



Section: Medical Records Administration
Policy: MRA 8
Subject: Record Retention - Medical

POLICY: Client Medical record retention.

PROCEDURE:

1. Client medical records must be retained for a minimum of seven years.
2. All family planning medical records must be kept in locked file cabinets while considered active clients (a client will be considered active for 18 months following the last clinic contact).
3. Inactive family planning medical records should be removed from the active files and must either be placed in locked file cabinets or sealed file storage boxes.
4. Inactive records may also be transferred to other media for efficient storage. Such media include: microfiche, microfilm, or electronic media such as PDF files.
5. Standards must be established for maintaining the security and confidentiality of files transferred to media other than paper. Mechanisms must also be established for date of destruction of records (example: tagged for month and year of destruction (5 1/2 years after being placed into inactive)).
6. Timing of transfer of records to alternative media should consider mobility of clients and timeframe within which clients may return to clinic after identification as inactive to reduce the potential need to create another paper copy.
7. All parts of the client's record will be retained, regardless of the age, while the record is active or inactive and still within the 7-year retention period.
8. Medical records of adolescents placed into inactive status while they are still adolescents, must be maintained for 7-years after the adolescent reaches the age of majority, eighteen years.
9. Other clinic medical documents, not part of a chart (lab logs, appointment schedules, Pap logs) should be retained until documented in client medical chart and no longer referenced for grant reporting.
10. Destruction of the records should be accomplished by use of a paper shredder whenever possible for paper products. For other media, techniques for destruction must assure that the record has been completely destroyed or expunged.

References:

1. Program Guidelines for Project Grants for Family Planning Services, January 2001, p. 28-29, Section 10.3, Medical Records.