

**10A NCAC 13J .1002 ADMINISTRATIVE, FINANCIAL AND STATISTICAL RECORDS**

(a) The agency shall establish, maintain and make available for inspection the home care annual budget.

(b) The agency shall record, maintain and make available as requested to the Department statistical records. The records shall include the following:

- (1) Number of home care staff, and their full-time equivalents including administrative, clerical, professional and paraprofessional and their total number of units of services;
- (2) Client demographics, including county of residence and age;
- (3) Number of units of service by applicable service category; and
- (4) Total charges and number of visits by payor source (for Medicare certified agencies).

(c) Records shall be retained for a period of not less than three years.

(d) When an agency operates as a part of a health care facility licensed under Article 5 or 6 of G.S. 131E, or as a part of a larger diversified agency, records of home care activities and expenditures that are separate and identifiable shall be maintained for the agency.

*History Note: Authority G.S. 131E-140;*

*Eff. July 1, 1992;*

*Amended Eff. February 1, 1996;*

*Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. June 25, 2016.*