

Retention and Classification Report

Agency: Department of Health. Division of Health Care Financing. Medical Assistance Program. Provo Office (1896)
Utah Medical Assistance
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Provo, UT 84601
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Records Officer: _____

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AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program.
Provo Office

SERIES: 17580

3

TITLE: Billing records

DATES: 1989-2003.

ARRANGEMENT: Chronological, thereunder alphabetical by billing type

DESCRIPTION:

These are medical billing records sent to patients for services received by the Utah Medical Assistance Program. Most of the payments received by the program are from medicare and medicaid, but some special funds are built into the program for homeless medical care. Information includes billing files, medical procedures, transaction files, receipts, and homeless billings.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 12/1996

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
This disposition is based on the administrative needs expressed by the agency.

PRIMARY DESIGNATION:

Private

AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program.
Provo Office

SERIES: 18109

3

TITLE: Clinic appointment books

DATES: 1985-2003.

ARRANGEMENT: Chronological

DESCRIPTION:

These are appointment books kept by the clinic to record future patient appointments. Information includes patients name and telephone number, appointment time, and doctor's name.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 12/1996

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the agency.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program.
Provo Office

SERIES: 18176

3

TITLE: Clinic deposit record books

DATES: 1990-2014.

ARRANGEMENT: Chronological

DESCRIPTION:

These are deposit records created by the clinic to document monies deposited by medicare, medicaid, private donations, and patients for medical services provided by the clinic. Information includes source of payment, date received, and date deposited.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 06/1997

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs expressed by the agency.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program.
Provo Office

SERIES: 18175

1

TITLE: Clinic monthly reports

DATES: 1993-2014.

ARRANGEMENT: Chronological

DESCRIPTION:

These are monthly reports created by the clinic to document the activities of the clinic. Information includes number of patients, drug usage, staff activities, medical procedures, and vaccinations given.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program.
Provo Office

SERIES: 27224

1

TITLE: Medical case files

DATES: 1989-2014.

ARRANGEMENT: Chronological by date signed, thereunder alphabetical by client name.

DESCRIPTION:

This series contains the medical history of individuals treated at the clinic. Case files list symptoms, medical treatments, procedures, vital signs, lab reports, medication, prescriptions, consent, EKG graphs,

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

These records have fiscal value as they document the contractual agreements between employers and the department.

AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program. Provo Office

SERIES: 18108

3

TITLE: Outlyer inpatient closed charts

DATES: 1989-2003.

ARRANGEMENT: Alphabetical by surname, thereunder chronological
DESCRIPTION:

These are closed medical charts for outpatients visiting the Provo Utah Medical Assistance Program (UMAP) clinic. Outlyer charts are for patients with special medical needs which are not normally covered by medicaid or medicare.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 12/1996

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after case has closed and then transfer to State Records Center. Retain in State Records Center for 8 years and then destroy.

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs expressed by the agency, and the common retention of medical records.

PRIMARY DESIGNATION:

Private

AGENCY: Department of Health. Division of Health Care Financing. Medical Assistance Program.
Provo Office

SERIES: 18107

3

TITLE: Outlyer outpatient closed charts

DATES: 1989-2003.

ARRANGEMENT: Alphabetical by surname, thereunder chronological
DESCRIPTION:

These are closed medical charts for outpatients visiting the Provo Utah Medical Assistance Program (UMAP) clinic. Outlyer charts are for patients with special medical needs which are not normally covered by medicaid or medicare.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 12/1996

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after case is closed and then transfer to State Records Center. Retain in State Records Center for 8 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the agency, and the common retention of medical records.

PRIMARY DESIGNATION:

Private