

April 14, 2020

**C-14**

HONORABLE MAYOR AND CITY COUNCIL  
City of Long Beach  
California

**RECOMMENDATION:**

Recommendation to adopt the revisions to the Department of Health and Human Services Records Retention Schedule (as shown in Attachment I), and rescind previously applicable Record Titles for the Department of Health and Human Services.

**DISCUSSION**

Under Municipal Code Section 1.28.010, records retention schedules for City Manager departments and elected officials must be submitted to the City Council for approval. The retention schedules for each department must designate the type, class or series of records maintained by the department.

In its capacity as responsible agent for the operation of the Records Center, the Office of the City Clerk has worked with the City Attorney's Office to revise the Records Retention Schedule (Attachment I) last adopted on August 23, 1983.

The City Attorney and the Police Department concur in the above recommendation.

**CONCURRENCES**

The City Attorney and Department of Health and Human Services concur in the above recommendation.

**FISCAL IMPACT**

Appropriations have been budgeted in FY 20 for the operation of the City Records Center.

Respectfully submitted,



MONIQUE DE LA GARZA  
CITY CLERK

MD:II

# ATTACHMENT I

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Communicable Disease Case and Contact Files	2 Years	-	2 Years	All cases will be entered into the state's database system, CalREDIE (California Reportable Disease Information Exchange) prior to being destroyed.

Department/Bureau/Division: <b>Health &amp; Human Services / City Health Officer /          Public Health Emergency Management /          Communicable Disease Control Program</b>	City Council Approval Meeting Date: <b>August 23, 1983; Rev: April 14, 2020</b>	Page No. <b>1 of 1</b>
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. COMMUNICABLE DISEASE CASE AND CONTACT FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>CITY HEALTH OFFICER                  BUREAU/PUBLIC HEALTH                  EMERGENCY MANAGEMENT                   COMMUNICABLE DISEASE                  CONTROL PROGRAM</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS		2 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

**CASE AND CONTACT FILES** – HOSPITAL NOTES; LABORATORY RESULTS; HISTORY & PHYSICAL; AND CASE NOTES

WORKING COPIES ARE STORED ALPHABETICALLY BY DISEASE AND CHRONOLOGICALLY BY YEAR.

ALL CASES WILL BE ENTERED INTO THE STATE'S DATABASE SYSTEM, CALREDIE (CALIFORNIA REPORTABLE DISEASE INFORMATION EXCHANGE) PRIOR TO BEING DESTROYED.

PREPARED BY: SANDY WEDGEWORTH

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	HIV Surveillance Case Files	1 Year	-	1 Year	All cases will be entered into the state's database system, CalREDIE (California Reportable Disease Information Exchange) prior to being destroyed.
2.	STD Surveillance Case Files	2 Years	-	2 Years	All cases will be entered into the state's database system, CalREDIE (California Reportable Disease Information Exchange) prior to being destroyed.

Department/Bureau/Division:  
**Health & Human Services / City Health Officer /  
 Public Health Emergency Management / HIV/STD  
 Surveillance Program**

City Council Approval Meeting Date:  
 August 23, 1983; **Rev: April 14, 2020**

Page No.  
**1 of 1**

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. HIV SURVEILLANCE CASE FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>CITY HEALTH OFFICER                  BUREAU/PUBLIC HEALTH                  EMERGENCY MANAGEMENT                   HIV/STD SURVEILLANCE PROGRAM</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR		1 YEAR

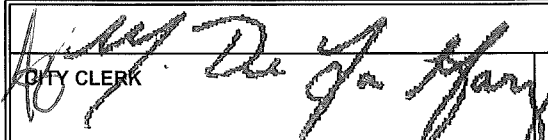

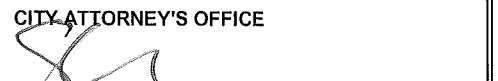
DESCRIPTION: (Purpose, Content, and Method of Filing)

**HIV SURVEILLANCE CASE FILES** – HOSPITAL NOTES; LABORATORY RESULTS; HISTORY & PHYSICAL; AND CASE NOTES.

WORKING COPIES ARE STORED BY DISEASE AND CHRONOLOGICALLY BY YEAR AND MONTH.

ALL CASES WILL BE ENTERED INTO THE STATE'S DATABASE SYSTEM, CALREDIE (CALIFORNIA REPORTABLE DISEASE INFORMATION EXCHANGE) PRIOR TO BEING DESTROYED.

PREPARED BY: SANDY WEDGEWORTH

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. STD SURVEILLANCE CASE FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>CITY HEALTH OFFICER                  BUREAU/PUBLIC HEALTH                  EMERGENCY MANAGEMENT                  HIV/STD SURVEILLANCE PROGRAM</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS		2 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

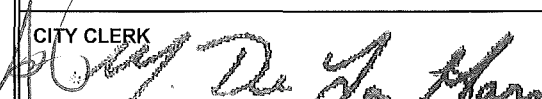

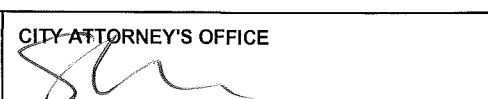
**STD SURVEILLANCE CASE FILES** – HOSPITAL NOTES; LABORATORY RESULTS; HISTORY & PHYSICAL; AND CASE NOTES.

WORKING COPIES ARE STORED BY DISEASE AND CHRONOLOGICALLY BY YEAR AND MONTH.

ALL CASES WILL BE ENTERED INTO THE STATE'S DATABASE SYSTEM, CALREDIE (CALIFORNIA REPORTABLE DISEASE INFORMATION EXCHANGE) PRIOR TO BEING DESTROYED.

PREPARED BY: SANDY WEDGEWORTH

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Grant Invoices and Audit Reports	G	5 Years	G + 5 Years	G = Life of Grant

Department/Bureau/Division:

**Health & Human Services / City Health Officer /  
Public Health Emergency Management / Public  
Health Emergency Management Program**

City Council Approval Meeting Date:

**August 23, 1983; Rev: April 14, 2020**

Page No.

**1 of 1**



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. GRANT INVOICES AND AUDIT REPORTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>CITY HEALTH OFFICER BUREAU/PUBLIC HEALTH EMERGENCY MANAGEMENT</b>  <b>PUBLIC HEALTH EMERGENCY MANAGEMENT PROGRAM</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	G	5 YEARS	G + 5 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

**GRANT INVOICES** – COPIES THE DEPARTMENT HAS RECEIVED FROM VARIOUS VENDORS FOR PRODUCTS PURCHASED.

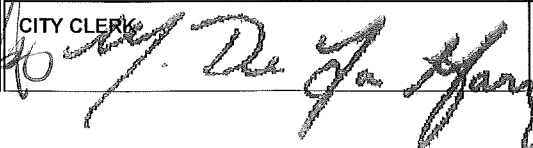
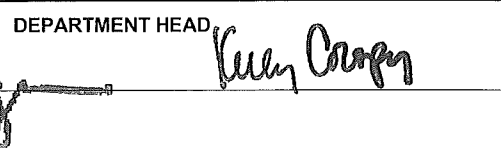
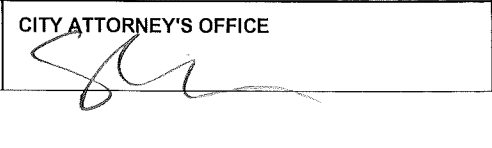
**AUDIT REPORTS** – ALL DOCUMENTS SUBMITTED FOR AUDITS (INCLUDING PAYROLL RECORDS, PURCHASE ORDERS) AND FINAL REPORTS.

ORIGINAL FORMS ARE TO BE MAINTAINED ON FILE FOR ALL DOCUMENTS SPECIFIED IN THE AGREEMENTS. SUCH RECORDS SHALL BE RETAINED FOR A PERIOD OF FIVE (5) YEARS AFTER TERMINATION OF THE AGREEMENT AND AFTER FINAL DISPOSITION OF ALL PENDING MATTERS.

FILES ARE STORED CHRONOLOGICALLY BY INDEX CODE, GRANT, AND GRANT DETAIL.

G = LIFE OF GRANT.

PREPARED BY: SANDY WEDGEWORTH

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Healthy Eating Active Living (HEAL) Files	G	4 Years	G + 4 Years	Destroy both working copy and electronic copy after grant has been expended. G = Life of Grant
2.	Nutrition Education & Obesity Prevention / Supplemental Nutrition Assistance Program Education (NEOP/SNAP-Ed)	G	3 Years	P + 3 Years	Destroy both working and electronic copy 3 years after final payment is received. G = Life of Grant P = Final Payment
3.	Office of Traffic Safety (OTS) Files	G	3 Years	P + 3 Years	Destroy both working and electronic copy 3 years after final payment is received. G = Life of Grant P = Final Payment
4.	Southern California Association of Governments (SCAG) Files	G	4 Years	C + 4 Years	Destroy both working and electronic copy 4 years from completion date or date an audit resolution is achieved. G = Life of Grant C = Completion Date
5.	Tobacco Education Program (TEP) Files	G	3 Years	P + 3 Years	Destroy both working and electronic copy 3 years after final payment is received. G = Life of Grant P = Final Payment

Department/Bureau/Division:

**Health & Human Services / Community Health /  
Chronic Disease and Injury Prevention**

City Council Approval Meeting Date:

August 23, 1983; Rev: April 14, 2020

Page No.

**1 of 1**

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. HEALTHY EATING ACTIVE LIVING ZONE (HEAL) FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/CHRONIC DISEASE &amp; INJURY PREVENTION</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	G	4 YEARS	G + 4 YEARS
	ELECTRONIC COPY	G	4 YEARS	G + 4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- CONTRACTS - WRITTEN AND SIGNED AGREEMENTS BETWEEN DEPARTMENT AND VARIOUS FUNDERS
- MOU'S - MEMORANDUM OF UNDERSTANDING
- SCOPE OF WORK – REQUIRED BY FUNDERS; DESCRIPTION OF GRANT DELIVERABLES, DEADLINES, ETC.
- INVOICES - RECEIPTS OF ITEMS PURCHASED FOR VARIOUS GRANT-FUNDED ACTIVITIES, INCLUDING: COOKING DEMONSTRATION EXPENSES (GROCERIES, SUPPLIES, ETC.), TRAVEL EXPENSES, REIMBURSEMENT REQUESTS, OFFICE SUPPLIES, EQUIPMENT EXPENSES, ETC.
- BACKUP DOCUMENTS – REQUIRED BY FUNDERS FOR PURCHASES MADE THROUGHOUT GRANT PERIOD.

DIVISION OFFICER KEEPS HARD COPIES OF CONTRACTS, MOUS, AND SCOPES OF WORK.  
 ACCOUNTING KEEPS ORIGINAL COPIES OF INVOICES/BACKUP DOCUMENTS.

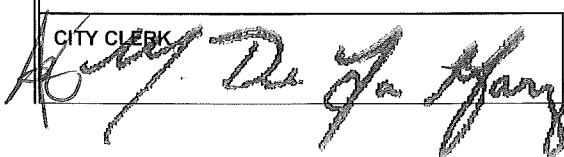
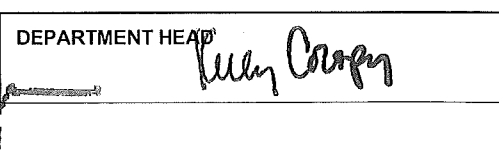
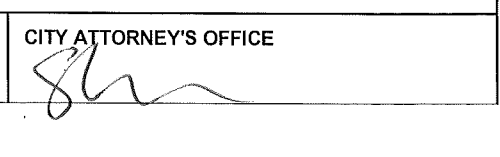
ALL RECORDS ARE SCANNED AND STORED ELECTRONICALLY BY YEAR AND ALPHABETICALLY (BY GRANT).

G = LIFE OF GRANT.

RECORDS ARE DESTROYED AFTER GRANT HAS BEEN EXPENDED.

PREPARED BY: ALINA MISSIRIAN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. NUTRITION EDUCATION &amp; OBESITY PREVENTION / SNAP-ED FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/CHRONIC DISEASE &amp; INJURY PREVENTION</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
		WORKING COPY	G	3 YEARS P + 3 YEARS
		ELECTRONIC COPY	G	3 YEARS P + 3 YEARS

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CONTENTS:

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- BACKUP DOCUMENTS – REQUIRED BY FUNDERS FOR PURCHASES MADE THROUGHOUT GRANT PERIOD.



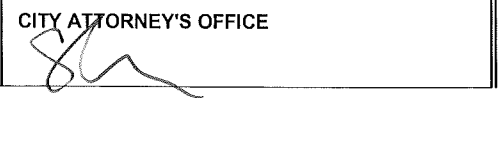
DIVISION OFFICER KEEPS HARD COPIES OF CONTRACTS, MOUS, AND SCOPES OF WORK.  
 ACCOUNTING KEEPS ORIGINAL COPIES OF INVOICES/BACKUP DOCUMENTS.

ALL RECORDS ARE SCANNED AND STORED ELECTRONICALLY BY YEAR AND ALPHABETICALLY (BY GRANT).

G = LIFE OF GRANT.  
 P = FINAL PAYMENT.

RECORDS ARE DESTROYED 3 YEARS AFTER FINAL PAYMENT IS RECEIVED.

PREPARED BY: ALINA MISSIRIAN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. OFFICE OF TRAFFIC SAFETY (OTS) FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>COMMUNITY HEALTH BUREAU/CHRONIC DISEASE &amp; INJURY PREVENTION</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	G	3 YEARS	P + 3 YEARS
	ELECTRONIC COPY	G	3 YEARS	P + 3 YEARS

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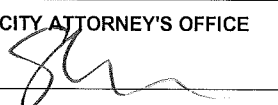
ALL RECORDS ARE SCANNED AND STORED ELECTRONICALLY BY YEAR AND ALPHABETICALLY (BY GRANT).

G = LIFE OF GRANT.  
 P = FINAL PAYMENT.

RECORDS ARE DESTROYED 3 YEARS AFTER FINAL PAYMENT IS RECEIVED.

PREPARED BY: ALINA MISSIRIAN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>4. SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENT FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>COMMUNITY HEALTH BUREAU/CHRONIC DISEASE &amp; INJURY PREVENTION</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	G	4 YEARS	C + 4 YEARS
	ELECTRONIC COPY	G	4 YEARS	C + 4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

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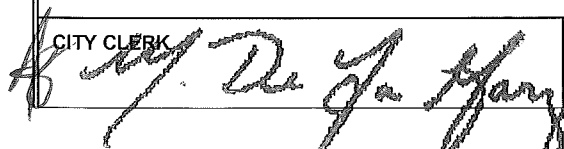
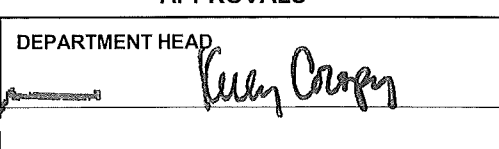
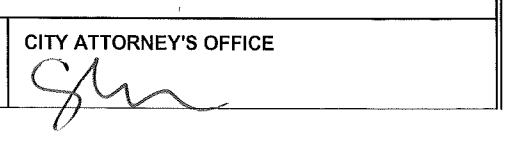
ALL RECORDS ARE SCANNED AND STORED ELECTRONICALLY BY YEAR AND ALPHABETICALLY (BY GRANT).

G = LIFE OF GRANT.  
 C = COMPLETION DATE.

RECORDS ARE DESTROYED 4 YEARS FROM COMPLETION DATE OR DATE OF AUDIT RESOLUTION IS ACHIEVED.

PREPARED BY: ALINA MISSIRIAN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

<b>ORIGINATING DEPARTMENT</b> <b>HEALTH &amp; HUMAN SERVICES</b>	<b>ITEM NO. &amp; TITLE:</b> <b>5. TOBACCO EDUCATION PROGRAM (TEP) FILES</b>	<b>DATE</b> <b>APR 14 2020</b>
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<b>COPIES/FILES BY DEPT/SECTION</b> <b>COMMUNITY HEALTH BUREAU/CHRONIC DISEASE &amp; INJURY PREVENTION</b>	<b>COPY DESIGNATION</b>	<b>RETENTION PERIOD</b>		
		<b>DEPARTMENT</b>	<b>REC. CENTER</b>	<b>DESTROY</b>
	<b>WORKING COPY</b>	<b>G</b>	<b>3 YEARS</b>	<b>P + 3 YEARS</b>
	<b>ELECTRONIC COPY</b>	<b>G</b>	<b>3 YEARS</b>	<b>P + 3 YEARS</b>

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

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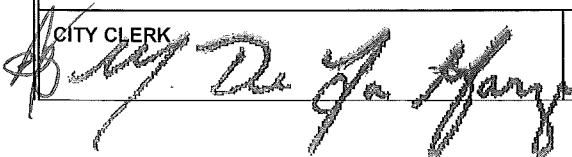
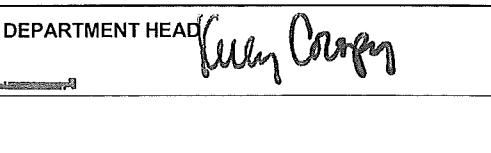
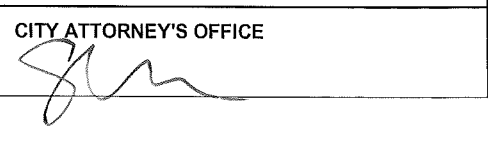
ALL RECORDS ARE SCANNED AND STORED ELECTRONICALLY BY YEAR AND ALPHABETICALLY (BY GRANT).

G = LIFE OF GRANT.  
 P = FINAL PAYMENT.

RECORDS ARE DESTROYED 3 YEARS AFTER FINAL PAYMENT IS RECEIVED.

PREPARED BY: ALINA MISSIRIAN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Black Infant Health (BIH) Client Files	5 Years	5 Years	10 Years	
2.	Child Health and Disability Prevention Program (CHDP)	3 Years	-	3 Years	
3.	Childhood Lead Poisoning Prevention Program (CLPPP) – Patient Files	5 Years	Permanent	Permanent	To be kept for auditing purposes / reference.
4.	Childhood Lead Poisoning Prevention Program (CLPPP) – Time Study Files	5 Years	7 Years	12 Years	
5.	Federal Financial Participation (FFP) – Time Study Files	5 Years	7 Years	12 Years	
6.	Medi-Cal Administrative Activities (MAA) – Time Study Files	5 Years	7 Years	12 Years	
7.	Medi-Cal Outreach (MCO) – Client Files	2 Years	8 Years	10 Years	
8.	Nurse Family Partnership Program (NFP) – Client Files	5 Years	5 Years	10 Years	
9.	Nursing Services Program Fiscal Files	5 Years	5 Years	10 Years	
10.	Nursing Services Program Reports and Correspondence	5 Years	5 Years	10 Years	
11.	Public Health Nursing Client Files	5 Years	5 Years	10 Years	

Department/Bureau/Division:

**Health & Human Services / Community Health /  
Nursing Services**

City Council Approval Meeting Date:

August 23, 1983; Rev: April 14, 2020

Page No.

**1 of 2**



**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
12.	Public Health Nursing Daily Visit Records	5 Years	5 Years	10 Years	
13.	Targeted Case Management (TCM)	5 Years	7 Years	12 Years	

Department/Bureau/Division:

**Health & Human Services / Community Health /  
Nursing Services**

City Council Approval Meeting Date:

**August 23, 1983; Rev: April 14, 2020**

Page No.

**2 of 2**

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. BLACK INFANT HEALTH (BIH) CLIENT FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS

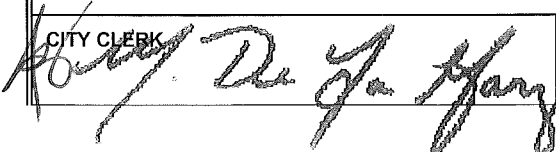
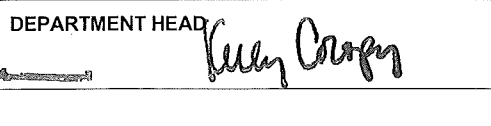
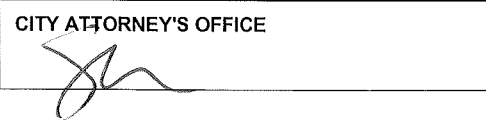
DESCRIPTION: (Purpose, Content, and Method of Filing)

BLACK INFANT HEALTH CLIENT CASE MANAGEMENT FILES. INCLUDES PROTECTED HEALTH INFORMATION, AGES AND STAGES QUESTIONNAIRES, CLINICAL ASSESSMENTS, HOME VISIT ENCOUNTERS, INDIVIDUALIZED SERVICE PLANS, LIFE COURSE PLANS, GENERALIZED ANXIETY DISORDER-7 (GAD-7), PATIENT HEALTH QUESTIONNAIRE-9 (PHQ-9), EDINBURG POSTPARTUM DEPRESSION SCALE, CASE NOTES, GROUP INTERVENTIONS, REFERRALS, AND TRANSFERS.

FILES ARE STORED CHRONOLOGICALLY BY CLIENT LAST NAME.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. CHILD HEALTH AND DISABILITY PREVENTION PROGRAM (CHDP)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS		3 YEARS

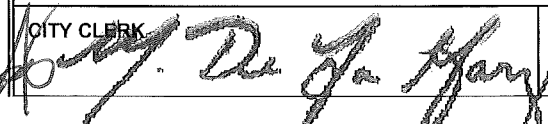
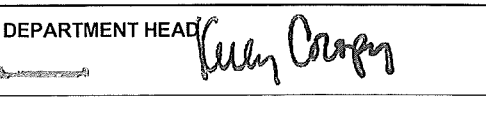
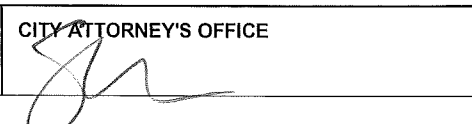
DESCRIPTION: (Purpose, Content, and Method of Filing)

CHILD HEALTH AND DISABILITY PROGRAM (CHDP) PROVIDER FILES, PM 160s, PROTECTED HEALTH INFORMATION, CLINICAL ASSESSMENTS, LABORATORY RESULTS, CASE NOTES, CASE COORDINATION FORMS AND CORRESPONDANCE.

PROVIDER FILES STORED ALPHABETICALLY. ALL OTHER FILES STORED ALPHABETICALLY BY YEAR.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. CHILDHOOD LEAD POISONING PREVENTION PROGRAM (CLPPP) – PATIENT FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	5 YEARS	PERMANENT	PERMANENT

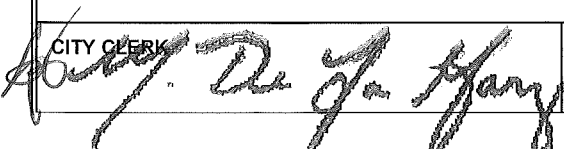


DESCRIPTION: (Purpose, Content, and Method of Filing)

PATIENT LEAD CASE FILES, LABORATORY REPORTS, PROTECTED HEALTH INFORMATION, MEDICAL RECORDS, HOME VISIT ENCOUNTERS, CLINICAL ASSESSMENTS, INDIVIDUALIZED SERVICE PLAN, CASE NOTES, ENVIRONMENTAL HEALTH INSPECTION REPORT, REFERRALS AND TRANSFERS.

FILES ARE STORED CHRONOLOGICALLY BY CLIENT CHART NUMBER. EACH CHART CONTAINS THE CLIENT'S NAME AND DOB.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>4. CHILDHOOD LEAD POISONING PREVENTION PROGRAM (CLPPP) – TIME STUDY FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	7 YEARS	12 YEARS

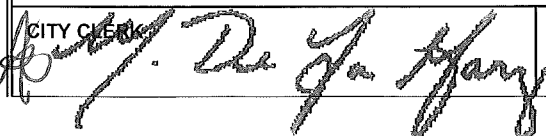
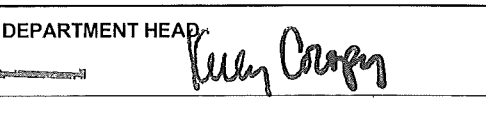
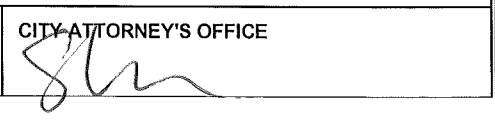
DESCRIPTION: (Purpose, Content, and Method of Filing)

CLPPP STAFF TIME STUDY FILES, TIME SHEETS, AND INVOICES.

TIME STUDY FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>5. FEDERAL FINANCIAL PARTICIPATION (FFP) – TIME STUDY FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	7 YEARS	12 YEARS

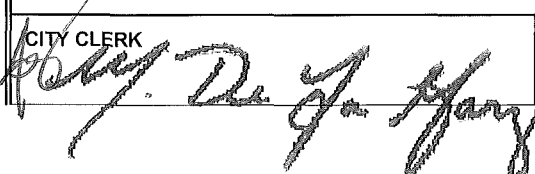
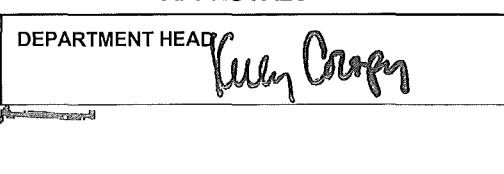
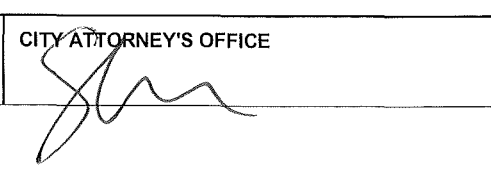
DESCRIPTION: (Purpose, Content, and Method of Filing)

STAFF TIME STUDY FILES, TIME SHEETS, AND INVOICES.

TIME STUDY FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>6. MEDI-CAL ADMINISTRATIVE ACTIVITIES (MAA) – TIME STUDY FILES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	7 YEARS	12 YEARS

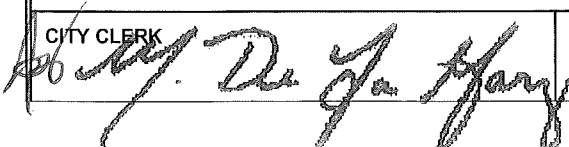
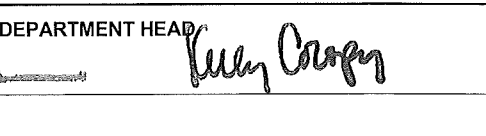
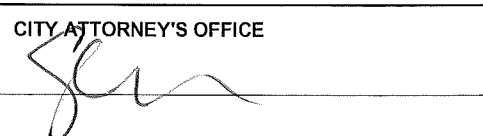
DESCRIPTION: (Purpose, Content, and Method of Filing)

STAFF TIME STUDY FILES, TIME SHEETS, INVOICES, CONTRACT AGREEMENTS AND RELATED CORRESPONDANCE.

TIME STUDY FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>7. MEDI-CAL OUTREACH CLIENT FILES (MCO)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	8 YEARS	10 YEARS

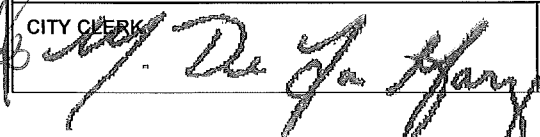
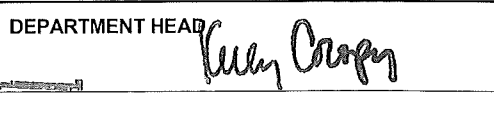
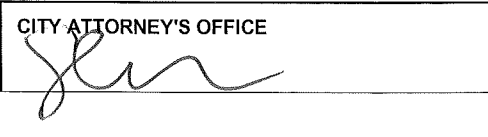
DESCRIPTION: (Purpose, Content, and Method of Filing)

CLIENT MEDI-CAL AND INSURANCE ENROLLMENT APPLICATIONS AND RELATED COMMUNICATIONS.

RECORDS ARE FILED CHRONOLOGICALLY.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>8. NURSE FAMILY PARTNERSHIP PROGRAM (NFP)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CLIENT CASE MANAGEMENT AND MEDICAL FILES. INCLUDES PROTECTED HEALTH INFORMATION, AGES AND STAGES QUESTIONNAIRES, CLINICAL ASSESSMENTS, HOME VISIT ENCOUNTERS, INDIVIDUALIZED SERVICE PLANS, DYADIC ASSESSMENT OF NATURALISTIC CAREGIVER-CHILD EXPERIENCES (DANCE), GENERALIZED ANXIETY DISORDER-7 (GAD-7), PATIENT HEALTH QUESTIONNAIRE-9 (PHQ-9), EDINBURG POSTPARTUM DEPRESSION SCALE, CASE NOTES, REFERRALS, AND TRANSFERS.

CHARTS ARE GENERATED BY LA COUNTY. CHARTS ARE COLOR-CODED AND NUMBERED, INCLUDING CLIENT NAME AND DOB. CHARTS ARE STORED CHRONOLOGICALLY BY CLIENT CHART NUMBER.

PREPARED BY: NANCY RIANO

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

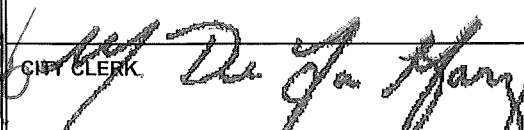


ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>9. NURSING SERVICES PROGRAM FISCAL FILES</b>	DATE <b>APR 14 2020</b>		
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

NURSING PROGRAM CONTRACTS, SCOPES OF WORK, INVOICES, AUDITS AND RELATED CORRESPONDANCE.

FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

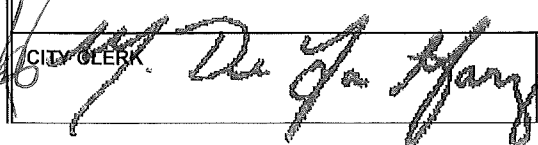
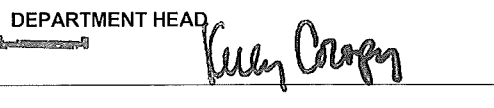
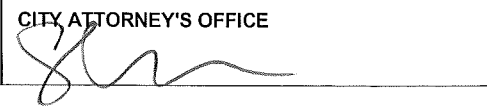
ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>10. NURSING SERVICES PROGRAM REPORTS AND CORRESPONDANCE</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

NURSING PROGRAM REPORTING AND RELATED CORRESPONDANCE.

FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

<b>ORIGINATING DEPARTMENT</b> <b>HEALTH &amp; HUMAN SERVICES</b>	<b>ITEM NO. &amp; TITLE:</b> <b>11. PUBLIC HEALTH NURSING CLIENT FILES</b>	<b>DATE</b> <b>APR 14 2020</b>
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<b>COPIES/FILES BY DEPT/SECTION</b> <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	<b>COPY DESIGNATION</b>	<b>RETENTION PERIOD</b>		
		<b>DEPARTMENT</b>	<b>REC. CENTER</b>	<b>DESTROY</b>
	<b>WORKING COPY</b>	<b>5 YEARS</b>	<b>5 YEARS</b>	<b>10 YEARS</b>

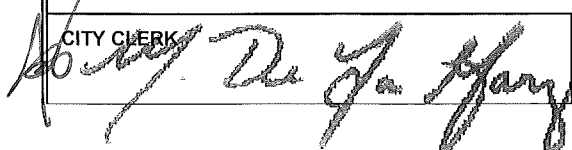
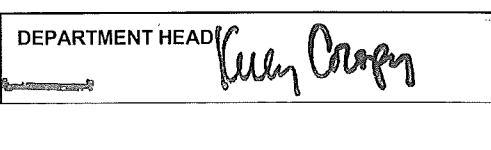
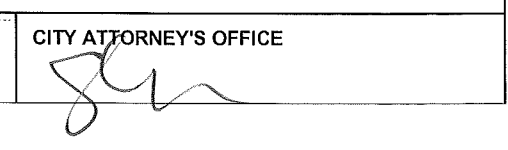
**DESCRIPTION: (Purpose, Content, and Method of Filing)**

PUBLIC HEALTH NURSING CASE MANAGEMENT AND MEDICAL FILES. INCLUDES PROTECTED HEALTH INFORMATION, CLINICAL ASSESSMENTS, HOME VISIT ENCOUNTERS, INDIVIDUALIZED SERVICE PLANS, GENERALIZED ANXIETY DISORDER-7 (GAD-7), PATIENT HEALTH QUESTIONNAIRE-9 (PHQ-9), EDINBURG POSTPARTUM DEPRESSION SCALE, CASE NOTES, LABORATORY RESULTS, HOSPITAL/PROVIDER RECORDS, REFERRALS, AND TRANSFERS.

FILES ARE STORED CHRONOLOGICALLY BY CLIENT CHART NUMBER. EACH CHART CONTAINS THE CLIENT'S NAME AND DOB.

PREPARED BY: NANCY RIANO

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>12. PUBLIC HEALTH NURSING DAILY VISIT RECORDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS

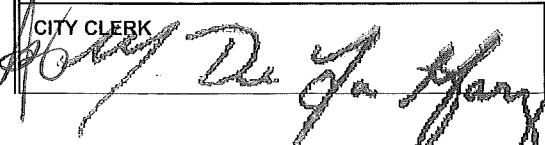
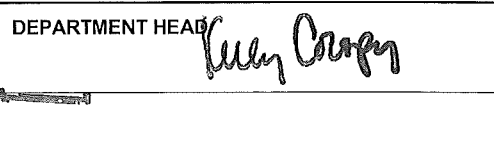
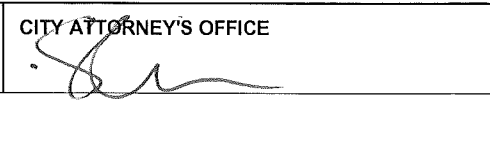
DESCRIPTION: (Purpose, Content, and Method of Filing)

PUBLIC HEALTH NURSING DAILY VISIT RECORDS. INCLUDES PATIENT'S NAME, DATE OF BIRTH, HOME VISIT CATEGORY CODES.

FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>13. TARGETED CASE MANAGEMENT (TCM)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NURSING SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	7 YEARS	12 YEARS

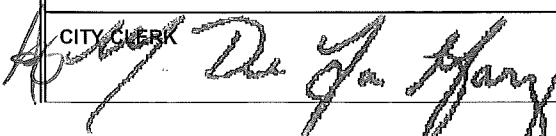
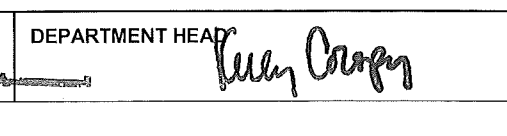
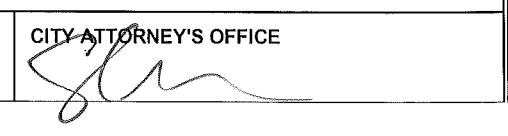
DESCRIPTION: (Purpose, Content, and Method of Filing)

TCM PROGRAM STAFF TIME STUDY FILES, TIME SHEETS, INVOICES, COST REPORTS, CONTRACT AGREEMENTS AND RELATED CORRESPONDANCE.

FILES ARE STORED CHRONOLOGICALLY BY FISCAL YEAR.

PREPARED BY: NANCY RIANO

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Participants' Documentation of Certifications (DOC)	1 Year	3 Years	4 Years	
2.	Participants Eligibility Single Disqualification Documents (SD)	1 Year	3 Years	4 Years	
3.	Participants' Food Instruments Signature Logs	1 Year	3 Years	4 Years	

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. PARTICIPANTS' DOCUMENTATION OF CERTIFICATIONS (DOC)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NUTRITION SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

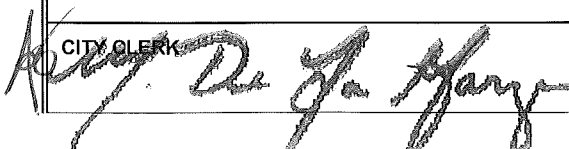

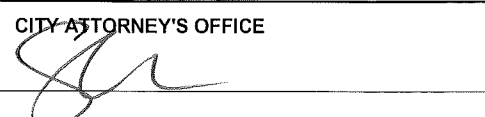
CONTENTS:

**DOCUMENTATION OF CERTIFICATION FILES** - ORIGINAL DOCUMENTS WHICH CONTAIN SIGNED DOCUMENTATION FROM WIC FAMILIES WHO RECEIVE SERVICES.

THEY ARE FILED CHRONOLOGICALLY BY MONTH AND YEAR.

PREPARED BY: NGA KIEU

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. PARTICIPANTS' ELIGIBILITY SINGLE DISQUALIFICATION DOCUMENTS (SD)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NUTRITION SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

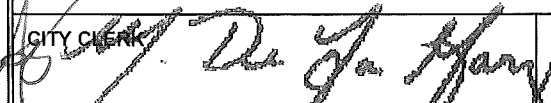
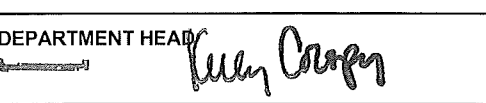
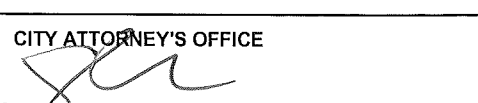
CONTENTS:

**NOTICE OF ACTION AFFECTING WIC PROGRAM PARTICIPATION FORMS - COMPLETED NOTICE OF ACTION AFFECTING WIC PROGRAM PARTICIPATION USED TO DISQUALIFY FOR INELIGIBILITY FOR WIC SERVICES.**

THEY ARE FILED CHRONOLOGICALLY BY MONTH AND YEAR.

PREPARED BY: NGA KIEU

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. PARTICIPANTS' FOOD INSTRUMENTS SIGNATURE LOGS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>COMMUNITY HEALTH BUREAU/NUTRITION SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

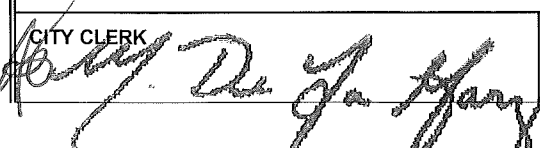
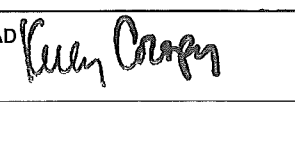
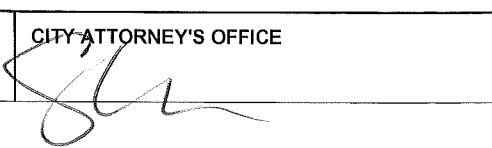
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**FOOD INSTRUMENTS SIGNATURE LOGS - PRE-PRINTED LOGS WITH WIC PARTICIPANTS' SIGNATURE.**

THEY ARE FILED CHRONOLOGICALLY BY MONTH AND YEAR.

PREPARED BY: NGA KIEU

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Client Records	2 Years	5 Years	7 Years	
2.	Family Support Program (FSP) Contractual Documents	2 Years	5 Years	7 Years	
3.	FSP Strengthening Families Workshop Documents	2 Years	5 Years	7 Years	

Department/Bureau/Division:

**Health & Human Services / Human Services /  
Community Impact**

City Council Approval Meeting Date:

**August 23, 1983; Rev: April 14, 2020**

Page No.

**1 of 1**

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. CLIENT RECORDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>HUMAN SERVICES BUREAU/COMMUNITY IMPACT</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEARS	7 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

THESE FILES ARE CLIENT CHARTS WITH CONFIDENTIAL INFORMATION (INTAKE ASSESSMENTS, PROGRESS NOTES, CASE PLANS, ETC.) AND MUST BE KEPT FOR A TOTAL OF SEVEN (7) YEARS. THE CHARTS ARE KEPT ONSITE FOR TWO (2) YEARS IN CASE OF AUDIT, AND THEN ARE STORED AT IRON MOUNTAIN FOR THE REMAINING FIVE (5) YEARS.

RECORDS ARE FILED CHRONOLOGICALLY AND ALPHABETICALLY BY YEAR.

PREPARED BY: STEPHANIE CHMELIK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. FSP CONTRACTUAL DOCUMENTS</b>	DATE <b>APR 14 2020</b>
--	--	----------------------------

COPIES/FILES BY DEPT/SECTION  <b>HUMAN SERVICES BUREAU/COMMUNITY IMPACT</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

FSP MEANS FAMILY SUPPORT PROGRAM.

THESE FILES ARE CLIENT CHARTS WITH CONFIDENTIAL INFORMATION (INTAKE ASSESSMENTS, PROGRESS NOTES, CASE PLANS, ETC.) AND MUST BE KEPT FOR A TOTAL OF SEVEN (7) YEARS. THE CHARTS ARE KEPT ONSITE FOR TWO (2) YEARS IN CASE OF AUDIT, AND THEN ARE STORED AT IRON MOUNTAIN FOR THE REMAINING FIVE (5) YEARS.

RECORDS ARE FILED CHRONOLOGICALLY AND ALPHABETICALLY BY YEAR.

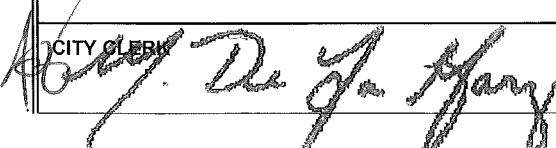
PREPARED BY: STEPHANIE CHMELIK

**APPROVALS**

CITY CLERK

DEPARTMENT HEAD

CITY ATTORNEY'S OFFICE





**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. FSP STRENGTHENING FAMILIES WORKSHOP DOCUMENTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>HUMAN SERVICES BUREAU/COMMUNITY IMPACT</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)




CONTENTS:

FSP MEANS FAMILY SUPPORT PROGRAM.

THESE FILES ARE CLIENT CHARTS WITH CONFIDENTIAL INFORMATION (INTAKE ASSESSMENTS, PROGRESS NOTES, CASE PLANS, ETC.) AND MUST BE KEPT FOR A TOTAL OF SEVEN (7) YEARS. THE CHARTS ARE KEPT ONSITE FOR TWO (2) YEARS IN CASE OF AUDIT, AND THEN ARE STORED AT IRON MOUNTAIN FOR THE REMAINING FIVE (5) YEARS.

RECORDS ARE FILED CHRONOLOGICALLY AND ALPHABETICALLY BY YEAR.

PREPARED BY: STEPHANIE CHMELIK

<b>APPROVALS</b>		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Continuum of Care (COC) Contracts	5 Years	2 Years	7 Years	
2.	Gateway Cities Council of Governments (COG) Contracts	5 Years	2 Years	7 Years	
3.	Emergency Solutions Grant (ESG) Contracts	5 Years	2 Years	7 Years	
4.	Program Grant Files	5 Years	2 Years	7 Years	
5.	Miscellaneous Files	5 Years	2 Years	7 Years	

Department/Bureau/Division:

**Health & Human Services / Human Services /  
Homeless Services**

City Council Approval Meeting Date:

**August 23, 1983; Rev: April 14, 2020**

Page No.

**1 of 1**

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. CONTINUUM OF CARE (COC) CONTRACTS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>HUMAN SERVICES BUREAU/HOMELESS SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	2 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

DIGITAL AND HARD COPIES OF CONTRACT FILES KEPT WITH THE OFFICE OF THE CITY CLERK:

- COC CONTRACTS
- COG CONTRACTS
- ESG CONTRACTS
- PROGRAM GRANT FILES
- MISCELLANEOUS FILES

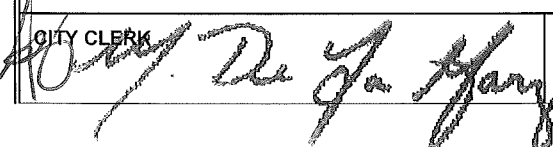
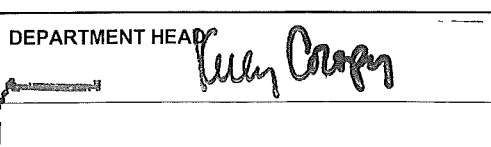
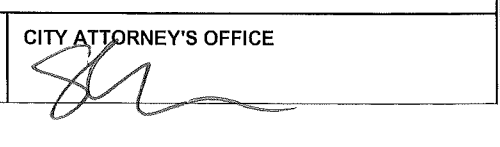
FILES KEPT ONSITE:

- CORRESPONDENCE (INTERNAL & EXTERNAL)
- ANNUAL PERFORMANCE REPORT
- QUARTERLY REPORTS
- PROGRAM FOLDERS

CONTRACT FILES ARE FILED CHRONOLOGICALLY BY YEAR OR ALPHABETICALLY BY SUBJECT.

PREPARED BY: MICHELLE MEL-DUCH AND MICHELLE LIM

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. GATEWAY CITIES COUNCIL OF GOVERNMENTS (COG) CONTRACTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>HUMAN SERVICES BUREAU/HOMELESS SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	2 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

DIGITAL AND HARD COPIES OF CONTRACT FILES KEPT WITH THE OFFICE OF THE CITY CLERK:




- COC CONTRACTS
- COG CONTRACTS
- ESG CONTRACTS
- PROGRAM GRANT FILES
- MISCELLANEOUS FILES

FILES KEPT ONSITE:

- CORRESPONDENCE (INTERNAL & EXTERNAL)
- ANNUAL PERFORMANCE REPORT
- QUARTERLY REPORTS
- PROGRAM FOLDERS

CONTRACT FILES ARE FILED CHRONOLOGICALLY BY YEAR OR ALPHABETICALLY BY SUBJECT.

PREPARED BY: MICHELLE MEL-DUCH AND MICHELLE LIM

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. EMERGENCY SOLUTIONS GRANT (ESG) CONTRACTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>HUMAN SERVICES BUREAU/HOMELESS SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	2 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

DIGITAL AND HARD COPIES OF CONTRACT FILES KEPT WITH THE OFFICE OF THE CITY CLERK:

- COC CONTRACTS
- COG CONTRACTS
- ESG CONTRACTS
- PROGRAM GRANT FILES
- MISCELLANEOUS FILES

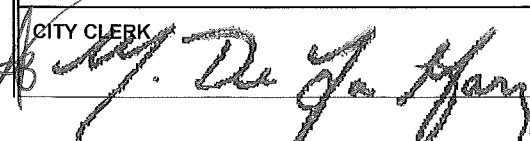

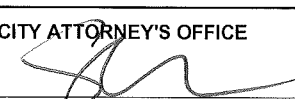
FILES KEPT ONSITE:

- CORRESPONDENCE (INTERNAL & EXTERNAL)
- ANNUAL PERFORMANCE REPORT
- QUARTERLY REPORTS
- PROGRAM FOLDERS

CONTRACT FILES ARE FILED CHRONOLOGICALLY BY YEAR OR ALPHABETICALLY BY SUBJECT.

PREPARED BY: MICHELLE MEL-DUCH AND MICHELLE LIM

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>4. PROGRAM GRANT FILES</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>HUMAN SERVICES BUREAU/HOMELESS SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	2 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

DIGITAL AND HARD COPIES OF CONTRACT FILES KEPT WITH THE OFFICE OF THE CITY CLERK:

- COC CONTRACTS
- COG CONTRACTS
- ESG CONTRACTS
- PROGRAM GRANT FILES
- MISCELLANEOUS FILES



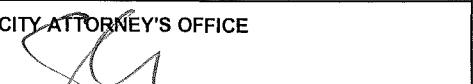
FILES KEPT ONSITE:

- CORRESPONDENCE (INTERNAL & EXTERNAL)
- ANNUAL PERFORMANCE REPORT
- QUARTERLY REPORTS
- PROGRAM FOLDERS

PROGRAM FILES ARE FILED CHRONOLOGICALLY BY YEAR OR ALPHABETICALLY BY SUBJECT.

PREPARED BY: MICHELLE MEL-DUCH AND MICHELLE LIM

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>5. MISCELLANEOUS FILES</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>HUMAN SERVICES BUREAU/HOMELESS SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	2 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

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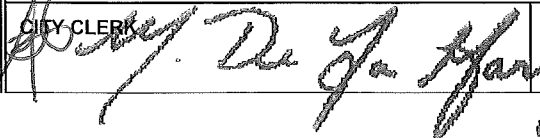
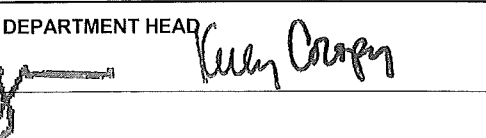
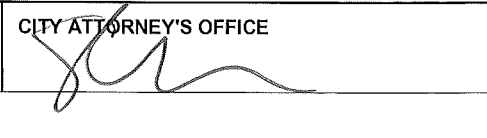
- COC CONTRACTS
- COG CONTRACTS
- ESG CONTRACTS
- PROGRAM GRANT FILES
- MISCELLANEOUS FILES

FILES KEPT ONSITE:

- CORRESPONDENCE (INTERNAL & EXTERNAL)
- ANNUAL PERFORMANCE REPORT
- QUARTERLY REPORTS
- PROGRAM FOLDERS

MISCELLANEOUS FILES ARE FILED CHRONOLOGICALLY BY YEAR OR ALPHABETICALLY BY SUBJECT.

PREPARED BY: MICHELLE MEL-DUCH AND MICHELLE LIM

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Cash Receipts	1 Year	6 Years	7 Years	
2.	Eligibility Checks	1 Year	6 Years	7 Years	
3.	Eligibility Verifications Forms	1 Year	6 Years	7 Years	
4.	Encounter Forms	1 Year	6 Years	7 Years	
5.	Explanation of Benefits (EOB)	1 Year	6 Years	7 Years	
6.	Fee Waiver Forms	1 Year	6 Years	7 Years	

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

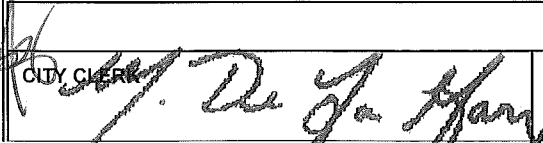


ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>1. CASH RECEIPTS</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/BILLING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	6 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

**CASH RECEIPTS** – INOVAH DATA FROM THE CASHIER; CAPTURES DAILY MONIES RECEIVED FROM CLIENTS AND VENDORS THAT ARE RECEIVING OR REQUESTING SERVICES.

RECORDS ARE FILED CHRONOLOGICALLY BY CLINIC.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

<b>APPROVALS</b>		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>2. ELIGIBILITY CHECKS</b></p>	DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL                  SERVICES/BILLING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	6 YEARS	7 YEARS

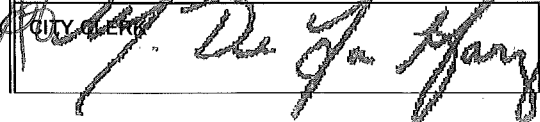
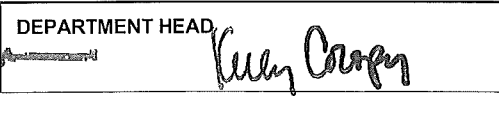
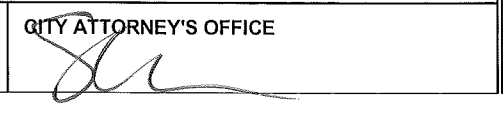
DESCRIPTION: (Purpose, Content, and Method of Filing)

**ELIGIBILITY CHECKS** – PAYMENTS RECEIVED BY VARIOUS THIRD PARTY VENDORS/INSURANCES FOR SERVICES PROVIDED TO CLIENTS.

ELIGIBILITY CHECKS ARE STORED WITH ENCOUNTER FORMS.

THEY ARE FILED CHRONOLOGICALLY BY PROGRAM.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. ELIGIBILITY VERIFICATION FORMS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/BILLING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	6 YEARS	7 YEARS


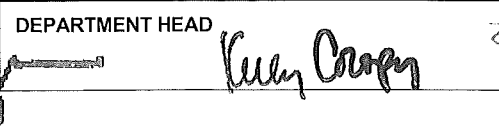
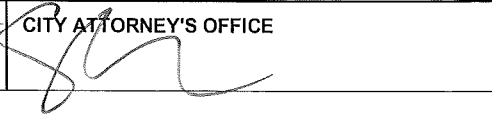
DESCRIPTION: (Purpose, Content, and Method of Filing)

**ELIGIBILITY VERIFICATION FORMS** – VERIFICATION OF CLIENTS’ MEDICAL INSURANCE COVERAGE FOR PROVIDED SERVICES.

FORMS ARE ATTACHED TO ENCOUNTER FORM AS PROOF OF APPROVAL OF SERVICES FROM INSURANCE COMPANIES, AND CAN BE USED IF PAYMENT IS DENIED.

FORMS ARE FILED CHRONOLOGICALLY BY PROGRAM.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH


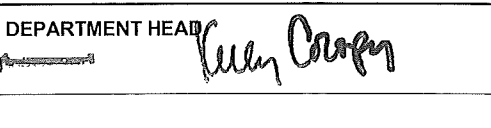
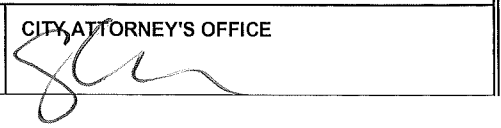
ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;">4. ENCOUNTER FORMS</p>			DATE <p style="text-align: center;">APR 14 2020</p>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/BILLING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	6 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

**ENCOUNTER FORMS** – BILLING ENCOUNTERS THAT DEFINE SERVICES RENDER TO CLIENTS AND ARE USED TO SUBMIT FOR REIMBURSEMENT FROM THE VENDOR.

FORMS ARE FILED CHRONOLOGICALLY BY PROGRAM.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>5. EXPLANATION OF BENEFITS (EOB)</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/BILLING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	6 YEARS	7 YEARS

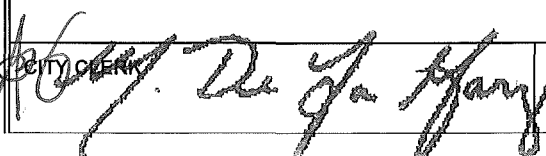
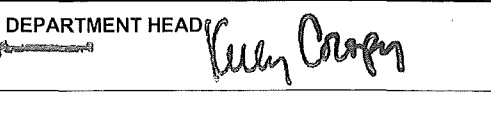
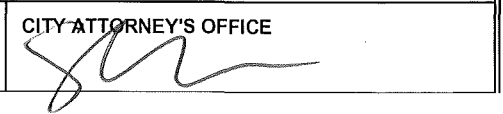
DESCRIPTION: (Purpose, Content, and Method of Filing)

**EXPLANATION OF BENEFITS (EOB)** – SENT BY THE HEALTH INSURANCE COMPANY TO EXPLAIN WHAT MEDICAL TREATMENTS AND/OR SERVICES WERE PAID FOR ON THEIR BEHALF.

EOB FORMS ARE COMMONLY ATTACHED TO A CHECK OR STATEMENT OF ELECTRONIC PAYMENT.

EOBS ARE FILED CHRONOLOGICALLY BY MONTH AND YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

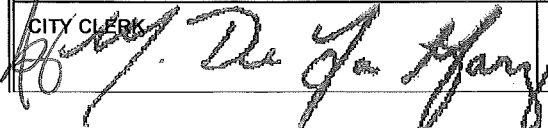
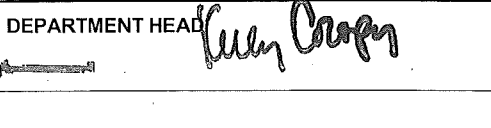
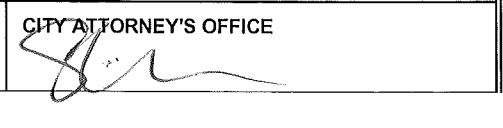
ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>6. FEE WAIVER FORMS</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL                  SERVICES/BILLING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	6 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

**FEE WAIVER** – USED TO DETERMINE ELIGIBILITY FOR LOW COST OR NO COST SERVICES TO THOSE WHO WITHOUT FINANCIAL ASSISTANCE WOULD NOT BE ABLE TO ACCESS MEDICAL SERVICES.

FORMS ARE ATTACHED TO DAILY CASH RECEIPTS, WHICH ARE FILED CHRONOLOGICALLY BY CLINIC AND DATE.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

<b>APPROVALS</b>		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Birth Records Application	CU + prior year	-	CU + prior year	CU = current year
2.	Death Records Application	CU + prior year	-	CU + prior year	CU = current year

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. BIRTH RECORDS APPLICATION</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/BIRTH &amp; DEATH RECORDS</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	CU + PRIOR YEAR		CU + PRIOR YEAR


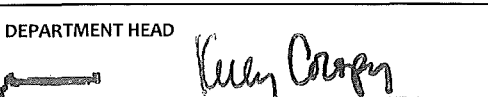
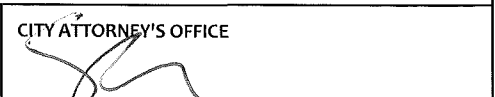
DESCRIPTION: (Purpose, Content, and Method of Filing)

**BIRTH RECORDS** – APPLICATION FOR ANY BIRTH WITHIN THE CITY OF LONG BEACH; REQUIRED TO OBTAIN A CERTIFIED BIRTH CERTIFICATE AT THE HEALTH DEPARTMENT. APPLICATION CONTAINS DEMOGRAPHIC, PARENT INFORMATION, TIME, PLACE OF BIRTH, AND CHILD’S GIVEN NAME AT BIRTH.

CU = CURRENT YEAR

APPLICATIONS ARE STORED IN A BINDER BY APPLICATION RECORD DISTRICT NUMBER.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. DEATH RECORDS APPLICATION</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/BIRTH &amp; DEATH RECORDS</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	CU + PRIOR YEAR		CU + PRIOR YEAR

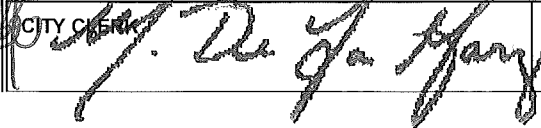
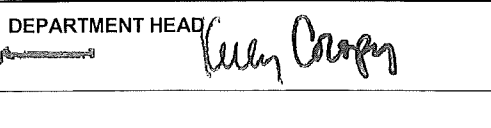
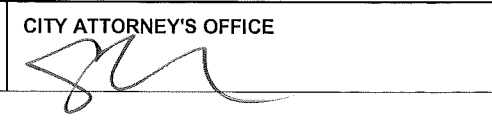
DESCRIPTION: (Purpose, Content, and Method of Filing)

**DEATH RECORDS** – CERTIFICATION OF DEATH OCCURRING IN THE CITY OF LONG BEACH. APPLICATION CONTAINS PERINATE INFORMATION, DATE, TIME, AND CAUSE OF DEATH.

CU = CURRENT YEAR

APPLICATIONS ARE STORED IN A BINDER BY A NUMBER THAT IS ASSIGNED WHEN THE MORTUARIES OPEN THE CASE IN EDR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

<b>APPROVALS</b>		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Family Planning Records – Working Copy	6 Years	1 Year	7 Years	- Adult: 7 years following discharge - Minor: 1 year after minor reaches the age of 18 years, but not less than 7 years following discharge (42 CFR § 482.24)
	Family Planning Records – Electronic Copy	Permanent	-	Permanent	Electronic copies are kept in NextGen and are stored on the City server
2.	Sexual Health Charts – Working Copy	6 Years	1 Year	7 Years	- Adult: 7 years following discharge - Minor: 1 year after minor reaches the age of 18 years, but not less than 7 years following discharge (42 CFR § 482.24)
	Sexual Health Charts – Electronic Copy	Permanent	-	Permanent	Electronic copies are kept in NextGen and are stored on the City server.

Department/Bureau/Division: <b>Health &amp; Human Services / Physician Services / Clinical Services / Family Planning &amp; Sexual Health Clinic</b>	City Council Approval Meeting Date: <b>August 23, 1983; Rev: April 14, 2020</b>	Page No. <b>1 of 1</b>
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. SEXUAL HEALTH CHARTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES                  FAMILY PLANNING &amp; SEXUAL HEALTH CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	6 YEARS	1 YEAR	7 YEARS
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

**SEXUAL HEALTH CHARTS** – RECORDS FOR INDIVIDUALS WHO RECEIVE MEDICAL SERVICES, CONTAINING SEXUAL HEALTH HISTORY FORMS, CONSENTS FOR SERVICES, INSURANCE INFORMATION, DEMOGRAPHICS, TREATMENTS, AND REFERRALS.

**ELECTRONIC RECORDS** – ELECTRONIC FILES ARE KEPT PERMANENTLY ON THE NEXTGEN DATABASE SYSTEM, AND CAN BE SEARCHED BY CLIENT'S LAST AND FIRST NAME.

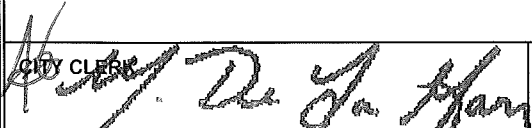


**DESTRUCTION OF MINORS' CHARTS** – MINORS' RECORDS ARE KEPT ONE (1) YEAR AFTER THE MINOR HAS REACHED THE AGE OF 18, BUT NOT LESS THAN SEVEN (7) YEARS FOLLOWING DISCHARGE.

RETENTION PER THE FOLLOWING CITATION:

- CODE OF FEDERAL REGULATIONS 42 CFR § 482.24

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR, AND CLIENT'S LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. FAMILY PLANNING RECORDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES                  FAMILY PLANNING &amp; SEXUAL HEALTH CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	6 YEARS	1 YEAR	7 YEARS
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

**FAMILY PLANNING CHARTS** – THESE RECORDS DOCUMENT THE INDIVIDUAL CLIENT’S MEDICAL SERVICES WHICH PERTAIN TO THEIR REPRODUCTIVE AND SEXUAL HEALTH. THIS INCLUDES LABORATORY TESTS, PAP SMEARS, MAMOGRAMS, CONSENTS, ELIGIBILITY, AND VERIFICATION OF PROGRAM. MEDICAL FILE MAY CONTAIN RECORDS FROM OUTSIDE PROVIDERS, AND IS USED FOR CONTINUITY OF SERVICES BEING RENDERED.

**ELECTRONIC RECORDS** – ELECTRONIC FILES ARE KEPT PERMANENTLY ON THE NEXTGEN DATABASE SYSTEM, AND CAN BE SEARCHED BY CLIENT’S LAST AND FIRST NAME.

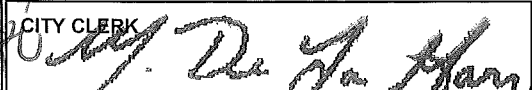


**DESTRUCTION OF MINORS’ CHARTS** – MINORS’ RECORDS ARE KEPT ONE (1) YEAR AFTER THE MINOR HAS REACHED THE AGE OF 18, BUT NOT LESS THAN SEVEN (7) YEARS FOLLOWING DISCHARGE.

RETENTION PER THE FOLLOWING CITATION:

- CODE OF FEDERAL REGULATIONS 42 CFR § 482.24

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR, AND CLIENT’S LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Affiliation Agreements	T + 3 Years	2 Years	T + 5 Years	T = Termination of Agreement
2.	AIDS Drug Assistance Program (ADAP) (State)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
3.	Benefits Specialty Services (BSS) (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
4.	Biohazardous Waste Disposal Manifest (Hard Copies)	Permanent	-	Permanent	
5.	Biomedical HIV Prevention Services (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
6.	Gen-Probe/Hologic Agreement	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
7.	HIV Ambulatory Outpatient Medical (AOM) (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
8.	HIV Care Program (HCP) (State)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
9.	HIV/Prevention (Mobile) (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
10.	HIV/STD Prevention (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
11.	Immunization Program (State)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement

Department/Bureau/Division: <b>Health &amp; Human Services / Physician Services / Clinical Services / Fiscal Analyst</b>	City Council Approval Meeting Date: <b>August 23, 1983; Rev: April 14, 2020</b>	Page No. <b>1 of 2</b>
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
12.	Lead Technical Services Contract/Agreement	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
13.	Medical Care Coordination (MCC) (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
14.	Minority AIDS Initiative (MAI) (County)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
15.	Pharmaceutical Log (Hard Copies)	Permanent	-	Permanent	
16.	Pre-Exposure Prophylaxis Assistance Program (PrEP-AP) (State)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
17.	Program Incentives Log (Hard Copies)	Permanent	-	Permanent	
18.	Refugee Health Services (State)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
19.	Safety Net Connect Agreement	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement
20.	Tuberculosis Base Award/Food, Shelter, Incentives & Enablers (FSIE) (State)	T + 5 Years	3 Years	T + 8 Years	T = Termination of Agreement

Department/Bureau/Division:

**Health & Human Services / Physician Services /  
Clinical Services / Fiscal Analyst**

City Council Approval Meeting Date:

**August 23, 1983; Rev: April 14, 2020**

Page No.

**2 of 2**

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>1. AFFILIATION AGREEMENTS</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 3 YEARS	2 YEARS	T + 5 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)




CONTENTS:

FULLY EXECUTED AFFILIATION AGREEMENT:

- AUHS
- CSU, DOMINGUEZ HILLS
- CSU, LONG BEACH
- LONG BEACH MEMORIAL MEDICAL CENTER

RECORDS ARE FILED ALPHABETICALLY BY ENTITY NAME.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. AIDS DRUG ASSISTANCE PROGRAM (ADAP) (STATE)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- FFS INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. BENEFITS SPECIALTY SERVICES (BSS) (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

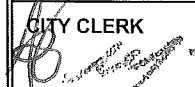


DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- GOALS AND OBJECTIVES
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- COST REPORT
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS, MONTHLY REPORTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>4. BIOHAZARDOUS WASTE DISPOSAL MANIFEST (HARD COPIES)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
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DESCRIPTION: (Purpose, Content, and Method of Filing)

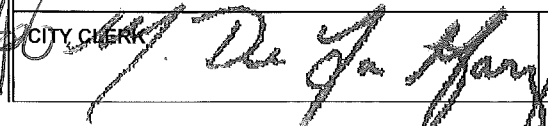
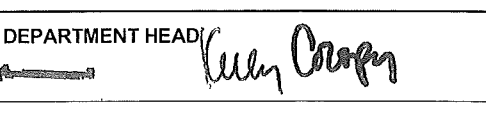
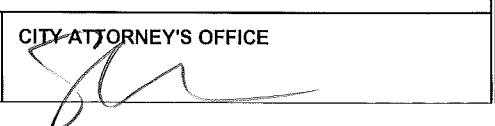
CONTENTS:

TO BE KEPT FOR AUDITING PURPOSES/REFERENCE.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>5. BIOMEDICAL HIV PREVENTION SERVICES (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

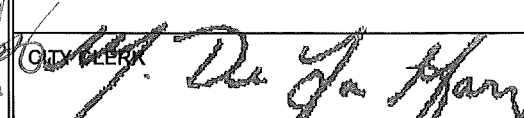

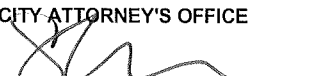
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- COST REPORT
- AUDIT DOCUMENTS
- FFS INVOICE
- COST REIMBURSEMENT BILLING (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>6. GEN-PROBE/HOLOGIC AGREEMENT</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES                      BUREAU/CLINICAL                      SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

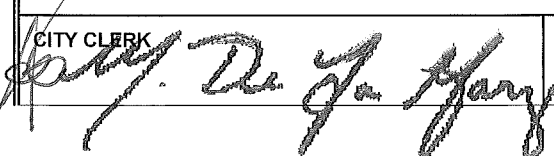
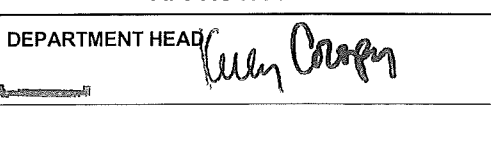
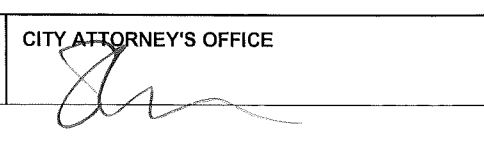
CONTENTS:

FULLY EXECUTED AGREEMENT

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>7. HIV AMBULATORY OUTPATIENT MEDICAL (AOM) (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- COST REPORT
- AUDIT DOCUMENTS
- FFS INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK

DEPARTMENT HEAD

CITY ATTORNEY'S OFFICE

*[Handwritten signatures: Sarady Kong, Aura Sok, William Cropp, and City Attorney's Office signature]*

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>8. HIV CARE PROGRAM (HCP) (STATE)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, SUMMARY TRACKING, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>9. HIV/PREVENTION (MOBILE) (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS (COMPRISED OF APPLICATION COVER SHEET CHECKLIST, APPLICATION, GRANTEE INFORMATION FORM, PROJECT SYNOPSIS, SCOPE OF WORK, BUDGET, VENDOR DATA RECORD)
- APPROVED BUDGET
- FEDERAL FUNDING ALLOWABLE AND NON-ALLOWABLE EXPENSES
- FEDERAL GRANT TERMS AND CONDITIONS
- IMMUNIZATION PAYEE DATA FORM
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>10. HIV/STD PREVENTION (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- TREATMENT MATRIX
- INCENTIVE PLAN OUTLINE
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- COST REPORT
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

<b>ORIGINATING DEPARTMENT</b> <b>HEALTH &amp; HUMAN SERVICES</b>	<b>ITEM NO. &amp; TITLE:</b> <b>11. IMMUNIZATION PROGRAM (STATE)</b>			<b>DATE</b> <b>APR 14 2020</b>
<b>COPIES/FILES BY DEPT/SECTION</b> <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	<b>COPY DESIGNATION</b>	<b>RETENTION PERIOD</b>		
		<b>DEPARTMENT</b>	<b>REC. CENTER</b>	<b>DESTROY</b>
	<b>WORKING COPY</b>	<b>T + 5 YEARS</b>	<b>3 YEARS</b>	<b>T + 8 YEARS</b>

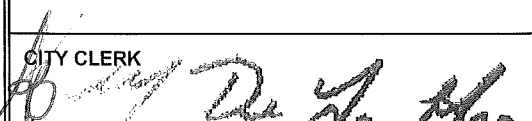


DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS (COMPRISED OF APPLICATION COVER SHEET CHECKLIST, APPLICATION, GRANTEE INFORMATION FORM, PROJECT SYNOPSIS, SCOPE OF WORK, BUDGET, VENDOR DATA RECORD)
- FEDERAL FUNDING ALLOWABLE AND NON-ALLOWABLE EXPENSES
- FEDERAL GRANT TERMS AND CONDITIONS
- IMMUNIZATION PAYEE DATA FORM
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

<p align="center"><b>APPROVALS</b></p>		
<b>CITY CLERK</b> 	<b>DEPARTMENT HEAD</b> 	<b>CITY ATTORNEY'S OFFICE</b> 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>12. LEAD TECHNICAL SERVICES CONTRACT/AGREEMENT</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)




CONTENTS:

FULLY EXECUTED AGREEMENT

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>13. MEDICAL CARE COORDINATION (MCC) (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

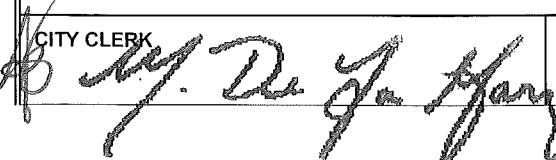
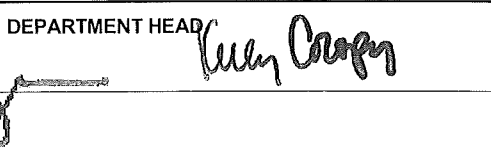
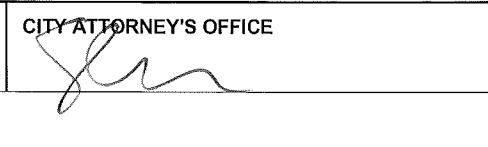
CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- COST REPORT
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS, MONTHLY/QUARTERLY REPORTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>14. MINORITY AIDS INITIATIVE (MAI) (COUNTY)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

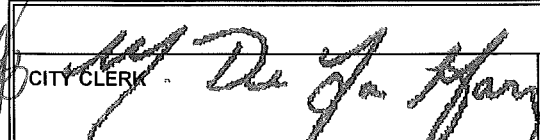


DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, SUMMARY TRACKING, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>15. PHARMACEUTICAL LOG (HARD COPIES)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

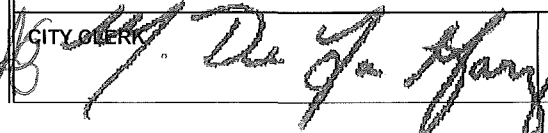

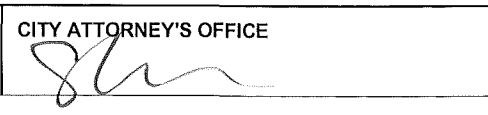
CONTENTS:

WASTE PICKUP LOG FROM THE CLINICS.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>16. PrEP-AP (STATE)</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

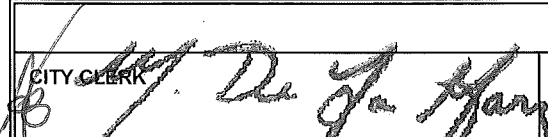
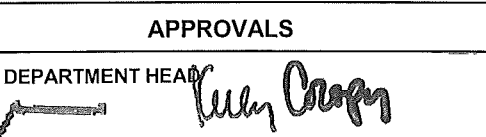
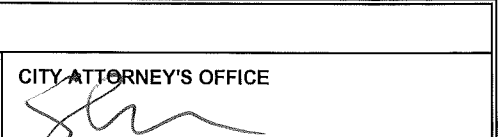
PrEP-AP STANDS FOR PRE-EXPOSURE PROPHYLAXIS ASSISTANCE PROGRAM.

CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- FFS INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

<b>APPROVALS</b>		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>17. PROGRAM INCENTIVES LOG (HARD COPIES)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

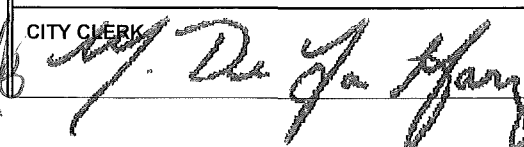
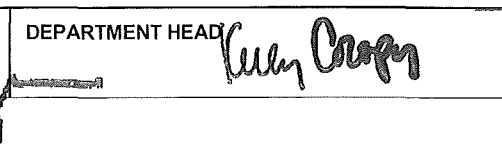
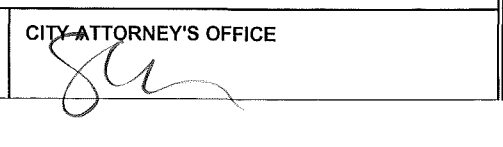
CONTENTS:

TO BE KEPT FOR AUDITING PURPOSES/REFERENCE.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>18. REFUGEE HEALTH SERVICES (STATE)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

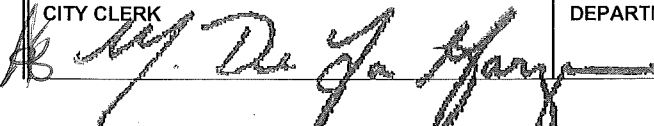


CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, CA REFUGEE HEALTH ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- INVOICES

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>19. SAFETY NET CONNECT AGREEMENT</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

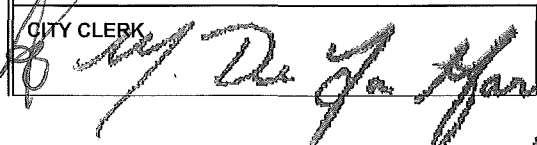
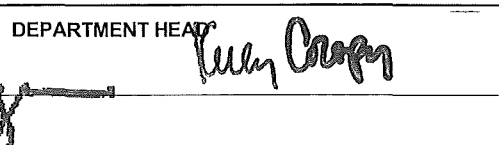
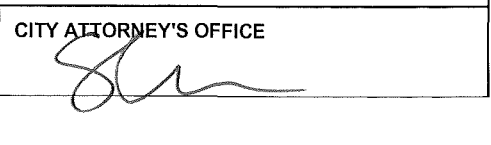
CONTENTS:

FULLY EXECUTED AGREEMENT

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>20. TUBERCULOSIS BASE AWARD/FOOD, SHELTER, INCENTIVES, &amp; ENABLERS (FSIE) (STATE)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/FISCAL ANALYST</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	T + 5 YEARS	3 YEARS	T + 8 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)


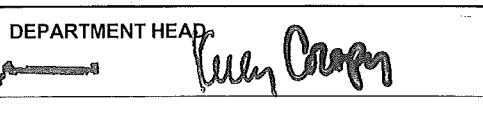
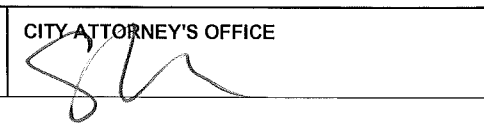
CONTENTS:

- FULLY EXECUTED CONTRACT/SUBCONTRACT AND AMENDMENTS
- SCOPE OF WORK
- APPROVED BUDGET
- BUDGET SUMMARY DETAIL JUSTIFICATION
- PERSONNEL MATRIX
- FUNDING MATRIX
- CONTRACTOR CERTIFICATION CLAUSES
- DARFUR CONTRACTING ACT
- SPECIAL TERMS AND CONDITIONS/FEDERAL TERMS AND CONDITIONS
- CERTIFICATION eDOT POLICIES AND PROCEDURES
- CERTIFICATE OF SELF INSURANCE (COSI)
- COMMUNICATIONS AND/OR CORRESPONDENCE
- LEGAL DOCUMENTS (COMPRISED OF APPROVED CITY COUNCIL LETTER, CC BUDGET, AND FACT SHEET)
- REPORTS, ASSESSMENTS, AND EVALUATIONS
- AUDIT DOCUMENTS
- GRANT BILLINGS (COMPRISED OF COVER MEMO, INVOICE, WORKSHEET, LABOR REPORT, EXPENSE SUPPORTING DOCUMENTS)

RECORDS ARE FILED BY INDEX CODE, GRANT DETAIL AND CHRONOLOGICALLY BY NUMBER OF YEARS.

PREPARED BY: SARADY KONG AND AURA SOK

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	AIDS Drug Assistance Program (ADAP) – Charts	4 Years	-	4 Years	Per California Department of Public Health (CDPH), ADAP files must be destroyed in a manner that makes them impossible to reconstruct. Paper-based records cannot be disposed in the garbage containers. Documents must be shredded, preferably with a crosscut shredder, and properly disposed of in a confidential destruction waste bin.
2.	AIDS Drug Assistance Program (ADAP) – Electronic	Permanent	-	Permanent	Per CDPH as of 2019, information is kept in AES (State Database).
3.	Benefits Specialty Services	CU + 2 Years	4 Years	CU + 6 Years	Per Los Angeles County Division of HIV and STD Programs (DHSP), Minimum 6 years + current year
4.	Bio Medical Pre-Exposure Prophylaxis (PrEP)	3 Years	7 Years	10 Years	Per DHSP
5.	Clinical Logs	3 Years	7 Years	10 Years	
6.	HIPAA Investigative Notes	C + 2 Years	4 Years	C+ 6 Years	Per CFR 160 & CFR 164, C = Case Closure or Action Filed by Federal Government
7.	Medical Charts	3 Years	7 Years	10 Years	Per CDPH

Department/Bureau/Division:  
**Health & Human Services / Physician Services /  
Clinical Services / HIV Care Coordination Clinic**

City Council Approval Meeting Date:  
**August 23, 1983; Rev: April 14, 2020**

Page No.  
**1 of 2**



**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
8.	Refugee Health Clinic (MOU)	C + 3 Years	4 Years	C + 7 Years	Per CDPH, documents must be destroyed after a period of 3 years from the date of final payment OR 3 years from the date of any resulting final settlement and/or 3 years after the resolution of any litigation, claim, negotiation, audit or other action involving records.

Department/Bureau/Division:

**Health & Human Services / Physician Services /  
Clinical Services / HIV Care Coordination Clinic**

City Council Approval Meeting Date:

**August 23, 1983; Rev: April 14, 2020**

Page No.

**2 of 2**

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. AIDS DRUG ASSISTANCE PROGRAM (ADAP) - CHARTS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	4 YEARS		4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

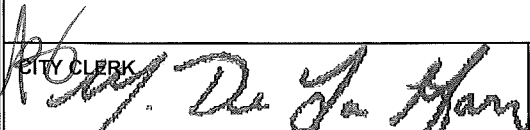


CONTENTS:

**AIDS DRUG ASSISTANCE (ADAP) CHARTS** – FINANCIAL SCREENING FOR ASSISTANCE WITH THE STATE MEDICATION PROGRAM. INCLUDES CLIENT DEMOGRAPHIC, INCOME, INSURANCE, AND MEDICAL INFORMATION.

ADAP FILES MUST BE DESTROYED IN A MANNER THAT MAKES THEM IMPOSSIBLE TO RECONSTRUCT. PAPER-BASED RECORDS CANNOT BE DISPOSED IN GARBAGE CONTAINERS. DOCUMENTS MUST BE SHREDDED, PRERABLY WITH A CROSSCUT SHREDDER, AND PROPERLY DISPOSED OF IN A CONFIDENTIAL DESTRUCTION WASTE BIN PER CALIFORNIA DEPARTMENT OF PUBLIC HEALTH (CDPH).

RECORDS ARE STORED ALPHABETICALLY BY LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. AIDS DRUG ASSISTANCE PROGRAM (ADAP) - ELECTRONIC</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)




CONTENTS:

**AIDS DRUG ASSISTANCE (ADAP) CHARTS** – FINANCIAL SCREENING FOR ASSISTANCE WITH THE STATE MEDICATION PROGRAM. INCLUDES CLIENT DEMOGRAPHIC, INCOME, INSURANCE, AND MEDICAL INFORMATION.

ADAP FILES MUST BE DESTROYED IN A MANNER THAT MAKES THEM IMPOSSIBLE TO RECONSTRUCT. PAPER-BASED RECORDS CANNOT BE DISPOSED IN GARBAGE CONTAINERS. DOCUMENTS MUST BE SHREDDED, PRERABLY WITH A CROSSCUT SHREDDER, AND PROPERLY DISPOSED OF IN A CONFIDENTIAL DESTRUCTION WASTE BIN.

PER CALIFORNIA DEPARTMENT OF PUBLIC HEALTH (CDPH) AS OF 2019, ELECTRONIC INFORMATION IS KEPT IN AES (STATE DATABASE) AND CAN BE SEARCHED BY LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. BENEFITS SPECIALTY SERVICES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	CU + 2 YEARS	4 YEARS	CU + 6 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)



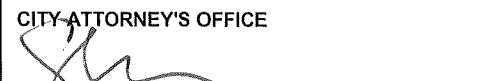
CONTENTS:

**BENEFITS SPECIALTY CHARTS** – FINANCIAL SCREENING FOR VARIOUS STATE AND COUNTY PROGRAMS. CHARTS INCLUDE DEMOGRAPHICS, INCOME, HIV STATUS, AND SUPPORTING DOCUMENTS.

PER LOS ANGELES COUNTY DIVISION OF HIV AND STD PROGRAMS (DHSP), RETENTION IS MINIMUM OF 6 YEARS + CURRENT YEAR.

RECORDS ARE FILED BY PATIENT'S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>4. BIOMEDICAL PrEP</b></p>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	7 YEARS	10 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)


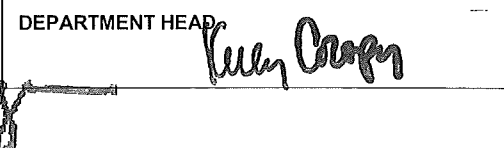
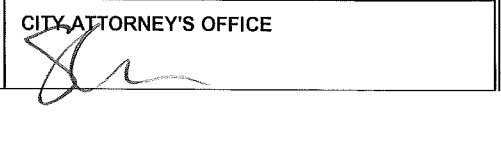
CONTENTS:

**BIOMEDICAL PrEP (PRE-EXPOSURE PROPHYLAXIS) CHARTS** – CLIENT MEDICAL INFORMATION. INCLUDES DEMOGRAPHICS, FINANCIAL SCREENING DOCUMENTATION AND INCOME VERIFICATION, CONSENTS, AND SEXUAL HEALTH ASSESSMENT DOCUMENTS.

RETENTION IS 10 YEARS PER DHSP LOS ANGELES COUNTY DIVISION OF HIV AND STD PROGRAMS (DHSP).

PHYSICAL CHARTS ARE FILED ALPHABETICALLY BY LAST NAME. INFORMATION IS SEARCHABLE IN NEXTGEN BY LAST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>5. CLINICAL LOGS</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	7 YEARS	10 YEARS



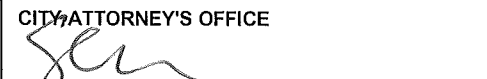
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**CLINIC LOGS** – TRACKING MECHANISM FOR VARIOUS CLINIC TASKS, SUCH AS REFERRALS, VACCINES, MEDICATIONS, REFRIGERATION, PHONE LOGS, AND LABORATORY.

RECORDS ARE FILED BY YEAR AND CLINIC.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>6. HIPAA INVESTIGATIVE NOTES</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	C + 2 YEARS	4 YEARS	C + 6 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**HIPAA INVESTIGATION LOGS** – DOCUMENTING POTENTIAL HIPAA CONCERNS, QUESTIONS, VIOLATIONS, OUTCOMES, RECOMMENDATIONS, AND RESOLUTIONS. ALSO INCLUDES UPDATES AND AMENDMENTS.


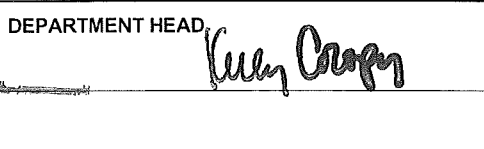
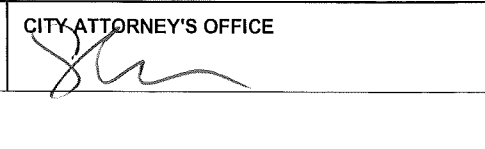
PER CODES OF FEDERAL REGULATIONS 160 & 164, RETENTION IS CASE CLOSURE + 6 YEARS.

FILES MUST BE KEPT UNTIL THE CASE IS CLOSED OR ACTION HAS BEEN FILED BY THE FEDERAL GOVERNMENT.

RECORDS ARE FILED IN A BINDER BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>7. MEDICAL CHARTS</b></p>	DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	7 YEARS	10 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**MEDICAL CHARTS** – PATIENT MEDICAL CHART, INCLUDING DEMOGRAPHICS, LABORATORY RESULTS, INSURANCE INFORMATION, AND NOTES FROM THE FOLLOWING PROGRAMS:



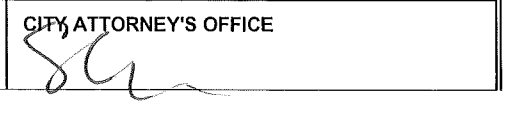
- HIV AMBULATORY OUTPATIENT (AOM)
- HIV CARE PROGRAM (HCP)
- MEDICAL CARE COORDINATION (MCC)
- MINORITY AIDS INITIATIVE (MAI)

PER CALIFORNIA DEPARTMENT OF HEALTH (CDPH), RETENTION IS 10 YEARS.

**MAI NOTES** – ALL PATIENT INFORMATION IS ELECTRONICALLY ENTERED INTO THE STATE DATABASE SYSTEM (ARIES), WHERE INFORMATION IS PERMANENTLY KEPT. REFERRAL LOGS KEPT WITH PATIENT DEMOGRAPHIC, LABORATORY RESULTS, AND INSURANCE INFORMATION ARE DESTROYED AFTER 30 DAYS. PHONE LOGS ARE DESTROYED EVERY 30 DAYS.

CHARTS ARE STORED ALPHABETICALLY BY LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>8. REFUGEE HEALTH CLINIC (MOU)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES/ HIV CARE COORDINATION CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	C + 3 YEARS	4 YEARS	C + 7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

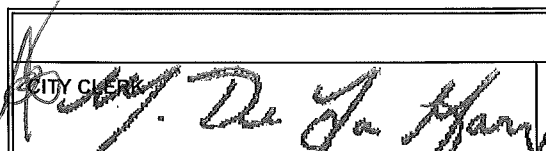


CONTENTS:

**REFUGEE HEALTH CLINIC** – PAYMENT HISTORY, AUDIT FINDINGS, MEDICAL CHARTS OR OTHER ACTIONS INVOLVING RECORDS FOR CLIENTS WHO RECEIVED MEDICAL SERVICES.

PER CALIFORNIA DEPARTMENT OF HEALTH (CDPH), DOCUMENTS MUST BE DESTROYED AFTER A PERIOD OF THREE (3) YEARS FROM THE DATE OF FINAL PAYMENT OR THREE (3) YEARS FROM THE DATE OF ANY RESULTING FINAL SETTLEMENT AND/OR AFTER THE RESOLUTION OF ANY LITIGATION, CLAIM, NEGOTIATION, AUDIT, OR OTHER ACTION INVOLVING RECORDS.

RECORDS ARE FILED BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Instrument Printouts	1 Year	3 Years	4 Years	
2.	Laboratory Billing Information	1 Year	3 Years	4 Years	
3.	Laboratories Licenses, Certificates, and Registration Records	2 Years	-	2 Years	The licenses, certificates and registration records of the current year are displayed in the department for 1 year, on top of the previous year's licenses, certificates and registration records. Paper copies are then destroyed after 2 years. Electronic copies are kept by the State indefinitely.
4.	Laboratory Proficiency Tests	1 Year	3 Years	4 Years	Per 42 CFR § 493.801; 42 CFR § 493.1105(a)(4); 17 CCR § 1050; Cal Bus & Prof Code BPC § 1265(j)(2)
5.	Laboratory Reports	1 Year	3 Years	4 Years	
6.	Laboratory Testing Records	1 Year	3 Years	4 Years	Per 42 CFR § 482.24; 42 CFR § 493.1105; 9 CCR § 784.28; 17 CCR § 1050(g)(3); Cal Bus & Prof. Code BPC § 1265;
7.	Laboratory Test Request Forms	1 Year	3 Years	4 Years	

Department/Bureau/Division:  
**Health & Human Services / Physician Services /  
Laboratory Services**

City Council Approval Meeting Date:  
August 23, 1983; Rev: **April 14, 2020**

Page No.  
**1 of 2**

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
8.	Non-Diagnostic General Health Assessments (NGHA)	1 Year	3 Years	4 Years	
9.	Quality Control Charts (Logs)	1 Year	3 Years	4 Years	Per 42 CFR § 493.1105; 17 CCR § 1050; 17 CCR § 1078; Cal Bus & Prof Code BPC §1265
10.	Staff Licenses, Certificates, and Registration Records	1 Year	-	1 Year	Returned to staff members upon expiration.
11.	Worklists / Worksheets	1 Year	3 Years	4 Years	

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. INSTRUMENT PRINTOUTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

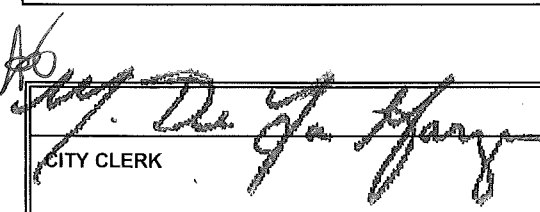
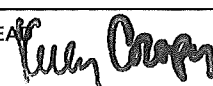

CONTENTS:

**INSTRUMENT PRINTOUTS** – LABORATORY MACHINERY, PANTHER, AA GRAPHIC FURNACE, MGIT, ABI, & EVOLI LAB INSTRUMENTS.

PRINTOUTS ARE FILED AS FOLLOWS:

- PANTHER – CHRONOLOGICALLY (HARD COPIES)
- AA GRAPHITE FURNACE – CHRONOLOGICALLY (HARD COPIES AND ELECTRONIC – IN THE INSTRUMENT)
- MGIT – CHRONOLOGICALLY (HARD COPIES)
- ABI – CHRONOLOGICALLY
- EVOLIS – LOANER (RETURNED TO VENDOR)

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. LABORATORY BILLING INFORMATION</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

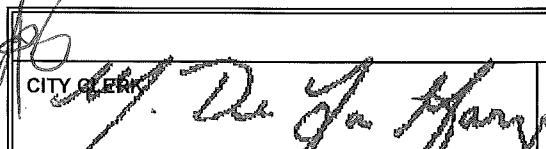


DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**LABORATORY BILLING INFORMATION** – PATIENT BILLING INFORMATION ON PRIVATE INSURANCE, HIPAA CONTENTS / INFORMATION, INSURANCE PAYMENTS, DENIALS.

INFORMATION IS FILED ACCORDING TO BILLER, CHRONOLOGICALLY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. LABORATORY LICENSES, CERTIFICATES, AND REGISTRATION RECORDS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS		2 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

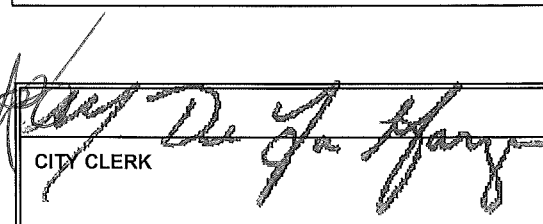


CONTENTS:

**LABORATORIES LICENSES, CERTIFICATES, & REGISTRATION RECORDS** – OPERATIONAL LICENSES FOR EQUIPMENT IN THE LABORATORY. INCLUDES CLIA WAIVER, LABORATORY ACCREDITATIONS, STATE AND FEDERAL LICENSES.

THE LICENSES, CERTIFICATES AND REGISTRATION RECORDS OF THE CURRENT YEAR ARE DISPLAYED IN THE DEPARTMENT FOR 1 YEAR, ON TOP OF THE PREVIOUS YEAR'S LICENSES, CERTIFICATES AND REGISTRATION RECORDS. PAPER COPIES ARE THEN DESTROYED AFTER 2 YEARS. ELECTRONIC COPIES ARE KEPT BY THE STATE INDEFINITELY.

RECORDS ARE FILED ALPHABETICALLY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>4. LABORATORY PROFICIENCY TESTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION  	RETENTION PERIOD  		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:




**LABORATORY PROFICIENCY TESTS** – PROFICIENCY TESTING RESULTS AND IMPROVEMENTS ON LABORATORY EQUIPMENT.

RETENTION PER THE FOLLOWING CITATION(S):

- CODE OF FEDERAL REGULATION 42 CFR § 493.801; 42 CFR § 493.1105 (a)(4)
- CALIFORNIA CODE OF REGULATION 17 CCR § 1050
- CALIFORNIA BUSINESS AND PROFESSIONS CODE BPC § 1265 (j)(2)

HARD COPIES AND ELECTRONIC RECORDS FILED ALPHABETICALLY BY SECTION, THEN CHRONOLOGICALLY PER SECTION.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>5. LABORATORY REPORTS</b></p>	DATE <b>APR 14 2020</b>		
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

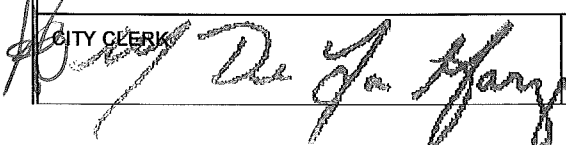
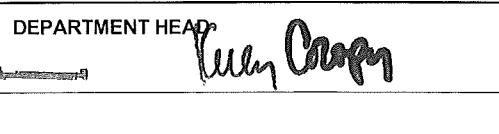
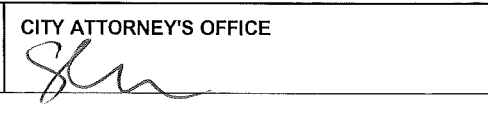
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

REPORTS ARE FILED ALPHABETICALLY BY SECTION, THEN CHRONOLOGICALLY PER SECTION.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>6. LABORATORY TESTING RECORDS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**LABORATORY TESTING RECORDS** – RESULTS FROM SPECIMENS SENT TO THE STATE LABORATORY FOR TESTING.

RETENTION PER THE FOLLOWING CITATION(S):

- CODE OF FEDERAL REGULATION 42 CFR § 482.24; 42 CFR § 493.1105
- CALIFORNIA CODE OF REGULATION 9 CCR § 784.28; 17 CCR § 1050 (g)(3)
- CALIFORNIA BUSINESS AND PROFESSIONS CODE BPC § 1265

HARD COPIES ARE FILED CHRONOLOGICALLY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK <i>[Signature]</i>	DEPARTMENT HEAD <i>[Signature]</i>	CITY ATTORNEY'S OFFICE <i>[Signature]</i>

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>7. LABORATORY TEST REQUEST FORMS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES                      BUREAU/LABORATORY                      SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

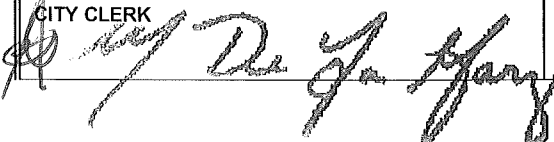
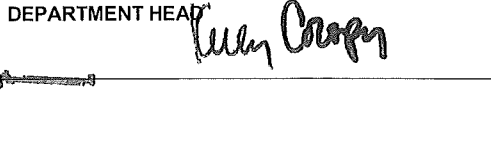
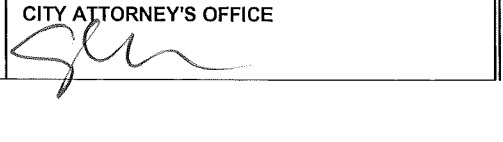
CONTENTS:

**LABORATORY TEST REQUESTS FORMS** – TEST REQUISITION FORMS FROM SUBMITTERS (PRIVATE, STD CLINIC, LEAD TESTING, ETC.)

RECORDS ARE FILED CHRONOLOGICALLY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>8. NON-DIAGNOSTIC GENERAL HEALTH ASSESSMENTS (NGHA)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**NON-DIAGNOSTIC GENERAL HEALTH ASSESSMENTS (NGHA)** - NGHA EVENT INFORMATION AND OPERATING CERTIFICATES FOR EVENTS THROUGHOUT THE CITY OF LONG BEACH.

RECORDS ARE FILED ALPHABETICALLY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>9. QUALITY CONTROL CHARTS (LOGS)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**QUALITY CONTROL CHARTS (LOGS)** – RANDOM LABORATORY EQUIPMENT TESTING ON FUNCTIONALITY.

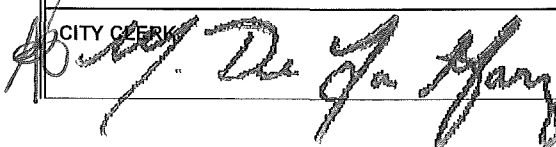
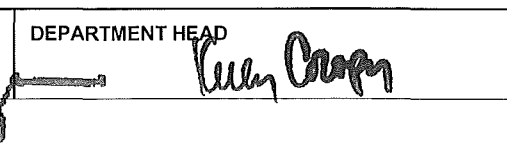
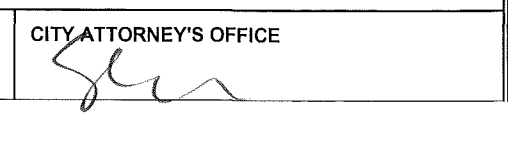
RETENTION PER THE FOLLOWIN CITATION(S):

- CODE OF FEDERAL REGULATION 42 CFR § 493.1105; 17 CCR § 1050
- CODE OF CALIFORNIA REGULATION 17 CCR § 1078
- CALIFORNIA BUSINESS AND PROFESSIONS CODE BPC § 1265.

CHARTS ARE FILED ALPHABETICALLY BY CATEGORY, THEN CHRONOLOGICALLY PER CATEGORY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>10. STAFF LICENSES, CERTIFICATES, AND REGISTRATION RECORDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	1 YEAR		1 YEAR



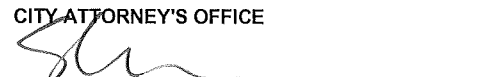
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**STAFF LICENSES, CERTIFICATES, AND REGISTRATION RECORDS** – OPERATIONAL LICENSES FOR STAFF MEMBERS WHICH ARE RETURNED TO THEM UPON EXPIRATION.

RECORDS ARE FILED ALPHABETICALLY.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>11. WORKLISTS / WORKSHEETS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/LABORATORY SERVICES</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR	3 YEARS	4 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

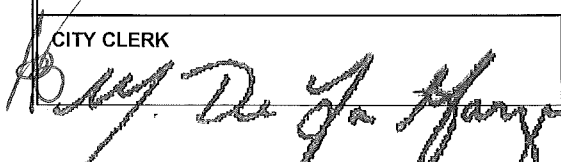
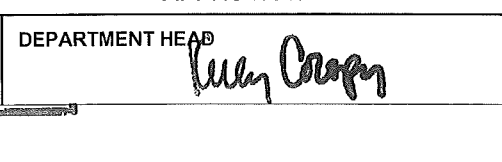
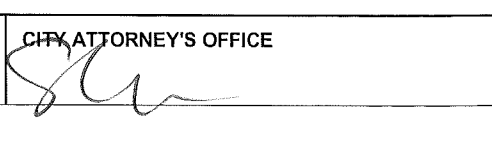
CONTENTS:

**WORKLIST/WORKSHEETS** – PROCEDURE LISTINGS FOR SPECIFIC INSTRUMENTS. LAB TO-DO LISTS AND WORKSHEETS (CHECK-OFF) OF TESTS FOR EACH INTERNAL SECTION OF THE LAB.

RECORDS ARE FILED ALPHABETICALLY BY SECTION, THEN CHRONOLOGICALLY BY SECTION.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Client Assessment Questionnaire	2 Years	5 Year	7 Years	
2.	Client Information Form	2 Years	5 Year	7 Years	
3.	Consents	2 Years	5 Year	7 Years	
4.	Laboratory HIV Slips	2 Years	5 Year	7 Years	

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. CLIENT ASSESSMENT QUESTIONNAIRE</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES                  MOBILE HIV TESTING &amp; COUNSELING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEAR	7 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**CLIENT ASSESSMENT QUESTIONNAIRE** – DOCUMENTS THE SEXUAL BEHAVIOR OF THOSE RECEIVING HIV TESTING AND COUNSELING.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND BY CLINIC ID.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. CLIENT INFORMATION FORM</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES</b>  <b>MOBILE HIV TESTING &amp; COUNSELING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEAR	7 YEARS

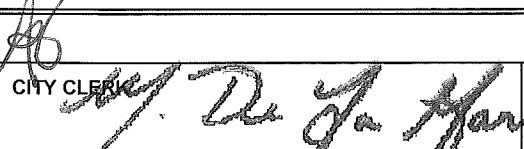


DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**CLIENT INFORMATION FORM** – CLIENT SELF-REPORTED SEXUAL HEALTH HISTORY, CONTAINING DEMOGRAPHICS, SEXUAL HEALTH, AGE, RACE, SEXUAL ORIENTATION (NO NAMES).

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND BY CLINIC ID.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;">3. CONSENTS</p>	DATE <p style="text-align: center;">APR 14 2020</p>		
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES</b> <b>MOBILE HIV TESTING &amp; COUNSELING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEAR	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

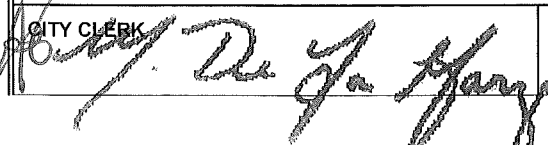

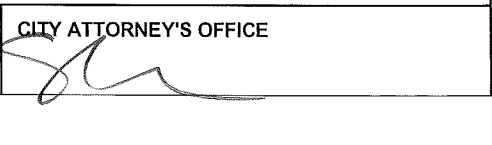
CONTENTS:

CONSENTS – TO DRAW BLOOD AND TEST FOR HIV. IF TEST IS POSITIVE, A CONFIRMATORY TEST WILL BE ORDERED.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND BY CLINIC ID.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>4. LABORATORY HIV SLIPS</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES MOBILE HIV TESTING &amp; COUNSELING</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	2 YEARS	5 YEAR	7 YEARS



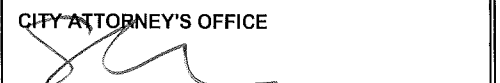
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**LAB SLIPS** – TRACKS THE HIV CLINIC FUNDING SOURCE. INCLUDES DEMOGRAPHICS, SEX, RACE, ETC.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND BY CLINIC ID.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Flu Vaccine Logs Offsite - Adults	3 Years	4 Years	7 Years	
2.	Flu Vaccine Logs Offsite - Minors	Y + 3 Years	4 Years	Y + 7 Years	Y = Until minor reaches 19 years of age
3.	Flu Vaccine Logs Offsite Partners	3 Years	4 Years	7 Years	
4.	Immunization Consents	Permanent	-	Permanent	Electronic immunization records are stored on a statewide data server, California Immunization Registry (CAIR).
5.	Immunization Records	Permanent	-	Permanent	Electronic immunization records are stored on a statewide data server (CAIR).
6.	Outbreak Logs	3 Years	4 Years	7 Years	Diseases like Hepatitis A, Meningitis, and any other public health outbreak
7.	Pneumonia Offsite Logs	3 Years	4 Years	7 Years	
8.	School Vaccine Audit Records	5 Years	5 Years	10 Years	
9.	Travel Immunization Consents	Permanent	-	Permanent	Electronic immunization records are stored on a statewide data server (CAIR).
10.	Travel Immunization Record Cards	10 Years	5 Years	15 Years	

Department/Bureau/Division:

**Health & Human Services / Physician Services /  
Clinical Services / Immunization/Travel Clinic**

City Council Approval Meeting Date:

August 23, 1983; Rev: April 14, 2020

Page No.

**1 of 2**

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
11.	Travel Immunization Records	Permanent	-	Permanent	Electronic immunization records are stored on a statewide data server (CAIR).
12.	Vaccine for Children (VFC) Provider Reports	3 Years	4 Years	7 Years	
13.	VFC Vendor Logs	3 Years	4 Years	7 Years	

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>1. FLU VACCINE LOGS OFFSITE - ADULTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	4 YEARS	7 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**FLU VACCINE LOGS** – LOGS FOR TRACKING CLIENTS WHO HAVE RECEIVED FLU VACCINES AT OFFSITE LOCATIONS. LOGS FOR ADULTS 19 YEARS AND OLDER ARE KEPT FOR SEVEN (7) YEARS. LOGS FOR MINORS ARE KEPT ON FILE UNTIL THE MINOR REACHES 19 YEARS OF AGE, BUT FOR NO LESS THAN SEVEN (7) YEARS.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND SITE.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>2. FLU VACCINE LOGS OFFSITE - MINORS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	UNTIL MINOR REACHES 19 YEARS OF AGE + 3 YEARS	4 YEARS	UNTIL MINOR REACHES 19 YEARS OF AGE + 7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

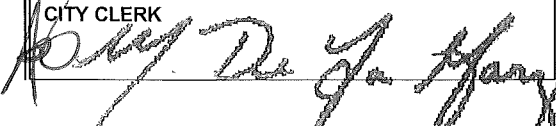


CONTENTS:

**FLU VACCINE LOGS** – LOGS FOR TRACKING CLIENTS WHO HAVE RECEIVED FLU VACCINES AT OFFSITE LOCATIONS. LOGS FOR ADULTS 19 YEARS AND OLDER ARE KEPT FOR SEVEN (7) YEARS. LOGS FOR MINORS ARE KEPT ON FILE UNTIL THE MINOR REACHES 19 YEARS OF AGE, BUT FOR NO LESS THAN SEVEN (7) YEARS.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND SITE.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. FLU VACCINE LOGS OFFSITE PARTNERS</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	4 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

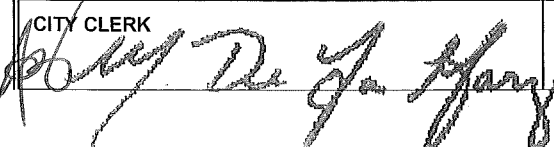
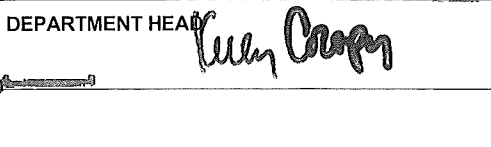
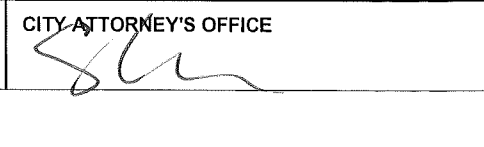
CONTENTS:

**PARTNER FLU VACCINE LOGS** – LOGS FOR THE DISTRIBUTION OF FLU VACCINES GIVEN TO COMMUNITY PARTNERS.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND NAME OF OFFSITE PARTNER.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH



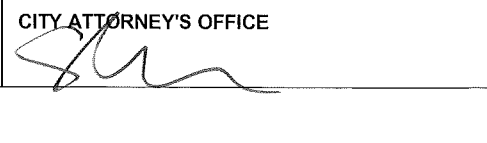
ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>4. IMMUNIZATION CONSENTS</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

ELECTRONIC IMMUNIZATION CONSENTS ARE STORED IN STATEWIDE DATA SERVER, CALIFORNIA IMMUNIZATION REGISTRY (CAIR). THESE RECORDS ARE SEARCHABLE BY PATIENT LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

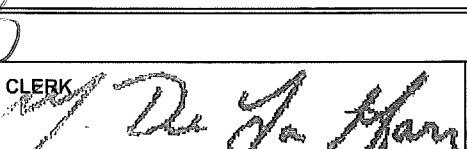


ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>5. IMMUNIZATION RECORDS</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

ELECTRONIC IMMUNIZATION CONSENTS ARE STORED IN STATEWIDE DATA SERVER, CALIFORNIA IMMUNIZATION REGISTRY (CAIR). THESE RECORDS ARE SEARCHABLE BY PATIENT LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>6. OUTBREAK LOGS</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL SERVICES                  IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	4 YEARS	7 YEARS

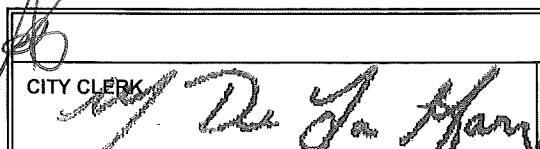

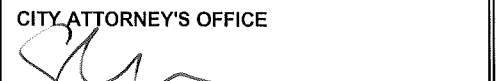
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**OUTBREAK TRACKING LOGS** – COMMUNITY OUTBREAKS (E.G. MENINGITIS, HEPATITIS A) THAT ARE TRACKED FOR DATA CENSUSES AND TREATMENT PROVIDED TO THE COMMUNITY.

RECORDS FILED BY YEAR AND OUTBREAK.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>7. PNEUMONIA OFFSITE LOGS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	4 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

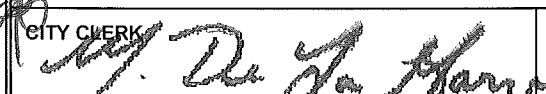
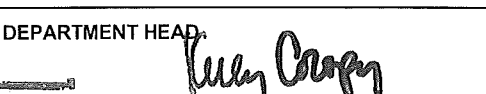
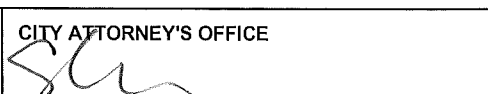
CONTENTS:

**PNEUMONIA OFFSITE LOG – TRACKING OF VACCINES GIVEN OFFSITE.**

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR AND SITE NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>8. SCHOOL VACCINE AUDIT RECORDS</b></p>	DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

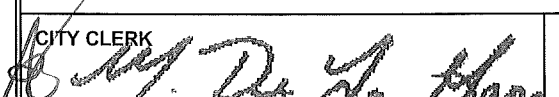

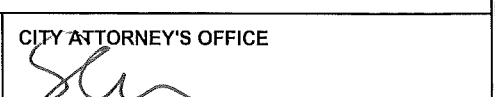
CONTENTS:

**SCHOOL VACCINE AUDIT RECORDS** - LBDHHS CONDUCTS ANNUAL AUDITS OF STUDENT VACCINE RECORDS TO ENSURE ALL STUDENTS ARE VACCINATED. AUDIT FINDINGS ARE KEPT ON RECORD.

RECORDS ARE FILED BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>9. TRAVEL IMMUNIZATION CONSENTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

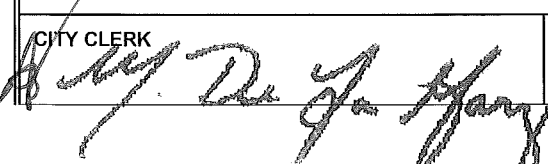
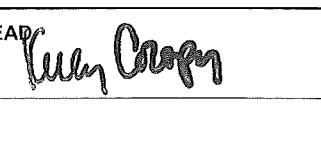
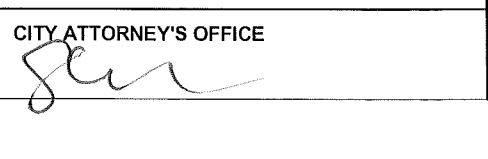
CONTENTS:

ELECTRONIC IMMUNIZATION CONSENTS ARE STORED IN STATEWIDE DATA SERVER, CALIFORNIA IMMUNIZATION REGISTRY (CAIR). THESE RECORDS ARE SEARCHABLE BY PATIENT LAST AND FIRST NAME.

RECORDS ARE FILED BY PATIENT'S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>10. TRAVEL IMMUNIZATION RECORD CARDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	10 YEARS	5 YEARS	15 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**TRAVEL IMMUNIZATION RECORD CARDS** – DOCUMENTATION OF VACCINES GIVEN TO INDIVIDUALS WHO TRAVELED OUTSIDE OF THE COUNTRY.

RECORDS ARE FILED BY PATIENT'S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>11. TRAVEL IMMUNIZATION RECORDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**TRAVEL IMMUNIZATION RECORDS** – DOCUMENTATION OF VACCINES GIVEN TO INDIVIDUALS WHO TRAVELED OUTSIDE OF THE COUNTRY.

ELECTRONIC IMMUNIZATION CONSENTS ARE STORED IN STATEWIDE DATA SERVER, CALIFORNIA IMMUNIZATION REGISTRY (CAIR). THESE RECORDS ARE SEARCHABLE BY PATIENT LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 



RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>12. VFC PROVIDER REPORTS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION  	RETENTION PERIOD  		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	4 YEARS	7 YEARS


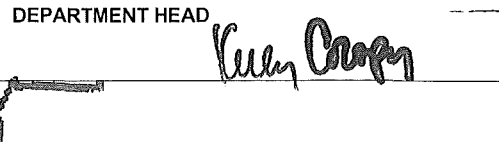
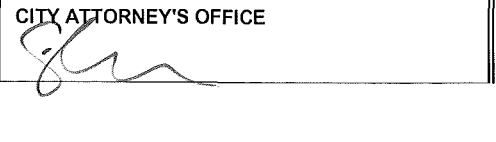
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**VFC PROVIDER REPORTS** – VACCINE FOR CHILDREN PROVIDER REPORTS.

RECORDS ARE FILED BY QUARTER BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>13. VFC VENDOR LOGS</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES IMMUNIZATION/TRAVEL CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS	4 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

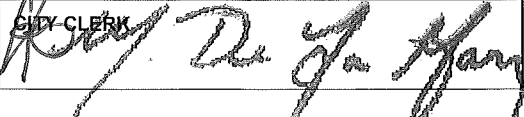

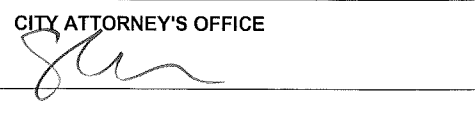
VFC STANDS FOR VACCINE FOR CHILDREN.

CONTENTS:

**VFC VENDOR LOGS** – INVENTORY OF VACCINES, PLACED ORDERS FOR VACCINES, SHIPPING AND RECEIVING INFORMATION, AND ORDER CONFIRMATIONS.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Correspondence	5 Years	5 Years	10 Years	
2.	Lab Results	5 Years	5 Years	10 Years	
3.	Medical History	5 Years	5 Years	10 Years	

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

<b>ORIGINATING DEPARTMENT</b> <b>HEALTH &amp; HUMAN SERVICES</b>	<b>ITEM NO. &amp; TITLE:</b> <p style="text-align: center;"><b>1. CORRESPONDENCE</b></p>			<b>DATE</b> <b>APR 14 2020</b>
<b>COPIES/FILES BY DEPT/SECTION</b> <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES PERINATAL HEP B PROGRAM</b>	<b>COPY DESIGNATION</b>	<b>RETENTION PERIOD</b>		
		<b>DEPARTMENT</b>	<b>REC. CENTER</b>	<b>DESTROY</b>
	<b>WORKING COPY</b>	<b>5 YEARS</b>	<b>5 YEARS</b>	<b>10 YEARS</b>

DESCRIPTION: (Purpose, Content, and Method of Filing)

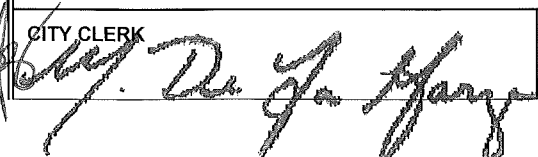
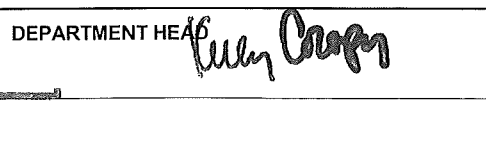
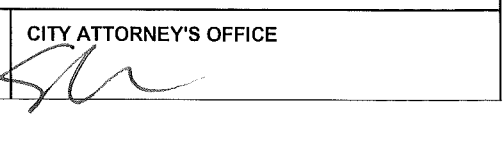
CONTENTS:

**CORRESPONDANCE** – SHARED MEDICAL INFORMATION OBTAINED FROM OUTSIDE MEDICAL FACILITIES USED FOR CONTINUITY OF CARE FOR MOTHER AND CHILD.

RECORDS ARE FILED BY CLIENT'S LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

**APPROVALS**

<b>CITY CLERK</b> 	<b>DEPARTMENT HEAD</b> 	<b>CITY ATTORNEY'S OFFICE</b> 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>2. LAB RESULTS</b></p>			DATE <p style="text-align: center;"><b>APR 14 2020</b></p>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL SERVICES                  PERINATAL HEP B PROGRAM</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	5 YEARS	10 YEARS


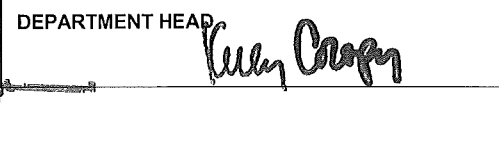
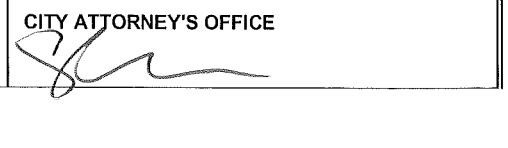
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**LAB RESULTS** – LABORATORY RESULTS FOR BOTH MOTHER AND CHILD FROM OUTSIDE PROVIDERS AND FROM CLBDHHS.

RECORDS ARE FILED BY CLIENT'S LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>3. MEDICAL HISTORY</b></p>	DATE <p style="text-align: center;"><b>APR 14 2020</b></p>															
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL SERVICES                  PERINATAL HEP B PROGRAM</b>	COPY DESIGNATION  	RETENTION PERIOD  															
	WORKING COPY	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">DEPARTMENT</td> <td style="width: 33%;">REC. CENTER</td> <td style="width: 33%;">DESTROY</td> </tr> <tr> <td>5 YEARS</td> <td>5 YEARS</td> <td>10 YEARS</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	DEPARTMENT	REC. CENTER	DESTROY	5 YEARS	5 YEARS	10 YEARS									
DEPARTMENT	REC. CENTER	DESTROY															
5 YEARS	5 YEARS	10 YEARS															




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**MEDICAL HISTORY** – MEDICAL HISTORY INFORMATION FOR BOTH MOTHER AND FATHER OBTAINED FROM OUTSIDE MEDICAL PROVIDERS, INCLUDING PRIVATE PHYSICIAN AND HOSPITAL.

RECORDS ARE FILED BY CLIENT'S LAST AND FIRST NAME.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Correspondence	1 Year	-	1 Year	
2.	GOTCH	3 Years	-	3 Years	Current and previous years are kept in the department, prior to destruction. Per the State Health and Safety Code HSC Division 105, Part 5; Administrative Codes, Title 17, Chapter 4, Section 2500
3.	Electronic X-Rays/Films	Permanent	-	Permanent	Electronic X-Ray records are kept indefinitely in the Medstraat Database. All films prior to 2019 are currently being scanned to Medstraat, and will thereafter be destroyed.
4.	Report of Verified Case of Tuberculosis (TB) - Electronic Copy	Permanent	-	Permanent	Paper charts from years prior to 2008 have been destroyed.  2009 – 2018 paper charts will be kept for an additional 10 years then destroyed.  2019 reports are scanned into NextGen and are kept indefinitely. Hard copies of records are destroyed once electronically stored.
5.	TB Electronic Medical Records	Permanent	-	Permanent	Hard copies of records are destroyed once electronically stored.

Department/Bureau/Division: <b>Health &amp; Human Services / Physician Services / Clinical Services / Tuberculosis Clinic</b>	City Council Approval Meeting Date: <b>August 23, 1983; Rev: April 14, 2020</b>	Page No. <b>1 of 3</b>
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**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
6.	TB Medical Records (Charts)	7 Years Following Discharge	Permanent	Permanent	Adult: 7 years following discharge  Minor: 1 year after minor reaches the age of 18 years, but not less than 7 years following discharge  Effective October 2016, all records are entered electronically into the NextGen system. All previous records are paper charts.
7.	TB Medical Records (Cases)	10 Years	10 Years	20 Years	
8.	TB Medical Records (Non-Cases)	7 Years Following Discharge	-	7 Years Following Discharge	Adult: 7 years following discharge  Minor: 1 year after minor reaches the age of 18 years, but not less than 7 years following discharge
9.	TB Registry – MDR TB	Permanent	-	Permanent	Information in TB registry is also kept indefinitely in State Database.
10.	TB Registry – Non-MDR TB	20 Years	-	20 Years	Information in TB registry is also kept indefinitely in State Database.
11.	X-Ray Records – Paper/Film Adult	7 Years Following Discharge	Permanent	Permanent	
12.	X-Ray Records – Paper/Film MDR-TB	7 Years	Permanent	Permanent	Effective October 2016, all records are entered electronically into the NextGen system.



**City of Long Beach  
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
13.	X-Ray Records – Paper/Film Minors	*See Remarks	Permanent	Permanent	1 year after minor reaches the age of 18, but not less than 7 years following discharge
14.	X-Ray Records – Paper/Film Other	5 Years	2 Years	7 Years	X-rays received from outside entity

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>1. CORRESPONDENCE</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	1 YEAR		1 YEAR



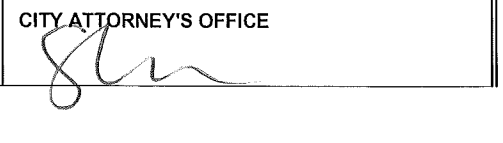
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**CORRESPONDENCE** – INTERJURISDICTIONAL NOTIFICATIONS OF CURRENT TB CASES, COPIES OF FAXES FROM OUTSIDE PROVIDERS, CLASS B II CASE INVESTIGATION INFORMATION, AFB NEGATIVE CULTURE RESULTS, PENDING LABORATORY RESULTS FOR NEGATIVE TB CASES.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;"><b>2. GOTCH</b></p>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	3 YEARS		3 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**GOTCH** – CONFIDENTIAL TB SUSPECT CASE REPORT FORMS AND TB DISCHARGE CARE PLAN. HOSPITAL REPORTINGS OF RESIDENCE OF PATIENTS WHO RESIDE OUTSIDE OF LONG BEACH BUT ARE RECEIVING MEDICAL CARE FOR TB IN A LONG BEACH HOSPITAL/FACILITY. HOSPITAL TB REPORTS, SHARED INFORMATION WITH PROVIDERS.


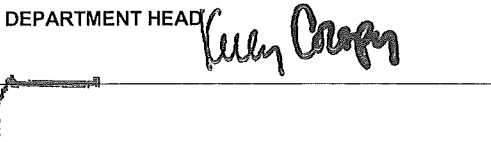
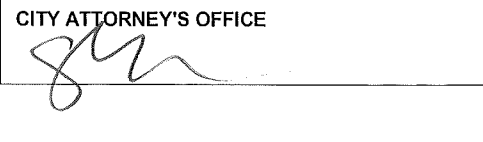
CURRENT AND PREVIOUS YEARS ARE KEPT IN THE DEPARTMENT, PRIOR TO DESTRUCTION.

RETENTION PER THE FOLLOWING CITATION(S):

- CALIFORNIA HEALTH AND SAFETY CODE HSC DIVISION 105, PART 5
- CALIFORNIA ADMINISTRATIVE CODES, TITLE 17, CHAPTER 4, SECTION 2500
- 

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>3. ELECTRONIC X-RAYS/FILM</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

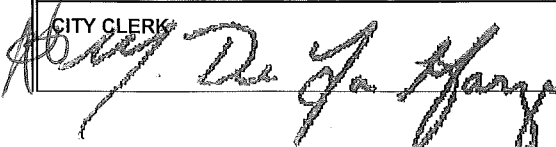
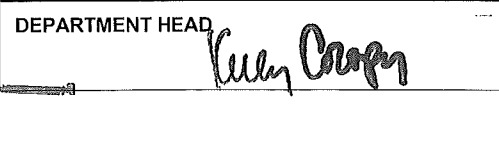
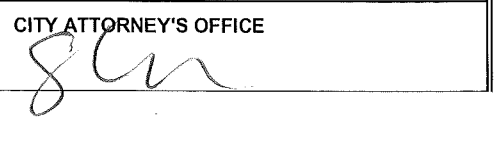
CONTENTS:

**ELECTRONIC X-RAY/FILMS** – THESE RECORDS ARE KEPT IN THE MEDSTRAAT DATABASE SYSTEM INDEFINITELY. ALL FILMS PRIOR TO 2019 ARE CURRENTLY BEING SCANNED TO MEDSTRAAT, AND WILL THEREAFTER BE DESTROYED.

RECORDS ARE FILED BY CLIENT'S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>4. REPORT OF VERIFIED CASE OF TB</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**REPORT OF VERIFIED CASES OF TB** – ALL VERIFIED TB CASES IN THE CITY OF LONG BEACH ARE REPORTED TO LOS ANGELES COUNTY AND THE STATE OF CALIFORNIA.

PAPER CHARTS FROM YEARS PRIOR TO 2008 HAVE BEEN DESTROYED.

PAPER CHARTS FROM 2009 THROUGH 2018 ARE KEPT IN A PAPER FILE AND WILL BE STORED FOR AN ADDITIONAL 10 YEARS PRIOR TO DESTRUCTION.

2019 REPORTS ARE SCANNED INTO NEXTGEN AND ARE KEPT INDEFINITELY. HARD COPIES OF RECORDS ARE DESTROYED ONCE ELECTRONICALLY STORED.

REPORTS ARE FILED CHRONOLOGICALLY BY YEAR.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>5. TB ELECTRONIC MEDICAL RECORDS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**TB ELECTRONIC MEDICAL RECORDS** – MEDICAL HISTORY, LABORATORY RESULTS, OUTSIDE MEDICAL RECORDS FROM PROVIDERS AND HOSPITALS, TREATMENT PLANS, TRACKING OF PATIENT MEDICATIONS, PROVIDER VISITS.




PAPER RECORDS PRIOR TO 2008 HAVE BEEN DESTROYED.

PAPER RECORDS FROM 2009 THROUGH 2018 WILL BE KEPT FOR AN ADDITIONAL 10 YEARS, AND THEN DESTROYED.

2019 REPORTS HAVE BEEN SCANNED INTO NEXTGEN AND WILL BE KEPT INDEFINITELY. HARD COPIES OF RECORDS ARE DESTROYED ONCE THEY HAVE BEEN ELECTRONICALLY STORED.

TB EMR CAN BE SEARCHED BY CLIENT'S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>6. TB MEDICAL RECORDS (CHARTS)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
ADULTS	ELECTRONIC COPY	7 YEARS FOLLOWING DISCHARGE	PERMANENT	PERMANENT
MINORS	ELECTRONIC COPY	*SEE BELOW	PERMANENT	PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:




**TB MEDICAL RECORDS** – MEDICAL HISTORY, LABORATORY RESULTS, OUTSIDE MEDICAL RECORDS FROM PROVIDERS AND HOSPITALS, TREATMENT PLANS, TRACKING OF PATIENT MEDICATIONS, PROVIDER VISITS. THIS INCLUDES TB CASES AND NON-CASES.

FOR MINORS, RECORDS ARE KEPT FOR ONE (1) YEAR AFTER THE MINOR REACHES THE AGE OF 18, BUT NOT LESS THAN SEVEN (7) YEARS FOLLOWING DISCHARGE.

HARD COPIES OF RECORDS HAVE BEEN DESTROYED ONCE ELECTRONICALLY STORED IN NEXTGEN.

CHARTS ARE FILED CHRONOLOGICALLY BY YEAR, FOLLOWING THE CHART NUMBER.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>7. TB MEDICAL RECORDS (CASES)</b>	DATE <b>APR 14 2020</b>
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COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ELECTRONIC COPY	10 YEARS	10 YEARS	20 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

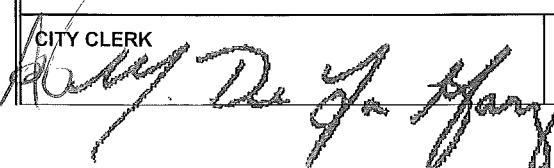
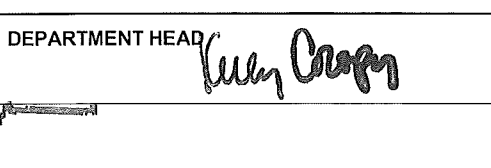
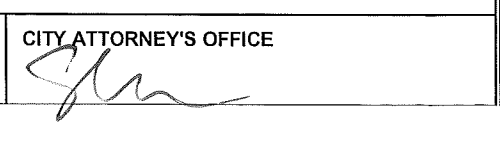
**TB MEDICAL RECORDS** – MEDICAL HISTORY, LABORATORY RESULTS, OUTSIDE MEDICAL RECORDS FROM PROVIDERS AND HOSPITALS, TREATMENT PLANS, TRACKING OF PATIENT MEDICATIONS, PROVIDER VISITS. THIS INCLUDES TB CASES AND NON-CASES.

HARD COPIES OF RECORDS HAVE BEEN DESTROYED ONCE ELECTRONICALLY STORED IN NEXTGEN.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR, CLIENT'S LAST NAME, FIRST NAME, AND BY CLASSIFICATION.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

**APPROVALS**

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>8. TB MEDICAL RECORDS (NON-CASES)</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
ADULTS	ELECTRONIC COPY	7 YEARS FOLLOWING DISCHARGE	DEPARTMENT REC. CENTER	DESTROY 7 YEARS FOLLOWING DISCHARGE
MINORS	ELECTRONIC COPY	*SEE BELOW		*SEE BELOW

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**TB MEDICAL RECORDS** – MEDICAL HISTORY, LABORATORY RESULTS, OUTSIDE MEDICAL RECORDS FROM PROVIDERS AND HOSPITALS, TREATMENT PLANS, TRACKING OF PATIENT MEDICATIONS, PROVIDER VISITS. THIS INCLUDES TB CASES AND NON-CASES.

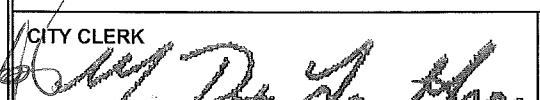
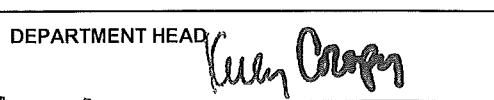
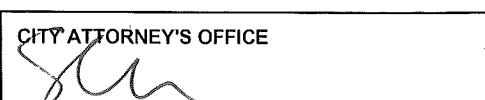
FOR MINORS, RECORDS ARE KEPT FOR ONE (1) YEAR AFTER THE MINOR REACHES THE AGE OF 18, BUT NOT LESS THAN SEVEN (7) YEARS FOLLOWING DISCHARGE.

HARD COPIES OF RECORDS HAVE BEEN DESTROYED ONCE ELECTRONICALLY STORED IN NEXTGEN.

RECORDS ARE FILED CHRONOLOGICALLY BY YEAR, CLIENT'S LAST NAME, FIRST NAME, AND BY CLASSIFICATION.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <p style="text-align: center;">9. TB REGISTRY – MDR TB</p>			DATE APR 14 2020
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	PERMANENT		PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

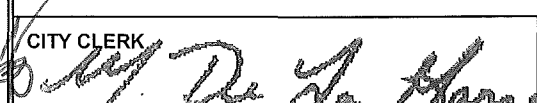
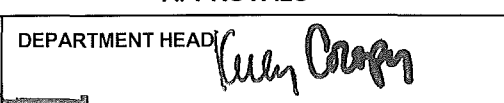

CONTENTS:

**TB REGISTRY – MDR TB & NON-MDR TB CASES** – PATIENT CASES THAT DOCUMENT MULTIDRUG RESISTANCE TO TB MEDICATIONS. THIS INFORMATION IS ALSO HOUSED IN THE TB REGISTRY AND THE CLIENT'S MEDICAL RECORD, WHICH IS FILED CHRONOLOGICALLY BY CLIENT'S LAST AND FIRST NAME.

RECORDS ARE ALSO KEPT INDEFINITELY IN THE STATE DATABASE.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**RECORDS RETENTION EVALUATION/CITY OF LONG BEACH**

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>10. TB REGISTRY – NON-MDR TB</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	20 YEARS		20 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**TB REGISTRY – MDR TB & NON-MDR TB CASES** – PATIENT CASES THAT DOCUMENT MULTIDRUG RESISTANCE TO TB MEDICATIONS. THIS INFORMATION IS ALSO HOUSED IN THE TB REGISTRY AND THE CLIENT’S MEDICAL RECORD, WHICH IS FILED CHRONOLOGICALLY BY CLIENT’S LAST AND FIRST NAME.

RECORDS ARE ALSO KEPT INDEFINITELY IN THE STATE DATABASE.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>11. X-RAY RECORDS – PAPER/FILM ADULT</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL SERVICES                  TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
		ORIGINAL COPY	7 YEARS FOLLOWING DISCHARGE	PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

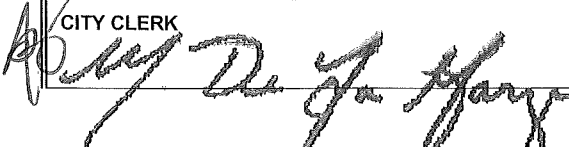

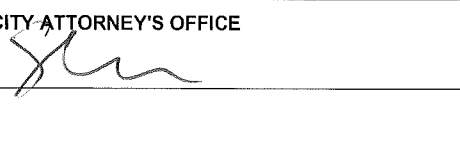
CONTENTS:

**X-RAY RECORDS PAPER/FILM – FILM RECORDS OF CHEST X-RAYS AND/OR REPORTS OF X-RAYS.**

RECORDS ARE FILED BY CLIENT'S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>12. X-RAY RECORDS – PAPER/FILM MDR-TB</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	7 YEARS	PERMANENT	PERMANENT

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:


**X-RAY PAPER/FILM MDR – PAPER/FILM FOR CLIENTS WHO HAVE MULTIDRUG RESISTANCE TO TB MEDICATIONS.**

EFFECTIVE OCTOBER 2016, ALL RECORDS HAVE BEEN ELECTRONICALLY ENTERED INTO NEXTGEN.

RECORDS ARE FILED BY CLIENT’S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>13. X-RAY RECORDS – PAPER/FILM MINORS</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION <b>PHYSICIAN SERVICES                  BUREAU/CLINICAL SERVICES                  TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	ORIGINAL COPY	*SEE BELOW	PERMANENT	PERMANENT


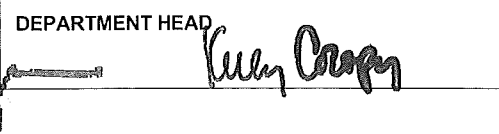
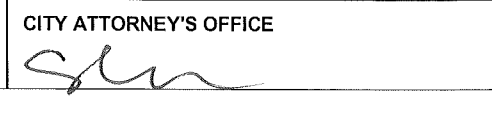
DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS:

**X-RAY PAPER/FILM MINORS** – RECORDS ARE KEPT ONE (1) YEAR AFTER THE MINOR REACHES THE AGE OF 18, BUT NOT LESS THAN SEVEN (7) YEARS FOLLOWING DISCHARGE.

RECORDS ARE FILED BY CLIENT’S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT <b>HEALTH &amp; HUMAN SERVICES</b>	ITEM NO. & TITLE: <b>14. X-RAY RECORDS – PAPER/FILM OTHER</b>			DATE <b>APR 14 2020</b>
COPIES/FILES BY DEPT/SECTION  <b>PHYSICIAN SERVICES BUREAU/CLINICAL SERVICES TUBERCULOSIS CLINIC</b>	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	WORKING COPY	5 YEARS	2 YEARS	7 YEARS

DESCRIPTION: (Purpose, Content, and Method of Filing)

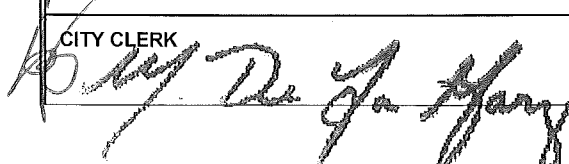
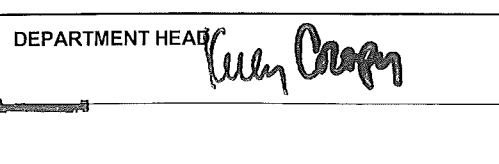
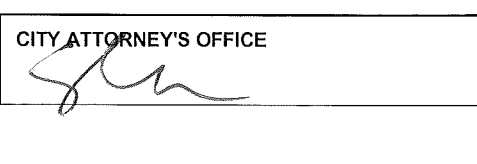
CONTENTS:

**X-RAY RECORDS PAPER/FILM** – FILM RECORDS OF CHEST X-RAYS AND/OR REPORTS OF X-RAYS. THE ‘OTHER’ CATEGORY FOR X-RAY RECORDS REFERS TO ANY X-RAYS WE RECEIVE FROM AN OUTSIDE ENTITY (NAMELY, THE COUNTY) AND GETS ADDED TO OUR REFERRED PATIENT’S MEDICAL RECORD. ONCE THE RECORD COMES INTO OUR POSSESSION, THEN WE KEEP IT ONSITE FOR 5 YEARS.

RECORDS ARE FILED BY CLIENT’S LAST NAME, FIRST NAME, AND DOB.

PREPARED BY: CATHY GUEVARA AND MARGARET MURPHY-BORNN

APPROVALS

CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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