> </ul>	thich records was	
20	Meal Count	ACT+1FY	5 FY	ACT+6FY	٩	s S	z	<ul> <li>ACT= until the end of the FY in which records was created or received.</li> </ul>	hich records was	-
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Agency Approval

Secretary of State, State Archives & Records Services Date Signed

Date Approved

### Attachment D- LA Commission for the Deaf ÷

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4	A Commission f	orther	sect		1044
	Secretary of State				rchives, Records Management and History Florent J. Hardy, Jr., PhD. State Archivist and Director P. O. Box 94125 Baton Rouge, LA 70804-4125 Http://www.scc.state.la.us
	spartment: Department of Social Services	Re	cords Retention Sc	hedule	
Ai	gency: Louisiana Rehabilitation Services	In Office	Records	Pag Destroy After	pelof4
-	Series Title Administrative &		Center		Disposition and Remarks
	Programmatic Records: Fiscal/Budget Records: Paid Files				
	raio rues	6 FY		6 FY	EDGAR
	Accounts Receivable	6 FY		6 FY	EDGAR
	Federal Reports	6 FY		6 FY	EDGAR
	State Reports	6 FY		6 FY	EDGAR
	Budget Documentation	6 FY		6 FY	EDGAR
	Validation Reports	6 FY		6 FY	EDGAR
	Social Security Reimbursement Records	6 FY		6 FY	EDGAR
	Purchasing Records	6 FY		6 FY	EDGAR
	Telephone Bills	6 FY		6 FY	EDGAR
	Travel Expense Reports	6 FY		6 FY	EDGAR
	Regional Office Personnel: Regional Office Payroll Time & Attendance Sheets/Leave Slips	6 FY		6 FY	EDGAR
	All Contracts:	Active + 10 FY		Active + 10 FY	Active = expiration date of the contract.
	Site Reviews	6 FY		6 FY	EDGAR
	Request for Proposals: - Funded - Non-Funded	10 FY 6 FY		10 FY 6 FY	EDGAR
	Grants	6 FY		6 FY	EDGAR

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Rehabilitation Services Administration's: Informational Memorandums	6 FY			
remorandums	OFY		6 FY	EDGAR
Reports	6 FY		6 FY	EDGAR
Contracts	Active + 10 FY		Active + 10 FY	Active = expiration date of contract.
Grant Awards	6 FY		6 FY	EDGAR
Grantee Reporting Forms	Active + 6 FY		Active + 6 FY	EDGAR Active = Grantee has met payback requirements.
State Plan	20 FY	Permanent	Permanent	Permanent or Archival Value.
Louisiana Rehabilitation Services' Policy & Procedure	20 FY	Permanent	Permanent	Permanent or Archival Value.
Strategic Plan	20 FY	Permanent	Permanent	Permanent or Archival Value.
Quality Assurance Records	6 FY		6 FY	EDGAR
Audit Reports	6 FY		6 FY	EDGAR
In-Service Training Records	Active + 6 FY		Active + 6 FY	EDGAR Active = federal grant ends.
Independent Living Reports	6 FY		6 FY	EDGAR.
Supported Employment Reports	6 FY		6 FY	EDGAR
Council Documents	20 FY	Permanent	Permanent	This includes State Use Council, Act 378 Council, and Developmental Disabilities Council Reports
Accessibility Reports	6 FY		6 FY	(Archival Value). EDGAR
Louisiana Rehabilitation Council Meeting Minutes	20 FY	Permanent	Permanent	Permanent or Archival Value. Note: Also transfer copy to archives annually.
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Consumers' Records: Consumer Case Records	Active + 6 FY		Active + 6 FY	EDGAR Active = case is closed.
Vocational Evaluations	6 FY		6 FY	EDGAR
 Consumer Referral Logs	6 FY		6 FY	EDGAR
Agency Appeals: Fair Hearing Records Federal Appeals Reports	6 FY 6 FY		6 FY 6 FY	EDGAR EDGAR
Property Control Records	6 FY		6 FY	EDGAR
Safety Reports	6 FY		6 FY	EDGAR
State Vehicle Logs	6 FY		6 FY	EDGAR
Employee Authorization/Driving History	6 FY		6 FY	EDGAR
Randolph Sheppard Program; Facility Files	Active + 6 FY		Active + 6 FY	EDGAR Active = during life of facility.
Insurance Recipient files	Active + 6 FY		Active + 6 FY	EDGAR Active = until date of death of recipient.
Facility Agreements	Active + 10 FY		Active + 10 FY	Active = until date agreement expires.
Louisiana Rehabilitation Services' Requests- Vendor Agreements	Active + 10 FY		Active + 10 FY	Active = until date agreement expires.
Host Agreements	Active + 10 FY		Active + 10 FY	Active = until date of resolicitation.
Manager Files	Active + 6 FY		Active + 6 FY	Active = until date of death of client.
Purchase Approvals	6 FY		6 FY	EDGAR
Elected Committee Minutes	20 FY	Permanent	Permanent	Permanent or Archival Value.
Blind Vendor Trust	20 FY	Permanent	Permanent	Permanent or Archival Value.

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Debt Payment Log	Active + 6 FY		Active + 6 FY	EDGAR Active until debt is paid.
Facility Fiscal Records	Active + 6 FY		Active + 6 FY	EDGAR Active until facility closes.
Louisiana Commission for the Deaf: Minutes of Interpreter Certification Board & Telephone Access Board	20 FY	Permanent	Permanent	Permanent or Archival Value.
Consumer Files	Active + 6 FY		Active + 6 FY	EDGAR Active until case closure.
Commission Policies & Procedures	20 FY	Permanent	Permanent	Permanent or Archival Value.
Contracts & Documentation	Active + 2 FY	8 FY	10 FY	Active until expiration date of contract.
Task Force & Committee Final Reports	20 FY	Permanent	Permanent	Permanent or Archival Value.
Traumatic Brain Injury/Spinal Cord Injury Trust Fund:				
Administrative Records (Database)	20 FY	Permanent	Permanent	Database tracks expenditures on each consumer. (Archival Value).
Appeals	6 FY		6 FY	EDGAR
Consumer Records	Active + 6 FY		Active + 6 FY	EDGAR Active until case closure.
EDGAR-Education Department Ge	neral Admin	istrative	Approval:	
Regulations FY- Fiscal year (State)			Jam	a blallas
E T. LIPPHI JOHN (DIMIE)			8/11/0	s for Rehal. Ser.
			Date, Secretary 12/30/05 Undersigned Sch	

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d Hospitals/Office of Aging and Adult Services (OAAS)       Item 10 file       Item 10 file       In Office       System for a diversion       Addult Services (OAAS)       In Office     In Office     Storage     Retention       Addult Services     Addult Services (OAAS)     Addult Services (OAAS)     Addult Services (OAAS)       In Office     Addult Services     Addult Services (OAAS)     Addult Services (OAAS)       In Office     Addult Services     Addult Services (OAAS)     Addult Services (OAAS)       In Office     Addult Services     Addult Services (OAAS)     Addult Services (OAAS)       Addult Services     Addult Services     Addult Services (OAAS)     Addult Services (OAAS)       Addult Services     Addult Services     Addult Services (OAAS)     Addult Services (OAAS)       Addult Services     Addult Services (OAAS)     Addult Services (OAAS)     Addult Services (OAAS)       Addult Services     Addult Services     Addult Services (OAAS)     Addult Services (OAAS)     Addult Services (OAAS)       Addult Services     Addult Services     Addult Services (OAAS)     M     N     V       Addult Services     Addult Services     Addult Services     Addult Services     N     V       Addult Services     Addult Servi	Agened	2 DOX 84 125, Baton Rouge, LA 70804				Http:	www.j	sos.la.	Nof	Indicate Line of Farm	
d Hospitals/Office of Aging and Adult Services (OAS)       d Hospitals/Office of Aging and Adult Services (OAS)       Retention Period       In Office       In Office       Storage       Retention Period       AGT + 2 CY       AGT + 2 CY     M     S     N     VItal       AGT + 2 CY     M     S     N     V     S       AGT + 2 CY     AGT + 2 CY     M     S     N     V       AGT     AGT + 2 CY     M     S     N     V       AGT     AGT     AGT + 5 CY     M     S     N     V       AGT     AGT     M     S     N     V     S       System (PES)     AGT     M     S     N     V     S       AGT     AGT     AGT     C     S     N     V     S       AGT     AGT     AGT     C     S     N     V     N	No	Agency / Division / Section								X OPICINAL STIBMISSION	
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Retention         Retention         Notice         N								sp.		REPLACEMENT PAGE	
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Indences         ACT + 2 CY         ACT + 2 CY         ACT + 2 CY         M         S         N         V         O           is         ACT + 2 CY         ACT + 2 CY         ACT + 2 CY         M         S         N         V </th <th></th> <th></th> <th>In Office</th> <th>In Storage</th> <th>Total Retention</th> <th>Securi</th> <th></th> <th>H etst2</th> <th>IstiV</th> <th>Remarks</th> <th></th>			In Office	In Storage	Total Retention	Securi		H etst2	IstiV	Remarks	
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# Attachment E- Office of Aging and Adult Services

SS ARC 932 (01/12)

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7	Annual Budget Audit Reports)	ACT + 6 FY		ACT + 6 FY	٩	s	z	-	ACT = until the end of the FY in which the report is issued.	
12	Contracts	ACT + 10 FY		ACT + 10 FY	٩	ω	z	-	ACT = until end of the FY in which the contract ends or is terminated.	
13	Request for Information-Bid/Contracts	ACT + 1 FY		ACT + 1 FY	o	w	z	-	ACT = until end of FY in which contract awarded.	-
14	Employee Driving Records	ACT + 2 FY		ACT + 2 FY	o	s	z	>	ACT = until employee separates' from OAAS.	-
15	Property Risk Management Claims	ACT + 1 CY		ACT + 1 CY	٩	s	z	>	Active = until end of CY in which claim is closed out.	
16	Travel Expense Records	ACT + 1 FY		ACT + 1 FY	U	w	z	-	ACT + until the end of the FY in which the expense is paid.	
17	Provider Audit Files	ACT + 3 FY	3 FY	ACT + 6 FY	o	w	z	>	ACT = until the end of the FY in which the audit is completed.	
18	Service Review Panel (SRP) Meeting Notes	Perm		Perm	o	œ	z	>	Permanent and highly confidential. Waiver awards decision are made, reeded for appeals, lawsuits, etc.	
19	Mortality Review Committee	ACT + 1 FY		ACT + 1 FY	U	Ś	z	>	Active = until end of "Y in which case is reviewed and closed.	
Permitted Retv ACT – Active P	Permitted Retention Period Abbrevlations ACT – Active Period (when used define term in remarks column)	Security Status Codes P - Public Record	Codes	Stat	State Records Center Use	ords C	enter	-	Agency Abbreviations	

Agency Approval

Secretary of State, State Archives & Records Services

Date Signed

Vital Record Identification Code

FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s)

PERM – Permanent

AY - Academic Year (Aug 1 - July 31)

CY - Calendar Year (Jan 1 - Dec 31) FY- Fiscal Year (July 1- June 30)

Y – Yes oN - N

M - May Contain Confidential Information

l = Important U= Useful

S – Review by State Archives O – Other (Specify in Remarks) R – Retain in Agency Archives A - Transfer to State Archives Archival Processing Codes C - Confidential Information

V= Vital

Date Approved

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018.000	Department of Health and Hospitals/Office of Aging and Adult Services (OAAS)	jing and Adult S	services (O	AAS)					RENEWAL
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20	Quarterly Critical Incidents Reports	ACT + 5 FY		ACT + 5 FY	۵.	w	z	>	ACT = until the end of the FY in which the record was created or received.
21	OAAS Walver Participant files	ACT + 1 CY	scγ	ACT + 5 CY	0	o	>	>	ACT = until end of the CY in which participant leaves waiver program.
22	<b>OAAS Policies and Operational Instructions</b>	Perm		Perm	٩	œ	z	>	D
23	<b>OAAS Internal Policy Manuals</b>	Perm		Perm	۵.	œ	z	>	
24	Waiver Policy Manuals	ACT + 5 FY		ACT + 5 FY	٩	o	z	>	ACT = until end of FY in which policy is suspended or abolished. Original published by BHSF.
25	OAAS Numbered Documents and Policy Memorandum	Perm		Pem	۵.	~	z	>	
26	Rulemaking (OAAS)	Perm		Perm	٩	۲	z	>	
27	Rulemaking Request for Waivers)	Perm		Perm	٩	۲	z	>	Copy kept for reference purposes; BHSF rulemaking unit has original waiver rulemaking request record.
28	Protective Services (APS and EPS) Participant Files	ACT + 5 FY		ACT + 5FY	o	œ	z	>	ACT = until end of the FY in which the record was created
29	National Voter Registration Act (NVRA) documents	10 CY		10 CY	0	œ	z	>	Electronic format
30	National Voter Registration Act (NVRA) documents	5 CY		scY	U	Ľ	z	>	Hard copy format
Permitted Ret	Permitted Retention Period Abbreviations	Security Status Codes	odes	Sta	te Re	cords	State Records Center	T	Agency Abbreviations
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CY - Calendar		C - Confidential Information	formation	ż	N- No				
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Date Approved Secretary of State, State Archives & Records Services

Agency Approval

Date Signed

SS ARC 932 (01/12)

Louisiana Secretary of State, Division of Archives, Records Management and History

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177.000	Louisiana Traumatic Brain Injury/spinal Cord Injury Trust Fund Board	jury Trust Fund	Board						X_ORIGINAL SUBMISSION	
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2	Participant Case Record	Perm		Реш	U	۲	z	>		1
e	General Correspondence	ACT + 3 CY		ACT + 3 CY	z	s	z	5	ACT = until the end of the CY in which the record was created or received.	-
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		O – Other (Specify in Remarks)	in Remarks)	5	U= Useful					

Agency Approval

Secretary of State, State Archives & Records Services

Date Signed

Date Approved

# Attachment F- Materials Management/Procurement Support

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Secratar	y of State				Division of Archives, Records Management and Histor
					Florent J. Marsiy, Jr., PhD. State Archivist and Director
					P.O. Box 94125
			-		Baton Roupe, LA 20804-4125
			ds Retentio	n Schodule	Http://www.sec.state.its.us
Department: HE	ALTH AND HOS	FITALS			
tem	E OF MANAGEM	ENT AND FI	NANCE - MA	TERIALS M	ANAGEMENT/PROCUREMENT SUPPORT
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-	Agency Budget Requests filed to DOA	FY+2	FY + 4	7		×			
2	Appropriation Letters	FY + 2	FY + 4	7		×		_	
<del>ب</del>	BA-7 forms and back up documentation	FY + 2	FY + 4	7		×			
4	Time sheets with back up documentation	FY +2	FY + 4	7		×		_	
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Permitted Retu	Permitted Retention Period Abbreviations ACT – Active Period (when used define term in remote actived)	Security Status Codes	odes	State	State Records Center	ords C	enter	Agi	Agency Abbreviations
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Attachment G- Planning and Budget

Secretary of State Archives & Records Services Date Approved

Date Signed

Agency Approval

### **Attachment H- Health Services Financing**



STATE OF LOUISIANA DEPARTMENT OF HEALTH AND HOSPITALS



# MEMORANDUM NO: 00 - S - 051

- TO: Program Managers Regional & Assistant Managers
- FROM: Erin Rabalais, RN Manager St
- DATE: 7/27/00

### RE: RECORD RETENTION POLICY

Records or documents produced as a result of licensing and certification survey activities conducted by the Health Standards Section of the Bureau of Health Services Financing will be maintained as outlined in this memorandum. The references for this policy can be found in the State Operations Manual (SOM) at Section 4800 et seq. and La, Revised Statute 44;36.

### RECORDS TO BE RETAINED INDEFINITELY

- Provider's utilization review plan
- Expression of fiscal intermediary preference
- transfer agreement (for SNFs)
- floor plan (if revised, the SA retains the superseded documents)
- physical plant layout (if revised, the SA retains the superseded documents)
- Provider Agreement
- Copies of Certification and Transmittal transmitted to HCFA R/O for initial certification
- Request to Establish Eligibility forms
- Initial licensing application forms

RECORDS TO BE RETAINED FOR A PERIOD OF THREE YEARS (Plus the current year)

- All forms completed as a result of a licensing or certification survey
- All documents received or completed as a result of an application renewal process
- All correspondence received from a provider

### Page 1 of 2

OFFICE OF MANAGEMENT AND FINANCE • BUREAU OF HEALTH SERVICES FINANCING • HEALTH STANDARDS SECTION 655 NORTH FIFTH STREET - THIRD FLOOR (70802-5313) • P.O. BOX 3767 • BATON ROUGE. LOUISIANA 70E21:3767 PHONE • VOICE (225) 342-0138 • FAX (225) 342-5292 \*AN EQUAL OPPORTUNITY EMPLOYER\*

- All correspondence <u>sent to</u> a provider, either as a result of a survey or in reply to an inquiry from a provider
- \*\* EXCEPTION:
- If certification surveys are done less often than annually; the two most recent recertification surveys should be retained even if the time frame exceeds a period of three years.

NOTE: Any record where litigation is pending shall be maintained until closure of the action.

### BUDGET AND FINANCIAL REPORT FILES

State Agency records used to estimate, justify, and approve State Agency program costs and to account for funds received and expended by the State Agency (ie: HCFA-1465A, HCFA-1466, HCFA-435, HCFA-434) shall be retained for a period of three (3) years after the calendar year in which a DHHS audit has been completed. If a DHHS audit has not been performed, the records may be destroyed five (5) years following the calendar year in which the regular audit was completed.

cc: Lisa Deaton, Ken Baker, Terry Cooper, Barbara Anthony

Revised 6/2000

Page 2 of 2

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1	Vendor and Contractor Paid Files	3 FY	3 FY	6 FY		м	s	Y	v	
2	Travel Reimbursement Files	3 FY	3 FY	6 FY		м	s	Y	۷	
3	Medicaid Provider Financial Files	3 FY	3 FY	6 FY		м	s	Y	۷	
4	Medicaid Escrow Reconciliations	3 FY	3 FY	6 FY		м	s	Y	۷	
5	Time Statements	3 FY	3 FY	6 FY		м	s	Y	I.	
6	Annual Financial Reports	3 FY	9 FY	12 FY		Р	s	Y	۷	
7	Monthly Financial Statements	3 FY	7 FY	10 FY		P	s	Y	۷	Includes BUNDL reports. Workpapers, and Journal Vouchers
8	Grant Ledgers	3 FY	7 FY	10 FY		P	s	Y	v	Includes Cash on Hand, Payment Management System 272 Report and Federal Financial Report 269 and 269A
9	Cash Receipts	3 FY	7 FY	10 FY		м	s	Y	I.	Includes Workpapers and Federal Classification Documents
10	Receivables	3 FY	7 FY	10 FY		P	s	Y	۷	Includes Receivables, Yearend Reports and Quarterly Reports
Permitted Relention Period Abbrevitations ACT – Active Period (when used define term in remarks column) FY- Fiscal Year (July 1- June 30) CY – Calendar Year (Jun 1 – Dec 31) AY – Academic Year (Aug 1 – July 31) FFY – Federal Fiscal Year (Oct 1 – Sept 30) MO – Months WK – Week DY - Day(s) PERM – Permanent		Security Status Codes P – Public Record M – May Contain Confidential Information C – Confidential Information Archival Processing Codes A – Transfer to State Archives R – Retain In Agency Archives S – Review by State Archives O – Other (Specify In Remarks)			State Records Center Use Y – Yes N – No Vital Record Identification Code V – Vital I – Important U – Useful					Agency Abbreviations

Agency Approval

Date Signed

Secretary of State, State Archives & Records Services Date Approved

### Attachment I – Fiscal

### Records Retention Schedule

SS ARC 932 (01/12)

Agency No	Box 94125, Baton Rouge, LA 70804 Agency / Division / Section								Indicate Use of Form
307	Department of Health and Hospitals/Office of the Secretary/Office of Management and Fi						ter		_ORIGINAL SUBMISSION
							s Center		X_RENEWAL REPLACEMENT PAGE
ltem Number	Records Series Title	Retention Period				a	lecord		ADDENDUM PAGE
		In Office	In Storage	Total Retention	Security	Archival	State Records	Vital	Remarks
11	Medicaid Reports	3 FY	7 FY	10 FY	м	s	Y	v	Includes Centers for Medicare and Medicaid Services Reports (CMS 64, CMS 21, and CMS 37)
12	Cost Allocation	3 FY	7 FY	10 FY	P	s	Y	v	
13	Bank Reconciliation	ACT + 1 FY	4 FY	6 FY	Ρ	s	Y	v	ACT = Current Fiscal Year
14	Medical Assistance Trust Fund Files	3 FY	9 FY	12 FY	м	s	Y	v	
15	Daily Deposits	ACT + 1 FY	4 FY	6 FY	Ρ	s	Y	v	ACT = Current Fiscal Year; Includes Check Logs
16	Classification Documents – Non Federal	ACT + 1 FY	4 FY	6 FY	P	s	Y	v	ACT = Current Fiscal Year
17	Audit Receivables	3 FY	8 FY	11 FY	P	s	Y	v	Includes documents relative to A/R established due t a DHH Medicaid Audit
18	Accounts Receivables Control System Files	3 FY	7 FY	10 FY	P	s	Y	v	Electronic files
Permitted Retention Period Abbreviations					State R	cords	Center		Agency Abbreviations
ACT – Active Period (when used define term in remarks column)		P – Public Record			V – Yes				
FY- Fiscal Year (July 1- June 30)		M – May Contain Confidential Information			r – res N - No				
CY – Calendar Year (Jan 1 – Dec 31)		C – Confidential Information							
AY – Academic Year (Aug 1 – July 31)		14			Vital Re Identifie		Code		
FY – Federal Fiscal Year (Oct 1 – Sept 30)		A – Transfer to State Archives			V= Vital				
MO – Months WK – Week DY - Day(s) PERM – Permanent						ortant			
'ERM – Fermanent		-	O – Other (Specify in Remarks)						

Per Policy #VA16 - Clinical Review Committee Minutes are to be kept in Administrators' Office for 5 years, and The Appointing Authority is signed by the Office for Citizens with Developmental Disabilities Secretary, (Presently, Kathy Kliebert) and an Original is kept in Central Office). Indicate Use of Form X\_ORIGINAL SUBMISSION \_\_REPLACEMENT PAGE Remarks Agency Abbreviations: ACT = Active/Current \_\_ADDENDUM PAGE then transferred to Storage. RENEWAL 8 ď Page 1 Vital Record Identification Code 6117 > ∍ \_ > State Records Center Use -\_ State Records z z z z z z Archival œ œ s ŝ Ś ဟ I = Important U= Useful Y - Yes すいす Security N - No υ υ ≥ ۵. ≥ Σ Retention PERM Total PERM PERM Š 문 ЗFY **Retention Period** M - May Contain Confidential Information Storage PERM FE 5 ž Ŧ O - Other (Specify in Remarks) ŝ R - Retain in Agency Archives A – Transfer to State Archives S – Review by State Archives Louisiana Secretary of State, Division of Archives, Records Management and History Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office PERM δÇ ç Ĕ ŤΓ ŝ Pinecrest Supports and Services Center / DHH/OCDD Appointing Authority (Other originals are kept in Employees file in Employee Administration) Clinical Review Committee (CRC) Meeting Insurance Recovery Property Damage ACT - Active Period (when used define term in remarks column) **Records Series Title** Post Office Box 94125, Baton Rouge, LA 70804 DA2041 Vehicle Accident Report Departmental Safety Meetings Administration-2 Administration - 3 Administration - 4 Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) Administration - 6 Administration - 5 Administration -1 MO - Months WK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) Http://www.sos.louisiana.gov CY - Calendar Year (Jan 1 - Dec 31) FY- Fiscal Year (July 1- June 30) Minutes PERM – Permanent Agency No Item 4 c i ė ÷ 'n ó

# **Records Retention Schedule**

SS ARC 932 (07/07)

### **Attachment J- Pinecrest Supports and Services Center**

Agency Approval

Date Signed

Secretary of State, State Archives & Records Services Date Approved

Kept in Administration "Do Not Destroy" Files Kept in Administration "Do Not Destroy" Files Date Approved Indicate Use of Form Includes minutes and all attachments. X\_ORIGINAL SUBMISSION Remarks \_\_\_REPLACEMENT PAGE Agency Abbreviations: ACT = Active/Current \_ADDENDUM PAGE SS ARC 932 (07/07) RENEWAL Secretary of State, State Archives & Records Services Page 2 of 86 Vital Record Identification Code > > - HΛ -\_ \_ State Records Center Use 3 State Records z z z z z Archival œ s s i = important œ s U= Useful V= Vital Y - Yes N-No Security c υ o ۵., ۵. **Records Retention Schedule** Retention PERM PERM Total 4FY °℃ ЗCY M - May Contain Confidential Information **Retention Period** Storage 0 - Other (Specify in Remarks) 운 R - Retain in Agency Archives l≥ A - Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Louisiana Secretary of State, Division of Archives, Records Management and History Security Status Codes P - Public Record In Office Date Signed PERM PERM ŝ Ŧ ЗÇ Agency No | Pinecrest Supports and Services Center / DHH/OCDD AdHoc Human Rights Committee Behavioral Department of Environmental Quality Permits for Wastewater ACT – Active Period (when used define term in remarks column) **Records Series Title** Human Rights Committee Minutes Post Office Box 94125, Baton Rouge, LA 70804 Insurance Information Notices Lease Agreements (Land) Right of way Permits Administration - 8 Administration - 9 Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) Administration - 7 MO - Months WK - Week DY - Day(s) Client Rights -1 Client Rights -2 AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Http://www.sos.louisiana.gov FY- Fiscal Year (July 1- June 30) Agency Approval PERM - Permanent Item Number ġ Ξ ŕ 6 ø

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Intary completed by PSSC     ACT     3CY     ACT+3CY     C     S     N     I       In arry completed by PSSC     ACT     3CY     ACT+3CY     C     S     N     I       In arry completed by PSSC     ACT     3CY     ACT+3CY     C     S     N     I       In arry completed by PSSC     ACT     Status Codes     State Records Center Use     Y - Yes       In arry completed by PSSC     C - Confidential Information     N - No     Y - Yes     Y - Yes       In arrange     C - Confidential Information     N - No     Y - Yes     Y - Yes       Archival Processing Codes     Y Ital Record Identification C     Vital Record Identification C       R - Transfer to State Archives     Vital Record Identification C     Y = Vital       R - Ettain in Agency Archives     Vital Record Identification C       S - Review by State Archives     U = Useful       S - Review by State Archives     U = Useful       O - Other (Specify in Remarks)     U = Useful	*	Client Rights -5 Investigations completed by Adult Protective Services	ACT +	3CV	ACT + 3CY	U		z	"After investi recipient of si of three (3) y cases in Mig- mantained in situation invo ACT + = Wral Pinecree Sue	gation is closed and as long as the person is a envices by PSSC and its affliates and for a peri ease from the data services are no longer provi ation or where charges are pending shall be allon or where charges are pending shall be allon or where charges are pending shall be allon or where charges are pending shall be to contrained with legel manufates in the particu- tion of the period.
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no longer provided. Cases in litigation or where charges are pending shall be maintained in accordance with legal mandates in the particular situation involved. ACT + = During Human Rights Research Period. ACT = While pending and receiving services at Pinecrest Supports and Services Center. Indicate Use of Form X\_ORIGINAL SUBMISSION ACT = Until obsolete or superseded. Remarks \_\_\_REPLACEMENT PAGE Agency Abbreviations: ACT = Active/Current \_ADDENDUM PAGE SS ARC 932 (07/07) RENEWAL ACT= Until closed. Page 4 of 86 Vital Record Identification Code AIA \_ > \_ State Records Center Use State Records z z z Archival s s s i = important U= Useful V= VII8 Υ-Υ08 N-N Security o U o Retention ACT + 3CY Total ACT °S M - May Contain Confidential Information **Retention Period** Storage 3CY 2Ç O – Other (Specify in Remarks) R - Retain in Agency Archives A - Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Louisiana Secretary of State, Division of Archives, Records Management and History Security Status Codes ACT + Previous CY P - Public Record In Office Date Signed ACT ACT Agency No | Pinecrest Supports and Services Center / DHH/OCDD Restraints, Behavior, Rights, Target, Risk Indicator, Client to Client Attercation, Injury of Unknown Origin, Incident Reporting Error, Consumer Complaint Human Rights Research proposals/Research "Includes the following databases: Investigations, ACT - Active Period (when used define term in remarks column) **Records Series Title** Post Office Box 94125, Baton Rouge, LA 70804 Client Rights Databases\* Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) Client Rights -8 Client Rights -9 Client Rights -7 AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Http://www.sos.louisiana.gov FY- Fiscal Year (July 1- June 30) documents Agency Approval staff PERM - Permanent Item Number <u>1</u>6 5 ž

**Records Retention Schedule** 

Secretary of State, State Archives & Records Services

Date Approved

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21.	Community Home -3 Inter-Office Memos	107	1CY	2CY	Σ	o	z	5	
22.	Community Home -4 Recall List	1CY		ţČ	0	s	z	I Updai	Updated Monthly
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Date Approved Secretary of State, State Archives & Records Services

Date Signed

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Date Approved

Secretary of State, State Archives & Records Services

Date Signed

Agency Approval

**Records Retention Schedule** 

SS ARC 932 (07/07)

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43.	Employ Administration -5 Payroll records (leave, overtime, time sheets)	ACT + 2CY	SCY	7CY	۵.	s	z	Integrat Resour	Integrated Systems Information Services Human Resources Indefinitely.
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Secretary of State, State Archives & Records Services

Date Signed

Date Approved

Agency Approval

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Date Approved

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**Records Retention Schedule** 

SS ARC 932 (07/07)

Date Signed

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Secretary of State, State Archives & Records Services

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Agency Approval

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96.	FISCAL -41 Bank reconciliations, cancelled checks, bank statements	ACT + 3FY		ACT + 3FY	٩	RS	z	V ACT +	ACT + = Until Audit
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Agency Approval

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Secretary of State, State Archives & Records Services

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**Records Retention Schedule** 

Secretary of State, State Archives & Records Services

Date Signed

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103,	HEALTH SERVICES -DIRECTOR-5 Medical Equipment Logs	3CY		зсY	<u> </u>	0	z	5	
104.	HEALTH SERVICES -DIRECTOR-6 Health Services Safety Meeting Minutes	1CY		1CY	z	w	z	5	
105.	HEALTH SERVICES -DIRECTOR-7 Approved Travel Authorizations (copies)	1CY		1CY	U	w	z	5	Contains travel guide booket
106.	HEALTH SERVICES -DIRECTOR-8 Department Personnel Files	ACT	1CY	ACT+1CY	۵.	w	z	2	ACT + # While employed. Include PAR's, PPR's, license (if applicable), CME's,
107.	HEALTH SERVICES -DIRECTOR-9 Consultant Folders (Contracted Services)	ACT	1CY	ACT + 1CY	U	s	z	5	Contains contracts, payments, invoices, copy of license
108.	HEALTH SERVICES -DIRECTOR-10 Employees Monthly Connections Training	1CY		1CY	0	s	z	5	ACT = While employed.
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109.	HEALTH SERVICES – DIRECTOR-11 Medical Staff Files	ACT	θCY	ACT + 6CY	0	w	z	Includes continuin	Includes certification, credentiats, complaints & continuino medical education
	HEALTH SERVICES -DIRDIRECTOR-12 Certificates of Insurance (copies)	īč		1CY	0	s	z	Commer	Commercial general liability, personal injury liability, medical malpractice liability.
Ξ	HEALTH SERVICES -DIRECTOR-13 Quarterly Drug Alerts	зсү		3CY	0	s	z	U Contains support a	Contains adverse drug reactions event for people we support at PSSC.
112.	HEALTH SERVICES -DIRECTOR-14 Quarterly Random Drug Screening Memos	2CY		2CY	U	s	z	I Memos fr employee	Memos from Employment Administration for random employee drug screening
113	HEAL TH SERVICES -DIRECTOR-15 DHH Emergency Preparedness Policy	PERM		PERM	٩	æ	z	5	
÷	HEALTH SERVICES -DIRECTOR-16 Emergency Recall List	ACT	1CV	ACT + 1CY	٩	w	z	U ACT += [	ACT + = Duration of empkyment.
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116.	HEALTH SERVICES - DIRECTOR-18 Medical Staff Memos	2CY		2CY	0	s	z	_	
117.	HEALTH SERVICES - DIRECTOR-19 Medical Director Correspondence	2CY		2CY	z	w	z		
118.	HEALTH SERVICES -DIRECTOR20 Medication Cart Inspection Summary	1CY		1CY	0	w	z	5	
.119.	HEALTH SERVICES - DIRECTOR21 Mortality Review Report (copies)	1 CY		1CY	U	s	z	5	
120.	HEALTH SERVICES -DIRECTOR-22 Monthly Mortality Review Progress Report	2CY		2CY	U	w	z	U Mortalit closed)	Montality review log with recommendations (received / closed)
121.	HEALTH SERVICES -DIRECTOR-23	10Y		1CY	v	s	z	U Correst	Correspondence to/from Omega
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128.	HEALTH SERVICES -DIRECTOR-30 Dental Supply & Equipment Budget	зсү		3CY	Σ	w	z	5	
129.	HEALTH SERVICES-DIRECTOR-31 Physicians Safety Meetings	1CY		1CY	U	s	z	2	
130.	HEALTH SERVICES -DIR-ECTOR32 Property Control Action Requests	2CY		2CY	z	ŝ	z	D	
131.	HEALTH SERVICES -DIRECTOR33 Property Receipts	1CY		1CY	z	s	z	U ordered	Includes records of inventories, supplies & equipment ordered, maintained & usec by individual departments
132.	HEALTH SERVICES - ELECTROENCEPHALOGRAMIELECTROCARDIOG RAM-34 ELECTROENCEPHALOGRAM Tracings	ACT	10 CY	ACT + 10CY	U	s	z	RS40:21 ELECTF where a medical	RS40.2144: RS40:1299.96 Includes actual strips generated by ELECTROENCEPHALOGRAM monitors & testing devices where a report or interpretationhas been recorded in the patient medical record. ACT+ = Until death or discharge.
133.	HEALTH SERVICES -	10Y		1CY	o	s	z	I Record	Recording of monthly ELECTROENCEPHALOGRAMs
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SS ARC 932 (07/07)

Date Signed

Agency Approval

Secretary of State, State Archives & Records Services Date Approved

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134.	HEALTH SERVICES - ELECTROENCEPHALOGRAMELECTROCAR DIOGRAM-36	1CY		ţ	0	z v	-	Recording of monthly ELECTROENCEPHALOGRAMs performed. Includes ID# name home date sent to	
	ELECTROCARDIOGRAM Encounter Book								-
135.	HEALTH SERVICES -Health Information Department-37	ý	200	200			-		
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136.	HEALTH SERVICES –Health Information Department-38	104	756	206	+				
	Infection Control Committee Mission (control	2	2	500	5	z n	>		-

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**Records Retention Schedule** 

Date Approved Secretary of State, State Archives & Records Services U= Useful O - Other (Specify in Remarks) S - Review by State Archives Date Signed

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Infection Control Committee Minutes (copies) HEALTH SERVICES -Health Information Department-39

137.

State Records Center Use

Y – Yes

N-No

M - May Contain Confidential Information

Security Status Codes P - Public Record

ACT - Active Period (when used define term in remarks column)

FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) FY- Fiscal Year (July 1- June 30)

PERM – Permanent

Permitted Retention Period Abbreviations

C - Confidential Information Archival Processing Codes

Vital Record Identification Code

I = Important

R - Retain in Agency Archives A - Transfer to State Archives

V= Vital

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	Pharmacy & Therapeutic Committee Minutes (originals)								
138.	HEALTH SERVICES –Health Information Department-40	1CY	2CY	ЗСY	U	s	z		
	Safety Committee Minutes (copies)								
139.	HEALTH SERVICES –Health Information Department-41 Employee Personnel File	ACT	1CY	ACT + 1CY	٩	w	z	U ACT +	ACT + = Duration of employment.
140.	HEALTH SERVICES –Health Information Department-42	ACT		ACT		5	z	u ACT=	ACT = Until obsolete or superseded. Contain staff
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141.	HEALTH SERVICES –Health Information Department-43	1 CY		1CV	Σ	s	z	5	
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- Active P Fiscal Year Calendar	ACT Active Period (when used define term in remarks column). FY- Fiscal Year (Jury 1- June 30) CY Cstender Year (Jan 1 - Dec 31)	P – Public Record M – May Contain Confidential Information C – Confidential Information	nfidential Inform		Y - Yes N - No				ACT = Active/Current
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Contains responses to request for information of individuals who never lived here. May contain evidence, statements & pictures of incidents/accidents that were investigated by Indicate Use of Form \_X\_ORIGINAL SUEMISSION \_\_\_REPLACEMENT PAGE Remarks Agency Abbreviations: ACT = Active/Current ACT + = Until death/discharge. ACT + = Until death/discharge. \_ADDENDUM PAGE RENEWAL of 86 Secretary of State, State Archives & Records Services Page 27 Vital Record Identification Code THA > > ⊃ -State Records Center Use State Records z z z z z Archival ŝ Ś s Ś œ I = Important U= Useful V= Vital Security Y – Yes N-No ٩ υ ≥ o ۵. Retention ACT + 10CY ACT + 10CY Total Š ₫ 50 **Retention Period** M - May Contain Confidential Information Storage 10CY 10CY Ş O – Other (Specify in Remarks) R - Retain in Agency Archives A - Transfer to State Archives S - Review by State Archives Louisiana Secretary of State, Division of Archives, Records Management and History Archival Processing Codes C - Confidential Information Security Status Codes In Office P - Public Record ≩ ACT ACT ç Ş Agency No Pinecrest Supports and Services Center / DHH/OCDD HEALTH SERVICES -Health Information HEALTH SERVICES -Health Information HEALTH SERVICES -Health Information HEALTH SERVICES -Health Information Department-46 HEALTH SERVICES –Health Information HID Staff Meeting Monthly Reports ACT - Active Period (when used define term in remarks column). **Records Series Title** Post Office Box 94125, Baton Rouge, LA 70804 Correspondence – General Disclosure Records Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) Memorandums AY - Academic Year (Aug 1 - July 31) Department-45 Http://www.sos.louisiana.gov Department-47 Department-44 Department-48 CY - Calendar Year (Jan 1 - Dec 31) Living Wills FY- Fiscal Year (July 1- June 30) PERM – Permanent Item Number 쉭 <u>5</u>3 4 5 146.

**Records Retention Schedule** 

SS ARC 932 (07/07)

Date Approved

Date Signed

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HEALTH SERVICES -Health Information Department-51 Individual's Overflow Records	ACT	10CY	ACT + 10CY	æ	s	z	V Overflow	Overflow records for individuals residing at PSSC. ACT + = Until death/discharge.
HEALTH SERVICES -Health Information Department-52 PSSC Connections	1CV		1CY	٩	s	z	2	
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SS ARC 932 (07/07)

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152.	HEALTH SERVICES –Health Information Department-54 Fire Drill Log	ţĊ	1CV	2CY	۵.	s	z		
153.	HEALTH SERVICES –Health Information Department-55 Departmental Safety Meeting Reports	1CY		tcv	۵.	s	z		
154.	HEALTH SERVICES –Health Information Department-56 Monthly HID Staff Meeting Minutes	1CV		ţÇ	<u>م</u>	s	z	5	
155.	HEALTH SERVICES –Health Information Department-57 24-Hour Nursing Reports (copy)	ţĊ		1CY	0	s	z	5	
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SS ARC 932 (07/07)

Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125, Baton Rouge, LA 70804

Designated years for current oral, written electronic test requests. 42 CFR 493.1105 physical examinations, consultation reports, labs, x-ray reports and quarterly health profile reports. Contains electronic versions of patient annual medical Log of tests performed, date & initials of person who received specimen. Indicate Use of Form \_X\_ORIGINAL SUBMISSION ACT = Until obsolete or superseded. ACT = Until obsolete or superseded. \_\_\_REPLACEMENT FAGE Remarks Agency Abbreviations: ACT = Active/Current \_\_\_ADDENDUM PAGE RENEWAL Page 30 of 86 U 42 CFR 493.1105 Vital Record Identification Code чіл Ξ -State Records Center Use \_ State Records z z z z z Archival Ś s ŝ s S I = important U= Useful Y - Yes V= Vital Security oN - No o o o o c Retention Total ACT ACT 50 ZC 2Cγ M - May Contain Confidential Information **Retention Period** In Storage ç °2 O – Other (Specify in Remarks) R - Retain in Agency Archives A - Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office ACT ACT 2Ç ₫ 2Ç Agency No | Pinecrest Supports and Services Center / DHH/OCDD Hospital Admissions & Discharges Report Health Information Department Databases HEALTH SERVICES –Health Information Department-59 HEALTH SERVICES –Health Information Department-60 Physician Network Patient Information HEALTH SERVICES -Laboratory-62 HEALTH SERVICES -Laboratory-63 HEALTH SERVICES -Laboratory 61 ACT - Active Period (when used define term in remarks column) **Records Series Title** Patient Laboratory Results Laboratory Requisitions Laboratory Test Log Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Http://www.sos.louisiana.gov FY- Fiscal Year (July 1- June 30) PERM - Permanent Item 137. 158. 159. 160. 161.

Date Approved

Secretary of State, State Archives & Records Services

Date Signed

Louisiana Secretary of State, Division of Archives, Records Management and History

Indicate Use of Form \_X\_ORIGINAL SUBMISSION \_\_\_\_REPLACEMENT PAGE Remarks U Fasting list of homes (list daily) ADDENDUM PAGE Page 31 of 86 THA • 0 State Records z Archival s Security o Retention Total ζ **Retention Period** In Storage In Office ₫ Agency No Pinecrest Supports and Services Center / DHH/OCDD HEALTH SERVICES -Laboratory-64 HEALTH SERVICES -Laboratory-65 **Records Series Title** Post Office Box 94125, Baton Rouge, LA 70804 Http://www.sos.louisiana.gov Nothing By Mouth (NPO) List Item 163. 162.

## **Records Retention Schedule**

SS ARC 932 (07/07)

Agency No         Practract Supports and Services Center / DHH/OCDD           Agency No         Practract Supports and Services Center / DHH/OCDD           Item         Records Series Title         Retention Period           Number         Records Series Title         Notifice         Storage         Retention         Storage           100         HEALTH SERVICES -NURSING-71         3CY         2C         3         N         U           170.         HEALTH SERVICES -NURSING-72         1CY         2CY         3CY         C         S         N         U           170.         HEALTH SERVICES -NURSING-72         1CY         2CY         3CY         C         S         N         U           171.         HEALTH SERVICES -NURSING-72         1CY         2CY         3CY         C         S         N         U           173.         HEALTH SERVICES -NURSING-73         1CY         2CY         3CY         C         S         N         U           173.         HEALTH SERVICES -NURSING-75         1CY         2CY         SCY         SCY         S         N         U           173.         HEALTH SERVICES -NURSING-75         1CY         2CY         SCY         SCY         S         N         U	Page 32 of 86 Indicate Use of Form
Circle Series Title         Retention Period           Circle Storage         Retention Period           CES -NURSING-71         3CY         3CY           CES -NURSING-72         1         CY         3CY           CES -NURSING-72         1         CY         3CY         3CY           CES -NURSING-72         1         CY         2         3CY         3CY           CES -NURSING-72         1         CY         2         3CY         3CY         3CY           CES -NURSING-72         1         CY         2         2         3CY         3CY         3CY         3CY           CES -NURSING-72         1         CY         2         2         3CY         3CY         3CY         3CY           CES -NURSING-75         5         5         2         3 </th <th></th>	
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Orders for medication as prescribed by the physician of medication history while living and PSSC. Files are maintained on a continuous basis in the Contains detailed information concerning daily pharmacy operations; maintained and updated according to agency standards. record; maintained in accordance with La. Board of Pharmacy Standards +1CY. Includes medical diagnoses and/or miscellancous medical orders. An electronic listing of each individual's Indicate Use of Form X\_ORIGINAL SUBMISSION \_\_\_REPLACEMENT PAGE Remarks Agency Abbreviations: pharmacy computer system. ACT = Active/Current \_\_\_ADDENDUM PAGE RENEWAL Page 33 of 86 Vital Record Identification Code \_ State Records Center Use \_ -5 State Records z z z Archival œ Ś Ľ I = Important U= Useful Y ~ Yes V= Vital Security 0N - N ۵. C o Retention ACT + 3CY PERM PERM Total **Retention Period** M - May Contain Confidential Information In Storage šč O - Other (Specify in Remarks) R - Retain in Agency Archives A – Transfer to State Archives Archival Processing Codes S - Review by State Archives Louisiana Secretary of State, Division of Archives, Records Management and History C - Confidential Information Security Status Codos P - Public Record In Office PERM PERM ACT Agency No Pinecrest Supports and Services Center / DHH/OCDD HEALTH SERVICES -PHARMACY-77 Procedures Manual HEALTH SERVICES -PHARMACY-78 HEALTH SERVICES -PHARMACY-79 Department Personnel Files (copies) **Records Series Title** ACT - Active Period (when used define term in remarks column) Post Office Box 94125, Baton Rouge, LA 70804 MEDICATION PROFILES Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) Http://www.sos.louisiana.gov CY - Calendar Year (Jan 1 - Dec 31) Prescriptions FY- Fiscal Year (July 1- June 30) PERM – Permanent Item 175. 177. 176.

**Records Retention Schedule** 

SS ARC 932 (07/07)

Secretary of State, State Archives & Records Services

Date Approved

Date Signed

Agency No     Pinecrest Supports and Services Center / DHH/OCDD       Altern     Records Series Title       Number     Records Series Title       178.     HEALTH SERVICES -PHARMACY-80       179.     HEALTH SERVICES -PHARMACY-81       179.     HEALTH SERVICES -PHARMACY-81       179.     HEALTH SERVICES -PHARMACY-81       179.     HEALTH SERVICES -PHARMACY-81       180.     HEALTH SERVICES -PHARMACY-83       180.     HEALTH SERVICES -PHARMACY-83       181.     HEALTH SERVICES -PHARMACY-83       182.     HEALTH SERVICES -PHARMACY-83       182.     HEALTH SERVICES -PHARMACY-83       182.     HEALTH SERVICES -PHARMACY-84       182.     HEALTH SERVICES -PHARMACY-84       182.     HEALTH SERVICES -PHARMACY-83       182.     HEALTH SERVICES -PHARMACY-84       182.     HEALTH SERVICES -PHARMACY-84       182.     HEALTH SERVICES -PHARMACY-84       182.     HEALTH SERVICES -PHARMACY-84								Indicate Use of Form
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180.         HEALTH SERVICES -PHARMACY-82           Reference Books         181.           181.         HEALTH SERVICES -PHARMACY-83           181.         HEALTH SERVICES -PHARMACY-83           182.         Supervisor Personnel Files (copies)           182.         HEALTH SERVICES -PHARMACY-84           182.         HEALTH SERVICES -PHARMACY-84           182.         HEALTH SERVICES -PHARMACY-84           182.         HEALTH SERVICES -PHARMACY-84	ACT	2CY	ACT + 2CY	U	s	z	Provided fi provided fi committee ACT = Cu	Specialized reports and data maintained and provided for various disciplines and/or committees of the agency. ACT = Current Month/Year.
181.         HEALTH SERVICES -PHARMACY-83           Supervisor Personnel Files (copies)           182.           HEALTH SERVICES -PHARMACY-84           titled Retention Period Abbreviations           - Active Period (when used define term in remarks column)	ACT		ACT	۵.	s	z		
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After death or discharge of person radiographs are kept in death/discharge file in office until 5CY...then sent to Baton Rouge for storage. X-ray reports are used if needed. Previous 10CY x-rays are tept in patient folder. Others are sent to Baton Rouge for storage. Contains detailed information concerning daily pharmacy operations; maintained and updated according to agency standards Indicate Use of Form "X\_ORIGINAL SUBMISSION \_\_REPLACEMENT PAGE Remarks Agency Abbreviations: ACT = Active/Current ADDENDUM PAGE RENEWAL Page 35 of 86 ACT' + 2CY ACT + 2CY Vital Record Identification Code TIA Ξ 5 ----\_ State Records Center Use \_ State Records z z z z z Archival s s œ ŝ s I = Important U= Useful gecnuty Y - Yes V= VIIal N-No Σ Z ۵. υ o Retention ACT + 2CY ACT + 2CY Total PERM <sup>10</sup>C δÇ **Retention Period** M - May Contain Confidential Information In Storage Š 2Ç O – Other (Specify in Remarks) R - Retain in Agency Archives A - Transfer to State Archives Louisiana Secretary of State, Division of Archives, Records Management and History S - Review by State Archives Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office PERM 10C√ Date Signed ÅCT ACT δÇ Agency No Pinecrest Supports and Services Center / DHH/OCDD General Files (non-correspondence/memos) HEALTH SERVICES -PHARMACY-86 HEALTH SERVICES -PHARMACY-85 HEALTH SERVICES -PHARMACY-87 HEALTH SERVICES -Radiology-88 HEALTH SERVICES -Radiology-89 **Records Series Title** ACT - Active Period (when used define term in remarks column) Post Office Box 94125, Baton Rouge, LA 70804 General Correspondence/Memos Death/Discharge Radiographs In-Service Training Records Procedures Manuai FFY - Federal Fiscal Year (Oct 1 - Sept 30) Permitted Retention Period Abbreviations MO - Months WK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) Http://www.sos.louisiana.gov CY - Calendar Year (Jan 1 - Dec 31) Radiographs FY- Fiscal Year (July 1- June 30) PERM – Permanent Item Number 183. 184. 185. 186. 187.

**Records Retention Schedule** 

SS ARC 932 (07/07)

Date Approved

Secretary of State, State Archives & Records Services

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188.	HEALTH SERVICES -Radiology-90 Employee Dosimetry Reports	PERM		PERM	U	æ	z	V Environn XV	Must be maintained indefinitely or until the office of Environmental Compliance terminates the license environmental regulatory radiation protection code Part XV
189.	HEALTH SERVICES -Radiology-91 Department of Environmental Quality Inspection Reports	ACT		PERM	٩	æ	z	I ACT=I	ACT = Life of machine
190.	HEALTH SERVICES -Radiology-92 Calibrations of X-Ray Machine	ACT		PERM	<u> </u>	œ	z	I ACT=I	ACT = Life of machine
191.	HEALTH SERVICES -Radiology-93 E-mails and memos from administration	1CY		107	0	s	z	U Memos	Memos with directives from administration
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194.	HEALTH SERVICES -Radiology-96					_			
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195.	HEALTH SERVICES -Receptionist-97				-			-	
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SS ARC 932 (07/07)

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SS ARC 932 (07/07)

Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125, Baton Rouge, LA 70804

Time Sheets, leave/overtime slips, dr. statements, travel authorizations and documentation, FEDERAL MEDICAL LEAVE ACT, etc. Includes all corresponding attachments from 6/15/88 – present. Indicate Use of Form \_X\_ORIGINAL SUBMISSION Remarks \_\_\_REPLACEMENT PAGE Agency Abbreviations: ACT = Active/Current \_\_ADDENDUM PAGE To document time entered. 45 CFR Parts 160 & 164 ACT = While employed. RENEWAL Page 39 of 86 Vital Record Identification Code ----------\_ State Records Center Use State Records z z z z z Archival ŝ s Ś ŝ s Security Y - Yes N-No Σ ۵. ٥. ۵. o ACT +1 0CY Retention Total Š Š Š ξ **Retention Period** M - May Contain Confidential Information In Storage 10CY ŝ ŝ §CY Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office ACT ₫ ₫ 6FV ₫ Agency No Pinecrest Supports and Services Center / DHH/OCDD Accounting of Disclosures of Protected Health HEALTH SERVICES - Respiratory-107 HEALTH SERVICES -Timekeeper-108 HEALTH SERVICES -Timekeeper-109 HEALTH SERVICES -Timkeeper-110 Health Information Portability and ACT - Active Period (when used define term in remarks column) **Records Series Title** Accountability Act (HIPAA) -1 Absence Data Reports Timekeeping Records Permitted Retention Period Abbreviations In-Service Training FFY - Federal Fiscal Year (Oct 1 - Sept 30) Fixed Time Entries Personnel Files AY - Academic Year (Aug 1 - July 31) Http://www.sos.louisiana.gov CY - Calendar Year (Jan 1 - Dec 31) FY- Fiscal Year (July 1- June 30) Information Item 205. 207. 206. 208. 209,

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I = Important U= Useful

O – Other (Specify in Remarks)

R - Retain in Agency Archives S - Review by State Archives A - Transfer to State Archives

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PERM – Permanent

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Indicate Use of Form X\_ORIGINAL SUBMISSION \_\_REPLACEMENT PAGE Remarks Agency Abbreviations: ACT = Active/Current \_\_\_ADDENDUM PAGE 45 CFR Parts of 160 & 164 SS ARC 932 (07/07) 45 CFR Parts 160 & 164 45 CFR Parts 160 & 164 RENEWAL Page 41 of 86 Vital Record Identification Code ŦΛ ---State Records Center Use State Records z z z Archival l = Important s ŝ ŝ U= Useful Y - Yes V= Vital Security N-No υ υ υ **Records Retention Schedule** Retention Total 6F7 6FY GFΥ M - May Contain Confidential Information **Retention Period** In Storage O - Other (Specify in Remarks) R - Retain in Agency Archives A – Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Louisiana Secretary of State, Division of Archives, Records Management and History Security Status Codes In Office P - Public Record 6F7 θFY 5 Agency No Pinecrest Supports and Services Center / DHH/OCDD Permission to Use & Disclose Protected Health Information (7505-03) Request for Amendment to Protected Health Request for Access to Protected Health Limited Data Set Request & Data Use Health Information Portability and Health Information Portability and Health Information Portability and Accountability Act- (HIPAA) - 6 ACT – Active Period (when used define term in remarks column) **Records Series Title** Health Information Portability and Accountability Act (HIPAA) - 9 Post Office Box 94125, Baton Rouge, LA 70804 Accountability Act (HIPAA) - 7 Accountability Act (HIPAA) - 8 Agreement (HIPAA7509-03) Information (HIPAA4503-03) Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months VK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Http://www.sos.louisiana.gov FY- Fiscal Year (July 1- June 30) PERM – Permanent Item 214. 215. 217. 216.

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219.	Health Information Portability and Accountability Act (HIPAA) -I1 Request to Receive Confidential Information by Alternative Means or at Alternative Location ( HIPAA 7505-03 & 7521-03)	6FY		6FY	U	s	z	-	45 CFR Parts 160 & 164
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221.	Health Information Portability and Accountability Act (HIPAA) - 13									
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Secretary of State, State Archives & Records Services

Date Signed

Agency Approval

**Records Retention Schedule** 

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Secretary of State, State Archives & Records Services

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Maintenance-27         3CY         P         S         N         I           Chlorine Test         Maintenance-28         3CY         P         S         N         I           Maintenance-28         Maintenance-28         3CY         P         S         N         I           Maintenance-28         Biological Oxygen Demand Test Results         3CY         P         S         N         I           Maintenance-29         Graph Charts for the Influent and Effluent         3CY         P         S         N         U           Maintenance -29         Graph Charts for the Influent and Effluent         3CY         P         S         N         U           Maintenance -29         Graph Charts for the Influent and Effluent         3CY         B         S         N         U           Menutor         Graph Charts for the Influent and Effluent         3CY         P         S         N         U           Remotion         Menue vector         Menue vector         3CY         P         S         N         U           Remotion         Menue vector         Menue vector         Menue vector         N         N         N         N           Ref (ubt 1- Lue 30)         Mer Veer (Lot 1 - Sep 30)	Bindiuent Test Results     3CY     P     S     N     I       emand Test Results     3CY     P     S     N     I       Sindiuent and Effluent     3CY     P     S     N     I       And Scored     3CY     P     S     N     I       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N     N       And May Central for Context     N     N     N       And May Centrives     N </td <td>248.</td> <td>Maintenance-26 Certification of Back Flow Preventer</td> <td>3CY</td> <td></td> <td>зсY</td> <td><u>a</u></td> <td>s</td> <td>z</td> <td>-</td> <td></td>	248.	Maintenance-26 Certification of Back Flow Preventer	3CY		зсY	<u>a</u>	s	z	-	
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253.	Maintenance-31				_				
	Water Treatment Report for Closed Loop System and Cooling Towers	3CY		3CY	۵.	ŝ	z	5	
254.	Maintenance-32 Hood Classifier and Echanic Dura Mode	3CY		3CY	۵.	s	z	5	
255	Maintenance-33				+	_			
	Fire Suppression System in Hoods	3CY		3CY	۵.	s	z	5	
256.	Maintenance -34 Annual Chiller Inspections	3CY		3CY	۵.	s	z	5	
257.	Maintenance-35 Walk-in Freezer and Cooler Temp. Reports	3CY		зсY	<u> </u>	s.	z	5	
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Date Approved Secretary of State, State Archives & Records Services

Date Signed

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SS ARC 932 (07/07) Page 53 of 86 4 **Records Retention Schedule** Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125, Baton Rouge, LA 70804 Hittor//www.com/bruition.com

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Secretary of State, State Archives & Records Services

Agency Approval

Date Signed

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290. Proj	Property Control -5							10.	
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291. Prop	Property Control -6				_		:	+	
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292. Prop	Property Control -7	TOT	201	101 - 101	:	1	-	L	
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293. Prop	Property Control -8 Department - Time Sheets & related documents	ACT + 3CY	4CY	ACT + 7CY	Σ	w	z	u ACT + Leave	ACT + = Current Payroll Period. Includes Approved Leave slips, Overtime Slips Physicians Slips
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295.	Property Control - 10 State Form - Daily Vehicle Log Sheet	ACT+ 3CY	PERM	PERM	٩	œ	z	U Prope	ACT += Life of Vehicle and While Data Stored in Property Control Warehouse.
296.	Property Control -11 Department - Vehicle Log Checklist	ACT+3CY	A PER	PERM	۵.	۳	z	U Prope	ACT + = Life of Vehicle and While Data Stored in Property Control Warehouse.
297.	Property Control -12 Department - Daily Vehicle Log Report & Fuelman / Chevron Gas Report	ACT+ 3CY	PER	PERM	٩	×	z	U Prope	ACT + = Life of Vehicle and While Data Stored in Property Control Warehouse.
298.	Property Control -13 Copies of Fuelman Bill and Chevron Bill	ACT+ 3CY	A PER	PERM	۵.	۳	z	U ACT.	ACT + = While Data Stored in Property Control Warehouse.
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Secretary of State, State Archives & Records Services

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300.	Property Control -15 Copies of Maintenance Work Order from Mechanic Shop	ACT+ CY	AFR	PERM	٩	۲	z	U Wareh	ACT + = While Data Stored in Property Control Warehouse.
301.	Property Control -16 Sign Out Sheet for Exxon & Chevron Gas Credit Cards	ACT	1CY	ACT+ 1CY	٩	s	z	U Wareh	ACT + = While Data Stored in Property Control Warehouse.
302.	Property Control -17 Vehicle Master File (Title & Registration & Original Purchase Papers)	ACT		ACT	٩.	w	z		
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ACT + = Until balanced with Inventory Control. Indicate Use of Form ACT + = Until Obsolete or Superseded. ACT + = Until Obsolete or Superseded. ACT + = Until Obsolete or Superseded. X\_ORIGINAL SUBMISSION ACT = Until Obsolete or Superseded. Remarks \_\_\_REPLACEMENT PAGE Agency Abbreviations: ACT = Active/Current ADDENDUM PAGE RENEWAL Page 57 of 86 Warehouse. Vital Record Identification Code 5 5 > > > State Records Center Use State Records z z z >z ≻ Archival s s s s S s I = Important U= Useful V= Vital Security Y – Yes 9N-N ۵. ۵. ٩ ۵. ٩ ۵ Retention ACT+ 3MO ACT+ 1CY ACT+ 1CY ACT+ 7CY ACT+ 7CY Total ACT **Retention Period** M - May Contain Confidential Information Storage £ O = Other (Specify in Remarks) R - Retain in Agency Archives Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125, Baton Rouge, LA 70804 A - Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office ACT+ 1CY ACT+ 1CY 4CT+ 3MO ACT+ 7CY ACT+ 7CY ACT Agency No Pinecrest Supports and Services Center / DHH/OCDD Approval Numbers for Warehouse #1 Orders Sheets PSS Safety Meeting Report / Sign In Sheet PSS Connections Self-Directed Study **Records Series Title** ACT - Active Period (when used define term in remarks column) Copies of Pro Card Statement Access Inventory Reports Vendor Receipt Forms Property Control -19 Property Control -20 Property Control -21 Property Control -22 Property Control -24 Property Control -23 Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO-Months WK-Week DY-Day(s) AY - Academic Year (Aug 1 - July 31) Http://www.sos.louisiana.gov CY - Calendar Year (Jan 1 - Dec 31) FY- Fiscal Year (July 1- June 30) PERM - Permanent Item 307. 309. 36 305. 306. 308.

**Records Retention Schedule** 

SS ARC 932 (07/07)

Secretary of State Archives & Records Services Date Approved

Date Signed

Agency No Pinecrest Supports a Agency No Pinecrest Supports a Number Record 10. Property Control -25 310. Property Control -25 BF 11 Forms / Repoi 311. Pshcyiatry-1 Department – Persoi 313. Psychology -1	Http://www.sos.louisiana.gov Agency No Pinecrest Supports and Services Center / DHH/OCDD Agency No Pinecrest Supports and Services Center / DHH/OCDD Item Records Series Title It Number 310. Property Folders 310. Property Control -25 BF 11 Forms / Reports 311. Pshcytatry-1 Department – Personnel Files Al	ACT							Indicate Lies of Form
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316.	Quality Management Improvemnt-2 Administrative Officer's Guidebook	ACT	scγ	ACT+ 5CY	<u>م</u>	s	z	V ACT+=	ACT+ = Until Obsolete or Suspended.
317.	Quality Management Improvement-3 Census Database	ACT		ACT	o	s	z	V ACT=	ACT = Until Obsolete or Superseded.
318.	Quality Management Improvement-4 Department - Computer Back-up Logs	1CY	107	2CY	۰	s	z		
319.	Quality Management Improvement-5 Department - Personnel Files	ACT	1CY	ACT + 1CY	٩	s	z	U ACT +	ACT + = While employed, includes correspondence.
320.	Quality Management Improvment-6 Department- Federal Medical Leave Act Paperwork	ACT	3CY	ACT + 3CY	o	ŝ	z	U ACT+	ACT += While employed.
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It Improvement-9     1CY     4CY     5CY     P     S     N     U       Mesced Forms     1CY     4CY     5CY     P     S     N     U       Infinition     ACT     ACT     P     S     N     I       Infinition     ACT     2CY     3CY     P     S     N     I       Infinition     ACT     2CY     3CY     P     S     N     V       Infinition     ACT     2CY     3CY     P     S     N     V       ex     ACT     ACT     ACT     P     S     N     V       it Improvement-12     ACT     P     S     N     V       al forms     State Records     N     N     V       in remarks columity     Recurity Status Codes     Y     Y     Y       in remarks columity     Record     N     N     N       A     Tansfer to State Archives     Y     Y     Y       in remarks columity     C-Confidential Information     N     N       A     M     N     N     N       A     M     M     N     N       A     F     N     N     N       A     M	322.	Quality Management Improvement-8 Department Time Sheets and related Documents	107	6CY	7CY	٩			_	Includes Approved Leave slips, Overtime Slips, Physician Slips.
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**Records Retention Schedule** 

SS ARC 932 (07/07)

Date Signed

Agency Approval

Date Approved

Secretary of State, State Archives & Records Services

SS ARC 932 (07/07)

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336.	Quality Management Improvement-22	ACT	202	ACV+ 5CV	٩	u,	z	V ACT= Ur	ACT= Until Obsolete or Superseded.
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**Records Retention Schedule** 

\$\$ ARC 932 (07/07)

Date Signed

Agency Approval

Date Approved

Secretary of State, State Archives & Records Services

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338.	Quality Management Improvement-24 Internal Audits- Internal Reports	зсү		3CY	Þ	s	z	>	
339.	Quality Management Improvement-25 Internal Client Specific/Facility Audits	3CY		3CY	z	ŝ	z	>	
340.	Quality Management Improvement-26 Integrated Record Guidelines	ACT	3CY	ACT + 3CY	٩	s	z	-	ACT = Until Obsolete or Superseded .
341.	Quality Management Improvement-27 Licensing Provider Numbers	Act	зсү	Act + 3CY	۹.	s	z	>	ACT= While in-service.
342.	Quality Management Improvement-28 Licensing Surveys	εcγ		SCY	٩	s	z	-	
343.	Quality Management Improvement-29 Meaningful Activity Observation Forms	зсү		3CY	×	s	z	2	
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346.	Quality Management Improvement-32 Medication Variance Database-Community Homes	ACT		ACT	ပ	s	z	I ACT= I	ACT= Until Obsoletes or superseded.
347.	Quality Management Improvement-33 Meeting Attendance Database	ACT	ACT	ACT	Σ	ω	z	U ACT =	ACT = Until obsolete or superseded.
348.	Quality Management Improvement-34 Mortality Review File – Hard Copy Original	ACT	10CY	ACT+ 10CY	U	s	z	ACT =	ACT = Case files remain active until the file is closed by the Mortality Review Committee. (Includes Committee Minutes, Death Certificates, Autopsy Reports, Facility Reports/Memo's and Computer Originals).
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349. Quali Morta	Quality Management Improvement-35 Mortality Review Database	ACT	10CY	ACT+1 0 CY	0	s	z	ACT = C	ACT = Case files remain active until the file is closed by the Mortality Review Committee. (Includes Mortality Chart and Mortality Review Loci
350. Quali Morta	Quality Management Improvement-36 Mortality Review Monthly Report	1CY	9 CY	10CY	U	s	z		
351. Quali OCDI	Quality Management Improviment-37 OCDD Accident/Incident Report Data Form	1CY	зсү	40Y	0	s	z	5	
	Quality Management Improvement-38 OCDD Accident/Incident Report Database	ACT	ACT	ACT	0	s	z	U ACT = Until obsol and Backup Disk.	ACT = Until obsolete or superseded, Includes Database and Backup Disk.
353. Quali	Quality Management Improvement-39				0	s	z	V Includes	Includes Client Specific DA- 3000 only
	Office of Risk Management, Unit of Risk Analysis and Loss Prevention, Visitor/client Accident Reporting Form – DA-3000	1CY	4CY	SCY					
354. Quali	Quality Management Improvement-40	зсү		3CY	Σ	s	z	D	
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Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125, Baton Rouge, LA 70804 Http://www.sos.louisiane.ovv

Encompasses Annual Evacuation and Sleep drills: Documents include evaluators check sheets, analysis ACT = Until absoletes or superseded. Inter-agency agreements to house during disasters, includes agreements for transportation. Indicate Use of Form Keep records until law suit was settled. \_X\_ORIGINAL SUBMISSION Includes minutes and all attachments ACT= Until Obsolete or Superseded. \_\_\_REPLACEMENT PAGE Remarks Agency Abbreviations: ACT = Active/Current ADDENDUM PAGE Includes sign in sheets. RENEWAL Vital Record Identification Code ∍ > \_ -\_ State Records Center Use z State Records z z z z z Archival s s Ś ŝ s s I = Important U= Useful Y – Yes V= Vital ۵. 92 - N Security Σ ۵. ۵. ٩. ۵. Retention Total 380 δÇ ACT SC√ Act š M - May Contain Confidential Information **Retention Period** In Storage 27CY ŝ R - Retain in Agency Archives 307 A – Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office 2CY Act °Ç 30, Š ACT Agency No | Pinecrest Supports and Services Center / DHH/OCDD Quality Management Improvement Computers Safety -Cooperative evacuation agreements Q A - Director Correspondence - General Quality Improvement Committee Minutes Quality Management Improvement-45 Quality Management Improvement-46 Quality Management Improvement-41 Quality Management Improvement-42 Quality Management Improvement-43 Quality Management Imrpovement44 ACT – Active Period (when used define term in remarks column). Safety - Asbestos Lawsuit Records **Records Series Title** Safety Committee Minutes Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) CY - Calendar Year (Jan 1 - Dec 31) AY - Academic Year (Aug 1 - July 31) Http://www.sos.louisiana.gov FY- Fiscal Year (July 1- June 30) Database PERM – Permanent Item 355. 356. 357. 358. 359. 360.

Date Approved

Secretary of State, State Archives & Records Services

Date Signed

Agency Approval

O – Other (Specify in Remarks)

ACT = Until obsoletes or superseded. Stored in locked closet in Safety Office and in a filing cabinet at Dispatch. includes the original cards and work orders for repairs. Manifests for Medical, Chemical and Silver Sludge waste. Indicate Use of Form Date Approved \_X\_ORIGINAL SUBMISSION correspondence and corrective action ACT = Until obsoletes or superseded. ACT= until obsoletes or superseded Includes hardcopies and database. \_\_\_REPLACEMENT PAGE Remarks Agency Abbreviations: ACT = Active/Current ADDENDUM PAGE SS ARC 932 (07/07) RENEWAL of 86 Secretary of State, State Archives & Records Services Page 67 Vital Record Identification Code > \_ -\_ -State Records Center Use -State Records z z z z z z z Archival s s s s s S s I = Important U= Useful V= Vital Y – Yes Security ۵. N-No o ۵. ۵. ۵. ۵. ۵. **Records Retention Schedule** Retention Total 30CY ACT ç ŞC ACT Š ACT **Retention Period** M - May Contain Confidential Information Storage 20CY Ş O - Other (Specify in Remarks) 5 R - Retain in Agency Archives A - Transfer to State Archives S - Review by State Archives Archival Processing Codes Louisiana Secretary of State, Division of Archives, Records Management and History C - Confidential Information Security Status Codes In Office P - Public Record ₫ ç Date Signed ACT ÅĊT ACT 5CY ŝ Agency No | Pinecrest Supports and Services Center / DHH/OCDD Safety -Employee Incident/Accident database Safety -Material Safety Data Sheets (MSDS) Quality Management Imrprovement-52 Quality Management Improvement-47 Quality Management Improvement-48 Quality Management Improvement-49 Quality Management Improvement-50 Quality Management Improvement-53 Quality Management Improvement-51 Safety -Hazardous Waste Manifests Safety -Health Department Surveys **Records Series Title** ACT - Active Period (when used define term in (gmarks column) Post Office Box 94125, Baton Rouge, LA 70804 Safety -Emergency Recall List Safety -Fire Marshal Surveys Permitted Retention Period Abbreviations FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months VVK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Http://www.sos.louisiana.gov Safety Drills FY- Fiscal Year (July 1- June 30) Agency Approval PERM – Permanent Item 367. 361. 362. 363. 364 365. 366.

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ACT += Files containing special programs the Resource Center has been involved in. ACT = Email correspondence sent and received concerning business of the Resource Center. ACT += Until obsolete or superseded. Indicate Use of Form \_X\_ORIGINAL SUBMISSION Remarks \_\_\_REPLACEMENT PAGE Agency Abbreviations: ACT = Active/Current \_ADDENDUM PAGE SS ARC 932 (07/07) RENEWAL Page 78 of 86 L.A.R.S. 44:36.C Vital Record Identification Code > > > FIT A ----State Records Center Use State Records z z ≻ z **Isvirb1A** ŝ s œ s 1 = Important U= Useful Y - Yes V= Vèal Security 2-N ≥ ≥ o o **Records Retention Schedule** ACT + 7CY Retention ACT+ PERM Total Š M - May Contain Confidential Information **Retention Period** Storage PERM ζ ŝĈ O - Other (Specify in Remarks) R - Retain in Agency Archives A - Transfer to State Archives S - Review by State Archives Archival Processing Codes C - Confidential Information Louisiana Secretary of State, Division of Archives, Records Management and History Security Status Codes P - Public Record In Office Date Signed ACT ACT Š ACT Agency No | Pinecrest Supports and Services Center / DHH/OCDD Resource Center - 006 [Central Louisiana Resource Center - 008 [Central Louisiana Resource Center -007 [Central Louisiana Developmental Disabilities (CLBHRC)] Developmental Disabilities (CLBHRC)] Developmental Disabilities (CLBHRC)] ELECTRONIC CORRESPONDENCE Behavioral/Health Resource Center on Behavioral/Health Resource Center on Behavioral/Health Resource Center on ACT – Active Period (when used define term in remarks column) **Records Series Title** Post Office Box 94125, Baton Rouge, LA 70804 Social Services Department - I POLICY - PROCEDURES SPECIAL PROGRAMS Permitted Retention Period Abbreviations FFY – Federal Fiscal Year (Oct 1 – Sept 30) MO - Months WK - Week DY - Day(s) AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Http://www.sos.louisiana.gov FY- Fiscal Year (July 1- June 30) PERM – Permanent Item Number 437. 438. 435. 436.

Date Approved

Secretary of State, State Archives & Records Services

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445.	Staff Training ~ Accreditation5 Documentation of Outside Training	1CY		1CY	Σ	ω	z	-	
446.	Staff Training ~ Accreditation6 Training Data Base	ACT+ 30 years		ACT+ 30 years	2	w	z	-	ACT += While employed.
447.	Supported Independent Living (SIL-1 Department Daily Time Sheets	107	зсү	4CY	٩	s	z	>	Includes approved leave Slips, Overtime Slips and Doctor Slips.
448.	Supported Independent Living (SIL)-2 Department – Personnel Files	1CY	4CY	ACT + 5CY	۵.	s	z	5	ACT + = While employed + 1 CY, Includes Correspondence.
449.	Supported Independent Living (SIL)-3 Department- Personnel Files / Inactive	2CY	зсү	5 CY	Z	s	z	>	
450.	Supported Independent Living (SIL)-4 Print Shop Requisitions	1CY		1CY	۵.	s	z	-	
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**Records Retention Schedule** 

Louisiana Secretary of State, Division of Archives, Records Management and History

SS ARC 932 (07/07)

Date Approved

Secretary of State, State Archives & Records Services

Date Signed

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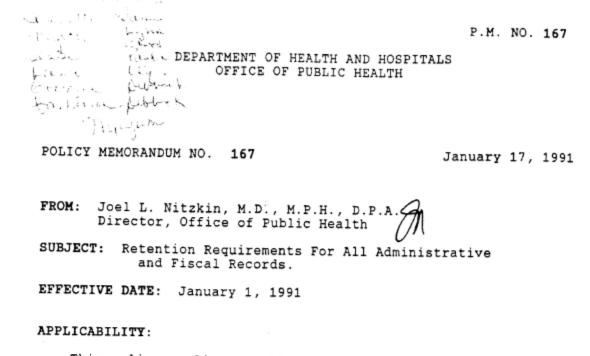
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Per Nichole Howard with Cept. of Labor: there is no specific regulation to how bing Time and Motion Studies have to be kept but 5 years is recommended. PERM = Copies maintained upon transition/discharge. Indicate Use of Form Date Approved "X\_ORIGINAL SUBMISSION Remarks \_\_\_REPLACEMENT PAGE ACT = Originals maintained until transitioned/discharged. ACT = Until Discharge or Death. Agency Abbreviations: ACT = Active/Current \_\_ADDENDUM PAGE SS ARC 932 (07/07) RENEWAL Page 85 of 86 Secretary of State, State Archives & Records Services Vital Record Identification Code > > > > State Records Center Use 5 State Records z z z z z Archival œ ŝ s v s = Important U= Useful Y - Yes Security V= Vital N-No o o Σ υ o **Records Retention Schedule** Retention Total PERM ŝ 70,7 Š δÇ **Retention Period** M - May Contain Confidential Information Storage °Ç A PER ş 3C ŝ O – Other (Specify in Remarks) R - Retain in Agency Archives A - Transfer to State Archives S - Review by State Archives Louisiana Secretary of State, Division of Archives, Records Management and History Archival Processing Codes C - Confidential Information Security Status Codes P - Public Record In Office Date Signed ACT 2Cγ 3Cγ 2Ç ζζ Agency No Pinecrest Supports and Services Center / DHH/OCDD Vital Records (birth certificates, social security Medicaid/Medicare/Insurance cards) – copies cards, state id's, insurance/burial policies, **Records Series Title** Individual Time Sheets/Leave Slips ACT - Active Period (when used define term in remarks column) Post Office Box 94125, Baton Rouge, LA 70804 Vocational Services TMS-Yr -2 Vocational Services TMS-Yr -1 Vocational Services B&P-Yr-4 Vocational Services PN-Yr -3 Progress Notes (copies) Transition Services -9 Permitted Retention Period Abbreviations Billings & Payments FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) Http://www.sos.louisiana.gov AY - Academic Year (Aug 1 - July 31) CY - Calendar Year (Jan 1 - Dec 31) Time Study FY- Fiscal Year (July 1- June 30) PERM – Permanent Number 477. 478. 479. 480. 481.

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#### Attachment K- Public Health

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This policy applies to all records that pertain to administrative and fiscal matters only. This does not apply to medical and vital records.

This policy does not apply to records maintained by contractors when the terms of the contract are in conflict. In such a case, the contract terms apply.

### INTRODUCTION:

The State record retention requirements as promulgated by R.S. 44:36, amended January 19, 1983, sets the retention period for preserving public records "at least three (3) years from the date on which the public record was made."

The Federal Government, in accordance with OMB Circular 102, effective October 1, 1988, has the same requirement as to the length of the retention period but the starting date is different. The starting date for the Federal Government is based on the funding or fiscal period and generally "starts on the day the grantee or subgrantee submits to the awarding agency its single or last expenditure report for the period."

Departure from the stated retention periods is necessary since OPH has numerous federal grants and contracts with different fiscal years that overlap the State fiscal year.

Additionally, only an original or copy (photocopy, microfilm 3200) or similar methods) of a record must be maintained to meet

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the above referenced legal requirements.

Since many of the same reports and forms are processed by several different sections of the Agency, the **primary** responsibility for retaining and preserving a record should be assigned to an organizational unit based on its function and the TYPE and/or NATURE of the record processed

TYPE of record refers to:

- Reports
  - FACS forms
  - Federal Grant Applications
  - State forms (Personnel, Accounting, Budget, Purchasing, Property Control, etc..)

ETC....

The NATURE of a record is determined by its use which is classified into two categories:

- TRANSACTIONAL Records that create and document a specific task and generally require processing in accordance with a formal procedure. These records, in most cases, are the various personnel, fiscal, budget, purchasing, property control, inventory, etc...forms and reports.
- INFORMATIONAL Records that provide information that is used to:
  - facilitate executive or administrative action,
  - b) support a transactional record,
  - c) update existing data or information.

Usually, these records include reports, memos, and other correspondence.

## POLICY:

RETENTION PERIOD:

The retention period for all administrative and fiscal records is:

## FOUR (4) COMPLETE FISCAL YEARS

NOTE: If the Agency implements the collection of

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Medicare Funds, all records pertinent to the Medicare Cost Reports must be kept for a period of SIX (6) YEARS.

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DESTROY

Example of the Four (4) year requirement:

		DESTROY
FISCAL	YEAR	ON OR AFTER
07/01/85 -	06/30/86	07/01/90
07/01/86 -	06/30/87	07/01/91
07/01/87 -	06/30/88	07/01/92
	ETC	

If the preservation and retention of a specific record has been identified to an organizational unit, which is addressed later in this policy, then other units of the Agency, after processing that record, must maintain a copy for:

## ONE (1) COMPLETE FISCAL YEAR

Example:

			D 20 2 20 2 20 0 2
FISCA	L	YEAR	ON OR BEFORE
07/01/88	-	06/30/89	07/01/90
07/01/89	-	06/30/90	07/01/91
		ETC	

If any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the stated retention periods, the records must be maintained until the completion of the action or until the end of the regular four (4) year period, whichever is later.

RESPONSIBILITY FOR PRESERVATION AND RETENTION OF RECORDS:

As a general rule, for all TRANSACTIONAL records, the unit that is responsible for the final disposition of the record shall have the responsibility of its preservation and retention. Final disposition means the last step in processing the record to effect its purpose.

Since INFORMATIONAL records vary in subject matter,

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the assignment of responsibility for maintenance is difficult. However, some general guidelines apply:

- The originator of a record (correspondence, or report) should maintain the record unless otherwise covered herein or it supports a transactional record and is attached to a form upon processing.
- Correspondence or reports related to a specific function (Fiscal; Budget; Personnel; Purchasing; Legal; Payroll; Property Control; etc..) are the responsibility of the organizational unit to which it is related.
- Records with historical significance currently being maintained by a unit should not be destroyed. Some examples of these records are:
  - a) Correspondence with Parish Officials
  - b) Annual Budget Requests
  - c) Annual Financial Reports and Audits
  - d) Annual Public Health Plans
- If the record crosses functional areas, it should be maintained by each organizational unit affected.

The following units have the responsibility for maintaining the related listed records (but are not limited to these records) for the four year retention period:

BUDGET AND MANAGEMENT:

- All Budget related reports, correspondence and forms.
- All contracts, leases, and other written agreements along with the related correspondence.
- All consumable supply inventory reports along with the supporting documentation.
- All documents originating from OPH related to the coordination and monitoring of the purchasing function with DHH and the State

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Purchasing Office.

DATA PROCESSING:

- All User Requests and related follow-up communications.
- 2. All data entry related documents.
- All correspondence related to DHH Computer Center interface.
- All documentation related to D/P Operations Control Procedures

FISCAL SERVICES:

- All Receiving Reports (FACS 100, 102 and 100S), Petty Cash Expenditure Summaries (FACS 1003), Petty Cash Receipts (FACS 1002) and all supporting documentation.
- All invoices, postage request letters, Travel Authorizations, Travel Expense Statements, LHS-39's and Supplemental Receiving Reports along with all supporting documentation.
- FACS Appropriation, Cost Center, Organizational, Project Expenditure Reports and related transaction reports.
- All bank statements (except Petty Cash accounts), deposit slips, Deposit Summaries, Transmittal Sheets and Account Authorizations.
- All Federal Grant Awards (not the applications) and the related fiscal reports along with any supporting workpapers.
- All financial audit reports and related correspondence.
- All financial reports prepared by the Fiscal Section along with any supporting workpapers.

HUMAN RESOURCES:

- 1. All records related to the following:
  - a) Personnel Actions
  - b) Disciplinary Actions

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INFORMATION SYSTEMS:

- 1. All records related to the following:
  - a) Outside computer services
  - b) Micro-computer standards and policies
  - c) Hardware and software inventory
  - d) DHH-OIS interface.

OPERATIONS & SUPPORT:

- 1. All records related to the following:
  - Building Maintenance
  - b) Hill-Burton Certification
  - c) Insurance Coverage
  - d) Safety Program
  - e) Property Inventory/Control
  - f) Coordination of Telecommunications Equipment and Service
  - g) Travel Policy
  - h) Vehicle Control & Maintenance

PAYROLL (DHH):

- Time and Attendance Reports (excludes the Time Allocation Worksheets)
- Leave Registers
- Individual Employee Payroll Files (SF-1's, deductions authorizations, W-2's, W-4's. etc.)

POLICY, PLANNING & EVALUATION:

- All records related to the following:
  - a) Federal grant consultation,
  - coordination and review
  - b) Legislative and Rulemaking coordination
  - c) Public Health Plan
  - d) Policy and Procedure Issuance

PURCHASING (DHH):

All records related to the following:

 a) All purchasing documents, except
 FACS 100-S, for contract orders,
 Purchase Orders, Release Orders, etc.

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PARISH HEALTH UNITS:

- All records related to revenue collections which include fees, insurance recoveries, and Medicaid billings,
- All "Dailies" and Time Allocation Worksheets along with the corresponding Variable Time and Attendance forms,
- All receipt books,
- All personnel records not forwarded to the Human Resources Section (OPH),
- Petty Cash Bank Account records, which include the bank statements, canceled checks, deposit slips, debit memos and any related correspondence,
- 6. PHU Revenue Collection Bank Account records,
- All inventory records for both movable property and consumable supplies that support information forwarded to the Central Office.

#### PHARMACY :

- Prescription files for programs serviced,
- AC-23 Forms for all items requisitioned from the pharmacy inventory,
- Computer FACS printouts and all related

records for the Drugs and Medical Supplies Inventory,

- Statistics concerning prescription counts and AC-23 lines filled, by project; including raw data,
- 5. Computer manifests of UPS shipping activity.

- <sup>3</sup> Pg. 8 of 8 P.M. No. 167
  - PROGRAM ADMINISTRATORS:
    - All grant applications and supporting documentation
      - All records related to the issuance of permits, licences and certificates
      - All records related to inspections, audits or other review functions related to the requirements of the program.
      - All records related to the testing of samples
      - All programmatic reports generated by or for the program staff

It shall be incumbent of the unit manager to maintain those records that are routinely accessed for a time period that is necessary to promote expediency and prudent processing of any information needed. In addition, if it is in the best interest of the State to maintain a record for more than the retention periods stated herein, then the records should be maintained until such time that the custodian of such record determines it to be useless.

Microfilming and off-site storage are options that are available to resolve any space problems. These options are only available to the extent that funds are available.

INQUIRIES:

All inquiries may be directed to:

Claude J. Carbo Deputy Assistant Secretary, Administration 325 Loyola Ave. Rm. 518 P.O. Box 60630 New Orleans, La. 70160 Ph. No. 504-568-5038 LINC. 621-5038 FAX -2609

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# Attachment L- Villa Feliciana Medical Complex

Secretary of State, State Archives & Records Services

Date Approved

Date Signed

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Secretary of State, State Archives & Records Services

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34	Group Benefits Invoices	70CY		70CY	0	۳	z	-	
35	Disclosures of Outside Employment	3CY		3CY	Σ	۲	z	5	
36	Vacancy & Promotional Announcements, Certificates of Eligibles, SF-9's, Applications	3CY		3CY	Σ	~	z	>	
37	FMLA	Active +5CY		Active +5CY	0	۲	z	-	Active= Until Closed
38	CS Job Studies	SCY		SCY	•	۲	z	∍	
39	CS Audit Files	SCY		SCY	۵.	۳	z	5	
40	Job Descriptions	Active +5CY		Active +5CY	٩	œ	z	5	Active=Until End of the CV #'s Abolished
41	Life Insurance by OGB	Active +5CY		Active +5CY	0	œ	z	-	Active=Until Separation
42	Life Insurance not covered by OFB	Active +70CY		Active +70CY	0	۲	z	-	Active=Until Separation
43	Supervisors File	Active +2CY		Active +2CY	Σ	œ	z	=	Active=Until Supervision Ends
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Secretary of State, State Archives & Records Services Date Approved

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44	Fire Drills	1CY	3CY	4CY				Shred
45	Safety Meeting Reports	tcY	3CY	4CY				Shred
46	Fire Alarm Checks	1CY	3CY	4CY	_			Shred
47	Building Inspections	1CY	3CY	4CY			-	Shred
48	Safety/Education Meeting Reports	1CY	3CY	4CY				Shred
49	Fall Prevention Meeting Reports	1CY	3CY	4CY				Shred
50	Visitor Accident Reports	Active + 1CY	3CY	Active + 4CY			-	Active = until final judgment or resolution ; shred
51	Investigation Reports	1CY	3CY	4CY				Shred
52	Drivers License Records	tcY	1CV	1CY		1		Shred
53	Internal Disaster Reports	1CY	зсү	4CY				Shred
Permitted Retentio ACT – Active Period FY- Fiscal Year (Jul) CY – Calendar Year AY – Academic Yea FFY – Federal Fisca MO – Months WK – PERM – Permanent	Permitted Retention Period Abbreviations ACT - Active Period (when used define term in remarks column) FY- Fiscal Year (July 1- June 30) CY - Calendar Year (Jan 1 - Dec 31) AY - Academic Year (Jug 1 - July 31) FFY - Federal Fiscal Year (Oct 1 - Sept 30) MO - Months WK - Week DY - Day(s) PERM - Permanent	Security Status Codes P - Public Record M - May Contain Confidential Information C - Confidential Information Archival Processing Codes A - Transfer to State Archives R - Retain in Agency Archives S - Review by State Archives	Codes d Confidential II niformation sing Codes incy Archives ate Archives		State Records Center Use Y – Yes N - No Vital Record Identification Code V = Important	ords Ce ion Coo	e nter	Agency Abbreviations
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54	Fire Watch Reports	1CY	зсY	4CY				Shred		
55	Office of Risk Management Audits	1CY	3CY	4CY	_					
56	Fire Alarm inspection Reports	107	3CY	4CY						
57	Fire Sprinkler Inspection Reports	1CV	3CY	4CY						
58	Hood Suppression System Inspection	tcY	ЭСҮ	4CY						
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60	Car Key Log	Active + 1CY		7CY				Shred	pe
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**Records Retention Schedule** Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125, Baton Review 1 A 70804

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62	Social Services Resident Record	Active	10CY	Active +10CV				Active = while resident; Send to Medical Records at
63	Visitor's Log	2CY	1CY	3CY		-		Active = while resident: Shred
64	Interdisciplinary Staffing List	2CY	1CY	3CY		+	-	Shred
65	Social Services Hours Monthly Report	2CY	1CY	3CY		-		Shred
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EEV Codemi	AT - Academic Year (Aug 1 - July 31)	Archival Processing Codes	ssing Codes	Vit	Vital Record			
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67	State Fire Marshall Inspection	Permanent		Permanent			+		
68	Blue Prints	Permanent		Permanent			-		1
69	Equipment Records	Active	Active	Active +1CY			+	Active =Life of Equipment	T
20	Vehicle Maintenance Records	Active	Active	Active +1CY			- a	Active = Life of Vehicle	
1	Generator Logs	Active	Active	Active +1CY				Active = Life of Equipment	T
72	Water Treatment logs	Active	Active	Active +1CY			+		
73	Water Temperature Logs	Active	Active	Active +1CY		-			
74	Gas Meter Logs	Active	Active	Active +1CY					1
75	Oxidation Log / Monitor	Active	Active	Active +1CY			+		
76	Maintenance Work Orders	Active	Active	Active +1CY					
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1	Schedules	1CY		1CY				Shred	
78	Verification of Nursing License	1CY		1CY			+	Shreet	
79	Gulf Coast Pharmaceutical Specialty Pharmacists' License	1CY		1CY				Shred	
80	Employee Sign-In Sheets	2CY	8CY	10CY				Microfiche Original Materials	
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81	Personnel Records	Active	70CY	Active= 70CV	5 2	/ <u>~</u>		\ >	Active = Until Separation	
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83	Delegation of Appt. Authority	Permanent		Permanent	•	œ	z	>		
84	Medical Files including Workers Compensation	Active+30CY		Active +30CY	υ	œ	z	-	Active = Until Separation	-
85	Payroll records (Time Sheets)	Active+5CY		Active+5CY	Σ	ĸ	z	5	Active until end of CY In which time is reported	-
86	Equal Employment Opportunity / Affirmative Action Reports	Active +2CY		Active +2CY	٩	œ	z	5		
87	Policy Statements	Permanent		Permanent	٩	ĸ	z	>		
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06	Confidential Files	Active+5CY		Active+5CY	0	œ	z	>	Active= Until Separation
91	Reports & Supporting Documentation	Active+5CY		Active+5CY	٩	۲	z	∍	Active=Untill end of CY Created or Received
92	Employee Grievances / Complaints / Appeals	Active+5CY		Active+5CY	v	۲	z	-	Active=Until Final Decision Rendered
93	EEO / Affirmative Action / Complaints	Active+5CY		Active+5CY	o	œ	z	-	Active=Until End of CY Created or Received
94	1-9 Employment Eligibility	Active+3CY		Active+3CY	0	œ	z	-	Active= Until Separation
95	Leave Slips / Verification w/Supporting Documentation	Active+5CY		Active+5CY	U	~	z	>	
96	Drug Testing (Forms / Results / Invoices)	Active+3CY		Active+3CY	0	۲	z	-	
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66	General Ledger	4FY	6FY	10FY		œ	z	-	Shred
100	Journal Entries	4FY	6FY	10FY		۲	z	-	Shred
101	Trial Balances	2FY	8FY	10FY	-	۲	z	-	Shred
102	Financial Statements	3FY	7FY	10FY		œ	z	-	Shred
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104	Billing Journal	2FY	8FY	10FY				Shred
105	Month End Aged Analysis	2FY	8FΥ	10FY			-	Shred
106	Daily Census	2FY	8FY	10FY			-	Shred
107	Medicare in Patient Remittance	2FY	8FY	10FY			-	Shred
108	Medicaid In-Patient	2FY	8FY	10FY				Shred
109	Patient Filer	2FY	8FY	10FY			-	Shred
110	Cash Receipts	2FY	8FY	10FY				Shred
ŧ	Entrust Fund	2FY	8Fy	10FY				Shred
112	Long Term Care Remittance	2FY	8FY	10FY				Shred
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115	Medicare Part B Remittance	2FY	8FY	10FY			-	Shred
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117	Accounts Payable	3FY	7FY	10FY				Shred	
118	General ledger	3FY	7FY	10FY				Shred	
119	Journal Entries Integrated Statewide System (ISIS)	5FY	SFY	10FY				Shred	
120	Trial Balances (ISIS)	3FY	7FY	10FY				Shred	
121	Financial Balances (ISIS)	ЗFY	7FY	10FY			-	Shred	
122	Financial Statements by Departments (ISIS)	3FY	7FY	10FY				Shred	
123	Audit Work Papers	4FY	6FY	10FY				Shred	
124	Bank Statements with Records	5FY	5FY	10FY				Shred	
125	Budget	3FY	7FY	10FY				Shred	
126	Audit Reports	4CY	Permanent	Permanent					
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129	Radiology Report Log for Louisiana War Veterans Home: East Louisiana Mental Health Systems Feliciana Forensic Facility	scY		scγ				On Computer
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7	Documents required for TJC and CMS certification – including Survey deficiencies and corrective actions	PERM	PERM	PERM	0	α.	z	>	usuraigeu. Necolas intaged to CU atter 10 FY.
e.	Licensing information	PERM	PERM	PERM	0	Ľ	z	>	
4	Sentinel Event /Root Cause Analysis /Near Miss Documentation	PERM	PERM	PERM	0	۲	z	>	
5	Employee Evaluation Documents	PERM	PERM	PERM	0	×	z	>	
9	Performance Improvement Documents	PERM	PERM	PERM	0	Ľ	z	>	
7	Performance Improvement Associated data	6FY	6FY	6FY	0	۲	z	>	
8	Patient Satisfaction Data	θFΥ	6FY	6FY	0	Ľ	z	>	
6	Utilization Review Data	6FY	6FY	6FY	0	2	z	>	
9	Policy & Procedures	6FY	6FY	6FY	0	~	z	>	
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## Attachment M- Central Louisiana State Hospital

Date Approved

Date Signed Secretary of State, State Archives & Records Services

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13	W-2's	5FY	5FΥ	SFY	U	: <u>~</u>	: z	5	
14	Personnel Records (Active and Inactive)	PERM	PERM	PERM	Σ	- <u>~</u>	: z	>	
15	Worker's Compensation Files	3FY	ЗFY	3FY	0	ď	z	>	
16	Applications for Employment (EEOC)	2FY	2FY	2FY	Σ	~	z	1-	
17	Promotional Announcements (EEOC)	2FY	2FY	2FY	Σ	•	2	>	
18	Layoff Records (EEOC)	2FY	2FY	2FY	Σ	< a	zz	>	
19	Verification of Employment Authorization – Immigration Reform and Control Act 1986	ЗFY	ЗFY	ЗFY	Σ	. <u>~</u>	z	>	
20	Accounting Records	θFY	6FY	6FY	×	ď	z	-	
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Secretary of State, State Archives & Records Services

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22	Budget Records	ACT	6FY	ACT+6FY	Σ	Ľ	z	-	
23	Audit Records	6FY	6FY	ACT+6FY	0	۲	z	>	
24	Safety Meetings	ACT	SFY	ACT+5FY	Σ	~	z	-	
25	Fire Drils	SFY	5FY	SFY	<u>م</u>	~	z	>	
26	Employee/Visitor Accidents	5FY	SFY	SFY	Σ	<u>α</u>	z	>	
27	Fire Marshal Inspections	PERM	PERM	PERM	٩	α.	z	-	
28	Office of Risk Management Audits	SFY	5FY	5FΥ	۵.	~	z	Þ	
29	Driving Records	ACT		ACT	Σ	ď	z	-	
30	Property Claims, Vehicle Accidents	10FY	10FY	10FY	Σ	œ	z	>	
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32	Directives from State Office (Administrative)	6FY	6FY	6FY	٩	۲	z	>	
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34	Memorandums	6FY	6FY	6FY	Σ	Ľ	z	>	
35	In-Service Training Records	6FY	6FY	6FY	z	۲	z	5	
36	Annual Reports	6FY	6FY	6FY	٩	×	z	>	
37	Cooperative Agreements	6FY	6FY	6FY	٩	œ	z	>	
38	Reports on Program Activities	6FY	6FY	6FY	٩	œ	z	>	
39	Affirmative Action Plans	6FY	6FY	6FY	s	۳	z	>	
40	Correspondence	6FY	6FY	6FY	٩.	۲	z	-	
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Louisiana Secretary of State, Division of Archives, Records Management and History Post Office Box 94125 Baton Routes 1 & 70804

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Secretary of State, State Archives & Records Services

Date Signed

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		requisitions; purchase orders; invoices; bank statements and reconciliation report	contractor time-shee	ts; receiving reports;
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1	FY94	Contracts and supporting documentation	which includes pro-	fessional and social
		service contracts and related correspond	enc e.	
	Prior to 6 FY	Budget Records:	-1	
	FY98			
	-	Budget requests, including workpapers a	nd backup documen	tation.
	Prior to 6 FY	Audit Reports:		
	FU98			
		Reports from internal and external auditor State Legislative Auditors.	ors including DHH	internal Auditors and
			-	
	INACTIVE + FUNL	Medical Records (Inpatient and Outpa	tijint)	
	The HAR		_	
	Prior to 6 FY	Directives from State Office	-	
1.	1440			
- 1'	Prior to 6 FY FU98	Licensing Information		
1	PROT TO 6 FY FU 95	Survey Information		
	Prince of the star		-	
1	Prior to 6 FY PU98	Memorandums	-	
1	Prior to 6 FY FY98	Inservice Training Records	-	
١.	Prior to 6 FY Fy 98	4		
1	Morto or 1970	Annual Reports	-	1
1 1	Prior to 6 FX FY98	Cooperative agreements with other age	ericies	
			-	
1	Martoorr Pyrc	Reports on program activities		
P	rior to 6 FY FY98	Affirmative Action Plans		
		State Vehicle Information		
P	rior to 6 FY FY98	Admissions Books (including those listi admission)	n'ss of the patient's	name and date of
			a -	
P	rior to 6 FY FU 98	Correspondence		
			~	
P	rior to 6 FY 1490	Other miscellaneous administrative for	zi'is	

1AR-1	LA 303 10-2004 14:0	97	CENTRAL LA STATE HOSPITAL	May 14 2004	318 484 6851
			Payroll Records:	N	
	Prior to 5 FY	FY 99	Time and attendance records; leave form documents; daily attendance sheets; and	adjustment-sheets.	id overtime approva)
	Prior to 5 CY	0499	W-2's	:	
	Prior to 3 FY	RIO	Workers' Compensation Files		
	Prior to 2 FY	Fyoz	Applications for Employment (EEOC)	) [	
	Prior to 2 FY	PYOZ	Promotional Announcements (EEOC)	-	
	Prior to 2 FY	Fije	Layoff Records (EEOC)		
	Prior to 3 FY	FUOl	Verification of employment authorization of the second sec	tion required by In	nmigration Reform
		•			
				··	
			Inactive = When patient is no longer und FY = Fiscal Years (July to June)	ier breatment.	
			CY = Calendar Year (Jan. to Dec.)	-	
				· . •	