

Resident financial files (GRS-2261)

Utah General Retention Schedule

Description

These records are used to manage the resident's financial account. May include money transfer requests, service fee waiver requests, transaction listings, and financial account summaries which are reconciled when the resident is released from the facility.

Retention and Disposition

Retain for 3 years, and then destroy records.

Categories

Business Services

Effective

06/1999

Previous Schedule Number

SG-2(229)-16