

DEPARTMENT OF GENERAL SERVICES
Records Management Division

Schedule
No. 1445

GS - 550 - 1

REV. 7/86

RECORDS RETENTION AND DISPOSAL SCHEDULE

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No. 1 of 1

Maryland Office on Aging		Housing: Group Senior Assisted Housing
Agency		Division
Item No.	Description	Retention
1	<p><u>GROUP CERTIFIED FACILITIES FILES:</u></p> <p>A file folder is maintained for each certified Senior Assisted Housing group facility. Files maintain local certification approvals, correspondence to facility, resident information and quarterly monitoring reports.</p>	Retain in office until group home closes. After four years transfer to State Record Center, then destroy after 2 years.
2	<p><u>GROUP SUBSIDY ALLOCATION FILES:</u></p> <p>A file folder is maintained for each county where Senior Assisted Housing - Group subsidies are allocated. Files contain subsidy contracts, correspondence with the Area Agency on Aging, reports of subsidies earned and confidential client information.</p>	Retain in office until group home closes. After four years transfer to State Record Center, then destroy after 2 years.
3	<p><u>GROUP CERTIFICATION APPLICATIONS FILES:</u></p> <p>A file folder is maintained for each county where applications and requests for information have been received for the Senior Assisted Housing - Group Program.</p>	Retain in office until group home closes. After four years transfer to State Record Center, then destroy after 2 years.
XXXXXXXXX LAST ITEM XXXXXXXXXXXX		

Schedule Approved by Department, Agency or Division Representative

Schedule Authorized by:

5-19-92 *Angela Bostick* Deputy Director
Date Signature Title

AUG 17 1992 *Edward C. Papenfuss*
Date Signature

RECORDS MANAGEMENT DIVISION
Schedule

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 278
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 1 OF 2

1. DEPARTMENT/AGENCY

Office on Aging

2. DIVISION

Housing

3. UNIT

Group
Senior Assisted Housing

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

Group Certified Facilities Files

5. EARLIEST YEAR/LATEST YEAR

1978 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)

A file folder is maintained for each certified Senior Assisted Housing group facility. Files contain local certification approvals, correspondence to facility, resident information and quarterly monitoring reports.

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 By County
 OTHER(SPECIFY)

9. VOLUME

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

10. ANNUAL ACCUMULATION

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

11. FILE IS USED

- DAILY WEEKLY MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 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

18. RECOMMENDED RETENTION

Retain in office until group home closes. After four years transfer to State Record Center, then destroy after 2 years.

19. NAME AND TITLE OF PREPARER

John F. Lessner

20. TELEPHONE NUMBER

225-1119

21. DATE

7/12/90

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 880-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7278 WATERLOO ROAD
P.O. BOX 278
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

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1. DEPARTMENT/AGENCY
Office on Aging

2. DIVISION
Housing

3. UNIT
Group
Senior Assisted Housing

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
Group Subsidy Allocation 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)

A file folder is maintained for each county where Senior Assisted Housing - Group subsidies are allocated. Files contain subsidy contracts, correspondence with the Area Agency on Aging, reports of subsidies earned and confidential client information.

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)
1
NUMBER

10. ANNUAL ACCUMULATION
 FILE DRAWER(S)
 MICROFILM REEL(S)
 COMPUTER TAPE(S)
 OTHER(SPECIFY)
1
NUMBER

11. FILE IS USED
 DAILY WEEKLY MONTHLY

12. FILE BECOMES INACTIVE AFTER
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

18. RECOMMENDED RETENTION
Retain in office until group home closes. After four years transfer to State Record Center, then destroy after 2 years.

19. NAME AND TITLE OF PREPARER
John F. Lessner

20. TELEPHONE NUMBER
225-1118

21. DATE
4/19/90

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 3 OF 3

1. DEPARTMENT/AGENCY

Office on Aging

2. DIVISION

Housing

3. UNIT

Group
Senior Assisted Housing

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

Group Certification Application Files

5. EARLIEST YEAR/LATEST YEAR

1978 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)

A file is maintained for each county where applications and requests for information have been received for the Senior Assisted Housing - Group 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

- FILE DRAWER(S)
 MICROFILM REEL(S)
 COMPUTER TAPE(S)
 OTHER(SPECIFY)
2
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

- 2
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

18. RECOMMENDED RETENTION

Retain in office until group home closes. After four years transfer to State Record Center, then destroy after 2 years.

19. NAME AND TITLE OF PREPARER

John F. Lessner

20. TELEPHONE NUMBER

301-3110

21. DATE

1/19/90