Proper management of a records retention schedule allows business operations to run efficiently and effectively. Let Joan Usher show you how with this 60-minute webinar designed specifically for administrative, financial, billing and support staff who maintain human resource records, medical records, and other business information. Joan will review the types of documents that should be maintained (e.g. administrative, operations, billing, employee/personnel, financial, and medical) and the length of required retention by document.

Legal Pitfalls of Record Retention takes things to the next level with methods and processes for proper storage & retention of medical records AND all of the records maintained in your home health agency or hospice. With so many regulations affecting different aspects of our businesses, ignorance is not an option. It’s imperative that your agency staff is prepared with a compliant record retention strategy. Make sure you are ready for the next audit or OIG investigation. Register today!

Objective:
1. Understand why establishing a retention schedule is necessary for an effective and legal record management program
2. Review regulations governing retention process including SOX (Sarbanes-Oxley decision)
3. Learn a 6-step process for creating an effective retention schedule
4. Provide an overview of some of the MAJOR types of documents and the retention periods kept by most agencies

Outline:
- Describe the definitions of legal record, business record, designated records set under HIPAA
- Purpose & benefits of a retention schedule are presented
- There are more than 20 separate regulations that govern retention of documents. A brief review of each regulation will be presented
  - HIPAA; OSHA; FLSA; ERISA; Sarbanes – Oxley Act; Gramm-Leach-Bliley Act
- Follow the 6 steps in developing the program for both paper and electronic records
- Brief review of the major documents stored and a sample retention period
- Proper destruction of both paper and e-records will be discussed

About the Presenter:
Joan Usher, BS, RHIA, ACE, President, JLU Health Record Systems is a nationally recognized health information management expert. She has been a home health consultant for over 30 years. She is an AHIMA Approved ICD-10-CM trainer and she has educated more than 15,000 people nationwide on coding, OASIS and Health Information Management topics. Joan is past president of the Massachusetts Health Information Management Association (MaHIMA) and is a Board of Director for the Home Care Alliance of MA and Hospice & Palliative Care Federation of MA. Joan’s webinars consistently earn outstanding reviews from participants.

Can’t make a session?
Recordings will be available approximately 1 day after each session. Recording will be available to view online only by paid attendees for 2 weeks after the final session.
Legal Pitfalls of Records Retention
1-hour Webinar, September 20, 2016, 2:00 pm to 3:00 pm Eastern | series will be recorded

**Convenience:** This program will be offered live on the GoToTraining.com platform, part of the Citrix family of products. There is no limit to the number of attendees from your agency who may participate at your site using one phone line and a computer with internet access. No need to block these dates and times either, you can train staff on your schedule for up to two weeks with the recording at no additional cost.

**Registration Instructions:** There is no limit to the number of attendees from your agency who participate using one login!

*Recording available through October 4, 2016 for no extra charge!!*

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| Legal Pitfalls of Record Retention  
September 20, 2016  
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$159  
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**Confirmation:** Prior to the webinar, a confirmation will be e-mailed to you. This confirmation will include a link to access the presentation handouts, the sign-in sheet, and evaluation, as well as a link enabling you to access the live and recorded webinars.

**Cancellation Policy:** Fees will be refunded only if written cancellation is received by HCAF two weeks prior to the webinar and no refunds after the dial-in number is sent to your agency. In the event of a written cancellation, HCAF will retain, or charge, $40 of the initial registration fee, to cover administrative overhead.

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Please contact Julia Heath at HCAF if you have questions about registering.