

## Retention and Classification Report

**Agency:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare. (4627)

**Records Officer:** \_\_\_\_\_

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**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1734

1

**TITLE:** Administrative action transmittals

**DATES:** 1973-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

Business-related messages that document work accomplished, transactions made, or actions taken. These records do not offer unique information about agency functions, programs, or policies, though they may cite them. These records may originate on paper, electronic mail, or other media.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**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 3 years or until administrative need ends, whichever is shorter and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6931

3

**TITLE:** Administrative files

**DATES:** 1982-

**ARRANGEMENT:** Alphabetical by subject.

**DESCRIPTION:**

Records detailing an organization, which could include charts, functional statements, reorganization studies. Also administrative maps that show regional boundaries and headquarters of decentralized agencies or that show the geographic extent or limits of an agency's programs and projects.

**RETENTION:**

Permanent. Retain for 5 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 for 5 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). This disposition is based on that the records document the activities of the division as a whole, and show its policies, achievements.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6931

**TITLE:** Administrative files

(continued)

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 06/2019.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6932

3

**TITLE:** Administrative hearings files

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

Records of hearings conducted as part of the regulatory process and hearings on proposed rules and changes; they may be maintained with related information including meeting notices, proofs of publications, meeting minutes, and the conclusions reached. UCA 52-4-200 (2009) requires that written minutes be kept of all open meetings. May include audio and video recordings.

**RETENTION:**

Permanent. Retain for 3 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Administrative hearing records, GRS-1655.

**AUTHORIZED:** 11-06-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). This disposition is based on the historical information contained in these hearing files.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6932

**TITLE:** Administrative hearings files

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private

Controlled

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1703

3

**TITLE:** Administrative review case files

**DATES:** 1979-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

Also known as the administrative record. Information an agency relies upon when making a rule under the Utah Administrative Rulemaking Act, Title 63G, Chapter 3, including copies of "(a) the proposed rule, change in the proposed rule, and the rule analysis form; (b) the public comment received and recorded by the agency during the public comment period; (c) the agency's response to the public comment; (d) the agency's analysis of the public comment; and (e) the agency's report of its decision making process." (Subsection 63G-3-102(1)) Also may include records and other information used by agencies to support rulemaking decisions. Agencies are required to file the administrative record along with their responsive pleadings with the court when the rule is challenged.

**RETENTION:**

Retain permanently

**DISPOSITION:**

May Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Administrative rule records, GRS-1692.

**AUTHORIZED:** 07-07-2021

**FORMAT MANAGEMENT:**

Paper: Retain in Office permanently.

Computer data files: Retain in Office permanently.



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 1703  
**TITLE:** Administrative review case files

(continued)

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1732

3

**TITLE:** Administrative rule change notices

**DATES:** 1973-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

Also known as the administrative record. Information an agency relies upon when making a rule under the Utah Administrative Rulemaking Act, Title 63G, Chapter 3, including copies of "(a) the proposed rule, change in the proposed rule, and the rule analysis form; (b) the public comment received and recorded by the agency during the public comment period; (c) the agency's response to the public comment; (d) the agency's analysis of the public comment; and (e) the agency's report of its decision making process." (Subsection 63G-3-102(1)) Also may include records and other information used by agencies to support rulemaking decisions. Agencies are required to file the administrative record along with their responsive pleadings with the court when the rule is challenged.

**RETENTION:**

Permanent. Retain for 6 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Administrative rule records, GRS-1692.

**AUTHORIZED:** 07-07-2021

**FORMAT MANAGEMENT:**

Paper: Retain in Office permanently.

Computer data files: Retain in Office permanently.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1732

**TITLE:** Administrative rule change notices

(continued)

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 28259

3

**TITLE:** Bureau of coverage and reimbursement policy director's files

**DATES:** 1978-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These records document policies and procedures that BCRP uses to determine whether Medicaid recipients may receive certain Medicaid services. Records are also used to determine proper reimbursement for Medicaid providers and nursing facilities, and to determine proper utilization of services. The series also includes administrative policies that BCRP uses to comply with federal statutes and state legislation. Records include policies, procedures, criteria, reports, legislation, statutes, utilization review, correspondence, memos, hearing decisions, legal cases, etc.

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Program and policy development records, GRS-1717.

**AUTHORIZED:** 02-26-2020

**FORMAT MANAGEMENT:**

Paper: Retain in Office until administrative need ends and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative value(s).  
For administrative reference

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 28259  
**TITLE:** Bureau of coverage and reimbursement policy director's files

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6928

3

**TITLE:** Cancelled contracts file

**DATES:** 1985-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

These records contain cancelled contracts that do not fall into other record series. Included are contracts with vendors for purchases and services. Information includes payment schedules, agreements, and dates of cancellation.

**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 cancellation of contract 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 legal value(s).  
This retention is based on UCA 78-12-23.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14966

3

**TITLE:** Claims processing assessment system user manuals

**DATES:** 1991-

**ARRANGEMENT:** Numerical by sections

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

These are system users manuals created by Financial Services Bureau within the division of Health Care Financing. The manuals documents all aspects of the Claims Processing Assessment System, (series 80578) which is a computer system that administers medicaid quality control and serves as a management tool for examining and evaluating the accuracy of claims processing and medical payments. The manuals also identifies the workings of the automated system and shows the documents which are produced by the system. Information includes a system introduction/function, manual organization, policy and procedures, CPAS audit program information for the various types of claims, and system log on/off procedures.

**RETENTION:**

Permanent. Retain until superseded

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 08/1996

**FORMAT MANAGEMENT:**

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

Paper copy: Retain in Office until administrative need ends and then destroy.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14966

**TITLE:** Claims processing assessment system user manuals

(continued)

**APPRAISAL:**

These records have historical value(s).

This disposition is based on the historical system documentation information located in this manual.

**PRIMARY DESIGNATION:**

Protected



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6927

3

**TITLE:** Contract files

**DATES:** 1984-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

These are the files containing contracts that do not fall into other record series. Included are contracts with vendors for purchases and services. Information includes payment schedules, agreements, and other related information.

**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 after final payment or termination of contract 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 legal value(s).  
This retention is based on UCA 78-12-23.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 6927  
**TITLE:** Contract files

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1736

3

**TITLE:** Correspondence

**DATES:** 1980-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule State agency executive correspondence, GRS-1758.

**AUTHORIZED:** 07-12-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

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

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 1736  
**TITLE:** Correspondence

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1800

3

**TITLE:** Difference letters

**DATES:** i 1985-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

Business-related correspondence that is routine or transitory in nature and does not offer unique information about agency functions or programs. These records include acknowledgment files and most day-to-day office and housekeeping correspondence. These records may originate on paper, electronic mail, or other media. This correspondence is filed separately from program and project case files.

**RETENTION:**

Retain for 3 year(s) or until administrative need ends

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Transitory correspondence, GRS-1759.

**AUTHORIZED:** 11-30-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years or until administrative need ends, whichever is shorter and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
This disposition is based on staff suggestion.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1800

**TITLE:** Difference letters

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 10667

3

**TITLE:** Director's executive correspondence

**DATES:** 1988-

**ARRANGEMENT:** Alphabetical by subject

**DESCRIPTION:**

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 07-12-2018

**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).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1745

3

**TITLE:** Distribution of publication logs

**DATES:** i 1978-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

Records which provide detailed information on incoming and/or outgoing documents, data, and other communications that require distribution or action.

**RETENTION:**

Retain for 1 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Transitory tracking records, GRS-1720.

**AUTHORIZED:** 03-09-2021

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 83667

3

**TITLE:** Explanation of medical benefits reports

**DATES:** 1991-

**ARRANGEMENT:** Alphabetical by client name

**DESCRIPTION:**

This series provides an explanation of medical benefits. Information includes the name of the client, name of provider, date of service, description of service, drug quantity information, client identification number, etc.

**RETENTION:**

Retain for 10 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 10/1999

**FORMAT MANAGEMENT:**

Computer output microfiche master: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14948

3

**TITLE:** Facility cost reports and worksheets

**DATES:** 1992-

**ARRANGEMENT:** Chronological, thereunder alphabetical by provider name

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

Fiscal analysis reports created by the Financial Audit Unit to meet federal and state guidelines. The information is used by the department to insure that approved medical health providers are following state and federal guidelines concerning cost analysis. Information includes facility cost profile, and home and community based waiver program cost profile.

**RETENTION:**

Retain for 12 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 08/1996

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This disposition is based on the fiscal need to retain these records, which is seven years. The agency requires a longer retention for administrative reasons.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14948

**TITLE:** Facility cost reports and worksheets

(continued)

**PRIMARY DESIGNATION:**

Private Information concerning individual clients

**SECONDARY DESIGNATION(S):**

Public. Facility cost information

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 13432

4

**TITLE:** Hearing case files

**DATES:** 1972-

**ARRANGEMENT:** Alphabetical by client name.

**ANNUAL ACCUMULATION:** 5.00 cubic feet.

**DESCRIPTION:**

This series contains hearing files of individuals appealing their denial for Medicaid benefits, such as individual procedures, home health care, medical equipment, hospitalization, and providers challenging amounts of payment. Formal hearings review eligibility decisions from the Department of Workforce Services. Information includes notices, notes, correspondence, conclusions reached, sound recordings, and other relevant information.

**RETENTION:**

Retain for 6 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:** 01/2011

**FORMAT MANAGEMENT:**

Paper: For records beginning in 1972 through 2008. Retain in Office for 2 years after case closes and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

Computer data files: For records beginning in 2009 and continuing to the present. Retain in Office for 6 years after case closes and then delete.

Sound recordings: Retain in Office for 1 year after approval of official minutes and then erase.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 13432  
**TITLE:** Hearing case files

(continued)

**APPRAISAL:**

These records have administrative, fiscal, and/or legal value(s).  
These records have administrative value as they document internal processes for fair hearings. They also have fiscal value as they document payments from state and federal funds and legal value as they document hearing outcomes. Record requirements are provided in the Utah Administrative Code R410-14-15.

**PRIMARY DESIGNATION:**

Private UCA 63G-2-302(1)(b); 63G-2-302(2)(d); and 304

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6925

3

**TITLE:** Hospital provider agreements

**DATES:** 1984-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These are records of agreements between the state and hospitals by which the later agree to abide by the requirements of the medicaid program in order to receive medicaid funding. These agreements are required by 42 CFR 431.107.

**RETENTION:**

Retain for 7 year(s)

**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 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 legal value(s).  
This disposition is based on 42 CFR 431.107 and UCA 78-12-23.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14949

3

**TITLE:** Information Systems Unit policies and procedures manual

**DATES:** 1992-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

Policies and procedures manual for the Information Systems Unit. The procedures are updated when changes are made within the department or changes in the law. They are used for program administration and as a training tool for new employees.

**RETENTION:**

Permanent. Retain until superseded

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 08/1996

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have historical value(s).

This disposition is based on the historical information contained in these policies and procedures. They document the agency's programs and activities within the Information Systems Unit.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 14949  
**TITLE:** Information Systems Unit policies and procedures manual

(continued)

**PRIMARY DESIGNATION:**

Public



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1807

3

**TITLE:** Lost check tracer case files

**DATES:** i 1985-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

Legal documentation explaining and justifying a lost warrant, so that a new one can be issued.

**RETENTION:**

Retain for 6 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Warrant/check - lost, GRS-1837.

**AUTHORIZED:** 07-01-1990

**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, and/or legal value(s).  
This disposition is based on if any legal action is taken on missing checks.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14950

3

**TITLE:** Medicaid Administrative Reporting System

**DATES:** 1991-

**ARRANGEMENT:** Chronological, thereunder numerical by report number

**DESCRIPTION:**

Computer program which tracks medical assistance financial status of medicaid services by facility type, such as inpatient/outpatient within general hospitals, and other medical facilities. The program also contain statistics on the facilities. Information includes financial status report, financial summary, most frequently occurring errors concerning provider paperwork, expenditure summary/detail, medicaid participation analysis, monthly statistical report on medical care, number of individuals eligible for program, operational performance summary/detail, claims processing performance summary, provider participation, cost settlement, third party payment analysis, provider ranking list, drug usage frequency report, recipient participation summary/detail, county participation/expenditure, drug usage eligibility classification, periodic screening cost analysis, recipient cost summary, benefit usage summary, long term care expenditures by program, family planning services, patient discharge data analysis, provider claim payment analysis, and financial summary on indigent medical care.

**RETENTION:**

Retain for 12 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 08/1996

**FORMAT MANAGEMENT:**

Computer data files: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 9 years and then delete.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 14950  
**TITLE:** Medicaid Administrative Reporting System

(continued)

Paper copy: Retain in Office until administrative need ends and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).  
This disposition is based on fiscal requirements of the financial information contained in these reports. The agency has also determined an administrative need as well.

**PRIMARY DESIGNATION:**

Protected 63G-2-305(11) (2008)

**SECONDARY DESIGNATION(S):**

Private. Information on individuals, medical information

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1737

3

**TITLE:** Medicaid coding manuals

**DATES:** i 1980-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

**RETENTION:**

Permanent. Retain until superseded

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

**AUTHORIZED:** 10-30-2018

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).  
This disposition is based on the long term value of interpreting the meaning of reimbursement codes.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 33

3

**TITLE:** Medicaid information bulletin assignment logs

**DATES:** 1981-

**ARRANGEMENT:** None.

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

These documents are used in the process of the drafting of medicaid information bulletins. They insure that all necessary input is received for its production. Information includes the subject, dates, mailing, printing, and completion of bulletins.

**RETENTION:**

Retain for 1 year(s) after completion of publication or report

**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 1 year after closed and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 07/2019.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 32

3

**TITLE:** Medicaid information bulletins

**DATES:** 1981-

**ARRANGEMENT:** Chronological.

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

**AUTHORIZED:** 10-30-2018

**FORMAT MANAGEMENT:**

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

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

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). This disposition is based on the historical information contained in these bulletins. They describe agency procedures concerning rule making.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 32  
**TITLE:** Medicaid information bulletins

(continued)

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 07/2019.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1738

3

**TITLE:** Medicaid procedures working records

**DATES:** i 1977-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

**RETENTION:**

Retain for 1 year(s) after end of project or program

**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 1 year after project closed and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1741

3

**TITLE:** Medicaid provider manuals

**DATES:** i 1975-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

**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 Publications, GRS-1678.

**AUTHORIZED:** 10-30-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). This disposition is based on the value of these records in documenting the policies and procedures of the Division of Health Care Financing.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1741

**TITLE:** Medicaid provider manuals

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 10668

3

**TITLE:** Medical adviser committee records

**DATES:** 1987-

**ARRANGEMENT:** chronological

**DESCRIPTION:**

Records created by a committee or conference, including advisory committee records relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees.

**RETENTION:**

Permanent. Retain for 3 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 10-28-2020

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14952

3

**TITLE:** Medical assistance management indicator records

**DATES:** 1992-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

This is a computer program which lists medicaid indicators by medicaid category. The information documents medicaid expenditures by service classification. Information includes Medicaid Administration Expenditures, and medical services expenditures by type of care received.

**RETENTION:**

Retain for 12 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 08/1996

**FORMAT MANAGEMENT:**

Computer data files: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 9 years and then delete.

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

Paper copy: Retain in Office until administrative need ends and then destroy.

**APPRAISAL:**

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

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 14952  
**TITLE:** Medical assistance management indicator records

(continued)

**PRIMARY DESIGNATION:**  
Protected 63G-2-305(11) (2008)

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 10118

4

**TITLE:** Medical card information system

**DATES:** 1990-

**ARRANGEMENT:** Numerical by client identification number

**DESCRIPTION:**

Computer system used in processing Medicaid payments through use of the Medical card given to qualified recipients to facilitate payments from Medicaid/Medicare health providers. Information includes: client name and identification number, age, sex, type of medical card, program type, county of residence, effective date, end date, issue date, provider name, and third party liability names.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 04/1995

**FORMAT MANAGEMENT:**

Computer data files: Retain in Office for 1 year or until transferred to computer output microfiche and then transfer to State Records Center. Retain in State Records Center for 3 years and then delete.

Computer output microfiche master: Retain in State Records Center for 3 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 3 years and then destroy.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 10118

**TITLE:** Medical card information system

(continued)

**APPRAISAL:**

These records have administrative value(s).

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

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

Protected. UCA 63G-2-305(11) (2008)

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1743

3

**TITLE:** Medicare policy and procedure manuals

**DATES:** i 1980-

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

Policies and procedures that govern the operation and administration of various programs.

**RETENTION:**

Permanent. Retain until superseded

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Program and policy development records, GRS-1717.

**AUTHORIZED:** 02-26-2020

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 24287

3

**TITLE:** Mental health cost settlements, financial reports, and audits

**DATES:** 1988-

**ARRANGEMENT:** Chronological by year, thereunder alphabetical by mental health center

**ANNUAL ACCUMULATION:** 2.00 cubic feet.

**DESCRIPTION:**

These records are created to help the Utah Department of Health administer Medicaid mental health programs.

The records in this series are used to determine the cost of each mental health center for delivering mental health services to Medicaid clients. If the center is "Capitated," this cost is used to determine the rates of payment to the respective mental health center for the number of people enrolled in Medicaid in its area. If the center is paid "Fee-For-Service," this cost is used to determine whether Medicaid overpaid for services.

The information contained in these records includes total hours by employee, time spent in each mental health service case, payroll and benefit information, non-employee costs, revenues, correspondence, audit and review reports of the centers, and other matters.

**RETENTION:**

Retain for 15 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 09/2011

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 12 years and then destroy.

Computer data files: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 24287  
**TITLE:** Mental health cost settlements, financial reports, and audits

(continued)

for 12 years and then delete.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).  
The retention meets the administrative and fiscal needs expressed by the agency which must accommodate requests for information by the federal Centers for Medicare and Medicaid Services (CMS), a division of the United States Department of Human Services.

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. patient information, private provider payroll data, Social Security Number, etc.  
UCA 63G-2-302(2)(c)

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 14110

3

**TITLE:** Mental health plan prepaid waiver request

**DATES:** 1993-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

Mental health waiver request report created annually by the division of health care financing, sent to the federal government for its approval and to hopefully receive money to help finance the program.

**RETENTION:**

Retain for 10 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 04/1995

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years 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.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 14110  
**TITLE:** Mental health plan prepaid waiver request

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Protected. UCA 63G-2-305(5, 2, 14,) (2008) Report Tables: 15-22 pages 42-45, Appendices: M & N, F & G, E & I

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 6924

3

**TITLE:** Nursing facility provider agreements

**DATES:** 1984-

**ARRANGEMENT:** Alphabetical by nursing facility name

**DESCRIPTION:**

These are agreements between the state and nursing homes by which nursing homes agree to abide by the requirements of the medicaid program in order to receive medicaid funding. These agreements are required by 42 CFR 431.107. These records include the name and address of the provider, the type of business (individual, partnership, or corporation), the type of care for which the provider is licensed, the terms of the agreement, the period of the agreement, and the signatures of the authorized officials.

**RETENTION:**

Retain for 7 year(s)

**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 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 legal value(s).  
This disposition is based on 42 CFR 431.107 and UCA 78-12-23.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 6924  
**TITLE:** Nursing facility provider agreements

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 27738

3

**TITLE:** Nursing facility reports

**DATES:** 2008-

**ARRANGEMENT:** Alphabetical

**ANNUAL ACCUMULATION:** 6.00 cubic feet.

**DESCRIPTION:**

The nursing facility reports allow the Department of Health to audit the revenue, costs, capital expenditures, and patient days for nursing homes in Utah over a 12-month period. Reports include the Facility Cost Profile (FCP), which is filed by providers and contains revenue, cost, patient financial classification, and bed data. As well as, the Fair Rental Value (FRV) of the facility as calculated each year.

**RETENTION:**

Retain for 4 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 07/2011

**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.

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

**APPRAISAL:**

These records have administrative, fiscal, and/or legal value(s). The records have a legal appraisal as the agency is required to "maintain an accounting system and supporting fiscal records", as well as, retain the records for 3 years after date of submission in accordance with Federal funds requirements (42 CFR §433.32(1979)).

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 27738  
**TITLE:** Nursing facility reports

(continued)

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 05/2017.



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1806

3

**TITLE:** Pharmacy Review Committee minutes

**DATES:** 1983-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These records document the activities of the Pharmacy Review Committee. The Committee provides input and recommendations for setting pharmacy prices and policies for medicaid programs.

**RETENTION:**

Permanent. Retain for 5 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 5 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s).  
This retention is based on the value of these records in documenting the activities of the Committee.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1802

3

**TITLE:** Policy and Planning Bureau's correspondence

**DATES:** 1982-

**ARRANGEMENT:** Alphanumerical

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

**RETENTION:**

Permanent. Retain for 2 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule State agency executive correspondence, GRS-1758.

**AUTHORIZED:** 07-12-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). This disposition is based on relating information to function, organization, and pattern of achievements.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 1802  
**TITLE:** Policy and Planning Bureau's correspondence

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1805

3

**TITLE:** Policy and Planning Bureau's Medicaid implementation and corrective action plans

**DATES:** 1981-

**ARRANGEMENT:** Alphanumerical.

**DESCRIPTION:**

Records detailing an organization, which could include charts, functional statements, reorganization studies. Also administrative maps that show regional boundaries and headquarters of decentralized agencies or that show the geographic extent or limits of an agency's programs and projects.

**RETENTION:**

Permanent. Retain until administrative need ends

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

**APPRAISAL:**

These records have administrative, and/or historical value(s).  
This disposition is based on administrative use

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 06/2019.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1804

3

**TITLE:** Policy and Planning Bureau's reference working files

**DATES:** 1971-

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

**RETENTION:**

Retain for 1 year(s) after end of project or program

**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 1 year after project closed and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public Exceptions may apply, including any rule of law which classifies attorney work product differently

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 1803

3

**TITLE:** Policy and Planning Bureau's suspense logs

**DATES:** 1981-

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

Records which provide detailed information on incoming and/or outgoing documents, data, and other communications that require distribution or action.

**RETENTION:**

Retain for 1 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Transitory tracking records, GRS-1720.

**AUTHORIZED:** 03-09-2021

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 44

3

**TITLE:** Provider and client services buying premium report

**DATES:** 1981-

**ARRANGEMENT:** Alphanumerical.

**DESCRIPTION:**

Reports documenting work productivity of employees or an office. Includes weekly activity or production reports, monthly activity reports, etc.

**RETENTION:**

Retain for 1 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Employee and program productivity records, GRS-1698.

**AUTHORIZED:** 12-18-2018

**FORMAT MANAGEMENT:**

Computer output microfiche duplicate: Retain in Office for 1 year and then destroy.

**APPRAISAL:**

These records have administrative value(s). This disposition is based on the administrative needs expressed by the agency. These computer output microfiche reports are updated annually. Therefore the copies kept in the agency only need to be kept for one year.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 45

3

**TITLE:** Provider and client services drug code report

**DATES:** 1981-

**ARRANGEMENT:** Alphanumerical.

**DESCRIPTION:**

These records document payments made to state employees and agencies for the purpose of reimbursing travel, transportation, equipment, service, training, and other reimbursable costs. Records include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, and other supporting records used to validate reimbursable expenses.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Reimbursement files, GRS-1833.

**AUTHORIZED:** 01-11-2019

**FORMAT MANAGEMENT:**

Computer output microfiche duplicate: Retain in Office for 3 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 08/2019.



**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 42

3

**TITLE:** Provider and client services medical assistance clients index

**DATES:** 1981-

**ARRANGEMENT:** Alphanumerical by case number.

**DESCRIPTION:**

Indices, lists, catalogs, registers, guides, and other aids necessary for the efficient use of other records. This is a by-monthly computer output microfiche report of clients receiving medical assistance. They contain report date, case number, client's date of birth, county or district code, type of assistance, category of assistance, client identification number, client name, effective date of assistance, sex, and amount of assistance payments.

**RETENTION:**

Retain until final action

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Information governance records, GRS-1713.

**AUTHORIZED:** 02-19-2019

**FORMAT MANAGEMENT:**

Computer output microfiche duplicate: Retain in Office until no longer needed and then destroy.

**APPRAISAL:**

These records have administrative value(s).

This disposition is based on the administrative needs of the agency.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 42

**TITLE:** Provider and client services medical assistance clients index

(continued)

**PRIMARY DESIGNATION:**

Private

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 07/2019.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 43

3

**TITLE:** Provider and client services medical eligibility directory

**DATES:** 1981-

**ARRANGEMENT:** Alphanumerical.

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This record series is a listing of medical eligibility requirements for patients and providers.

**RETENTION:**

Permanent. Retain for 1 month(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

**AUTHORIZED:** 10-30-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 month and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s).  
These records have long-term research value.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 07/2019.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.

**SERIES:** 23907

3

**TITLE:** Publications

**DATES:** 1977-

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

**RETENTION:**

Permanent. Retain until administrative need ends

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

**AUTHORIZED:** 10-30-2018

**FORMAT MANAGEMENT:**

Paper: Retain in State Archives permanently with authority to weed.

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

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

**APPRAISAL:**

These records have historical value(s).

Disposition based on the value of these records in documenting agency/program achievements, policies, procedures, and function.

**AGENCY:** Department of Health and Human Services. Healthcare Administration. Division of Integrated Healthcare.  
**SERIES:** 23907  
**TITLE:** Publications

(continued)

**PRIMARY DESIGNATION:**

Public