

## Retention and Classification Report

**Agency:** Department of Health and Human Services. Division of Aging and Adult Services.  
Adult Protective Services (2725)  
288 North 1950 West  
Salt Lake City, UT 84116  
801-538-3910

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

17485	Client case files
24565	Client trust account files
17863	Investigation files

**AGENCY:** Department of Health and Human Services. Division of Aging and Adult Services. Adult Protective Services

**SERIES:** 17485

3

**TITLE:** Client case files

**DATES:** 1990-

**ARRANGEMENT:** Alphabetical by client surname.

**ANNUAL ACCUMULATION:** 2.00 cubic feet.

**DESCRIPTION:**

These files document complete case histories of clients receiving services provided in or through the Division of Aging and Adult Services. Information includes name, social security number, telephone number, and living conditions.

**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:** 08/1996

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).

These files document complete case histories of clients receiving services provided in or through the Division of Aging and Adult Services.

**AGENCY:** Department of Health and Human Services. Division of Aging and Adult Services. Adult Protective Services  
**SERIES:** 17485  
**TITLE:** Client case files

(continued)

**PRIMARY DESIGNATION:**

Private

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 10/2018.

**AGENCY:** Department of Health and Human Services. Division of Aging and Adult Services. Adult Protective Services

**SERIES:** 24565

3

**TITLE:** Client trust account files

**DATES:** ca. 1990-

**ARRANGEMENT:** Chronological.

**ANNUAL ACCUMULATION:** 2.00 cubic feet.

**DESCRIPTION:**

These records document bank statements from client trust accounts and are used to manage financial and audit records. Information includes returned checks, financial statements, and bank transactions.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 02/2003

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Protected UCA 63G-2-305 (2008)

**AGENCY:** Department of Health and Human Services. Division of Aging and Adult Services. Adult Protective Services  
**SERIES:** 24565  
**TITLE:** Client trust account files

(continued)

**SECONDARY DESIGNATION(S):**

Controlled. UCA 63G-2-304 (2008) Contains medical, psychiatric, and psychological data

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 10/2018.

**AGENCY:** Department of Health and Human Services. Division of Aging and Adult Services. Adult Protective Services

**SERIES:** 17863

3

**TITLE:** Investigation files

**DATES:** 1979-

**ARRANGEMENT:** Alphabetical by region, thereunder by client surname.

**DESCRIPTION:**

These files document Adult Protective Service investigations completed as a result of a referral alleging abuse, neglect or exploitation of a disabled or senior adult. Information includes birthdate, names, addresses, court documents, medical reports, guardianship orders, referrant names, perpetrator and victim information, and investigation results.

**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:** 11/1996

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Protected UCA 63G-2-305 (2008)

**AGENCY:** Department of Health and Human Services. Division of Aging and Adult Services. Adult Protective Services  
**SERIES:** 17863  
**TITLE:** Investigation files

(continued)

**SECONDARY DESIGNATION(S):**

Controlled. UCA 63G-2-304 (2008)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 10/2018.