Retention and Classification Report

Agency: Mountainland Association of Governments (Utah) (2768)

586 East 800 North
Orem, UT 84057-4146
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Records Officer: _____

29694	Aging adult client case files
29979	Aging adult service and billing records
29670	Aging adult service provider contracts
30149	Audits
30840	Budget and Operations
30156	Community and Economic Development records
29695	Home delivered meals case files
30137	Meeting minutes

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29694 3
TITLE: Aging adult client case files
DATES: 2011-
ARRANGEMENT: Alphabetical by last name.
DESCRIPTION:

These records document the case management services provided to aging adult clients. They may include medical, health, service and home statuses of aging adults.

RETENTION:

Retain for 7 year(s) after separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Patient and client case files, GRS-1706.

AUTHORIZED: 01-10-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after separation and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

Computer data files: Retain in Office for 7 years and then delete.

APPRAISAL:

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

These records have a administrative and legal value based on Utah Administrative Code R432-100-34 (4)(c) (2018). "Medical records shall be retained for at least seven years. Medical records of minors shall be kept until the age of eighteen plus four years, but in no case less than seven years".

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29694
TITLE: Aging adult client case files

(continued)

PRIMARY DESIGNATION:

Controlled Utah Code 63G-2-304 (2008).

SECONDARY DESIGNATION(S):

Private

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29979 3
TITLE: Aging adult service and billing records
DATES: 2011-
ARRANGEMENT: Chronological
DESCRIPTION:

These records include billing and service data relating to aging adults who participate in the Mountainland Association of Governments' Home and Community Based Services (HCBS), including Medicaid assistance, New Choices program, Veterans HCBS, and the National Caregiver Support Program. Information can include aging adult name, date of service, name of service, units of service, and total dollar amount.

RETENTION:

Retain for 4 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.

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have fiscal value(s).

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29979
TITLE: Aging adult service and billing records

(continued)

PRIMARY DESIGNATION:

Private Utah Code 63G-2-302(1)(b)

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29670 3
TITLE: Aging adult service provider contracts
DATES: 2015-
ARRANGEMENT: Numerical by contract number.
DESCRIPTION:

These are contracts between Mountainland Association of Governments and private service providers for home based services for aging adults. Contracts are used to determine the appropriate rates, services, insurance coverage, and liability coverage requirements for work done on behalf of Mountainland Association of Governments.

RETENTION:

Retain for 7 year(s) after expiration of contractual agreement

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after contract expires and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public Utah Code 63G-2-301(3)(2018)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2018.

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 30149 3
TITLE: Audits
DATES: 1975-
ARRANGEMENT: Chronological
DESCRIPTION:

These audits document the annual review of the Mountainland Association of Governments' finances.

RETENTION:

Retain permanently

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Audit records, GRS-1727.

AUTHORIZED: 10-23-2019

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2021.

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 30840 3
TITLE: Budget and Operations
DATES: 1990-
ARRANGEMENT: Chronological by year
DESCRIPTION:

These records detail the source and use of funds for state or federally sponsored activities. Supporting documentation is required for all awards, authorizations, financial commitments, unobligated balances, assets, expenses, revenue, and interest. These records include the expenditures versus budget amounts for each award and supporting documentation. Expenditures for eligible Medicare participants reflect one-on-one help, counseling, and education to Medicare beneficiaries, their families, and caregivers.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Budget records, GRS-1856.

AUTHORIZED: 12-17-2018

FORMAT MANAGEMENT:

Paper: Retain in Office until administrative value has been met and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 30840
TITLE: Budget and Operations

(continued)

PRIMARY DESIGNATION:

Private Utah Code 63G-2-302(1)(a)(2023)

SECONDARY DESIGNATION(S):

Public. Utah Code 63G-2-301(3)(e)(2020)

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 30156 3
TITLE: Community and Economic Development records
DATES: 2003-
ARRANGEMENT: Chronological.
DESCRIPTION:

These records are the community and economic development block grant records created by Mountainland Association of Governments. Records may include agreements, subrecipient agreements, applications, monitoring reports, execution reports, and surveys.

RETENTION:

Retain permanently

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Community development block grant historical records, GRS-667.

AUTHORIZED: 04-03-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

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

These records are considered historical because they provide evidence of significant policy formulation and business processes of the government.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2021.

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29695 3
TITLE: Home delivered meals case files
DATES: 2014-
ARRANGEMENT: Alphabetical by last name.
DESCRIPTION:

These records are used to determine eligibility for home delivered meals. They may contain the name of the client, date of birth, contact information, emergency contact information, nutrition assessment, nutrition risk score, Activities of Daily Living (ADL) Report and Instrumental Activites of Daily Living (IDAL) Report.

RETENTION:

Retain for 4 year(s) after case is closed

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Homebound meals case files, GRS-406.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 months after separation and then transfer to State Records Center. Retain in State Records Center for 42 months and then destroy.

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have administrative value(s).

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 29695
TITLE: Home delivered meals case files

(continued)

PRIMARY DESIGNATION:

Controlled Utah Code 63G-2-304 (2008).

SECONDARY DESIGNATION(S):

Private

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 30137 3
TITLE: Meeting minutes
DATES: 1980-
ARRANGEMENT: Chronological.
DESCRIPTION:

These records are the meeting minutes and supplementary materials for the Mountainland Association of Governments. May include closed portions and recordings.

RETENTION:

Retain permanently

DISPOSITION:

Transfer to Archives.

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 until administrative need ends and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office until administrative need ends and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have historical value(s).

These records are considered permanent because they provide evidence of significant policy formulation and business processes of the government, as well as evidence of our government's conduct of political and/or interstate relations.

AGENCY: Mountainland Association of Governments (Utah)

SERIES: 30137
TITLE: Meeting minutes

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2021.