

County Aging Services Records Retention Schedule (Draft)

This schedule lists records commonly created by County Aging Services. The retention periods specified herein are either required by statute or have been determined by best practice. Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. The Ohio History Connection recommends that digital records with greater than a 10 year retention period also be maintained in either paper or microfilm formats. Records may not be disposed of until all audits are released and audit discrepancies have been settled. Where a lawsuit or agency proceeding is pending, a legal hold on relevant records is required. Records shall be retained until the legal hold has been removed. ELECTRONIC MAIL (e-mail) is a format on which records are sent, received and/or drafted using electronic mailing systems. E-mail is NOT a record series. Instead, each individual e-mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits.

Record Series	Description	Retention Period
Client Files	Records documenting assistance services provided to senior citizens including, but not limited to, emergency alarms systems, emergency care, homemaking personal care, meals, prescription medication, respite, and transportation.	3 years, after last contact
PACE Program Records (Program of All-inclusive Care)	Records documenting services provided to clients through the Medicaid PACE program. 42 CFR 460.200(f)	10 years after last contact, providing no pending litigation
PASSPORT Records (Preadmission Screening System Providing Options and Resources Today)	Records documenting services provided through the Medicaid waiver program that assist the elderly remain in their homes.	6 years
Program Statistics and Data Analysis	Data and corresponding interpretation related to services provided to clients.	Until superseded
Volunteer Records	All records pertaining to community members who volunteer their services to the department.	4 years