



Promise Health Plan

POLICY & PROCEDURE Medical Services

Policy Title: Record Retention			
Policy No: 70.2.71		Original Date: 7/09	
Effective Date: 12/18	Revision Date: 1/18, 12/18		Revision No: 2
Department Head:	Date:	Medical Services/P&T Committee:	Date:
P&P Committee:	Date:	Department(s): UM, CM, LTSS, SS, HEd	

PURPOSE:

To establish a procedure to ensure records are retained according to the legal framework, as required by the federal or state law or regulations.

POLICY:

All Departments within Medical Services maintain member information, records and materials reviewed related to healthcare services and determinations rendered, or to provision of medical services, including calls made by each Department, in a secure and confidential manner in accordance with Blue Shield Promise’s HIPPA procedure and policy on retention of documentation.

PROCEDURE:

1. Medical Services Departments maintain log(s) of cases processed as described in this policy from the date of the creation of document, or the date when the document was last in effect, whichever is later, for a period of 10 years.
2. The records may be stored in hardcopies or electronic copies (in the case of calls, the MIS dept will retain records in the form or recordings)
3. Records will be retained onsite or offsite.
4. Medical records will be readily available upon request, or for audit purposes.
5. Requirements for retention and destruction of record vary on the type of line of business:
 - a. Medicare = 10 years
 - b. Medi-Cal = 10years
6. Record retention procedure shall be reviewed annually and updated as necessary.

REFERENCES/AUTHORITIES: