

COMPLIANCE AND RISK MANAGEMENT

Records Retention and Management

The Trustees recognize the importance of Trust records as the record of acts of the Trustees and the repository of such information. The records of the Trust include but are not limited to, agendas, meeting minutes, individual claim appeal information and documents prepared by outside advisors necessary to administer the Trust.

Some of these records are public records and must be retained and destroyed in accordance with the Records Retention Manual and General Records Retention Schedule provided by the Office of the Secretary of State, Division of Archives and Records Management. Some of the records may contain protected health information (as the term is defined by HIPAA) and must be handled by the Trustees and others authorized to handle PHI in accordance with the Trust's HIPAA Privacy Manual (as amended for Security). In addition, PHI must be retained and destroyed as described in the HIPAA Privacy Manual (as amended for Security).

<u>Cross Reference:</u>	<u>Trust Policy 430</u>	Health Insurance Portability and Accountability Act of 1996 (HIPAA – Privacy and Security) HIPAA Privacy Manual, as amended for Security
	<u>Board Policy 8410</u>	Records Management and Retention (District Policy)
	<u>Board Procedure 8410P</u>	Records Management and Retention (District Procedure)
	General Records Retention Schedule, School Districts and Educational Service Districts, provided by the Office of the Secretary of the State, Division of Archives and Records Management	

~~Proposed: August, 2005~~

~~Approved~~Adopted: August 29, 2005

Proposed: December 2010