OPTIONS, INC
CONSUMER RECORD KEEPING POLICY

I. Policy

Options Inc. will maintain records in a systematic fashion to assist with current and future service delivery for individuals served.

II. Procedure

A. Individual Record Keeping

1. Options Inc. will maintain individual records, which contain the following information:
    a. health
    b. assessment
    c. legal
    d. ISP
    e. other
2. Information in the individual records will be maintained for the two year licensing cycle period of time, or until the next license review is conducted, whichever is later.
3. After the licensing review, information may be archived as directed by the Program Director.

a. information that has been summarized into a separate format (e.g., quarterly, semi-annual, annual progress reports) from individual records may be discarded after the licensing review

4. Individuals currently receiving services must have records retained for a seven-year period of time.
5. Records of individuals who have left or have been discharged from the program, or have otherwise had their services terminated must have their records retained for a three-year period of time following the termination or discharge.
6. Records must be maintained in a secure location.

Authorized by:_____ _____

Executive Director Date