



Legislation Details (With Text)

File #: 21-0739 **Version:** 1

Type: Agenda Item **Status:** Approved

File created: 4/26/2021 **In control:** Board of Supervisors

On agenda: 6/22/2021 **Final action:** 6/22/2021

Title: Health and Human Services Agency recommending the Board adopt and approve the attached Public Guardian Records Retention Schedule Resolution 062-2021, in accordance with Board of Supervisors Policy A-9.

FUNDING: N/A

Sponsors:

Indexes:

Code sections:

Attachments: 1. A - Approved CRS PG Record Retention Resolution 6/22/21, 2. B - Public Guardian Record Retention Schedule Resolution, 3. C- Policy A-9 6/22/21, 4. Executed Resolution 062-2021

Date	Ver.	Action By	Action	Result
6/22/2021	1	Board of Supervisors	Approved	Pass

Health and Human Services Agency recommending the Board adopt and approve the attached Public Guardian Records Retention Schedule Resolution **062-2021**, in accordance with Board of Supervisors Policy A-9.

FUNDING: N/A

DISCUSSION / BACKGROUND:

In accordance with Board of Supervisors Policy A-9, all departments of the County shall submit a Records Management Retention Schedule to the Board of Supervisors.

The Public Guardian (PG) Office has successfully managed historical documentation files within their office. However, after a review and assessment of historical files the PG determined that there is no longer sufficient space available to securely store the necessary records. After contacting the County Records Management staff, it was determined that in order to submit files to the Records Management office for storage, HHS would need the Board to adopt and approve the Retention Schedule Resolution.

The Public Guardian Office has identified records that should be stored prior to destruction for a period of ten years after a conservatorship ends, or after the estate or conservatorship is settled. Reference: Title 9 California Code of Regulations (CCR) 784.28(a); Title 22 CCR 75055(a); Title 22 CCR 79807(c); Title 42 CFR 482.24(b)(1); Assembly Bill (AB) 1688 Chapter 511, Statutes of 2017. California (CA) Probate Code §§ 7600-7666, 2900-2955; CA Government Code §§ 24350-24356

ALTERNATIVES:

Should the Board decline to adopt and approve the attached Record Retention Schedule Resolution, the Public Guardian Office would be unable to transfer documents to the Records Management Office for appropriate and secure storage.

PRIOR BOARD ACTION:

May 9, 1989 Agenda No. 44 item to approve Policy A-9.

OTHER DEPARTMENT / AGENCY INVOLVEMENT:

County Counsel

CAO RECOMMENDATION:

Approve as recommended.

FINANCIAL IMPACT:

There is no financial impact associated with this Board item.

CLERK OF THE BOARD FOLLOW UP ACTIONS

- 1) Clerk of the Board to obtain signature of Chair on the attached Record Retention Schedule Resolution.
- 2) Clerk of the Board to forward a copy of the executed Record Retention Schedule Resolution to the Records Management Office.
- 3) Clerk of the Board to forward a copy of the executed Record Retention Schedule Resolution to the the Health and Human Services Agency Contracts Unit, at 3057 Briw Road, Suite B.

STRATEGIC PLAN COMPONENT:

N/A

CONTACT

Don Semon, Director, Health and Human Services Agency