Retention and Classification Report

Agency: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired (1377)
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Records Officer Carol Lear

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AGENCY: Board of Education. 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 10 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention has not been approved by the State Records Committee.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative Historical

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

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82600

TITLE: Administrative files

(continued)

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 of the programs of the agency.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. Personnel and client issues are private

AGENCY: Board of Education. 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 1 year after employee has signed annual leave compilation card.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 2 Item 9.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. 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 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Fiscal

This retention is based on the needs of the agency and in the event of a federal audit.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82603

TITLE: Authorization for services files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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:

Retain until file is complete.

DISPOSITION:

Transfer to the Utah State Office of Education.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Fiscal

This retention is based on the needs of the agency in order to accumulate the necessary documentation for payment.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82607

TITLE: Billing files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 1847 3

TITLE: Bills register

DATES: 1897-1900.

ARRANGEMENT: Alphanumerical

ANNUAL ACCUMULATION:

DESCRIPTION:

STATE RECORDS COMMITTEE STATUS:

This retention has not been approved by the State Records Committee.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

AGENCY: Board of Education. 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 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative

This information is used in program planning and ties in with client files; therefore a five year retention is needed.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82604

TITLE: Case service weekly alphabetical list report

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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 5 years after case is closed.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

These cards are used to reference client files and are needed for the retention of the files.

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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

ANNUAL ACCUMULATION:

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 10 years after client file is closed.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82602

TITLE: Client daily authorization data system

(continued)

APPRAISAL:

Administrative Fiscal

This data system is related to information contained in the Client Case Files and has the same retention.

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative

This information is used in program planning and a five year retention is needed.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82606

TITLE: Client intake/closed file reports

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative

This information is used in program planning and ties in with client files; therefore a five year retention is needed.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82605

TITLE: Cumulative case load report

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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 10 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative Historical

General Schedule 24 Item 1 indicates a permanent retention for meeting files.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82590

TITLE: Governor's advisory council meeting files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 1849 3

TITLE: Minute books

DATES: 1909-1911.

ARRANGEMENT: Alphanumerical

ANNUAL ACCUMULATION:

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.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 10/01/2001.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Historical

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 51.

Minutes provide evidence of deliberations, decisions, and actions of the agency.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. 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

ANNUAL ACCUMULATION:

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 1 year after disposal of vehicle.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 10 Item 2.

AGENCY: Board of Education. 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 3 years after separation of employee or until cancellation of authorization to operate vehicle.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 10 Item 7.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. 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 4 years after vehicle leaves custody of agency.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 10 Item 6.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82592 3

TITLE: Original braille primers

DATES: 1975-

ARRANGEMENT: none

ANNUAL ACCUMULATION:

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 20 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Historical

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: Board of Education. 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:

Retain 1 year after separation or transfer.

DISPOSITION:

Transfer unique material to Office of Education.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 1 Item 18.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82596

TITLE: Personnel files

(continued)

PRIMARY CLASSIFICATION:

Public The approved 17 data elements

SECONDARY CLASSIFICATION(S):

Private

AGENCY: Board of Education. 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

ANNUAL ACCUMULATION:

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 6 years after funds are expended.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82591

TITLE: Petersen fund and visually handicapped trust fund files

(continued)

APPRAISAL:

Administrative Fiscal Historical

26 CFR 1.6033-2 indicates that trusts may be treated as a private foundation and that appropriate documentation by 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, the correspondence and reports will be maintained permanently.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

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

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 27551 3

TITLE: Publications

DATES: 1978-1980

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

Series consists of annual reports and publications.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

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

APPRAISAL:

Historical

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 25.

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

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. 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 5 years after file is closed.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82601

TITLE: Rehabilitation client case files

(continued)

APPRAISAL:

Administrative Fiscal Legal

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 CLASSIFICATION:

Private

AGENCY: Board of Education. 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

ANNUAL ACCUMULATION:

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 10 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative Historical

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

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82610

TITLE: Rehabilitation Services director's administrative files

(continued)

the development of services and programs, however, have a permanent retention.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. Administrative Files, personnel and client issues are private

AGENCY: Board of Education. 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 1 year after separation or transfer

DISPOSITION:

Transfer unique material to Office of Education.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 1 Item 18.

AGENCY: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82611

TITLE: Rehabilitation Services section personnel files

(continued)

PRIMARY CLASSIFICATION:

Public Approved 17 data elements

SECONDARY CLASSIFICATION(S):

Private

AGENCY: Board of Education. 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

ANNUAL ACCUMULATION:

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 5 years after case is closed.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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:

Administrative

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: Board of Education. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82608

TITLE: Social Security referral files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. 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 1 year.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

General Schedule 2 Item 9.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. 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 6 years after payment.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Fiscal

General Schedule 4 Item 6.

AGENCY: Board of Education. 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 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Fiscal

General Schedule 9 Item 4.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. 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 1 year after end of fiscal year.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Fiscal

General Schedule 6 Item 1.