

# Retention and Classification Report

**Agency:** Department of Workforce Services. Office of Rehabilitation.  
Division of Services for the Blind and Visually Impaired (1377)  
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**Records Officer:** Kent Naisbitt

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**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82600

3

**TITLE:** Administrative files

**DATES:** ca. 1957-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These files contain the director's administrative correspondence and other materials relating to the development of services and the administration of the agency. They include correspondence, memoranda, and other materials; names, addresses, and issues relating to the needs of the legally blind and visually handicapped.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). General Schedule 23 Item 1 lists a two year retention for general housekeeping administrative files. Program correspondence, however, has a permanent retention. Records under "A" relate solely to the internal housekeeping activities of the agency including budget papers; expenditure of funds; day-to-day administration of office personnel, including training and travel; supplies, office services and equipment requests; and all other materials that do not serve as the official documentation

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82600

**TITLE:** Administrative files

(continued)

of the programs of the agency.

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Personnel and client issues are private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82595

3

**TITLE:** Agency leave slips

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

These are the agency copies of leave applications. They include employee name and social security number, hours requested, and dates.

**RETENTION:**

Retain for 1 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after employee has signed annual leave compilation card and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 2 Item 9.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82603

3

**TITLE:** Authorization for services files

**DATES:** 1980-

**ARRANGEMENT:** Numerical by authorization number

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are copies of purchase authorizations and adjustment forms which document the purchase of equipment, bus passes, and other services for clients of the program and generated by the Client Daily Authorization Data System. The vendor maintains the original. These files include date; description of equipment, item or service purchased; vendor name, number, and address; and case number.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This retention is based on the needs of the agency and in the event of a federal audit.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82603

**TITLE:** Authorization for services files

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82607

3

**TITLE:** Billing files

**DATES:** 1980-

**ARRANGEMENT:** Numerical by authorization number

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These files collect the necessary documentation for payment to vendors for items and services purchased. These files include vendor name, number, and address; description of items or services purchased; copy of Daily Purchase Authorization; correspondence; and invoices.

**RETENTION:**

Until final action

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office until file is complete and then transfer to Utah State Office of Education.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This retention is based on the needs of the agency in order to accumulate the necessary documentation for payment.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 1847

3

**TITLE:** Bills register

**DATES:** 1897-1900.

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**FORMAT MANAGEMENT:**

Paper: Retain in State Archives permanently with authority to weed.



**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82604

3

**TITLE:** Case service weekly alphabetical list report

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

This is a computer printout generated by the Utah State Office of Education (USOE) which indicates amounts paid to vendors on behalf of clients and is used to track expenditures of the agency. These reports include name of vendor, name of client, dates, and amounts paid out.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

These records have administrative value(s). This information is used in program planning and ties in with client files; therefore a five year retention is needed.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82604

**TITLE:** Case service weekly alphabetical list report

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82609

3

**TITLE:** Client case card files

**DATES:** 1968-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are card files which act as indexes to active and closed Client Case Files. These files includes client name, address, telephone number, and case status.

**RETENTION:**

Retain for 5 year(s) after case is closed

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years after case is closed and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
These cards are used to reference client files and are needed for the retention of the files.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82602

3

**TITLE:** Client daily authorization data system

**DATES:** 1985-

**ARRANGEMENT:** none

**DESCRIPTION:**

This data system contains and tracks information concerning rehabilitation clients, is updated continually, and is used for generating reports, purchase authorizations, and for billing. This data is entered on a Courier system with access to the mainframe at the Utah State Office of Education. This series includes age, birthplace, client status codes, current and past addresses, date of birth, dates of activity in programs, job position information, marital status, medical information, name of next of kin, name, occupation, public housing occupancy, race, sex, social security number, telephone number, and types of services and items purchased.

**RETENTION:**

Retain for 10 year(s) after case is closed

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Computer data files: Retain in Office for 5 years after client file is closed and then transfer to magnetic tape.

Computer magnetic storage media: Retain in Tape Library for 5 years and then erase.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This data system is related to information contained in the Client Case Files and has the same retention.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82602

**TITLE:** Client daily authorization data system

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82606

3

**TITLE:** Client intake/closed file reports

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

This is a computer printout report generated by the Utah State Office of Rehabilitation and provides a list of new clients and clients whose files are closed. This report includes client numbers and dates files closed.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
This information is used in program planning and a five year retention is needed.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82605

3

**TITLE:** Cumulative case load report

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

This is a computer printout generated by the Utah State Office of Rehabilitation and indicates the clients assigned to various counselors. This report includes name of client, name of counselor, and inclusive dates.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

These records have administrative value(s). This information is used in program planning and ties in with client files; therefore a five year retention is needed.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82590

3

**TITLE:** Governor's advisory council meeting files

**DATES:** 1970-

**ARRANGEMENT:** chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are minutes and meeting files of the Governor's Advisory Council which document discussions of issues and resolutions regarding Utah's legally blind and visually handicapped citizens. They include names and resumes of advisory council members, minutes of meetings, and correspondence relating to the issues of the council.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to Agency Record Center. Retain in Agency Record Center for 5 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). General Schedule 24 Item 1 indicates a permanent retention for meeting files.



**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82590

**TITLE:** Governor's advisory council meeting files

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 1849

3

**TITLE:** Minute books

**DATES:** 1909-1911.

**ARRANGEMENT:** Alphanumerical.

**DESCRIPTION:**

Minutes of open and closed committee and board meetings as required by UCA 52-4-7.5(2005), et seq. "Written minutes shall be kept of all open meetings.(UCA 52-4-7 (2005)). May include agenda, meeting minutes, transcripts, and other supporting documentation.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. May Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Open meeting minutes & public materials, GRS-1709.

**AUTHORIZED:** 07-01-2014

**FORMAT MANAGEMENT:**

Paper: Retain in State Archives permanently with authority to weed.

**APPRAISAL:**

These records have historical value(s).  
Minutes provide evidence of deliberations, decisions, and actions of the agency.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82594

3

**TITLE:** Motor vehicle operating and maintenance files

**DATES:** ca. 1985-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are records relating to the general maintenance and service of motor pool vehicles. They include gas receipts, mileage reports, repair reports.

**RETENTION:**

Retain for 1 year(s) disposition of asset

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after disposal of vehicle and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 10 Item 2.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82614

3

**TITLE:** Motor vehicle operation files

**DATES:** 1985-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are files relating to individual employee operations of government-owned vehicles. These files include employee name, insurance information, authorizations, and other documentation.

**RETENTION:**

Retain for 3 year(s) after separation or until disposition of asset

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after separation of employee or until cancellation of authorization to operate vehicle and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 10 Item 7.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82593

3

**TITLE:** Motor vehicle release files

**DATES:** ca. 1982-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are files relating to transfer, sale, donation, or exchange of vehicles. They include titles to vehicles, other records relating to release of vehicle.

**RETENTION:**

Retain for 4 year(s) disposition of asset

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 4 years after vehicle leaves custody of agency and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 10 Item 6.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82592

3

**TITLE:** Original braille primers

**DATES:** 1975-

**ARRANGEMENT:** none

**DESCRIPTION:**

These are thin metal plates bound with masking tape that are perforated with braille symbols (alphabetic and numeric). The plates are used to make three basic primers, through a heat process and plastic paper, for teaching braille.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Artifacts: Retain in Office for 20 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). These plates were created by the staff of the division and provide excellent evidence of the manner in which braille has been taught to Utah's visually handicapped citizens.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82596

3

**TITLE:** Personnel files

**DATES:** ca. 1957-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are the agency's personnel files containing the complete work history of the employee. Included in these files are duplicate material from the official personnel file as well as the application, notices of changes in status, leave cards, letters of commendation, and other certificates.

**RETENTION:**

Until final action

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after separation or transfer and then transfer unique material to Office of Education.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 1 Item 18.

**PRIMARY DESIGNATION:**

Public            The approved 17 data elements

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82596

**TITLE:** Personnel files

(continued)

**SECONDARY DESIGNATION(S):**

Private



**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82591

3

**TITLE:** Petersen fund and visually handicapped trust fund files

**DATES:** 1970-

**ARRANGEMENT:** Alphabetical by subject

**DESCRIPTION:**

These records provide the documentation for the administration of the Petersen fund, a trust established to support services to the blind through direct funding, and the Visually Handicapped Trust Fund, a trust established to provide services to groups by supplementing the programs operated by the division. The files contain banking records, reports, and correspondence relative to the administration of the trust. They include correspondence; reports; statements and other banking records; stocks and securities documentation; accounts of money loaned, received, and expended; lists of donors and recipients; and other administrative records.

**RETENTION:**

Retain for 6 year(s) final action

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after funds are expended and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

**APPRAISAL:**

These records have administrative, fiscal, and/or historical value(s).

26 CFR 1.6033-2 indicates that trusts may be treated as a private foundation and that appropriate documentation be maintained. 26 CFR 1.6033-3 indicates a six year retention for records relating to taxable funds. This retention will also allow for audits. However, because of the research value of many of the records,

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82591

**TITLE:** Petersen fund and visually handicapped trust fund files

(continued)

the correspondence and reports will be maintained permanently.

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Visually Handicapped Trust Fund files, identifying information about client is private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 27551

3

**TITLE:** Publications

**DATES:** 1978-1980.

**ARRANGEMENT:**

**DESCRIPTION:**

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

**AUTHORIZED:** 10-01-2013

**FORMAT MANAGEMENT:**

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

**APPRAISAL:**

These records have historical value(s).

Disposition based of records in documenting agency achievements, functions, programs and policies for education of individuals who are visually impaired.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 27551

**TITLE:** Publications

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82601

3

**TITLE:** Rehabilitation client case files

**DATES:** ca. 1958-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.60 cubic feet.

**DESCRIPTION:**

These are active and closed case files that document the services supplied to legally blind and handicapped individuals to aid them in entering the work force and providing them with educational opportunities. These files include application, copies of correspondence, financial statements, copies of purchase authorizations, counselor's update forms (R-11), copies of eye examination reports, and other materials indicating training, education and equipment supplied or subsidized. Data elements include age, case number, civil/criminal court involvement, current and past addresses, date of birth, educational level, employer, employment history, ethnic group, job position information, insurance information, marital status, income, medical information, military service, name, occupation, occupational preferences, physical disabilities, psychiatric information, race, references, social security number, and telephone number.

**RETENTION:**

Retain for 5 year(s) after case is closed

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after file is closed and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82601

**TITLE:** Rehabilitation client case files

(continued)

**APPRAISAL:**

These records have administrative, fiscal, and/or legal value(s). As clients are allowed access to their files, a classification of private is appropriate and consistent with 34 CFR 366.42. 34 CFR 379.43(1) and 34 CFR 379.43(m)(7) indicate that records involving federal grants and rehabilitation services must be available for audits and for comparison over a several year period. 34 CFR 401.19(10) indicates that records be maintained for five years for evaluation of vocational education programs. This retention is therefore in keeping with agency needs and federal requirements. Previous decision: RDR 82-04 indicates a total retention of five years and a classification of confidential.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82610

3

**TITLE:** Rehabilitation Services director's administrative files

**DATES:** ca. 1980-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These files contain the director's administrative correspondence and other materials relating to the development of services and the administration of the agency. These files include correspondence, memoranda, and other materials; names, addresses, and issues relating to the rehabilitation of the legally blind and visually handicapped.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). General Schedule 23 Item 1 lists a two year retention for general housekeeping administrative files, which include budget papers; expenditure of funds; day-to-day administration of office personnel, including training and travel; supplies, office services and equipment requests; and all other materials that do not serve as the official documentation of the programs of the agency. Program correspondence and other materials that document the development of services and programs, however, have a permanent retention.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82610

**TITLE:** Rehabilitation Services director's administrative files

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Administrative Files, personnel and client issues are private



**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82611

3

**TITLE:** Rehabilitation Services section personnel files

**DATES:** ca. 1976-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are the supervisor's personnel files, maintained as a convenience for the section. These files include duplicate material from the official personnel file including the application, notices of changes in status, leave cards, letters of commendation, and other certificates.

**RETENTION:**

Retain for 1 year(s) after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after separation or transfer and then transfer unique material to Office of Education.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 1 Item 18.

**PRIMARY DESIGNATION:**

Public Approved 17 data elements

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82611

**TITLE:** Rehabilitation Services section personnel files

(continued)

**SECONDARY DESIGNATION(S):**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82608

3

**TITLE:** Social Security referral files

**DATES:** 1980-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These files contain referrals from the federal Social Security Office and document individuals eligible for Social Security Disability Insurance or Social Security Supplemental Security Income who may also be eligible for services provided by the agency. These files Includes age, current and past addresses, income, job position information, marital status, name, occupation, physical disabilities, rehabilitation status, social security number, and telephone number.

**RETENTION:**

Retain for 5 year(s) after case is closed

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years after case is closed and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

**APPRAISAL:**

These records have administrative value(s). Positive referrals are accepted as clients and the documentation is then added to the Client Case Files. The remaining files indicate that the referred individuals did not want to participate in Rehabilitation Services programs, and are maintained according to agency needs.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82608

**TITLE:** Social Security referral files

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82612

3

**TITLE:** Supervisors' leave slips

**DATES:** 1985-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are the supervisor's copies of completed applications for leave. These applications include employee's name, social security number, hours requested, and dates.

**RETENTION:**

Retain for 1 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
General Schedule 2 Item 9.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82598

3

**TITLE:** Surplus property case files

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are case files on sales of surplus property and related documentation. They include correspondence, surplus property forms, lists of materials, and other documentation.

**RETENTION:**

Retain for 6 year(s) resolution of issue

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 6 years after payment and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).  
General Schedule 4 Item 6.

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82613

3

**TITLE:** Travel files

**DATES:** 1980-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These files provide the documentation for employee travel. They include employee name, receipts, copies of itinerary, and other documentation.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).  
General Schedule 9 Item 4.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

**SERIES:** 82615

3

**TITLE:** Warrant requests

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are agency copies of warrant requests. They include vendor name and number, intended use, date, and amounts.

**RETENTION:**

Retain for 1 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after end of fiscal year and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).  
General Schedule 6 Item 1.