

Behavioral Health

Record Title	Description	Retention	Classification	Comments	Schedule #
Agency History	Scrapbooks, photographs, articles, program notes and documentation of events sponsored or funded by an agency. Also included are narrative audio or audiovisual agency histories.	Permanent	Public	Approved by GRAMPA 11/17/2005.	SA-002
Client Case Files	These case files document alcohol and drug treatment provided to division clients. They contain psychological and social information used to facilitate attendance in treatment programs. The case files include client intake records treatment forms, summary of action forms, and consent of disclosure confidential information forms.	6 years after case is closed	Exempt, 42 CFR Part 2 (2005) and 45 CFR Parts 160, 162 and 164 (2005).	Approved by GRAMPA 11/17/2005.	SA-003
Financial Records	These records document financial operations and are used for reference purposes. They include contract billings, budgets, mileage reports, travel reports, and petty cash records. The division maintains only a copy while the county auditor retains the official copies of these records.	3 years	Public	Approved by GRAMPA 11/17/2005.	SA-004
Payroll Records	These records document hours worked and leave taken by division employees and are used for reference purpose. They include time sheets, leave request, pay period time records sheets, time and attendance records, and copies of auditor's office payroll records.	4 years	Primary: Public Secondary: Private (Social Security Number) UCA 63-2-302(1)(f)	Approved by GRAMPA 11/17/2005.	SA-005
Procurement Records	These records document compliance with contracts between the division and vendors providing services. They include copies of contracts, purchase orders, request for proposals (RFP's), and statistical reports. The official copies of these records are retained by the contracts division.	1 year	Public	Approved by GRAMPA 11/17/2005.	SA-006