

# Retention and Classification Report

**Agency:** Rehabilitation Services. Services for the Blind & Visually Impaired. Training & Adjustment Services (1378)  
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**Records Officer:** Kent Naisbitt

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**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82629

3

**TITLE:** Application for library materials log

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This log tracks the application for library materials and documents that the materials were sent to the requestor. It includes name of client, city of residence, name of teacher, and date library materials sent.

**RETENTION:**

Retain 1 year after notebook is filled.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after notebook is filled and then destroy.

**APPRAISAL:**

Administrative

The log is maintained in a notebook and has no further administrative value after one year.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82634

3

**TITLE:** Budget printout report

**DATES:** 1986-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

These are computer printouts from the Utah State Office of Education which indicate budget status for planning purposes. They include inclusive dates, beginning balances, funds expended, and ending balances.

**RETENTION:**

Retain 3 years after close of the fiscal year.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after the close of the fiscal year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

Administrative Fiscal  
General Schedule 5 Item 5(b) indicates a three year retention.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82616

3

**TITLE:** Client case files

**DATES:** ca. 1970-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 2.40 cubic feet.

**DESCRIPTION:**

These files form complete case histories and document client registration, eligibility, and services rendered to legally blind and visually handicapped individuals. The files are divided into Current Case Files and Deceased Case Files. These files include case information and referral form; clinical reports; physician's report of eye examination including diagnosis, prognosis, and insurance information; supplemental report of eye examination; remarks of teachers; obituaries; and other documentation relating to care and treatment of eligible individuals. Data elements include age, current and past addresses, date of birth, educational level, medical information, marital status, military service, name, name of kin, occupation, physical disabilities, religious preferences, social security number, and telephone number.

**RETENTION:**

Retain 7 years after client is deceased.

**DISPOSITION:**

Transfer to the State Archives with authority to weed.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 05/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years after client is deceased 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.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82616

**TITLE:** Client case files

(continued)

**APPRAISAL:**

Administrative Historical

These case files may be current for several years and may contain many personal impressions of physicians and teachers, therefore requiring a classification of "confidential" for those selected pieces of information. These case files document the programs and treatment of Utah's legally blind and visually handicapped and possess rich research value similar to other patient case files.

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

Controlled. Personal evaluations are confidential, the remaining information is private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82623

3

**TITLE:** Client information form file

**DATES:** 1980-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

This form is used for data entry when a client is registered, and when the client file needs to be updated or deleted. This file includes name of client, identification number or social security number, address, telephone number, sex, birth date, veteran status, marital status, location data, and codes relating to case service and location.

**RETENTION:**

Retain until printout is received and verified.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office until printout is received and verified and then destroy.

**APPRAISAL:**

Administrative

This retention is based on the needs of the agency as the data entry forms have no value after the printouts are verified.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82623

**TITLE:** Client information form file

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82624

3

**TITLE:** Client information reports

**DATES:** 1986-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 2.00 cubic feet.

**DESCRIPTION:**

These are computer printouts used to verify the accuracy of data input from the Client Information Form. Specific reports may also be called for that group client information by age, area, or some other common factor. These forms include name of client, identification number or social security number, address, telephone number, sex, birth date, veteran status, marital status, location data, and codes relating to case service and location.

**RETENTION:**

Retain 1 year.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative

This retention is based on the needs of the agency. The reports are no longer needed after the data has been verified and the specific reports are too sporadic to provide any research value.



**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82624

**TITLE:** Client information reports

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82620

3

**TITLE:** Current client index card file

**DATES:** 1974-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

Indices, lists, catalogs, registers, guides, and other aids necessary for the efficient use of other records.

**RETENTION:**

Retain until client is deceased.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 03/31/2015

**FORMAT MANAGEMENT:**

Paper: Retain in Office until client is deceased and then transfer to Deceased Client Card File.

**APPRAISAL:**

Administrative

This file is needed to reference individuals receiving services and participating in programs of the division as long as the client case file is current.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82627

3

**TITLE:** Daily referral log

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This log lists individuals who are clients or who have been referred to the Division of Services for the Visually Handicapped. It is used to track visits of teachers to these individuals. This includes name of client of referred individual, social security number, city of residence, and name of teacher.

**RETENTION:**

Retain 1 year after notebook is filled.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after notebook is filled and then destroy.

**APPRAISAL:**

Administrative

The log is maintained in a notebook and has no further administrative value after one year.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82621

3

**TITLE:** Deceased client index card file

**DATES:** 1974-

**ARRANGEMENT:** Alphabetical by name and year

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

Indices, lists, catalogs, registers, guides, and other aids necessary for the efficient use of other records.

**RETENTION:**

Retain 15 years.

**DISPOSITION:**

Transfer to the State Archives with authority to weed.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 15 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

Administrative

This file is needed to reference the files of deceased individuals who have participated in programs of the division.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82639

3

**TITLE:** 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. They include employee's name, social security number, hours requested, and dates.

**RETENTION:**

Retain 1 year.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative  
General Schedule 2 Item 9.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82637

3

**TITLE:** Library of Congress reports

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These are six-month reports and related materials which describe activities and programs designed for the visually handicapped and were sent to the Library of Congress. As of January 1987, the State Library performs this function. These reports include number of clients, inventories of reading machines, descriptions of activities, and other statistical data.

**RETENTION:**

Retain 3 years.

**DISPOSITION:**

Transfer to the State Archives with authority to weed.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

Administrative Historical

As these reports provide documentation of a function no longer performed by the division, and because the reports provide excellent research value, a permanent retention is needed.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82617

3

**TITLE:** Out-of-state client case files

**DATES:** 1975-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These case files are incomplete histories of clients originally participating in programs and receiving other services from the division but who have moved from the state. These files include case information and referral form; physician's report of eye examination including diagnosis, prognosis, and insurance information; supplemental report of eye examination; remarks of teachers; and other documentation relating to care and treatment of eligible individuals. Data elements include age, current and past addresses, date of birth, educational level, medical information, marital status, military service, name, name of next of kin, occupation, physical disabilities, religious preferences, social security number, and telephone number.

**RETENTION:**

Retain 10 years.

**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 transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

**APPRAISAL:**

Administrative

These files are maintained to provide the case histories for clients returning to the state and then provide for the destruction of the files.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82617

**TITLE:** Out-of-state client case files

(continued)

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

Controlled. Personnel evaluations are confidential, the remaining information is private



**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82635

3

**TITLE:** Petersen fund files

**DATES:** 1986-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

These files contain copies of documentation regarding the use of funds from the Petersen Trust Fund, a trust established to support services to the blind through direct funding. The originals are sent to the accounting officer and these copies are used for tracking client expenses and for planning. These files include name of client, use of funds, amounts, copies of checks, correspondence, receipts, and other materials.

**RETENTION:**

Retain 1 year.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative

These copies have no further administrative value after one year.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82635

**TITLE:** Petersen fund files

(continued)

**SECONDARY DESIGNATION(S):**

Private. Identifying information about clients is private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82636

3

**TITLE:** Public relations activity reports

**DATES:** 1983-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are forms completed by counselors reporting on presentations given, noting attendance and evaluative comments. They include name of counselor; date and type of conference, committee meeting, or other presentation, number of participants, and evaluative comments.

**RETENTION:**

Retain 3 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative

This retention is based on the needs of the agency.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82630

3

**TITLE:** Public relations video tape

**DATES:** 1986-

**ARRANGEMENT:** none

**ANNUAL ACCUMULATION:**

**DESCRIPTION:**

This is a video tape produced by participants in the Orientation Training Program (O.T.P.) that is used in a public relations capacity to inform the legislature, prospective students, and the general public about the orientation program conducted by Services for the Visually Handicapped. This record series includes names of students participating in the video, types of classes offered by the program, and a general description and promotion of the program.

**RETENTION:**

Retain 15 years.

**DISPOSITION:**

Transfer to the State Archives with authority to weed.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Video recordings master: Retain in Office for 10 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

This video is unique in that it was produced by the students of the O.T.P. It provides graphic documentation of the program and the students' reaction to services offered to the visually handicapped.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82630

**TITLE:** Public relations video tape

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82633

3

**TITLE:** Receipts for merchandise sold

**DATES:** 1984-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These are receipts for merchandise sold to visually handicapped individuals, such as slates, styli, canes, and other items. They include description of item purchased, amount, name of client, and date.

**RETENTION:**

Retain 3 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

Administrative Fiscal  
General Schedule 6 Item 6 gives a retention of 3 years.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82625

3

**TITLE:** Received medical report log

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This is a log listing prospective clients who are waiting for the return of the Physician's Report of Eye Examination in order to document their eligibility for program participation. This includes name of prospective client, date the Physician's Report of Eye Examination form was sent out and returned, and the name of the physician.

**RETENTION:**

Retain 1 year after notebook is filled.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after notebook is filled and then destroy.

**APPRAISAL:**

Administrative

The log is maintained in a notebook and has no further administrative value after one year.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82625

**TITLE:** Received medical report log

(continued)

**PRIMARY DESIGNATION:**

Private



**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82619

3

**TITLE:** Registry of clients and assigned teachers

**DATES:** ca. 1974-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This registry lists legally blind and visually handicapped individuals and their assigned teachers. The list is now obsolete. It includes names of clients, addresses, telephone numbers, years of birth, and names of assigned teachers.

**RETENTION:**

Retain 1 year.

**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:**

This registry was a one-time record and is now obsolete.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82642

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.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative  
General Schedule 4 Item 6.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82628

3

**TITLE:** Teacher's visit log

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This log documents visits made by teachers to individuals who are clients or who have been referred to the Division of Services for the Visually Handicapped. The log is used to monitor the time span between the referral and the actual visit. It includes name of client, name of teacher, date referred, and number of days between referral and visit.

**RETENTION:**

Retain 1 year after notebook is filled.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after notebook is filled and then destroy.

**APPRAISAL:**

Administrative

The log is maintained in a notebook and has no further administrative value after one year.

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82628

**TITLE:** Teacher's visit log

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82618

3

**TITLE:** Too Much Vision client case files

**DATES:** 1975-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These are incomplete case files of individuals who have applied, but whose doctors' report indicate too high a level of visual capability to participate in programs and services of the division. These files include case information and referral form, physician's report of eye examination indicating degree of visual handicap, and supplemental report of eye examination.

**RETENTION:**

Retain 5 years.

**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:**

Administrative

This retention is based on the administrative needs of the agency to document applicant rejection.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82638

3

**TITLE:** Training and Adjustment Section personnel files

**DATES:** ca. 1957-

**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. They 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:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after separation or transfer and then destroy.

**APPRAISAL:**

Administrative  
General Schedule 1 Item 18.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82638

**TITLE:** Training and Adjustment Section personnel files

(continued)

**SECONDARY DESIGNATION(S):**

Private.                   except 17 data elements which are public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82631

3

**TITLE:** Training and Adjustment Services director's administrative files

**DATES:** ca. 1957-

**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. Some notes are in braille. 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.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**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:**

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



**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82631

**TITLE:** Training and Adjustment Services director's administrative files

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Personnel and client issues are private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82632

3

**TITLE:** Training and Adjustment Services management meeting files

**DATES:** ca. 1957-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These are minutes and other materials related to meetings of the management team of Training and Adjustment Services. These files include minutes, names of those attending the meetings, issues, and memoranda relating to the meetings.

**RETENTION:**

Retain 15 years.

**DISPOSITION:**

Transfer to the State Archives with authority to weed.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 15 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

Administrative Historical  
General Schedule 24 Item 1 gives a permanent retention to minutes and meeting files.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82632

**TITLE:** Training and Adjustment Services management meeting files

(continued)

**SECONDARY DESIGNATION(S):**

Private. Personnel and client issues are private

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82640

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.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 06/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative  
General Schedule 9 Item 4.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Rehabilitation Services. Services for the Blind & Visually Impaired.  
Training & Adjustment Services

**SERIES:** 82643

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.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1987

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

Administrative Fiscal  
General Schedule 6 Item 1.