

# Retention and Classification Report

**Agency:** Board of Education. Office of Rehabilitation. Disability  
Determination Services (284)  
250 East 500 South  
P.O. Box 144200  
Salt Lake City, UT 84114-4200  
801-538-7510

## Records Officer

81336 Residual reports from the duplicate copies of federal record  
81009 Social security disability determination records

**AGENCY:** Board of Education. Office of Rehabilitation. Disability Determination Services  
**SERIES:** 81336 3  
**TITLE:** Residual reports from the duplicate copies of federal records and work notes for social security disability determination  
**DATES:** 1981-  
**ARRANGEMENT:** Numerical by social security number  
**ANNUAL ACCUMULATION:** 21.80 cubic feet.  
**DESCRIPTION:**

These reports are extractions of the case files used in preparing the documentation necessary to approve or deny social security disability claims. The files indicate the rationale behind decisions to grant or deny social security disability benefits and are also used to document payment to vendors for services. The files include fact sheets, copies of decisions and rationale to approve or deny social security disability benefits, copies of various state fiscal forms, and correspondence. Data elements include age, alcohol or drug addiction, appearance, birthplace, brothers and sisters, civil/criminal court involvement, current and past addresses, date of birth, educational level, employer, employment history, ethnic group, family history, income, marital status, medical information, military service, name, name of kin, national origin, number of children, occupation, parent's birth information, personality inventory, physical characteristics, physical disabilities, psychiatric information, race, salary, security/other investigations, sex, signature, social security number, and telephone number.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 04/01/1987.

**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 Legal  
The United States Code, Title 42, Section 421, directs state agencies to determine disability of social security claimants according to federal regulations and 45 CFR 205.60 requires that

**AGENCY:** Board of Education. Office of Rehabilitation. Disability Determination Services

**SERIES:** 81336

**TITLE:** Residual reports from the duplicate copies of federal records and work notes for social security disability determination

(continued)

such records be maintained for efficient operation of the state's public assistance plan. The residual files are used to track payment of vendors and to document decisions made concerning disability social security benefits and are needed for one year in the office. This retention will then provide for the ethical destruction of the large amount of personal data in keeping with UCA 63-2-85.3(5).

**PRIMARY CLASSIFICATION:**

Controlled

**AGENCY:** Board of Education. Office of Rehabilitation. Disability Determination Services

**SERIES:** 81009

3

**TITLE:** Social security disability determination records

**DATES:** 1986-

**ARRANGEMENT:** None

**ANNUAL ACCUMULATION:** 30.00 cubic feet.

**DESCRIPTION:**

These are large files, containing several forms, used in preparing the documentation necessary to approve or deny social security disability claims. The files provide the documentation justifying decisions to grant or deny social security disability benefits and a complete medical history of the applicant. The record copy of the files are transferred to the federal agency. Information in these files include copies of federal forms, copies of various state fiscal forms, work notes of examiners, mailing labels, lists of claimants, federal review of cases, medical histories, psychological studies, and correspondence. Data elements include age, alcohol or drug addiction, appearance, birthplace, brothers and sisters, civil/criminal court involvement, current and past addresses, date of birth, educational level, employer, employment history, ethnic group, family history, income, marital status, medical information, military service, name, name of kin, national origin, number of children, occupation, parent's birth information, personality inventory, physical characteristics, physical disabilities, psychiatric information, race, salary, security/other investigations, sex, signature, social security number, and telephone number.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 04/01/1987.

**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 months and then destroy.

**AGENCY:** Board of Education. Office of Rehabilitation. Disability Determination Services

**SERIES:** 81009

**TITLE:** Social security disability determination records

(continued)

**APPRAISAL:**

Administrative Legal

The United States Code, Title 42, Section 421, directs state agencies to determine disability of social security claimants according to federal regulations and 45 CFR 205.60 requires that such records be maintained for efficient operation of the state's public assistance plan. However, the working papers used to prepare the case files have no further legal or administrative value after six months. This retention will provide for the ethical destruction of the large amount of personal data in keeping with UCA 63-2-85.3(5).

**PRIMARY CLASSIFICATION:**

Controlled