**EARPDC Paperwork Storage & Destroy Dates**

For Center Managers

Check at local level to find destroy dates.

Bank Statements

Keep forms for 3 years then destroy.

Participant Enrollment Forms

Each year should be in a separate folder.

You should have the following folders:

- Active Congregate (in alphabetical order)

- Active Homebound (in alphabetical order)

- Inactive Folder for current year

(Client dropped meals or passed away)

- Folder for last year

- Folder for two years ago

- Folder for three years ago

*\*\*\*As you do the updated assessments,*

*you should put the new form in the Active*

*Folder and put the old one in last year's folder.*

Keep the Current Fiscal Year.

Community Profile

5

Donation Records (EAC)

Fiscal Years.

Keep 3 Months.

Logs

Meal Service Requisition

yellow Meal change ticket

)

(

Until date it refers to has passed.

Meal Tickets

these are the daily yellow

(

sheets you keep)

Fiscal Year

1

(if October - December, also need at least

3 months prior).

Menus and

Nutritional Analysis

Keep the Current Dates.

Reimbursement Forms

Until Paid.

Sign-in Sheets

EARPDC keeps your originals for 3 years.

(Make sure EAC has your originals before

destroying your copies.)

Supply Request

Until filled correctly.

Timesheets (EAC) for

**Senior Aides**

2

years.

Timesheets (EAC) for

**Staff & Volunteers**

2

Fiscal Years.

*Updated 3/21/2022*

**EARPDC Paperwork Due Dates**

|  |  |  |
| --- | --- | --- |
|  | **Due** | **Item** |
| Weekly | Scan | Meal Tickets and Original Sign-in Sheets |
| Monthly | Friday after your Logs End  (Mail) | Public Education Sheet with Waiting List  Donation Logs attached to Donation Check  Time Sheets  Monthly Activity Calendar  Addition and Deletion Forms for Enrollments |
| Monthly | On Paper and in AIMS By the 20th of the Month | Re Enrollments for Congregate and Homebound |

**EARPDC Call List**

|  |  |
| --- | --- |
| Amanda Vingers  Project Director, Senior Center Services | Office # (256) 237-6741 Ext. 144  Cell # (256) 239-0984  Amanda.Vingers@earpdc.org |
| Sarah Seales  Project Administrator-Senior Center Services | Office # (256) 237-6741 Ext. 130  Cell # (256) 310-2330  Sarah.Seales@earpdc.org |
| Kristin Copeland  Human Services Coordinator | Office # (256) 237-6471 Ext. 120  Cell: 256-847-5048  Kristin.Copeland@earpdc.org |
| **Other Questions about Help for**  **Seniors or People with Disabilities** | **1-800-AGE-LINE (1-800-243-5463)** |

Diagram

Description automatically generated Logo

Description automatically generated