

Retention and Classification Report

Agency: Davis County (Utah). Council on Aging (2481)

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Records Officer: _____

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AGENCY: Davis County (Utah). Council on Aging

SERIES: 11124

3

TITLE: Alternatives program case files

DATES: undated.

ARRANGEMENT:

DESCRIPTION:

These case files document the participation of individuals in the Alternatives Program (TAP). This is a state funded program designed to keep "high risk" individuals (18 years of age or older) as independent as possible in the least restrictive environment and to prevent premature institutionalization. A physician's statement must be obtained stating that services brought into the home are needed for individual to remain at home. Services include case management, homemaker services, respite care, nurses aide, equipment, and coordination with other agencies. Quarterly visits are made to evaluate the care. The files include yearly assessment forms, care plan, client's rights form, client contract, eligibility declaration, summary sheets, needs assessment forms (social and physical, a nurse does the physical assessment), and quarterly review visit forms.

RETENTION:

Retain for 4 year(s) after separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-17-2018

FORMAT MANAGEMENT:

Paper: For records prior to and including 2010. Retain in Office for 4 years after client leaves program and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office for 4 years after after client leaves program and then delete.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11124

TITLE: Alternatives program case files

(continued)

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(b)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11419

4

TITLE: Area plan

DATES: 2020.

ARRANGEMENT: Chronological

DESCRIPTION:

Four year administrative plan required by the Older American Act (45 CFR 1321.59 and 45 CFR 1321.65 (1991)) updated annually and submitted to the State Division of Aging. Includes statement on type and amount of services provided to Davis County citizens under the Act.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper copy: Retain in Office for 5 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the office and meets the federal requirements stated in 45 CFR 1321.50.

PRIMARY DESIGNATION:

Public 45 CFR 1321.50 and 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11420

3

TITLE: Billings for services

DATES: 1981-2010.

ARRANGEMENT: Chronological, thereunder alphabetical by name

DESCRIPTION:

These are client billings for services provided. They include name, address, number of meals, kinds of services, and total amount owed for services.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1991

FORMAT MANAGEMENT:

Paper: Retain in Office 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

SECONDARY DESIGNATION(S):

Exempt. 45 CFR 1231.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11149

3

TITLE: Board of Directors agenda

DATES: 1981-2010.

ARRANGEMENT: Chronological, thereunder alphabetical by type of meeting
DESCRIPTION:

These are meeting notices for regular and special Board of Directors and committee meetings. They are used to inform members and the public of scheduled meetings and discussion items. They include date, time, meeting locations, and planned discussion items.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Open meeting minutes & supplementary materials, GRS-1709.

AUTHORIZED: 10-28-2020

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the office and reflects the previously approved County General Records Retention Schedule (schedule 1, item 2).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11156

4

TITLE: Board of Directors minutes

DATES: 2010.

ARRANGEMENT: Chronological

DESCRIPTION:

Official minutes of regular and special meetings of the Council's Board of Directors Include dates and time meetings convened and adjourned, board members present and excused, a summary of proceedings including motions, discussions, official actions and decisions.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1993

FORMAT MANAGEMENT:

Paper: Retain in Office until microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: Retain in State Archives permanently with authority to weed.

Microfilm duplicate: Retain in Office permanently.

APPRAISAL:

These records have administrative, and/or historical value(s).
This disposition is based on the primary administrative needs of the Board and the secondary value of these records documenting services to senior citizens.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11167

3

TITLE: Cash disbursement journals

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are account books showing details of daily receipts and expenditures such as deposit payments amount, date, payee, purpose, fund credited or debited, and check number. They are used to provide backup documentation to the general ledger.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11166

3

TITLE: Cash receipt journals

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are account books showing details of daily receipts and expenditures such as deposit payments amount, date, payee, purpose, fund credited or debited, and check number. They are used to provide backup documentation to the general ledger.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11132

3

TITLE: Client record

DATES: 1990-2018.

ARRANGEMENT: None

DESCRIPTION:

This form is completed by a service worker to determine whether an individual is eligible to receive services from the agency. It includes applicant's name, address, and social security number; reason for eligibility; birth date, income declaration, indication of action taken (open, close, redetermination), and applicant's and service worker's signatures.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Title xx eligibility declaration, GRS-424.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after final action and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11132

TITLE: Client record

(continued)

SECONDARY DESIGNATION(S):

Exempt. 45 CFR 1321.51

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11131

3

TITLE: Congregate reservation list

DATES: 1990-2019.

ARRANGEMENT:

DESCRIPTION:

This list records reservations made for meals served at senior centers. It is used for meal planning and to create reports. The form includes center's name, dates, participant's names, days of week, indication of dates reservations made, whether meal served, and whether individual is a volunteer.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Senior center meal reservation list, GRS-402.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final action and then destroy.

Computer data files: Retain in Office for 1 year after final action and then delete.

APPRAISAL:

These records have administrative value(s).

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11131

TITLE: Congregate reservation list

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Exempt. 45 CFR 1321.51

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2020.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27488

3

TITLE: Davis County transitional program records

DATES: 2008-2018.

ARRANGEMENT: Alphabetical by last name.

DESCRIPTION:

The Davis county transitional program has been created to help keep Utah senior citizens safe while living in their homes so that they will not have to move to a nursing facility. This program is similar to the Alternatives Program. The records contained in this series are used to monitor client services, and document medical conditions and financial expenditures. These records contain personal information, including name, address, phone number and Social Security number. These records also include medical information, and may include financial and caregiver information.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Alternatives program case files, GRS-401.

AUTHORIZED: 07-17-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

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

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27488

TITLE: Davis County transitional program records

(continued)

PRIMARY DESIGNATION:

Private 63G-2-302(1)(2)

SECONDARY DESIGNATION(S):

Controlled. 63G-2-304(1)(2)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11173

3

TITLE: Employee leave

DATES: 1981-2010.

ARRANGEMENT: Chronological by pay period

DESCRIPTION:

These files contain records of compilations of leave earned and taken. Includes the annual leave compilation card.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Timekeeping records, GRS-1902.

AUTHORIZED: 02-20-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11174

1

TITLE: Expenditure voucher

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

This is an official authorization to pay on a claim or bill.
Includes name of department fund, check number, date, amount of
claim, transmittal sheet number, and authorizing signature.

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 4 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11155

1

TITLE: Feasibility studies

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are studies conducted before the installation of any significant technology or equipment. They include specific studies and system analyses for the initial establishment and major changes of these systems.

RETENTION:

Permanent. Retain for 1 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11142

3

TITLE: Food delivery report

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This is a report on the condition of foods delivered to senior centers. It is used for compiling reports and for future planning. The report includes center name, date, time food arrived at center, temperatures for milk and hot and cold foods, homebound and congregate meals, time homebound meals left kitchen, a list of any missing items, a list of any additional foods, any comments from center staff and clients, and suggestions.

RETENTION:

Retain for 1 month(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office until monthly report compiled and then destroy.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11147

3

TITLE: Food invoices

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This invoice lists foods being delivered to senior centers for congregate and homebound meals. It is used for planning purposes. The invoice includes date, center name, food list, alternatives provided, and signature.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after final payment on contract and then destroy.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11165

3

TITLE: General ledgers

DATES: undated.

ARRANGEMENT:

DESCRIPTION:

These are summaries showing the "amount of receipts from and disbursements of each department" (UCA 17-19-6 (1995)). May also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11144

3

TITLE: Homebound authorization

DATES: undated.

ARRANGEMENT:

DESCRIPTION:

These are cards on all clients receiving meals at home (Meals-on-Wheels). They are used for reference purposes. The cards include client's name, address and telephone number, days scheduled to receive meals, name and telephone number to contact in an emergency, physician's name and telephone number, date service started and date service cancelled.

RETENTION:

Retain until superseded

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04-20-2018

FORMAT MANAGEMENT:

Paper: Retain in Office until superseded or 1 year after participation ends and then destroy.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11145

3

TITLE: Homebound emergency cards

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are cards used by the homebound program in emergency situations. They include client's name, address, and telephone number, meal schedule, any special instructions, physician's information, client's signature, and date.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after participation ends and then destroy.

PRIMARY DESIGNATION:

Private

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11125

3

TITLE: Homebound meals case files

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These case files document participation in the Homebound Meals Program (or Meals-on-Wheel). This is a program which provides one meal a day, five days a week, to a homebound person over the age of sixty. The meals are delivered by staff or volunteers and clients make donations pursuant to a suggested donation. The files include client application, eligibility form, intake evaluation form, disclosure form, and any related correspondence.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after client leaves program and then destroy provided all audits have been completed.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11128

3

TITLE: Homebound route sheets

DATES: undated.

ARRANGEMENT:

DESCRIPTION:

This weekly list documents those individuals who have made reservations to receive meals at home under the Homebound Program (Meals-on-Wheels). It is used for meal planning and to create billings. The list include site, week and year, clients' names and addresses, days of week, indication which days reservations were made for delivery of meals, and a check by driver to indicate whether meal was delivered.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Homebound meal reservation list, GRS-408.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final action and then destroy.

Computer data files: Retain in Office for 1 year after final action and then delete.

APPRAISAL:

These records have administrative value(s).

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11128

TITLE: Homebound route sheets

(continued)

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2020.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11129

3

TITLE: Homebound time sheet

DATES: 1990-2006.

ARRANGEMENT:

DESCRIPTION:

This worksheet is used to record the amount and types of services that a homemaker has provided to a specific client. All information is transferred to an official payroll record. This information is used in the creation of reports. It includes date, client's name, homemaker's name, dates worked, hours worked and services provided per day (special diet supervision, feeding, dressing and grooming, child care, cooking and meal preparation, general housework, errands, etc.).

RETENTION:

Retain for 3 year(s) after expiration of contractual agreement

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after contract ends and then destroy.

PRIMARY DESIGNATION:

Private UCA 63G-2-301(1)(e)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11123

3

TITLE: Homemaker program case files

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These case files document the participation of persons in the Homemaker Program. This program provides homemaker assistance to low income disabled persons or persons over the age of sixty. The client is billed according to ability to pay. The files include an eligibility declaration, long term support form, client rights form, personal care/in-home rehabilitation form, actual number of hours spent per client, and any related correspondence.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after client leaves program and then destroy provided provided all audits have been completed.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11172

4

TITLE: Income from services report

DATES: 2010.

ARRANGEMENT: Chronological

DESCRIPTION:

Records of income earned from services rendered to senior citizens in the county (e.g., homemaker services, homebound services, meals), used to account for monies collected from each program, includes name, month, and amount.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1993

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then destroy.

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. name

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11136

3

TITLE: Master participant list

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

These are lists of persons participating in specific senior center activities. They are used for planning purposes. They are updated at least annually. The lists include date, program or activity title, and participants' names.

RETENTION:

Retain until superseded

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: For records prior to and including 2010. Retain in Office until superseded and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office until superseded or obsolete.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27485

3

TITLE: Medicaid waiver for individuals 65 and older

DATES: 2010-2018.

ARRANGEMENT: Alphabetical by last name.

DESCRIPTION:

This record series is used to monitor Medicaid clients' medical status, to coordinate services and care, and to record expenditures accrued. These records include personal information such as name, phone, address, social security number, medical data, and may include financial information. These records are required by State statute.

RETENTION:

Retain for 6 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 08/2010

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private 63G-2-302(1)(2)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27485

TITLE: Medicaid waiver for individuals 65 and older

(continued)

SECONDARY DESIGNATION(S):

Controlled. 63G-2-304(1)(2)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27487

3

TITLE: National Family Caregiver Support Program records

DATES: 2001-2018.

ARRANGEMENT: Alphabetical by last name.

DESCRIPTION:

The National Family Caregiver Support Program (NFCSP), established in 2000, provides grants to States and Territories, based on their share of the population aged 70 and over, to fund a range of supports that assist family and informal caregivers to care for their loved ones at home for as long as possible. These records are used to monitor client services, medical condition, financial expenditures, and the caregiver status for persons who receive aid through the National Family Caregiver Support program. These records contain personal information, including name, address, phone, social security number, and may include financial information. These records also include medical information.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Alternatives program case files, GRS-401.

AUTHORIZED: 07-17-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

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

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27487

TITLE: National Family Caregiver Support Program records

(continued)

PRIMARY DESIGNATION:

Private 63G-2-302(1)(2)

SECONDARY DESIGNATION(S):

Controlled. 63G-2-304(1)(2)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27486

3

TITLE: New Choices waiver records

DATES: 2007-2018.

ARRANGEMENT: Alphabetical by last name.

DESCRIPTION:

The New Choices waiver helps eligible individuals move out of nursing facility settings. Services are designed to help people transition out of a nursing facility and re-establish themselves back in the community. These records are used to monitor client services, expenditures, and medical status. The records contain personal information, including name, address, phone, social security number, and may include financial information. These records also include medical information.

RETENTION:

Retain for 6 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 08/2010

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private 63G-2-302(1)(2)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27486

TITLE: New Choices waiver records

(continued)

SECONDARY DESIGNATION(S):

Controlled. 63G-2-304(1)(2)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11157

3

TITLE: Organizational files

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

These are graphic illustrations providing a detailed description of the arrangement and administrative structure of the county. These files contain organizational charts, reorganizational studies, functional statements, and formally prepared descriptions of the responsibility assigned to executive officers.

RETENTION:

Permanent. Retain for 1 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Agency history records, GRS-1723.

AUTHORIZED: 11-28-2018

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11594

4

TITLE: Outreach booklets

DATES: 2010.

ARRANGEMENT: Chronological

DESCRIPTION:

Informational booklet distributed to the public to inform them of the Council on Aging's purpose and services provided, updated as information is changed. Includes a description of the Council, listing and addresses of senior centers, and description of other services (nutrition, volunteers, home care, transportation, and community involvement).

RETENTION:

Permanent. Retain until superseded

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1993

FORMAT MANAGEMENT:

Paper: Retain in Office until superseded and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative value(s).

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

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11135

3

TITLE: Participant cards

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are cards on all participants in senior center programs. These programs include both those held at the center and any others provided (e.g., friendly visits, homebound meals, reassurance calls). The cards record the individual's participation for four quarters. They are used to compile an annual report. They include participant's name, quarter and year, and code for services provided.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after after participation ends and then destroy.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11175

4

TITLE: Payroll distribution records

DATES: 2010.

ARRANGEMENT: Chronological , thereunder Alphabetical by organization

DESCRIPTION:

Computer printout of employee salary breakdown used to determine program labor costs. Includes classification of salaries by program and organization, employee's salary, deductions, and social security number.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1993

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then destroy.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. UCA 63G-2-302(1)(e)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11159

1

TITLE: Policy and procedure case files

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These files contain records related to policy and procedure issuance which document their formulation. Includes issuances related to routine administrative functions (e.g., payroll, procurement, and personnel).

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 after being superseded and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11161

3

TITLE: Public relations files

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These files contain speeches, addresses, and official comments or remarks made at formal county ceremonies by elected county officials. The format may be paper, videotape, motion picture film, etc.

RETENTION:

Permanent. Retain for 1 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Public relations records, GRS-1716.

AUTHORIZED: 12-01-2014

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11127

3

TITLE: Quarterly program performance report

DATES: undated.

ARRANGEMENT:

DESCRIPTION:

This is a quarterly statistical report on all programs administered by the agency which is submitted to the State Division of Aging. The state compiles statistics and returns the report to local agency for subsequent quarters and a final annual report.

RETENTION:

Retain for 2 year(s) after resolution of issue

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after final payment on contract and then destroy.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11151

1

TITLE: Scrapbooks

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are a chronological record of the activities of the county or individual county department. They include photographs, newspaper clippings, flyers, program notes, brochures, and other items pertaining to county activities and actions and reactions of county citizens.

RETENTION:

Permanent. Retain for 1 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11141

3

TITLE: Senior center annual report

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This report is submitted to the local aging and adult services administrative office on senior center activities. It compares the current years activities with the previous year's. It is used for future planning.

RETENTION:

Permanent. Retain for 1 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

Paper: Retain in Office until administrative value has been met and then transfer to State Archives with authority to weed.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11133

3

TITLE: Senior center class rolls

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

These forms record the participation of individuals in programs or activities held at senior centers. These activities include creative arts, transportation, income tax assistance, and health screenings. The rolls are used to compile monthly, quarterly, and annual reports. They include program or activity title, month and year, participant's name, date, and a check indicating whether person participated in activity or program.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final payment made and then destroy.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.5

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11140

3

TITLE: Senior center emergency cards

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are cards on all senior center members. They are used to contact senior center member's next of kin. They include member's name, address, birth date, telephone, whether they are a member, health information, name and telephone number of next of kin.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after participation ends and then destroy.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11138

3

TITLE: Senior center monthly financial statement

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

This is a monthly financial statement submitted by senior centers to the county aging administrative office. It is used for accounting purposes. This statement includes center name, year, petty cash amount (current month, year-to-date), general account (class fees, center donations), less amount remitted to county, activity account, and total expenditures.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after final payment on contract and then destroy provided all audits have been completed.

Paper copy: Retain in Office until quarterly report submitted and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11146

3

TITLE: Senior center weekly meal report

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

This is a report on meals served by all senior centers. It is compiled daily and submitted weekly to the local aging and adult services administrative office. The report is used to compile reports for the State Division of Aging and for future planning. It includes month and year, senior center's name, daily and weekly totals for congregate meals served, homebound meals received for participants over 60 years of age and spouses, staff, and volunteers for one meal or two meals a day, total meals served, total meals ordered, and amount of donations received for meals, ensure, coffee, and extra food, and total deposit, and accounts receivable for congregate meals.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final payment made on contract and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11137

3

TITLE: Senior center's monthly report

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This is a monthly report on senior center activities. It is used to compile quarterly reports for the State Division of Aging Services. This report includes senior center name, date, actual service units provided, service (general category access service, in-home, community service, other services, meals, and transportation), year-to-date budget, actual budget, and current budget.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after final payment on contract and then destroy and all audits have been completed.

Paper copy: Retain in Office until quarterly report completed and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office for 4 years after final payment on contract and then delete provided all audits have been completed.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11137

TITLE: Senior center's monthly report

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11139

3

TITLE: Senior center's quarterly report

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This is a quarterly report on all service units provided at senior centers. It is submitted to the aging and adult services administrative office and is used to compile reports for the State Division of Aging. This report includes senior center name, date, actual service units provided, service (general category access service, in-home, community service, other services, and transportation), year-to-date budget, actual budget, and current budget.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: For records prior to and including 2010. Retain in Office for 4 years after final payment has been made on contract and then destroy provided provided all audits have been completed.

Paper copy: Retain in Office until annual report compiled and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office for 4 years after final payment has been made on contract and then delete provided all audits have been completed.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11139

TITLE: Senior center's quarterly report

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11160

4

TITLE: Senior citizen's bulletin

DATES: 2010.

ARRANGEMENT: Chronological

DESCRIPTION:

Quarterly newsletter distributed to all Davis County senior citizens who request copies, to inform them of the Council's program and services. Includes date, Board of Directors names, a director's statement, program announcements, senior centers activities, and advice.

RETENTION:

Permanent. Retain until superseded

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1993

FORMAT MANAGEMENT:

Paper: Retain in Office until superseded and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11126

3

TITLE: Title V personnel case files

DATES: 1990-2012.

ARRANGEMENT: None

DESCRIPTION:

These files document the participation of persons in the Senior Service Employment Program under 20 CFR 641 (2008). This program provides for the hiring of low-income persons over the age of fifty-five. The files include income certification form, client intake form, any related correspondence, and if applicable termination forms.

RETENTION:

Retain for 4 year(s) after separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after client leaves the program and then destroy provided all audits have been completed.

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

Public. UCA 63G-2-301(1)(b)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11130

3

TITLE: Title V quarterly progress report

DATES: 1990-2012.

ARRANGEMENT:

DESCRIPTION:

This is a quarterly report that is submitted to the U.S. Department of Health and Human Services on persons employed through the Senior Community Service Program. It includes the sponsor's name and address, month and year, program number, agreement number, subproject number, project period, number of enrolled positions established, unsubsidized placement goal, number of enrollees and enrollment levels, job inventory, categories indicating services to general community and services to elderly community, enrollee characteristics (sex, education, race/ethnic group, income, age), signature, date, and may include an attached narrative report.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after final payment on contract and then microfilm.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11148

3

TITLE: Title XX transportation provider service report

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This report is used to receive reimbursement from the federal government for provided transportation services. It includes service provider name and address, billing period, service category, contract number, name of clients provided transportation, eligibility code, service activity, number of service units, rate of reimbursements, reimbursement request, fee assessed, subtotals, grand totals, provider's signature, and date.

RETENTION:

Retain for 4 year(s) after final action

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after final payment on contract has been made and then destroy provided all audits have been completed.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11143

3

TITLE: Van driver's instructions

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

This is a form signed by all senior center van drivers. It is used to inform the driver of all driving policies. The statement includes a listing of driving policies, general statement on van insurance information, comments on winter driving, driver's signature and date.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after separation of employee and then destroy.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11134

3

TITLE: Volunteer calendar

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

This calendar documents the scheduling of volunteers at the senior centers. It is a monthly calendar containing notations indicating volunteer's name and specific times scheduled to work at center.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11162

1

TITLE: Word processing files

DATES: 2010.

ARRANGEMENT:

DESCRIPTION:

These are documents such as letters, messages, memoranda, reports, handbooks, directives, and manuals recorded on electronic media such as hard disks or floppy diskettes and used to produce hard copy which is maintained in organized files.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Computer data files: Retain in Office until hard copy is filed and administrative need ends and then delete.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11163

3

TITLE: Working papers

DATES: 1990-2013.

ARRANGEMENT:

DESCRIPTION:

These are project background records, such as studies, analyses, notes, drafts, and interim reports.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Working files, GRS-1684.

AUTHORIZED: 12-20-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years after project completion and then destroy.

PRIMARY DESIGNATION:

Exempt 45 CFR 1321.51

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2016.