

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
All Divisions	HSAD-010	Health Advisory Board Records	Operating files of advisory boards which establish policy for the department of health services. <b>Typical records include:</b> minutes, agendas, bylaws, policies, member lists, resolutions.			A	Permanent	If department no longer wants to retain records, send to the County Archives for permanent retention.
Administration	HSAD-020	Health Services Compliance Records	Records related to administering the DHS compliance program. <b>Typical records include:</b> program documentation; policies and procedures; compliance reporting, audit, and training logs, and corresponding documents; documents regarding inappropriate activities or misconduct; compliance assessments, monitoring and auditing documents; compliance committee agendas, minutes and reports; compliance related correspondence with regulatory agencies.	C	V		Calendar Year + 10 Years	
Administration	HSAD-030	Health Services Contracts and Agreements	Revenue contracts, contracts for goods and services not related to construction, and other miscellaneous contracts. <b>Typical records include:</b> contracts (services agreement, data sharing agreement, memorandum of understanding (MOU), joint powers agreement (JPA), letter of agreement (LOA), etc.), amendments, notices, licenses, evidence of insurance, competitive procurement documentation, etc.				After Event + 10 Years	Retain for 10 years from the final date of the contract period between the state and county or from the date of completion of any audit, whichever is later, per County Counsel recommendation.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Administration - Fiscal	HSAD-040	Accounts Payable/ Accounts Receivable/ Receipts - Non- Behavioral Health	Records related to: procurement of and payment for goods/services, contract payments, accounts receivable and cash receipts, cost reports documenting proposed and actual use of state funds, auditor-controller accounting reports, Medi-Cal billing, other billing. <b>Typical records include:</b> purchasing records, claims including Medi-Cal, invoices including contracts, petty cash records, deposit authorizations, bank statements and reconciliations, billings for services provided by county offices, preliminary and state plans, reports, worksheets, expenditures.	C	V		Fiscal Year + 7 Years	Destroy 7 years after close of fiscal year, or after audit is settled. Any records with client information are confidential.
Administration - Fiscal	HSAD-050	Accounts Payable/ Accounts Receivable/ Receipts - Behavioral Health	Records related to: procurement of and payment for goods/services, contract payments, accounts receivable and cash receipts, cost reports documenting proposed and actual use of state funds, auditor-controller accounting reports, Medi-Cal billing, other billing. <b>Typical records include:</b> purchasing records, claims including Medi-Cal, invoices including contracts, petty cash records, deposit authorizations, bank statements and reconciliations, billings for services provided by county offices, preliminary and state plans, reports, worksheets, expenditures.	C	V		After Event + 10 Years	Retain for 10 years from the final date of the contract period between the state and county or from the date of completion of any audit, whichever is later, per County Counsel recommendation.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Administration - Fiscal	HSAD-060	Medi-Cal Administrative Activities/Targeted Case Management Participation Records	Medi-Cal Administrative Activities (MAA)/Targeted Case Management (TCM) Local Governmental Agencies participation records needed to support county-based MAA (CMAA) and TCM programs. <b>Typical records include:</b> claiming plans, participation lists, org charts, etc.	C			Fiscal Year + 7 Years	
Administration - Fiscal	HSAD-070	Grants – Non-Behavioral Health	Documentation of non-construction grants and revenue generating agreements. <b>Typical records include:</b> claims, financials, grants, proposals, agreements, amendments.	C	V		Fiscal Year + 7 Years	Destroy 7 years after close of fiscal year, or after audit is settled. Any records with client information are confidential.
Administration - Fiscal	HSAD-080	Grants - Behavioral Health	Documentation of non-construction grants and revenue generating agreements. <b>Typical records include:</b> claims, financials, grants, proposals, agreements, amendments.	C	V		After Event + 10 Years	Retain for 10 years past final settlement. Any records with client information are confidential.
Administration - Fiscal	HSAD-090	Mental Health Medi-Cal Administrative Activities Participation Records	MAA/TCM participation records needed to support Mental Health Medi-Cal Administrative Activities (MHMAA) programs. <b>Typical records include:</b> claiming plans, participation lists, org charts, etc.	C			After Event + 10 Years	Retain for 10 years past final settlement
Administration - HPPE	HSAD-100	Sonoma County Health Profile	Compilation of public health statistics for Sonoma County. <b>Typical records include:</b> statistical information on types of diseases, health behaviors, demography, etc. Aka Portrait of Sonoma County.			A	Fiscal Year + 10 Years	If department no longer wants to retain records, send to the County Archives for permanent retention.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Administration - Inter- Departmental Multi- Disciplinary Team (IMDT)	HSAD- 110	Care Coordination	Summary of coordination steps across departments on behalf of the client. Contains partial information from various Safety Net source systems.	C			After Event + 1 Year	Maintain for one year following client's completion of plan, or disenrollment from inter-departmental multi-disciplinary team (IMDT). For actual client medical records, refer to related records series: BMMH-010, BMMH-020, BHSU-010, BHSU-020, BHSU-030, PHCC-010, PHJH-010, PHCL-250.
Administration - Privacy	HSAD- 120	Health Privacy and Security	Records of internal DHS privacy and security training and monitoring activities. <b>Typical records include:</b> internal policy, training materials, completion records, program and contractor audit reports, monitoring logs and reports, security risk assessments, privacy and security incident reports, records of correction or mitigation, etc.	C	V		Fiscal Year + 10 Years	Retention extended to create a uniform policy across the divisions of the Department. Statutory retention is 6 years. Departmental policy is the basis for the 10 year retention period.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Behavioral Health - Admin	BHAD-010	Quality Assessment and Performance Improvement	Records that document quality assurance and performance improvement for the various behavioral health programs such as mental health and substance abuse treatment. <b>Typical records include:</b> program audits by state Dept. of Healthcare Services (DHCS), DHCS and/or county certification records, beneficiary rights and protection including grievances and fair hearings, meeting minutes, sentinel events.	C	V		Calendar Year + 10 Years	Retain for 10 years past final settlement/audit or meeting date. Original external audit report records kept by state department of healthcare services, internal audit reports maintained by department. Certification records are vital.
Behavioral Health - Mental Health	BHMH-010	Client Medical Records - Adults	Records of client care for programs administered by the behavioral health division. <b>Typical records include:</b> medical treatment record, application, authorization for services, consent, assessment, plans, notes, diagnoses, legal documents, case management, financial info, etc.	C	V		After Event + 10 Years	Retain for 10 years from the date service was rendered, per counsel recommendation. Ref: 42 CFR 438.3(h), WIC 14124.1 , 45 CFR Sec 75.361
Behavioral Health - Mental Health	BHMH-020	Client Medical Records - Minors	Records of client care for programs administered by the behavioral health division. <b>Typical records include:</b> medical treatment record, application, authorization for services, consent, assessment, plans, notes, diagnoses, legal documents, case management, financial info, etc.	C	V		After Event + 25 Years	Retain for 25 years after Date of Birth. Retention per state contracts. BPC 4980.49, 42 CFR 438.3(h), WIC 14124.1

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Behavioral Health - Mental Health	MHMR-050	Patient Medical Records - Indexes - MHMR-050	Index card including patient name, case number, birth date, facility, date case opened, trans in, trans out, date case closed. Alphabetical by patient name.	C	V		Permanent	
Behavioral Health - Substance Use Disorder	BHSU-320	Urinalysis Test Results	Results of urinalysis testing for various clients who do not have a case file. Includes: spreadsheet with client name and results. Filed chronologically.	C			Fiscal Year + 2 Years	Records are confidential in accordance with Government Code 6254(c). Delete records from database when client leaves the program.
Behavioral Health - Substance Use Disorder	BHSU-010	Adolescent Treatment Program	Records of client care for programs administered by the behavioral health division. <b>Typical records include:</b> medical treatment record, application, authorization for services, consent, assessment, plans, notes, diagnoses, legal documents, case management, financial info, etc.	C	V		After Event + 10 Years	Retain for 10 years from the date service was rendered, per counsel recommendation. Ref: 42 CFR 438.3(h), WIC 14124.1, 45 CFR sec 75.361
Behavioral Health - Substance Use Disorder	BHSU-020	Adolescent Treatment Program - Pregnancies	Adolescent treatment program records for pregnant individuals receiving care and treatment for behavioral health and substance abuse at juvenile hall and probation camp. <b>Typical records include:</b> consent, screenings, assessments, recommendations, examination and health history, physician's orders, medications, notes, etc.	C	V		After Event + 19 Years	Records are to be maintained until the baby reaches its 19th birthday.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Behavioral Health - Substance Use Disorder	BHSU-030	Participant Records - Driving Under the Influence (DUI)	Records of DUI program participants documenting their participation in the court-ordered DUI program/school. <b>Typical records include:</b> enrollment and re-enrollment certificates, completion certificates, court papers outlining conviction information, financial information, aod screening/assessment, schedule of program activities, release of information (ROI)/ consent, photos.	C	V		After Close/Completion + 4 Years	9 CCR 9866 states DUI program participant records must be maintained 48 months after the date of transfer to another DUI program, date of dismissal from the program, or date of issuance of a notice of completion certificate.
Behavioral Health - Billing	MHBA-380	Statistical Reports	Summary biostatistical information on patients. Includes data such as the number of new patients, discharges, services provided, statistical tables for month and year to date, etc. Arranged chronologically by Month.			A	Permanent	If department no longer wants to retain records, send to County Archives for permanent retention.
Public Health - Animal Services	PHAS-010	Field Records	Records that document field operations of animal services such as abatements, bite reports, law enforcement activities. <b>Typical records include:</b> abatement orders, reports, petitions, photos, lab records, complaints, summons, court material, service requests, ride along forms and waivers.				After Close/Completion + 3 Years	Retain 1 year past statute of limitations on personal injury, which is two years per CCP 335.1.
Public Health - Animal Services	PHAS-040	Kennel Files	Registration and inspection records for hobby and commercial kennels, pet shops. <b>Typical records include:</b> kennel/pet shop application, inspections, correspondence, licenses.				Life	Retain records for the life of the kennel or pet shop regardless of ownership.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Animal Services	PHAS-020	Shelter - Medical	Records permitting use of controlled substances and documenting animal health/treatment. <b>Typical records include:</b> registration certificate, application, euthanasia record, supply tracking, medical records.				After Close/Completion + 3 Years	Medical records are governed by CCR 2032.3(b)
Public Health - Animal Services	PHAS-030	Shelter - Operations	Operational records of the services provided by the animal shelter such as licensing, impounds and medical treatment. <b>Typical records include:</b> license registrations, impound and release records, relinquishments, adoptions, lost/found.				After Event + 3 Years	Event is life of animal or discharge/adoption.
Public Health - Client Care	PHCC-010	Client Medical Records – Non-CCS/Forensic/TB/Syphilis/VOMC H	Medical records for clients of the public health division including medical therapy unit, home nurse visits, maternal & child health etc. <b>Typical records include:</b> physician's orders, diagnoses, exam and health history, medications, immunizations, consent and other forms, lab results, incident reports, legal documents, case management and client financial records.	C	V		After Event + 10 Years	<b>Adult records:</b> destroy 10 years after last month of service. Minor records: destroy the later of: (1) 10 years after last month of service or (2) 1 year after the minor has reached the age of 18 years of age. (W&I code sections 14124.1, 123105 & 22 CCR 70751, 72543.)



## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Client Care	PHJH-010	Client Medical Records - Juvenile Hall	Medical records for clients served by juvenile hall <b>typical records include:</b> physician's orders, diagnoses, exam and health history, medications, immunizations, consent and other forms, lab results, incident reports, legal documents, case management and client financial records.	C	V		After Event + 10 Years	Destroy 10 years after last month of service <b>and</b> the minor is 25 years of age. <b>Pregnant clients:</b> records are to be maintained until the baby reaches its 19th birthday. 22 CCR 70751(c), SB 823
Public Health - California Children's Services	PHCS-010	Client Care Records - CCS Admin	Case files which document eligibility for case management such as care coordination, provider referrals, and service authorizations under the California children's services program. <b>Typical records include:</b> application, annual review, bills, plans and notes, correspondence, client financial records, guardianship, HRIF, authorizations and reports, referrals, release of information.	C	V		After Event+ 5 Years	Destroy 5 years after close of the case. California Department of Health Services, SSC general administrative procedures manual 1.4.18d permits destruction 5 years from the last date of service or the last action recorded in the case.
Public Health - Clinical Serv.	PHCL-170	Client Medical Records - Forensic Exams	Forensic med. Exam for establishment of sexual assault & collection of evidence. <b>Typical records include:</b> notes, exam pages, counseling sheets, background histories, lab documents, correspondence, billing information, informed consents.	C			After Close/ Completion + 75 Years	Destroy 75y after patient was last seen. Retention recommended by DA office and supported by department preference. Includes both adult and minor records.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Clinical Serv.	PHCL-060	Client Medical Records - Syphilis/ Tuberculosis	Medical records for any client who tested positive for syphilis or tuberculosis. <b>Typical records include:</b> notes, exam pages, counseling sheets, background histories, lab documents, correspondence, billing information, informed consents. Aka 'syphilis charts', 'TB charts'.	C			100 Years	
Public Health - Disease Control	PHDC-160	Client Records - Registry Cards	Chart summaries of vitals (name, dob, gender, etc.) For tuberculosis patients. <b>Typical records include:</b> registry cards	C			100 Years	
Public Health - Clinical Serv.	PHCL-250	Client Medical Records - VOMCH	Medical records for children served by the Valley of the Moon Children's Center. <b>Typical records include:</b> physician's exam, medical summary, progress notes, lab reports, etc. Filed alphabetically.	C	V		After Event + 29 Years	Send to records center 5 years after close of case. Destroy 29 yrs after date of birth. 22 CCR 707519(c). Pregnant clients: records are to be maintained until the baby reaches its 19th birthday.
Public Health - Community Health Services - CHDP	PHCD-070	CHPD Program Records	Records required for the administration of the CHPD program. <b>Typical records include:</b> provider records, billing, reporting, and referrals from human services department aka PM 357's.	C			Fiscal Year + 3 Years	CHPD program letter 10-08 1.k, CCR 50111.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Disease Control	PHDC-080	HIV Testing - Court Ordered	Health services records of all court ordered HIV testing. <b>Typical records include:</b> copy of court order, correspondence, news clippings, lab slips, consent forms.	C			Calendar Year + 5 Years	State department of health services policy letter no. 4 requires records be kept for 3 years after close of fiscal year for possible audit purposes. Sonoma County District Attorney's office requested records be kept for 5 years after close of calendar year.
Public Health - Emergency Medical Services	PHEM-010	Certifications – Emergency Medical Technicians	Certification files for emergency medical technicians. <b>Typical records include:</b> copy of certificate, certification forms, backup.	C			After Close/ Completion + 6 Years	Destroy records 6 years after the individual is no longer an active EMT-I in this county. Title 22 California Code of Regulations 10082.
Public Health - Emergency Medical Services	PHEM-040	Accreditation Records - Paramedics	Certification files for paramedics. <b>Typical records include:</b> evidence of continuing education, letters of commendation and reprimand, and other correspondence.	C			After Close/ Completion + 6 Years	Destroy records 6 years after the individual is no longer an active paramedic in this county. Title 22 California Code of Regulations 100171 (d) permits destruction of records after 5 years.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Environmental Health	PHEH-010	Hazardous Material (CUPA) Files (Prior To 1999)	Hazardous material files managed by Sonoma County environmental health. <b>Typical records include:</b> business site plans, Tanner Hazmat Commission files and underground storage tanks.		V	A	Permanent	Current program managed by Permit Sonoma. If department no longer wants to retain records, send to the County Archives for permanent retention.
Public Health - Environmental Health	PHEH-020	Local Oversight Program/Leaking Underground Storage Tanks	Active and inactive tanks or contaminated soil sites as a result of removed/leaking storage tanks. Monitors repairs, installation, removal and progress as per cleanup program (SB 2004). <b>Typical records include:</b> permits, applications, petitions, timesheets, lab results, activity logs, correspondence, inspections, fees.		V	A	Permanent	Portions of file kept at North Coast Water Quality Control Board. Sites meeting the threshold for state monitoring are known as lop files. If department no longer wants to retain records, send to the County Archives for permanent retention.
Public Health - Environmental Health	PHEH-030	Monitoring Well Files	Contains permits, drilling and inspection information pertinent to recording underground contamination. <b>Typical records include:</b> permit applications, invoices, logs, inspections reports and correspondence.		V	A	Permanent	If department no longer wants to retain records, send to the County Archives for permanent retention. CA Water Code 13752 governs whether well logs are confidential or not. Please review code prior to destruction or disclosure.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Environmental Health	PHEH-040	Non-Permitted Facility Plan Check Files	Approved design records for facilities that do not become permitted facilities. <b>Typical records include:</b> submitted plans, approvals, applications and modifications, correspondence.				After Event + 2 Years	Also known as plan review files. Hold for 2 years past issuance of approval.
Public Health - Environmental Health	PHEH-050	Permit Files	Permit files and inspection reports for: food facilities, public pools, dairies, organized camps, detention facilities, body art, schools, state small water systems, pumper trucks, medical waste, liquid waste, refuse collection, cannabis, waste tire, etc. <b>Typical records include:</b> permits, billing card, requests for services, plan checks, inspections, test results complaints, etc.	C			5 Years	Complaints are confidential. These files have a rolling 5y retention period.
Public Health - Environmental Health	PHEH-060	Permit Files - Applications	Permit applications for programs administered by environmental health such as: food facilities, public pools, dairies, organized camps, detention facilities, body art, schools, state small water systems, pumper trucks, medical waste, refuse collection, etc.				Obsolete + 5 Years	Does not include monitoring wells or solid waste.
Public Health - Environmental Health	PHEH-070	Permit Files - Final Plans	Final plans for permit programs administered by the Department of Health Services. <b>Typical records include:</b> facility plans, spec sheets.				Until Superseded	Records are superseded when new design records are received and obsolete 5y after close of facility.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Environmental Health	PHEH-080	Proposition 65 Files	Media reporting as a result of an identified Prop 65 substance release. <b>Typical records include:</b> incident reports, correspondence, case reports.		V		Calendar Year + 10 Years	
Public Health - Environmental Health	PHEH-090	Right Of Entry (ROE) and Debris Management	Right of entry access or opt out forms, insurance documentation, environmental site/soils samples and testing, completion letters or certifications indicating the clearance of property is completed, non-compliance/code enforcement. <b>Additional records may include:</b> owner identification, trust records, correspondence.	C	V	A	Permanent	All owner and insurance information is confidential. If department no longer wants to retain records, send to the County Archives for permanent retention.
Public Health - Environmental Health	PHEH-100	Solid Waste Files	Records status of solid waste facilities, identifying volume and type of waste. <b>Typical records include:</b> correspondence, plans, maps, invoices, inspection reports and request forms.			A	Permanent	If department no longer wants to retain records, send to the County Archives for permanent retention.
Public Health - Environmental Health	PHEH-110	Solid Waste/Garbage Complaints	Records public complaints about garbage health hazards in violation of health code. <b>Typical records include:</b> inspection reports, complaints, correspondence.				Fiscal Year + 5 Years	Any complaints that result in litigation would be retained as case files by the district attorney's office
Public Health - Emergency Medical Services	PHEM-050	EMS Historical File	Records that document the history of the program. <b>Typical records include:</b> original reports relating to program development, minutes of major committee meetings, awards, etc.			A	Permanent	If department no longer wants to retain records, send to the County Archives for permanent retention.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Emergency Medical Services	PHEM-060	EMS Event Reports	Incident reports for individual firms documenting unusual occurrences. <b>Typical records include:</b> complaints, correspondence.	C			Fiscal Year + 6 Years	
Public Health - Emergency Medical Services	PHEM-080	Permit Files	Files for ambulance companies and helicopters that have been granted an operating permit. <b>Typical records include:</b> application, California Highway Patrol (CHP), insurance, and personnel information, spot inspection reports, correspondence.				Life + 5 Years	Retain for the life of the emergency service vendor plus 5 years.
Public Health - HIV Prevention & Care	PHAI-120	Evaluating Local Interventions (ELI)	Risk assessment for HIV. <b>Typical records include:</b> completed outreach forms, risk assessment, behavior outcomes, referrals.	C			After Close/Completion + 7 Years	Destroy 7yrs after end of contract under which risk assessment is performed in accord with mou between county & the state.
Public Health - Laboratory	PHLB-010	Inspection Reports	Initial inspection records of facilities performing non-diagnostic tests. <b>Typical records include:</b> correspondence and completed forms.				Calendar Year + 4 Years	
Public Health - Laboratory	PHLB-020	Quality Control	Quality control records for equipment and media other than those for immunohematology. <b>Typical records include:</b> circular graphs and charts, media cards listing manufacturer, controls, reactions, etc. Filed by piece of equipment or media.				Calendar Year + 2 Years	Records are required to be kept for at least 2 years, 42CFR 493.1105. For quality control procedures see policies, procedures, standards, and plans - temporary (caar-410).

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Public Health - Laboratory	PHLB-060	Register And Test Results	Patient test results (lab slips) and related logs, forms used to order lab tests and record the results. <b>Typical records include:</b> submitter and patient information, dates samples received and tests performed, results. Maintained by test type and in chronological order.	C			Calendar Year + 2 Years	42CFR 493.1105
Public Health- Program Support	PHPS-030	Public Health Orders	Public health orders issued by the Public Health Officer.			A	Calendar Year + 10 Years	
Public Health - Vital Stats	PHPS-100	Vital Records	Vital stats documents related to birth and death. <b>Typical records include:</b> applications, dispositions, home birth, registrations, hospital lists, certificates.		V		Calendar Year + 1 Year	Kept for one year as back up due to client inquiries. Certificates can be held and created here and then are submitted to the state and local registrar. Clerk-recorder-assessor is primary record holder
Public Health - WIC	PHCW-020	WIC Administrative Records	Inventory of state furnished property, other records needed to administer the WIC program. <b>Typical records include:</b> logs, state id tags, A2's, budgets and grants with state equipment purchases and inventories, hearing complaints/procedures, outreach programs, etc.				Fiscal Year + 3 Years	Ref WIC program manual 110-20.



## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Homelessness Services-Heart	HMLS-010	Client Program Records	Records of client engagement and interactions in programs administered by the homelessness division. <b>Typical records include:</b> consent, criminal background, legal documents, financial, case management, encampments, shelter sites, occupancy, housing, etc.	C			After Event + 10 Years	Retain for 10 years from the date service was rendered. Refer to related records series: BMMH-010, BMMH-020, BHSU-010, BHSU-020.
Homelessness Services Division- IMDT	HMLS-020	Care Coordination	Summary of coordination steps across departments on behalf of the client. Contains partial information from various safety net source systems.	C			After Event + 1 Year	Maintain for one year following client's completion of plan, or disenrollment from interdepartmental multi- disciplinary team (IMDT). For actual client medical records, refer to related records series: BMMH-010, BMMH-020, BHSU-010, BHSU-020.
Homelessness Services Division- Ending Homelessness	HMLS-030	Continuum Of Care Board Records (Similar to Advisory Board Records)	Description: operating files of an independent board. The DHS team staffs the board, but it is not part of DHS. <b>Typical records include:</b> minutes, agendas, bylaws, policies, member lists, resolutions.				Calendar Year + 5 Years	If department no longer wants to retain records, confer with continuum of care board and send to the County Archives for permanent retention.
Homelessness Services Division- Ending Homelessness	HMLS-040	Grants- Continuum of Care	Documentation of non-construction grants and revenue generating agreements. <b>Typical records include:</b> claims, financials, grants, proposals, agreements, amendments.	C	V		Fiscal Year + 7 Years	Financial records are retained in accordance with the uniform retention period for all divisions within the department.

## Retention Schedule for the Department of Health Services

Division	Item #	Title	Description	Conf	Vital	Arch	Retention	Remarks
Homelessness Services Division- Ending Homelessness	HMLS-050	Homeless Management Information System (HMIS) Database- Continuum of Care	Records related to administering the HMIS database. <b>Typical records include:</b> program documentation; policies and procedures; compliance reporting, audit, and training logs, and corresponding documents; documents regarding inappropriate activities or misconduct; compliance assessments, monitoring and auditing documents; compliance committees agendas, minutes and reports; compliance related correspondence with regulatory agencies.	C	V		After Event + 10 Years	Compliance and program administration documents are retained in accordance with the uniform retention period for all divisions within the department.