

Aging Services

Program	Record Title	Description	Retention	Classification	Comments	Schedule #
Administration - Business Office	Auditors Reports	These records notify the division of bills paid and payments made for services rendered. They are used to verify facts and figures reported to the Auditor's office. They are maintained chronologically. Include balance sheets, bills, reports, records of reports, records of payments, vouchers, and warrants.	5 years	Public	Originals maintained by Auditor's office. Approved by GRAMPA 06/19/2002	AG-007
Administration - Business Office	Bank Statements	These are statements for stipend and petty cash checking accounts. They show the money on deposit in Aging Services for both accounts. Includes the date, account number, name of bank, total deposit and drafts.	4 years	Public	Approved by GRAMPA 06/19/2002	AG-008
Administration - Business Office	Budget Preparation Notes	These reports are forecasts of expenditures. They are used in the application process for funds from county and federal agencies. Includes fiscal budget, county auditor's reports, all Division programs' budgets, work-up sheets, cost estimates, and rough data accumulated in the preparation of annual budget estimates with the related correspondence and documentation for approval of final budget.	5 years after close of budget year	Public	Approved by GRAMPA 06/19/2002	AG-009
Administration - Business Office	Cancelled Checks	These are the actual warrant or check cut from a warrant request documenting monies paid to various vendors, etc.	7 years	Public	Previously scheduled as series 20731 Approved by GRAMPA 06/19/2002	AG-102
Administration - Business Office	Contracts	These are original contracts for goods or services, as well as revenue-producing contracts, between Aging Services and various contractors.	6 years after contract expires.	Public	Approved by GRAMPA 06/19/2002	AG-010
Administration - Business Office	Deposit Reconciliation Forms	These are the daily deposits of the Division. Includes the breakdown of daily deposits, bank cashier's slips showing the amount, date, and location of deposit donations into the main account.	4 years	Public	Approved by GRAMPA 06/19/2002	AG-011
Administration - Business Office	General Ledger Report	These are the summaries showing the "amount of receipts from funding sources and disbursements". May also include documentation from subsidiary ledger (payroll summaries) to general ledger and accounting adjustments in the form of journal vouchers.	5 years	Public	Approved by GRAMPA 06/19/2002	AG-012
Administration - Business Office	Invoices	These records document the procurement of goods and services and include the purchase requests. They are usually part of the Accounts Payable or Purchase Order files. Includes date, number of items received, description of items, invoice number, purchase order number, vendor, unit and total prices of the goods.	4 years	Public	May keep 2 years in office if space permits. Processed purchase order forms are files with supporting documentation such as invoices, receipts, etc. Approved by GRAMPA 06/19/2002	AG-013
Administration - Business Office	Journal Vouchers (JV's)	These are monthly adjustment entries to the General Ledger accounts. Include date, number, line item code, program code, brief explanation of the adjustment, debit or credit amount, and usually supporting documentation.	5 years	Public	Arranged numerical and chronological Approved by GRAMPA 06/19/2002	AG-014
Administration - Business Office	Long Distance Charges	These are billings from long distance carriers from all sections of Aging Services.	3 years	Public	Duplicates Approved by GRAMPA 06/19/2002	AG-015
Administration - Business Office	Medicaid Client Files	The files document the time spent on each client by case managers. They show how many units to be billed. Includes copy of bill paid or denied each month for Case Management, Meals on Wheels, Senior Companion and Nursing home stays for Medicaid	5 years after last payment on contract	Private	Approved by GRAMPA 06/19/2002	AG-016

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Program	Record Title	Description	Retention	Classification	Comments	Schedule #
		clients.				
Administration - Business Office	Medicaid Waiver Administration Billings	This is the billing and reports that show payroll distribution on administration Waiver time. Includes the letter showing breakdown of costs.	7 years	Public	Approved by GRAMPA 06/19/2002	AG-017
Administration - Business Office	Monthly Expenditure Reports (MER)	This is a status report of all program expenditures. They are distributed to all programs and used to compare the actual with the program's month and year to date budget. Includes name of program, month/year, monthly expenditure budget, and year to date expenditure budget.	4 years	Public	Maintained chronologically. Approved by GRAMPA 06/19/2002	AG-018
Administration - Business Office	Payroll Reports	These reports document payroll expenditures and include the payroll register, benefits register, other payroll printouts, payroll distribution and allocations.	7 years	Public	Payroll distribution allocations are internal accounting records. Approved by GRAMPA 06/19/2002	AG-019
Administration - Business Office	Petty Cash Forms	This is the request for change or establishment of petty cash or imprest funds. It contains all information necessary to change or establish a fund and information regarding agent cashier and custodian.	2 years	Public	Duplicate Approved by GRAMPA 06/19/2002	AG-020
Administration - Business Office	Petty Cash Vouchers	These vouchers are attached to the request for reimbursement from petty cash. The request is maintained as part of the invoice and accounts payable file under the name of the fund custodian.	1 year (1yr if maintained separately from invoices. If kept with invoices, follow invoice retention)	Public	Duplicate Approved by GRAMPA 06/19/2002	AG-021
Administration - Business Office	Revenue Contract Files	These files define the function of revenue contracts and are reference for monthly, quarterly, and yearly billings for Division programs. Include copy of the revenue contract and bill, billings backup, and verification of receipts and checks.	7 years	Public	Chronological arrangement Approved by GRAMPA 06/19/2002	AG-022
Administration - Business Office	Stipend Payroll Reports	These financial records document stipends paid and include the station report, check register, check control logs, check log books, mileage records, phone and travel reimbursements.	3 years	Public	Used for administrative purposes only. Approved by GRAMPA 06/19/2002	AG-023
Administration - Business Office	Terminated Personnel Files	This is the agency copy of employees personnel file including pay and leave history, correspondence, copies of application form and credentials, training, and evaluations.	1 year after termination	Public Private UCA 63-2-302 (1)(f)	Originals are maintained by Personnel. Shred when retention met. Approved by GRAMPA 06/19/2002	AG-025
Administration - Business Office	Void Checks	These are checks that may have been voided during printing of Volunteers paychecks. They are maintained for controlling the check log book and for audit purposes.	4 years after the pay period.	Private Public UCA 63-2-301 (1)(b)	Numerical and chronological arrangement Approved by GRAMPA 06/19/2002	AG-026
Administration - Business Office	Year to Date Reports	These are monthly income statement reports by program that show current month and year to date activities (revenues and expenses). These are used for preparing the Monthly Expenditure Reports and monthly or quarterly billings.	5 years	Public	Chronological arrangement Approved by GRAMPA 06/19/2002	AG-027
Administration - General	Council for the Aging Minutes	These minutes document the actions and decision of the committee. They may also include an official agenda.	Permanent	Public	Approved by GRAMPA 06/19/2002	AG-101
Administration - General	Directors Policy Correspondence	These are records that document how the office is organized and how it functions; its pattern of action, its policies, procedures, decision making information, and achievements.	Permanent	Public	Duplicates; maintain current year a 1 year previous Approved by GRAMPA 06/19/2002	AG-001
Administration - General	General Correspondence	These are records of a general facilitative nature created or received in the course of administering programs. Includes daily, weekly, or monthly activity reports that are summarized in an	2 years	Public	Approved by GRAMPA 06/19/2002	AG-002

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Program	Record Title	Description	Retention	Classification	Comments	Schedule #
		annual report, correspondence, and memoranda.				
Administration - General	Interview letters & Correspondence Records	These are interview records with prospective employees. They include correspondence, reports, questions, notes, and test scores.	1 Year	Public	Described in 29 CFR 1602.14 (2002) Approved by GRAMPA 06/19/2002	AG-100
Administration - General	Legislative Committee Minutes	These records document the legislative issues relating to aging. It includes actions and decisions of the committee. These records include agenda, internal memoranda, notes, and informal minutes.	4 years	Public	Approved by GRAMPA 06/19/2002	AG-099
Administration - General	Management Team Minutes	These records document actions of the internal staff regarding management of the agency. These records usually include agenda, internal memoranda, notes, and informal minutes.	2 years	Public	Approved by GRAMPA 06/19/2002	AG-003
Administration - General	Purchase & Supply Orders	These records authorize the order to purchase supplies or equipment. They contain the name of requesting agency, name of vendor, item, date ordered, delivery date, purchase order number, account charged, and authorizing signature	1 Year	Public	Approved by GRAMPA 06/19/2002	AG-004
Administration - General	Travel Request & Expenditures Reports	These files contain records relating to the reimbursement of employees for authorized travel. They may include travel orders, per diem vouchers, transportation requests, hotel reservations, and supporting documentation.	4 Years	Public	Approved by GRAMPA 06/19/2002	AG-005
Administration - General	Work Orders	These are authorization forms for the repair or maintenance work on department equipment, facilities, MIS orders, or telephone repairs.	3 Years	Public	Approved by GRAMPA 06/19/2002	AG-006
Administration - Legislative	Legislative Working Files	These files document legislative issues that concern aging, both past and present. They contain copies of legislative bills, research materials, correspondence, reports, minutes, and other reference documents.	10 years	Private	Approved by GRAMPA 05/21/2003	AG-032
Administration - Legislative	Seniors Legislative	These files document the issues concerning the aging population. Aging Services acts as the liaison to this quasi-official body of volunteers.	4 years	Public	Maintained as a County record due to their affiliation with Aging Services. Approved by GRAMPA 05/21/2003	AG-033
Administration - Planning	Aging Services Customer Data Base	This is a computerized file that contains information on each customer served by the Division including various demographic characteristics and the type, number and date of service received. Customer demographic files are alphabetical and service delivery files are chronological.	4 years (payments), 3 years (customer info), [7 years (service delivery data - 3 years in active file, then 4 years on inactive tape back-up systems)]	Private	Contract requires retention of 4 years after last payment made or all audits completed. Approved by GRAMPA 06/19/2002	AG-028
Administration - Planning	Game Plans	Program plans that outline their mission, goals, training and outcome measures for the year. These are done by individual program and reviewed four times a year.	5 years	Public	Approved by GRAMPA 05/21/2003	AG-104
Administration - Planning	Monthly Data Reports (MDR)	These reports summarize the volume of services provided, number of customers served, and other key service delivery characteristics on a monthly basis. They are maintained on a calendar year basis and are chronological by program.	7 years	Public	Contract requires retention of 4 years after last payment made or all audits completed. Approved by GRAMPA 06/19/2002	AG-029
Administration - Planning	Program Reports	These reports are generated on a monthly basis and compile data indicating the demographic characteristics of customers served by each program in the division. They are maintained chronologically	7 years	Public	Contract requires retention of 4 years after last payment made or all audits completed.	AG-030

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		by program.			Approved by GRAMPA 06/19/2002	
Administration - Planning	Quarterly Performance Reports (QPR)	This is a report of activity that is submitted to the State Division of Aging and Adult Services at the end of each quarter.	7 years	Public	Contract requires retention of 4 years after last payment made or all audits completed. Approved by GRAMPA 06/19/2002	AG-031
Administration - Planning	Recognition Committee	Recognition awards are given to employees on a regular basis who have been recognized by a peer. These awards are kept on a yearly basis and then filed; each award either gives a day off or a monetary award.	2 years	Public	Approved by GRAMPA 05/21/2003	AG-105
Alternatives - Aging Wavier	Case Management Logs	These logs document activity of the client files in the program.	1 year	Public	Approved by GRAMPA 06/19/2002	AG-061
Alternatives - Aging Wavier	Closed Client Files	These case files document participation of individuals in the program. Files may include assessments, care plans, eligibility, and review information.	5 years	Private	Maintained in accordance with the DHS contract. Approved by GRAMPA 06/19/2002	AG-062
Alternatives - Aging Wavier	Provider Contracts	These are copies of contracts with service providers for the program.	Maintain until end of contract.	Public	These copies to be shredded. Approved by GRAMPA 06/19/2002	AG-063
Alternatives - Aging Wavier	Provider Correspondence	This is documentation between the program and the service providers concerning issues relative to the contracts.	Maintain until end of contract.	Public	To be forwarded to Administration at the close of contract and kept with the original contracts. Approved by GRAMPA 06/19/2002	AG-064
Alternatives - Aging Wavier	State Remittance Statements	These are financial records that contain copies of Medicaid waiver forms and document medical services performed for patients.	5 years	Public	Approved by GRAMPA 06/19/2002	AG-096
Alternatives - Aging Wavier	State Waiver Memos	These records are correspondence regarding the Aging Waiver program on issues of eligibility, audits, billings and other aspects of the program.	5 years	Public	Approved by GRAMPA 06/19/2002	AG-097
Alternatives - Housing Service Coordination	Housing Contracts	These files document the contracts between the program and residents.	7 years	Private	Maintained in accordance with HUD guidelines. Approved by GRAMPA 05/21/2003	AG-070
Alternatives - Housing Service Coordination	Provider Correspondence	This is documentation between the program and the service providers concerning issues relative to the contracts.	Maintain until end of contract.	Public	To be forwarded to Administration at the close of contract and kept with the original contracts. Approved by GRAMPA 05/21/2003	AG-069
Alternatives - Respite	Case Management Logs	These logs document activity of the client files in the program.	1 year	Public	Approved by GRAMPA 06/19/2002	AG-065
Alternatives - Respite	Closed Client Files	These case files document participation of individuals in the program. Files may include assessments, care plans, eligibility, and review information.	5 years	Private	Maintained in accordance with the DHS contract. Approved by GRAMPA 06/19/2002	AG-066
Alternatives - Respite	Fee and Donation Reports	These records document monies received by the program for services rendered and donations received.	2 years	Private	Approved by GRAMPA 05/21/2003	AG-067
Alternatives - Respite	Provider Contracts	These are copies of contracts with service providers for the program.	Maintain until end of contract.	Public	Originals are maintained in the Business Office. These copies to be shredded. Approved by	AG-068

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					GRAMPA 06/19/2002	
Alternatives - Tap	Case Mangement Logs	These logs document activity of the client files in the program.	1 year	Public	Approved by GRAMPA 05/21/2003	AG-052
Alternatives - Tap	Closed Client Files	These case files document participation of individuals in the program. Files may include assessments, care plans, eligibility, and review information.	6 years	Private	Maintained in accordance with the DHS contract. Approved by GRAMPA 05/21/2003	AG-053
Alternatives - Tap	Closed Intakes	These records consist of information for interested individuals who were determined ineligible for the Alternative Program through the intake process.	1 year	Private	These copies to be shredded. Approved by GRAMPA 05/21/2003	AG-054
Alternatives - Tap	Employee Records	These are copies of time sheets and sign-out sheets used for administrative purposes.	1 year	Public Private (UCA 63-3-302(1)(f))	These copies to be shredded. Approved by GRAMPA 05/21/2003	AG-055
Alternatives - Tap	Fee and Donation Reports	These records document monies received by the program for services rendered and donations received .	2 years	Private	Approved by GRAMPA 05/21/2003	AG-056
Alternatives - Tap	Provider Billings	These are financial records to document payments to providers of services.	1 year	Public	Copies signed by case manager should be maintained one year; originals sent to Administration for processing and retention. Approved by GRAMPA 05/21/2003	AG-057
Alternatives - Tap	Provider Contracts	These are contracts with service providers for the program.	Maintain until end of contract.	Public	These copies to be shredded. Approved by GRAMPA 05/21/2003	AG-058
Alternatives - Tap	Provider Correspondence	This is documentation between the program and the service providers concerning issues relative to the contracts.	Maintain until end of contract.	Public	To be forwarded to Administration at the close of contract and kept with the original contracts. Approved by GRAMPA 05/21/2003	AG-059
Archives	Photographs					AG-109
Centers	Advisory Committee Minutes	These minutes document the actions and decision of the committee. They may also include an official agenda.	Permanent.	Public	Submitted on an annual basis. These records vary in quality and reflect the skills of personnel at each center. Approved by GRAMPA 05/21/2003	AG-076
Centers	Daily Meal Reports	These records document meals served at each center. They are used to determine the accuracy of food vendor billings and to completed orders. The financial reconciliation is also included.	3 years	Public	Approved by GRAMPA 05/21/2003	AG-077
Centers	Monthly Data Reports	These reports summarize the volume of services provided, number of customers served, and other key service delivery characteristics on a monthly basis. They are maintained on a calendar year basis and are chronological by program.	3 years	Public	Duplicates. Planning maintains 7 year retention of compiled data. Approved by GRAMPA 05/21/2003	AG-079
Centers	Staff Minutes	These records document actions of the bi-weekly staff meetings. They relate to information and management of the program. May be duplicated in the Management Team Minutes.	1 year	Public	Deleted from computer files when retention is met. Approved by GRAMPA 05/21/2003	AG-080
Foster Grandparent &	CNCS Grant Records	These records document federal grants received from the Corporation for National Service. It includes the application, notice	3 years after end of grant period, or until all	Public	All records relating to the FGSP Program are governed under the	AG-048

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Senior Companion		of award, progress reports, and supporting documentation. These grants have a 3 year grant cycle.	litigation, claims or audit findings have been resolved.		regulations of the Grant Management Handbook number 2650.2 Approved by GRAMPA 05/21/2003	
Foster Grandparent & Senior Companion	Past SCP Placement Files	These are records of individuals that have been placed as Senior Companions in the past. They are used for reference and administration. These grants have a 3 year grant cycle.	3 years after end of grant period, or until all litigation, claims or audit findings have been resolved.	Public Secondary: Protected UCA 63G-2-305(50) (2012)	All records relating to the FGSP Program are governed under the regulations of the Grant Management Handbook number 2650.2 Approved by GRAMPA 05/21/2003	AG-049
Foster Grandparent & Senior Companion	Volunteer Personnel Files	These are employment files for volunteers in the program. They include all records relating to their work; correspondence, memos, any financial information, applications, training, and other relevant data. These grants have a 3 year grant cycle.	3 years after end of grant period, or until all litigation, claims or audit findings have been resolved.	Private	All records relating to the FGSP Program are governed under the regulations of the Grant Management Handbook number 2650.2 Approved by GRAMPA 05/21/2003	AG-051
Healthy Aging	Client Sign in Sheets	These records document who attended classes offered by Healthy Aging, such as alcohol prevention, screenings, and behavior modifications. They include name, date of birth, county ID, check-in time, date and name of class, and comments.	6 years	Exempt (45 CFR Parts 160, 162, 164)	Approved by GRAMPA 05/21/2003	AG-095
Healthy Aging	ESL Client Information	ESL program teaches english to non-english speaking Seniors. The client information consist of information (personal) about the client as well as test scores.	6 years	Exempt (45 CFR Parts 160, 162, 164)	Approved by GRAMPA 05/21/2003	AG-107
Healthy Aging	Immunization Forms	These are medical immunizations from regular screening clinics including flu, pneumonia and DT forms.	7 years	Private	Approved by GRAMPA 06/19/2002	AG-034
Healthy Aging	Medicare Billing Records	These are the records of billings to Medicare (Billing EBO's) from insurance companies on behalf of Health Aging clients.	7 years	Private	Approved by GRAMPA 06/19/2002	AG-035
Healthy Aging	Prevention Class Records	These are records of senior clients who attend classes and general information about the class.	6 years after contract expires with provider.	Exempt (45 CFR Parts 160, 162, 164)	Approved by GRAMPA 05/21/2003	AG-036
Healthy Aging	Volunteer Contracts	Contracts between Healthy Aging and Volunteer. Similar to AG-051 but the volunteers are not necessarily full time or constant (as FGP and SCP volunteers). The volunteers are nursing students & etc not personnel.	6 years	Exempt (45 CFR Parts 160, 162, 164)	Approved by GRAMPA 05/21/2003	AG-108
Meals on Wheels (Nutrition)	BCI Notifications	This file documents the criminal background checks through the Bureau of Criminal Identification that are completed on volunteers in the program.	5 years after volunteer becomes inactive. 30years	Private	Maintain in separate file. Many notifications from BCI contain more than one volunteer name. Keep one year then transfer to RC. Approved by GRAMPA 05/21/2003	AG-085
Meals on Wheels (Nutrition)	Code of Conduct Records	This is the signed code of conduct indicating a volunteer knows and will uphold appropriate rules of conduct.	5 years after volunteer becomes inactive	Private	Copies. Original is kept in the volunteer's personnel file. Approved by GRAMPA 05/21/2003	AG-086
Meals on Wheels (Nutrition)	Diet Forms	These records assign or change special diets to MOW clients. It is completed by the Office coordinator and includes name, address, telephone number, date of birth, physician's information and diet information.	Maintain until client becomes inactive	Private	Data derived from Agency Database. MOW maintains yellow and pink copies. Approved by GRAMPA	AG-087

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					05/21/2003	
Meals on Wheels (Nutrition)	Intake Forms	These are forms that are completed on new clients by Outreach. They include demographic, emergency, and health data. The information is derived from the Agency database.	Maintain until entered into Automeals database	Private	Duplicates. Shredded daily after database entry. Approved by GRAMPA 05/21/2003	AG-088
Meals on Wheels (Nutrition)	Nutrition Council Meeting Minutes (Internal Council)	These are minutes of the special meetings of the official council members from all senior centers regarding functions and operations.	2 years	Public Protected (minutes of closed meetings)	Approved by GRAMPA 05/21/2003	AG-089
Meals on Wheels (Nutrition)	Purchase Orders	These are authorized forms for the purchase of office supplies.	2 years	Public	Duplicates Approved by GRAMPA 05/21/2003	AG-090
Meals on Wheels (Nutrition)	SL County Contracts	These are the individual volunteer contracts of each person in the program documenting their participation.	5 years after volunteer becomes inactive	Private	Duplicates. Original kept in volunteer's personnel file. Approved by GRAMPA 05/21/2003	AG-092
Meals on Wheels (Nutrition)	Staff Meeting Minutes	These are the records of regular staff meetings for the program. These records usually include agenda, internal memoranda, notes, and informal minutes.	2 years	Public	Approved by GRAMPA 05/21/2003	AG-091
Meals on Wheels (Nutrition)	Title III Reports	This is a monthly report submitted to the State by the 10th of each month. It includes number of meals served the previous month including Congregate, Delivered, and Ensure meals.	Maintain until administrative need ends.	Public	Report derived from MDR report on Agency Database Approved by GRAMPA 05/21/2003	AG-093
Meals on Wheels (Nutrition)	Volunteer Intake Forms	These records document information about a volunteer into the program.	5 years after volunteer becomes inactive	Private	Duplicates. Original kept in volunteer's personnel file. Approved by GRAMPA 05/21/2003	AG-094
Meals on Wheels (Nutrition)	Waiver Forms	These forms are signed by volunteers coming into the program for legal and liability purposes.	5 years after volunteer becomes inactive	Private	Duplicates. Original kept by RSVP program. Approved by GRAMPA 05/21/2003	AG-103
Ombudsman	Master Complaint Log	This log documents the list of complaints regarding long-term care facilities. It includes the case number, facility, type of complaint, day of intake, victim, perpetrator, investigator, date of closure and date of entry into Ombud2 database.	8 years	Private	Previously scheduled under state series 83098, retention Permanent. Approved by GRAMPA 05/21/2003	AG-081
Ombudsman	Ombud2 Database	This database is a transitional on-line file that compiles information regarding complaints and investigations into them. The data is transferred to the state database on a fiscal year basis.	Maintain until file is transferred and verified to the state database.	Private	Approved by GRAMPA 05/21/2003	AG-083
Ombudsman	Ombudsman Case Files	These records are the intake and complaint forms made regarding individuals in long-term care. It includes notes, medical records, and other information compiled during the investigation of the case.	8 years	Exempt (UCA 62A-3-207 section & 307 of the Older Americans Act)	Previously scheduled under state series 17229, retention 8 years. Approved by GRAMPA 05/21/2003	AG-082
Ombudsman	Ombudsman Volunteer Personnel Files	These are records of the individuals that participate in the program. Includes interview notes, application, volunteer information for Aging Services, copy of drivers license and insurance, signed code of conduct, release, waiver, BCI form completed, conflict of interest agreement, job description volunteer agreement, reference check, certificates of training, Ombudsman certification; recertifications, confidentiality agreement, shadow log, interest form, monthly log, current TB	5 years	Private	Approved by GRAMPA 05/21/2003	AG-084

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Program	Record Title	Description	Retention	Classification	Comments	Schedule #
		text results, annual supervisory report, correspondence, recognition, and roundtable in-service log.				
Outreach	Closed Client Files	These files document services provided to seniors who are clients of Outreach services. . Includes demographic data, information on daily living activities (eating, dressing, etc), money management, shopping, case notes, diet, and other relevant data.	4 years	Private	These files contain questioners with personal information including: address, name, age. Approved by GRAMPA 05/21/2003	AG-098
Outreach	Deceased Client Files	These files documents services provided. Includes demographic data, information on daily living activities (eating, dressing, etc), money management, shopping, case notes, diet, and obituary notice.	4 years	Private	Approved by GRAMPA 05/21/2003	AG-037
Outreach	Outreach Staff Minutes	These records document actions of the internal staff regarding management of the agency. These records usually include agenda, internal memoranda, notes, and informal minutes.	1 year	Public	Approved by GRAMPA 05/21/2003	AG-038
Outreach	Staff Sign Out Logs	These records document staff's time away from the office including dates, times, and destinations.	1 year	Public	Approved by GRAMPA 05/21/2003	AG-039
Outreach	UAIERS Council Minutes (Internal Council)	These minutes document the actions and decision of the committee. They may also include an official agenda.	1 year	Public	Approved by GRAMPA 05/21/2003	AG-040
Retired & Senior Volunteer	Federal Grant Funding Records	These are files pertaining to current federal grants received by the program from the Corporation for National Service. Includes the grant applications, notice of awards, and semi-annual progress reports that are all-inclusive.	3 years after grant expires.	Public	Maintained according to grant requirements. Approved by GRAMPA 05/21/2003	AG-046
Retired & Senior Volunteer	Volunteer Reimbursement Records	These files document financial reimbursement made to volunteers and volunteer leaders for mileage and meals. Includes time sheets and associated stipend account stubs.	3 years	Public	Maintained according to grant requirements. Approved by GRAMPA 05/21/2003	AG-047
Retired & Senior Volunteer (Bill Payee Program)	Bill Payer Client Files	Contains personal financial information about clients assisted by volunteers in managing client finances	5 years	Private	Approved by GRAMPA 05/21/2003	AG-106
Senior Employment Program	Administration Records	These are records of a general facilitative nature created or received in the course of administering programs. Includes daily, weekly, or monthly activity reports that are summarized in an annual report, correspondence, and memoranda.	5 years	Public	Approved by GRAMPA 05/21/2003	AG-072
Senior Employment Program	Title V Personnel Case Files	These files document the participation of persons in the program. The files include income certification form, client intake form, any related correspondence, and if applicable termination forms.	4 years after client leaves the program provided all ongoing audits have been completed.	Private	Retention in accordance with federal and state guidelines (see state schedule 19-21) Approved by GRAMPA 05/21/2003	AG-074
Senior Employment Program	Training Records	These records document training provided to clients of the program in various types of employment areas.	5 years	Public	Approved by GRAMPA 05/21/2003	AG-073
Senior Employment Program	Wasatch Front Experiences Workers Advisory Council Minutes	These minutes document the actions and decision of the committee. They may also include an official agenda.	4 year	Public Protected (minutes of closed meetings)	Approved by GRAMPA 05/21/2003	AG-075
Senior Transportation	Intakes	These forms are completed on every participant to the program. Includes demographic, emergency, and health data.	1 year	Private	Duplicates. Shred when retention is met. Becomes part of the Agency database (See	AG-041

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Program	Record Title	Description	Retention	Classification	Comments	Schedule #
					under Planning, AG-028) Approved by GRAMPA 05/21/2003	
Senior Transportation	Monthly Data Information	These reports summarize the volume of services provided, number of customers served, and other key service delivery characteristics on a monthly basis. They are maintained on a calendar year basis and are chronological by program.	3 years	Public	Duplicates. Planning maintains 7 year retention of compiled data. Approved by GRAMPA 05/21/2003	AG-042
Senior Transportation	Staff Minutes	These records document actions of the internal staff regarding management of the agency. These records usually include agenda, internal memoranda, notes, and informal minutes.	1 year	Public Protected (minutes of closed meetings)	Approved by GRAMPA 05/21/2003	AG-043
Senior Transportation	Volunteer Records	These are employment files for volunteers in the program. They include all records relating to their work; correspondence, memos, any financial information, applications, training, and other relevant data.	5 years	Private	Approved by GRAMPA 05/21/2003	AG-044