DGS - 550 - 1

REV. 7/86

DEPARTMENT OF GENERAL SERVICES
Records Management Division

RECORDS RETENTION AND DISPOSAL SCHEDULE

Schedule No. 1239

Maryland Office on Aging — Agency

Nutrition & Community Services Division — Division

Item No.	Description	Retention
1	<u>Senior Employment & Training</u> Arranged alphabetically These files contain information relating to 135 seniors eligible to participate in the federal JTPA program. The following are included: Application forms, Participant Activity/ Support form, Termination/Placement form on each of 135 seniors trained each year. Also, a folder on each of 6-8 grantees funded each year containging proposals, N.G.A.'s and correspondenc.	Retain for 3 years, then destroy.
2	<u>Senior Employment & Training</u> Arranged alphabetically These files contain information relating to 235 seniors employed by the Agency. The following are included: Client Intake Forms, Time sheets, Insurance forms, correspondence and termination forms.	Retain for three years, then destroy.
3	<u>Senior Information & Assistance</u> Arranged alphabetically These files contain information on 19 Area Agencies on Aging's operations in the administration of the program. The following are included: Monitoring Reports, Quarterly Program Reports Gatekeeper Materials & Reports, and Information Resource files	Retain for three years, then destroy.

-Continuation-

Schedule Approved by Department, Agency or Division Representative

Date | Signature | Title

Schedule Authorized by:

8/21/91

Date | Signature

RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation Sheet)

Item No.	Description	Retention
4	<u>Pre-Retirement Education</u>	
	Arranged chronologically These files contain information relative to pre-retirement seminars provided for persons who are preparing for retirement.	
	The following are included: Registration forms for attendance of pre-retirement series and clerical documentation of arrangements for speakers. Data for budget book on participation and evaluation.	Retain for 1 year, then destroy
5	<u>Senior Olympics</u>	
	These files contain information relative to the Maryland Senior Olympics Registration. The purpose is to document participation, to register competitors and to verify proof of age eligibility.	
	The following are included: Annual registration for participation in the Maryland Senior Olympics, which consists of an 8 1/2" X 11" registration form and a copy a birth certificate as proof of age.	Retain for 3 years
	XXXXXXXXXXXX LAST ITEM XXXXXXXXXXXX	

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 1 OF 1

1. DEPARTMENT/AGENCY	2. DIVISION	3. UNIT
Maryland Office on Aging	Nutrition & Community Services	Senior Information & Assistance

DEFINITION-RECORD SERIES- A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE	5. EARLIEST YEAR/LATEST YEAR
Senior Information and Assistance Files	1982 TO 1990

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

These files contain information on 19 Area Agencies on Aging operations in the administration of the program.

7. RECORD SERIES FORMAT(S)
- ☐ LETTER SIZE
- ☐ MICROFILM
- ☐ LEGAL SIZE
- ☐ COMPUTER TAPE
- ☐ BOUND BOOK
- ☐ FLOPPY DISK
- ☐ AUDIO TAPE
- ☐ VIDEO TAPE
- ☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE
- ☐ ALPHABETICAL
- ☐ NUMERICAL
- ☐ CHRONOLOGICAL
- ☐ GEOGRAPHICAL
- ☐ OTHER(SPECIFY)

9. VOLUME
5 NUMBER
- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION
3 NUMBER
- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

11. FILE IS USED
☐ DAILY ☐ WEEKLY ☐ MONTHLY

12. FILE BECOMES INACTIVE AFTER
3 NUMBER ☐ MONTH(S) ☐ YEAR(S)

13. CURRENT LOCATION(S) (BLDG.,FLOOR,ROOM)
301 West Preston Street, Room 1004

14. IS RECORD SERIES DUPLICATED ELSEWHERE? (IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☐ NO

15. ACCESS RESTRICTIONS ☐ YES ☐ NO
(IF YES, CITE LAW(S) & REGULATION(S)

16. AUDIT REQUIREMENTS
☐ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES,EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)
☐ YES ☐ NO

18. RECOMMENDED RETENTION
Retain for three years, then destroy.

19. NAME AND TITLE OF PREPARER	20. TELEPHONE NUMBER	21. DATE
Helene S. Seaman	225-1095	May 16, 1990

DGS 550-4 (REVISED 2/87)

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

1. DEPARTMENT/AGENCY: Maryland Office on Aging
2. DIVISION: Nutrition & Community Services
3. UNIT: Senior Employent & Training

DEFINITION-RECORD SERIES- A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE: Senior Aides Program Files
5. EARLIEST YEAR/LATEST YEAR: 1986 TO 1990

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

These files contain information relative to each Senior Aides' employment with the agency

7. RECORD SERIES FORMAT(S)
- ☐ LETTER SIZE
- ☐ MICROFILM
- ☐ LEGAL SIZE
- ☐ COMPUTER TAPE
- ☐ BOUND BOOK
- ☐ FLOPPY DISK
- ☐ AUDIO TAPE
- ☐ VIDEO TAPE
- ☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE
- ☐ ALPHABETICAL
- ☐ NUMERICAL
- ☐ CHRONOLOGICAL
- ☐ GEOGRAPHICAL
- ☐ OTHER(SPECIFY)

9. VOLUME
- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

8 NUMBER

10. ANNUAL ACCUMULATION
- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

2 NUMBER

11. FILE IS USED ☐ DAILY ☐ WEEKLY ☐ MONTHLY

12. FILE BECOMES INACTIVE AFTER 3 NUMBER ☐ MONTH(S) ☐ YEAR(S)

13. CURRENT LOCATION(S) (BLDG.,FLOOR,ROOM): 301 West Preston Street, Room 1004

14. IS RECORD SERIES DUPLICATED ELSEWHERE? (IF YES, SPECIFY AGENCY OR OFFICE) ☐ YES ☐ NO

15. ACCESS RESTRICTIONS ☐ YES ☐ NO (IF YES, CITE LAW(S) & REGULATION(S)): Department of Labor Regulations

16. AUDIT REQUIREMENTS ☐ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES,EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE) ☐ YES ☐ NO

18. RECOMMENDED RETENTION: Retain for three years, then destroy.

19. NAME AND TITLE OF PREPARER: Beatrice Kendall
20. TELEPHONE NUMBER: 225-1095
21. DATE: May 16, 1990

DGS 550-4 (REVISED 2/87)

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

1. DEPARTMENT/AGENCY	2. DIVISION	3. UNIT
Maryland Office on Aging	Nutrition & Community Services	Senior Employment & Training

DEFINITION-RECORD SERIES- A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE	5. EARLIEST YEAR/LATEST YEAR
Job Training Partnership Act Program Files	1986 TO 1990

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

These files contain information pertaining to 135 seniors eligible to participate in the federal JTPA program.

7. RECORD SERIES FORMAT(S)

- ☐ LETTER SIZE
- ☐ MICROFILM
- ☐ LEGAL SIZE
- ☐ COMPUTER TAPE
- ☐ BOUND BOOK
- ☐ FLOPPY DISK
- ☐ AUDIO TAPE
- ☐ VIDEO TAPE
- ☐ OTHER(SPECIFY) _____

8. RECORD SERIES SEQUENCE

- ☐ ALPHABETICAL
- ☐ NUMERICAL
- ☐ CHRONOLOGICAL
- ☐ GEOGRAPHICAL
- ☐ OTHER(SPECIFY) _____

9. VOLUME

3 NUMBER

- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION

1 NUMBER

- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

11. FILE IS USED

☐ DAILY ☐ WEEKLY ☐ MONTHLY

12. FILE BECOMES INACTIVE AFTER

3 NUMBER ☐ MONTH(S) ☐ YEAR(S)

13. CURRENT LOCATION(S) (BLDG.,FLOOR,ROOM)

301 West Preston Street, Room 1004

14. IS RECORD SERIES DUPLICATED ELSEWHERE? (IF YES, SPECIFY AGENCY OR OFFICE)

☐ YES ☐ NO

15. ACCESS RESTRICTIONS ☐ YES ☐ NO

(IF YES, CITE LAW(S) & REGULATION(S)

Department of Labor Regulations

16. AUDIT REQUIREMENTS

☐ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES,EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

☐ YES ☐ NO

18. RECOMMENDED RETENTION

Retain for three years, then destroy.

19. NAME AND TITLE OF PREPARER	20. TELEPHONE NUMBER	21. DATE
Beatrice Kendall	225-1095	May 16, 1990

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 1 OF 1

1. DEPARTMENT/AGENCY	2. DIVISION	3. UNIT
Maryland Office on Aging	Nutrition & Community Services	Pre-Retirement

DEFINITION-RECORD SERIES- A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE	5. EARLIEST YEAR/LATEST YEAR
Retirement Education	1987 TO 1990

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

These files contain information rrelative to Pre-retirement seminars, series & clerical.

7. RECORD SERIES FORMAT(S)

- ☐ LETTER SIZE
- ☐ MICROFILM
- ☐ LEGAL SIZE
- ☐ COMPUTER TAPE
- ☐ BOUND BOOK
- ☐ FLOPPY DISK
- ☐ AUDIO TAPE
- ☐ VIDEO TAPE
- ☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

- ☐ ALPHABETICAL
- ☐ NUMERICAL
- ☐ CHRONOLOGICAL
- ☐ GEOGRAPHICAL
- ☐ OTHER(SPECIFY)

9. VOLUME

1 NUMBER

- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION

1/4 NUMBER

- ☐ FILE DRAWER(S)
- ☐ MICROFILM REEL(S)
- ☐ COMPUTER TAPE(S)
- ☐ OTHER(SPECIFY)

11. FILE IS USED ☐ DAILY ☐ WEEKLY ☐ MONTHLY

12. FILE BECOMES INACTIVE AFTER 1 NUMBER ☐ MONTH(S) ☐ YEAR(S)

13. CURRENT LOCATION(S) (BLDG.,FLOOR,ROOM)

301 West Preston Street, Rm. 1004

14. IS RECORD SERIES DUPLICATED ELSEWHERE? (IF YES, SPECIFY AGENCY OR OFFICE) ☐ YES ☐ NO

15. ACCESS RESTRICTIONS ☐ YES ☐ NO (IF YES, CITE LAW(S) & REGULATION(S)

CONFIDENTIALITY, PRIVACY ACT

16. AUDIT REQUIREMENTS ☐ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES,EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE) ☐ YES ☐ NO

Department of Retirement computerized records of this information

18. RECOMMENDED RETENTION

Retain for one year, then detroy

19. NAME AND TITLE OF PREPARER	20. TELEPHONE NUMBER	21. DATE
Joanne Keiser, Unit Manager	225-1094	June 6, 1990

DGS 550-4 (REVISED 2/87)

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY PAGE 1 OF 1

1. DEPARTMENT/AGENCY	2. DIVISION	3. UNIT
Maryland Office on Aging	Nutrition & Community Services	Senior Olympics

DEFINITION-RECORD SERIES- A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE	5. EARLIEST YEAR/LATEST YEAR
Maryland Senior Olympics Registration	1985 TO 1989

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

These files contain information on participation in the Senior Olympics.

7. RECORD SERIES FORMAT(S)	8. RECORD SERIES SEQUENCE	9. VOLUME
☐ LETTER SIZE ☐ MICROFILM ☐ LEGAL SIZE ☐ COMPUTER TAPE ☐ BOUND BOOK ☐ FLOPPY DISK ☐ AUDIO TAPE ☐ VIDEO TAPE ☐ OTHER(SPECIFY)	☐ ALPHABETICAL ☐ NUMERICAL ☐ CHRONOLOGICAL ☐ GEOGRAPHICAL ☐ OTHER(SPECIFY)	3 NUMBER ☐ FILE DRAWER(S) ☐ MICROFILM REEL(S) ☐ COMPUTER TAPE(S) ☐ OTHER(SPECIFY)
		10. ANNUAL ACCUMULATION 1/4 NUMBER ☐ FILE DRAWER(S) ☐ MICROFILM REEL(S) ☐ COMPUTER TAPE(S) ☐ OTHER(SPECIFY)

11. FILE IS USED - from Aug. - Nov.	12. FILE BECOMES INACTIVE AFTER
☐ DAILY ☐ WEEKLY ☐ MONTHLY	NUMBER ☐ MONTH(S) ☐ YEAR(S)
13. CURRENT LOCATION(S) (BLDG.,FLOOR,ROOM) 301 W. Preston Street, Room 1004	14. IS RECORD SERIES DUPLICATED ELSEWHERE? (IF YES, SPECIFY AGENCY OR OFFICE) ☐ YES ☐ NO
15. ACCESS RESTRICTIONS ☐ YES ☐ NO (IF YES, CITE LAW(S) & REGULATION(S)	16. AUDIT REQUIREMENTS ☐ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT
17. IS AN INDEX SYSTEM USED? (IF YES,EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE) ☐ YES ☐ NO Maryland Senior Olympics Commission, TLD maintains computerized list of participants	18. RECOMMENDED RETENTION Retain for three years, then destroy

19. NAME AND TITLE OF PREPARER	20. TELEPHONE NUMBER	21. DATE
Joanne Deiser, Manager Nutrition Fitness	225-1095	June 6, 1990

DGS 550-4 (REVISED 2/87)