Retention and Classification Report

Agency: Department of Human Services.$bOffice of Public Guardian (3238)

195 North 1950 West
Salt Lake City, UT 84116
801-538-8255

Records Officer: _____

27295	*Board of Public Guardian Services meeting records
27645	Financial information
25889	Guardianship and conservatorship case records

AGENCY: Department of Health and Human Services. Division of Aging and Adult Services. Office of Public Guardian

SERIES: 27295 3

TITLE: Board of Public Guardian Services meeting records

DATES: 1999-2009.

ARRANGEMENT: Chronological

DESCRIPTION:

Minutes of open and closed committee and board meetings as required by UCA 52-4-203 (2014), et seq. "Written minutes shall be kept of all open meetings" UCA 52-4-203 (2013). May include agenda, meeting minutes, transcripts, and other supporting documentation.

RETENTION:

Permanent. Retain for 10 year(s)

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 for 4 years and then transfer to State Records Center. Retain in State Records Center for 6 years and then transfer to State Archives with authority to weed.

APPRAISAL:

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

These records document the activities of the board during the years 1999 through 2004.

AGENCY: Department of Health and Human Services. Division of Aging and Adult Services. Office of Public Guardian

SERIES: 27295

TITLE: Board of Public Guardian Services meeting records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Health and Human Services. Division of Aging and Adult Services. Office of Public Guardian

SERIES: 27645 3

TITLE: Financial information

DATES: 1999-

ARRANGEMENT: Chronological by year of closure or death; thereunder alphabetical by surname.

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This series is made up of payment records for guardian clients, accounts payable, records processed through the state accounting system, and appropriate supporting information which document expenditure of cash. The series is used to refer to clients's past payments and to document payments, invoices, purchasing records, and travel reimbursements. Documents include invoices, check copies, reimbursement forms, client trust fund records, etc.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

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).

This appraisal is based on the administrative and fiscal needs of the agency.

AGENCY: Department of Health and Human Services. Division of Aging and Adult Services. Office of Public Guardian

SERIES: 27645

TITLE: Financial information

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Health and Human Services. Division of Aging and Adult Services. Office of Public Guardian

SERIES: 25889 3

TITLE: Guardianship and conservatorship case records

DATES: 1999-

ARRANGEMENT: chronological by case closed date, thereunder alphabetical by client surname.

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Guardianship and conservatorship case files are maintained by the agency in support of court ordered guardianship and conservatorship activities. Records are used to track events in the life of the ward, maintain a historical record of the ward, and to assist in determinations and decisions regarding the ward. These records include but are not limited to: name, address, phone number, age, social security number, medical information, psychological information, psychiatric information, property records, financial records, correspondence, and progress and case notes. Records are stored in one case file for both guardianship and conservatorship case records. Documents may include records for clients transferred to the OPG Contractor or records for clients that OPG did not take such as referrals.

RETENTION:

Retain for 10 year(s) after case is closed

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 11/2005

FORMAT MANAGEMENT:

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

Computer data files: Retain in Office for 10 years after case closes and then delete.

AGENCY: Department of Health and Human Services. Division of Aging and Adult Services. Office of Public Guardian

SERIES: 25889

TITLE: Guardianship and conservatorship case records

(continued)

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Private	UCA 63G-2-302 (2008)

SECONDARY DESIGNATION(S):

Controlled.	UCA 63G-2-304 (2008) Medical, psychiatric, and psychological data
Protected.	UCA 63G-2-305 (2008) Attorney work product, test questions and answers, records that may jeopardize the life or safety of an individual