

Program/Person Purge Grid

Book Name	People Supported Material (What items are being Purged)	Monthly	Over 1 year old (can be purged to a banks box and kept on site)	Over 2 year old (can go to long term storage)	Over 10 year old
Goals and Objectives Book	Any paper form of documentation or relative information associated with the following items. If any of the following have any written enteries they would get purged. Goals and Objectives Data Sheets. Daily progress notes. Behavior Treatment Plan Data Sheets /ABC charts. Sleep charts. LADD Community Outing Log	Purge in persons purge book	More than 1 full year old purge in person's box.	Anything more than 2 full year old purge into a person's box.	Compliance arranges termination of outdated records.
Goals and Objectives Book	Purge any paper document or relative information associated with the following items. PCP Person Centered Plan and Addendums- (Contract Agency & L.A.D.D., Inc.) Personal Profile. Behavioral Treatment Plans. Employee Training Signature sheet. Items purged from the Goals Book annually when a new PCP goes into effect. Specific trainings or inservice documents pertaining to a person		More than 1 full year old purge in person's box (PCP, Behavioral Plans, don't purge old one until the new one is in place).		
Medication Book	Purge any paper document or relative information associated with the following items. Medication Records, Treatment Sheets, Count Sheets and Protocol Order records. Bowel Movement Record, Menses Chart (If applicable). Vital Signs records and Seizure Chart (If applicable).	Purge in persons Aministrative records book			
Medication Book	Purge any paper document or relative information associated with the following items. Persons Standing Missed Mediation Orders and Protocol Orders. Consent for Psychotropic Medication. Old Prescriptions (expired or discontinued). Administering Medication signature sheet.				
HCC Book	Persons HCC Sheets				
Administrative Records Book	Documents to purge: Persons Personal Profiles etc., PCP, Addendums. Supports Coordinator Notes. MAIR, Heath Care Plan, Nursing Annual Assessment Etc. Annual Physical (Health Care Appraisal, keep 2 year worth in book), TB Test and results, only purge when there is a new one in place. Lab and X-ray results. Mammogram, PAP/Prostate, Podiatry (If applicable). Neurology, Seizure Records (If applicable). Monthly Weights (previous year's weight records), Dietary/Nutrition Assessment (If applicable). Dental, Vision, Speech, Swallow, Audio logical – Hearing. (If applicable). Occupational Therapy, Physical Therapy (If applicable). Medication consent for Psychotropic (originals). Behavior Management Information. (If a person's BTP or Guidelines are discontinued, note on the top of the plan the date that it was discontinued, this would not get purged out unless there was a new one in place that would replace the old). (Only Purge Documents that have a new one to replace the old, (For example someone has a Dietary/Nutrition Assessment and it was completed in 1998, no additional assessments were needed). That Assessment will stay in the Records Book indefinitely or until a new one is in place and replaces the old).		Only purge items that are: over 1 year old and have a new form to replace the old. More than 1 full year old purge in person's box (Note: please make sure you don't remove a permanent document).	Only purge items that are: over 2 year old and have a new form to replace the old. Purge in person's. (Note: please make sure you don't remove a permanent document).	Compliance arranges termination of outdated records.

Incident Report Book	IRs			2 year, plus current working year of IR's are kept on site. Anything older than that purge in person's box.	Compliance arranges termination of outdated records.
Personal Allowance Book	Persons Personal Allowance Ledgers.	Annual	More than 1 full year old purge in person's box box.	Anything more than 2 full year old purge in person's box.	
Discharge from LADD Services	All documents for that person, pack in bankers box, label with name and year for long term storage.	when applicable			
Book Name	Program Material (What items are being Purged)	Monthly	Over 1 year old (can be purged to a banks box and kept on site)	Over 2 year old (can go to long term storage)	Over 10 year old
HIPAA Log	Section II		More than 1 full year old purge in program box.	Anything more than 2 full year old purge in program box.	Compliance arranges termination of outdated records.
Maintenance Manual	Section I-III Purge Annually, Section IV Purge every two year		Section I-III Purge Annually Anything more than 1 full year old purge in program box.		
Employee Training Book	Section I Miscellaneous Training, Section II Family Staff Information.		More than 1 full year old purge in program box.		
Staff Communication Book	Staff book notebooks/pages, shift duties, postings and other.	Every six months can purge to a program purge box.			
Menu Guide	Substitution sheets, old menu sheets				
Resident Register Service Register	N/A	Do Not Purge	N/A	N/A	N/A
Service register Resident Register	N/A	Do Not Purge			
Toolbox Book	Do Not Purge. The only time you would purge sheets from the toolbox training book is if there was person specific information and that person was no longer there or if there was a change and person specific information was updated. If that occurs the document would get purged in the persons purge.	Do Not Purge	N/A	N/A	N/A
Vehicle Log (Mileage)	Vehicle Mileage Log	Monthly, West Office, Print Room, in appropriate box.	Compliance will relocate to long term storage annually.		Compliance arranges termination of outdated records.
Petty Cash Book	Petty Cash Funds Ledger Printout		More than 1 full year old purge in program box.	Anything more than 2 full year old purge in a program box.	
Emergency Guidebook	Emergency Guidebook, Drills and Drill Data Sheets, Any worksheet that is outdated and has been replaced with a newer updated one. Escores must be kept in book until new one is completed each year to replace previous one. Unless there was a change that prompted additional Escores to be completed in which case you would keep both versions in the book for the year.		More than 1 full year scan all drill logs into manager (R) 007 Emergency Forms and then put paper copies in old purge in program box.	Anything more than 2 full year old purge in a program box.	