

## Record Retention & Destruction

**Summary:** Coastal Medical Billing maintains records in accordance with applicable federal and Georgia retention requirements and destroys records securely when retention periods expire.

### Record Retention & Destruction Policy — Public Summary — Coastal Medical Billing

**Effective Date:** May 5, 2026

**Last Revised:** May 5, 2026

#### Purpose

This public summary describes the general principles that guide Coastal Medical Billing's retention and destruction of business records and any records maintained on behalf of clients. Detailed retention schedules and internal procedures are maintained separately and are available to clients upon request.

#### Retention Principles

Coastal Medical Billing retains records for the periods required by applicable federal and state law, regulatory guidance, and the terms of our client service agreements, including but not limited to:

- **HIPAA Requirements** — The HIPAA Privacy Rule (45 C.F.R. § 164.530(j)) requires covered entities and business associates to retain HIPAA-related policies, procedures, and documentation for a minimum of six (6) years from the date of creation or the date when the document was last in effect, whichever is later.
- **Federal Billing Records** — Records related to Medicare and Medicaid billing are retained consistent with Centers for Medicare & Medicaid Services (CMS) guidelines and the False Claims Act statute of limitations.
- **Georgia Requirements** — Records are retained in accordance with any applicable Georgia record retention laws and regulatory guidance.
- **Client Agreements** — Where a client's service agreement specifies a retention period that exceeds the statutory minimum, we comply with the longer retention period.

#### Types of Records Retained

Records subject to our retention policy include, but are not limited to:

- Claims and billing records
- Correspondence with payers, providers, and patients (as applicable)
- Business Associate Agreements and compliance documentation
- Employee training records
- Internal audit and compliance reports
- Financial and accounting records

#### Secure Destruction

When records reach the end of their required retention period and are approved for destruction, Coastal Medical Billing ensures they are destroyed in a secure manner designed to prevent unauthorized access, including:

- **Paper records:** Cross-cut shredding or professional destruction services
- **Electronic records:** Secure deletion, degaussing, or physical destruction of storage media, consistent with NIST Special Publication 800-88 guidelines

Records containing PHI are destroyed in accordance with HIPAA requirements and the terms of the applicable Business Associate Agreement.

**Litigation and Regulatory Holds**

In the event of pending or anticipated litigation, regulatory investigation, or audit, Coastal Medical Billing will suspend the routine destruction of records that may be relevant to such proceedings, regardless of their scheduled destruction date.

**Client Access**

Clients may request access to records maintained by Coastal Medical Billing on their behalf in accordance with the terms of their service agreement. Following termination of a client relationship, records will be returned or securely destroyed as specified in the service agreement and BAA.

**Contact Us**

For questions about our record retention and destruction practices, or to request access to records maintained on your behalf, please contact:

**Emilee Usry**

Coastal Medical Billing

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**Revision History**

Date	Version	Description
May 5, 2026	1.0	Initial publication