

Retention and Classification Report

Agency: Board of Education. Office of Education. Services to the Visually Handicapped.
Industries for the Blind (1230)
1595 West 500 South
Salt Lake City, UT 84104
801-538-9393

Records Officer: _____

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AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80803

3

TITLE: Basic equipment files

DATES: [ca. 1985]-1992.

ARRANGEMENT: Alphabetical by type of machine.

DESCRIPTION:

These files document the procurement and maintenance of equipment used by the agency. They include the type of equipment, name of supplier, documentation of procurement, and repairs.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final disposition of equipment 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).
OMB Circular A-102 indicates a three year retention after the final disposition of the equipment.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80819

3

TITLE: Budget reports

DATES: 1985-1992.

ARRANGEMENT: Chronological

DESCRIPTION:

These files contain periodic reports on the status of appropriation accounts, apportionment, and adjustments to be made to the budget. They include reports of expenditures, staffing plans, adjustments to approved budget, and annual statements.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 5:5.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80818

3

TITLE: Budget working papers

DATES: 1985-1992.

ARRANGEMENT: Chronological

DESCRIPTION:

These are background papers, cost estimates, and rough data gathered to prepare budget estimates.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 5:4 indicates a one year retention for budget working papers.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80798

3

TITLE: Cash sales files

DATES: 1985-1992.

ARRANGEMENT: Numerical by receipt number.

DESCRIPTION:

These files contain receipts which account for over-the-counter sales of products manufactured by the agency. The receipts include name of sales person, name of customer, customer's address, amount tendered, and type of product purchased.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s). General Schedule 3:4 indicates a three year retention for purchase order files relating to transactions of less than \$10,000.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80810

3

TITLE: Client case files

DATES: 1967-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These files document the work history of each client who participates in the programs of Utah Industries for the Blind. The information in these files includes name of client, evidence of disability, physician's reports, psychiatric tests results, intelligence quotient test results, performance ratings, productivity ratings, evaluation data, and the application. 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 AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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.

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.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind
SERIES: 80810
TITLE: Client case files

(continued)

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80812

3

TITLE: Client employment files

DATES: [ca. 1967]-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These files provide the documentation necessary to fulfill all requirements to work in the state. The information from the files includes name of client, federal income tax withholding forms (W-4), insurance information, leave data, and other required paperwork. Data elements include address, salary, medical information, name of next of kin, social security number, and telephone number.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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.

APPRAISAL:

These records have administrative value(s).

These files are maintained in conjunction with the Client Case Files and have the same retention.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2019.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80793

3

TITLE: Client employment status change files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are copies, maintained in a binder, which indicate a change in employment status of clients. They include name of client, social security number, position, and changes made to that position.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

These records are similar to Notification of Personnel Action Forms used by the State Division of Personnel Management (Form 33). General Schedule 1:14 indicates a retention of five years.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80792

3

TITLE: Client leave records

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These records indicate leave applied for and taken by the clients of the program. They include name of client, social security number, dates, leave applied for and taken.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

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

APPRAISAL:

These records have administrative value(s).

A classification of private is applied because these records refer to clients. General Schedule 2:9 provided the basis for the retentions.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80788

3

TITLE: Client payroll reports

DATES: 1984-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These reports are filed in binders and are used to document the actual wage earned by the client, any leave taken, and corrections made. The information is then sent to the Utah State Office of Education so that a check may be prepared for the client. The reports include name of client, amount earned for pay period, and notations concerning leave taken, any corrections made, and check verification.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 2:12 indicates a three year retention for this type of payroll file and is in keeping with 29 CFR 3.4(b).

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80785

3

TITLE: Client production records

DATES: 1985-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are cards which account for the time a client worked on a particular project and document the client's productivity. They are used to prepare the client payroll. They include name of client, hours worked, beginning and ending time, number of units produced, and comments of supervisor.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). Payroll records of contractors and subcontractors of the federal government are to be maintained three years after completion of contract according to 29 CFR 3.4(b).

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80786

3

TITLE: Client time clock cards

DATES: 1985-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are actual cards punched by a time clock indicating time worked by a client. The cards are used to verify the information contained on the production cards. They include name of client, time beginning and ending work, and date.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or legal value(s). Payroll records of contractors and subcontractors of the federal government are to be maintained three years after completion of contract according to 29 CFR 3.4(b).

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80811

3

TITLE: Client/employee contact file

DATES: 1967-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These files are comprised of incident reports, histories, and notations to monitor client behavior. They include name, date, description of incident, evaluative comments, and other notes.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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.

APPRAISAL:

These records have administrative value(s).

These files are maintained in conjunction with the Client Case File and have the same retention.

PRIMARY DESIGNATION:

Controlled

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80816

3

TITLE: Commensurate wage study files

DATES: 1985-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These studies contain questionnaires used for comparing tasks, wages, and benefits throughout the country. They include responses relating to tasks, average wage, overtime, and benefits.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

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

These reports are compiled by the Department of Labor and are related to the Time Studies. 29 CFR 516.6(2) indicates a two year retention for wage and rate records.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2019.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80787

3

TITLE: Computer printout client payroll report

DATES: 1985-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

This computer report is generated by the Utah State Office of Education and indicates client hourly totals and productivity. The report is used to prepare the payroll by documenting the actual wage earned with respect to hours worked and productivity. It includes name of client, job description, hours worked, units completed, and incentives earned.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or legal value(s). General Schedule 2:14 indicates a three year retention for payroll control files and is in keeping with 29 CFR 3.4(b).

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80809

3

TITLE: Cost work analysis reports

DATES: 1985-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These reports indicate costs of materials and overhead and are used to devise prices for finished products. They include type of product, costs for materials and overhead, and suggested prices.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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 retention relates to the purchase agreement files and time studies and allows for comparison over time.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80782

3

TITLE: Customer files

DATES: 1980-1992.

ARRANGEMENT: Alphabetical by name of customer.

DESCRIPTION:

These are files relating to customers not entering into manufacturing agreements, who purchase products made by the agency. They include invoices, payment reports, account information, and correspondence relating to customer relations.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 6:6 indicates a three year retention for accounts receivable invoices, and General Schedule 6:2 indicates a retention of two years after closure for settlement files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80789

3

TITLE: Deposits with State Treasurer files

DATES: 1985-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are deposit slips and supporting documentation indicating deposits made by the agency and submitted to the State Treasurer.

These records include copies of checks, copies of deposits slips, receipts, and other documentation indicating amounts deposited.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

General Schedule 6:8 indicates a retention of 2 years for deposit slips.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80825

3

TITLE: Director's administrative files

DATES: [ca. 1967]-1992.

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. Includes correspondence, memoranda, and other materials; names, addresses, and issues relating to the needs of the legally blind and visually handicapped working at the agency.

RETENTION:

Permanent. Retain for 10 year(s)

DISPOSITION:

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.

APPRAISAL:

These records have administrative, and/or historical value(s). General Schedule 23:1 lists a two year retention for general housekeeping administrative files (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). Program correspondence, however, has a permanent retention.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind
SERIES: 80825
TITLE: Director's administrative files

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. Personnel and client issues are private.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80801

3

TITLE: Inventory reports

DATES: 1986-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are computer-generated reports from the Utah State Office of Education which monitor stores of raw materials and finished goods. These reports include types of materials and products, amounts, and dates.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 3:10 indicates a two year retention for inventory control files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80820

3

TITLE: Leave slips

DATES: 1985-1992.

ARRANGEMENT: Chronological

DESCRIPTION:

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

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

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 2:9.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80796

3

TITLE: Materials requisitions file

DATES: 1985-1992.

ARRANGEMENT: Numerical by requisition number.

DESCRIPTION:

These requisitions are used by lead workers to acquire raw materials from the warehouse. They include requisition number, amount, and type of requested material.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

General Schedule 3:5 indicates a retention of 2 years for supply management files, which have a similar function.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80807

3

TITLE: National Industries for the Blind (NIB) reports

DATES: 1980-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are quarterly reports, based on daily and monthly reports, prepared for the NIB, a non-profit organization. The reports provide statistical data concerning the program and its participants. These reports include number of clients, the number of hours worked and at what job, wages paid, and other characteristics of individuals participating in the program.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

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

These reports provide excellent data concerning the progress of Utah Industries for the Blind.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind
SERIES: 80807
TITLE: National Industries for the Blind (NIB) reports

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80794

3

TITLE: Personal injury files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are copies of injury reports filed with the State Department of Industrial Commission and indicate an on-the-job injury and the manner in which it was handled. They include name, description of injury, description of action taken, and personal information about the injured employee or client including age, addresses, date of birth, marital status, medical information, family information, salary, social security number, and telephone number.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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).
General Schedule 1:31 indicates a retention of five years.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80821

3

TITLE: Personnel files

DATES: 1967-1992.

ARRANGEMENT: Alphabetical by name

DESCRIPTION:

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

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:

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

PRIMARY DESIGNATION:

Private

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80804

3

TITLE: Petersen fund accounting files

DATES: 1980-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are files which account for the maintenance of the Petersen Trust Fund, a trust established to support services to the blind through direct funding. These files include bank statements, receipts, bank reconciliations, and other documentation relating to the Petersen Fund.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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 legal 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.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80805

3

TITLE: Petersen transactions files

DATES: 1980-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These files are maintained in binders and document the withdrawal of funds from the Petersen accounts for client expenses. They include name of client, address, requested amount, intended purpose, amount received.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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, and/or fiscal value(s).
This retention will also allow for audits.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. Identifying information about clients is private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80779

3

TITLE: Product development files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These files indicate projects studied but not entered into by Industries for the Blind for manufacturing. They include examples of products such as helmet covers, specifications for the product, and other documentation relating to the manufacture of the product as well as justification for not entering into the project.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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 retention is based on the needs of the agency and is consistent with related files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80775

3

TITLE: Product requirement files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by product.

DESCRIPTION:

These files certify that products manufactured by Utah Industries for the Blind are made according to pre-established standards, including materials and workmanship. They include copies of purchase authorizations, certificates of compliance, vendor information, specifications, and correspondence relating to the manufacture and sale of products.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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, fiscal, and/or legal value(s). Many of the products manufactured by the agency are for federal contracts. 34 CFR 379.43(1) and 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.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80780

3

TITLE: Product status reports

DATES: 1982-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These reports indicate the current status of products manufactured by the agency and note any changes in schedule. They are submitted monthly to the federal government. They include number of orders received, national stock numbers, order number, quantities, dates shipped and received, and other information relating to the status of orders.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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 retention is based on the needs of the agency and is consistent with related files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80817

3

TITLE: Production manuals

DATES: 1985-1992.

ARRANGEMENT: Chronological

DESCRIPTION:

This manual is contained in a binder and provides specifications and work flow charts for each product. It is used to ensure compliance with standards. It includes type of product, specifications for manufacture, and work flow charts.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office until superseded and then destroy.

APPRAISAL:

These records have administrative value(s).

As the manual is updated nearly every year, it is only needed until superseded by another edition.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80778

3

TITLE: Purchase agreement change files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These files document any changes to be made to the purchase agreements as well as production forecasts. They include correspondence relating to any changes and copies of amended forms.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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).
The changes files must be kept for the duration of the Purchase Agreement Files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80776

1

TITLE: Purchase agreement files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These are contract case files which indicate the ordering of products, the specifications for manufacturing, and shipment to the customer. These files include copies of contractual agreements, bills of lading, proof of shipment documents, and correspondence relating to the transaction of business.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

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, fiscal, and/or legal value(s). Many of the products manufactured by the agency are for federal contracts. 34 CFR 379.43(1) and 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. 34CFR 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.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80781

3

TITLE: Purchase agreement summary files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These files contain the only complete copy of the contract entered into by the agency and documents the specifications to be followed in the manufacture of specific products. Selected information from the summary files is contained in the purchase agreement files. They include all specifications for the product, instructions, and contract information.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

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, and/or fiscal value(s).
These files are closely related to the Purchase Agreement Files and require a five year retention for agency and federal audit needs.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80795

3

TITLE: Purchase log file

DATES: 1982-1992.

ARRANGEMENT: Numerical by purchase authorization number.

DESCRIPTION:

This log is maintained in a binder and is used to track purchase authorizations used to procure materials, services, and other products. It includes purchase authorization number, dates, amount to be expended, commodity, and name of supplier.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

This retention is based on the administrative needs of the agency and supports the five year retention placed on the Purchase Agreement Files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80815

3

TITLE: Quality control files

DATES: 1985-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These files monitor the quality of products manufactured by the agency and gauge compliance with federal and in-house standards.

These files include type of product, evaluations of materials and craftsmanship, and comments noting adherence to standards.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office until superseded and then destroy.

APPRAISAL:

These records have administrative value(s).

As specifications change frequently, this retention will allow for the maintenance of the files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2019.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80813

3

TITLE: Rehabilitation referrals evaluation files

DATES: 1982-1992.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These files provide evaluations of individuals referred from the Rehabilitation Office, but who are not participating in the programs of Utah Industries for the Blind. Includes name of referred individual, address, telephone number, social security number, data concerning eligibility, and evaluative remarks.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

This retention is based on Equal Employment Opportunity Commission standards and the administrative needs of the agency.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2019.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80797

3

TITLE: Sales orders files

DATES: ca. 1985-1992.

ARRANGEMENT: Numerical by sales order number.

DESCRIPTION:

These files contain forms used to take orders from established customers to purchase products manufactured by the agency. Includes name of customer, address, date, type of product, and amount.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s). General Schedule 3:4 indicates a three year retention for purchase order files relating to transactions of less than \$10,000.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80802

3

TITLE: Stock shortage reports

DATES: 1986-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are computer-generated reports from the Utah State Office of Education which indicate discrepancies in stock holdings. Includes dates, and types of materials where discrepancies or shortages are noticed.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s). General Schedule 3:10 indicates a two year retention for inventory control files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80783

3

TITLE: Sub-contractor bidding files

DATES: 1985-1992.

ARRANGEMENT: Alphabetical by name of company.

DESCRIPTION:

These files document the bidding process for sub-contracted work performed by the agency. Includes name of company, proposals for work to be done, and job descriptions.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final payment expired and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 3:6 and General Schedule 3:4.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80784

3

TITLE: Sub-contractor case files

DATES: 1985-1992.

ARRANGEMENT: Alphabetical by name of company.

DESCRIPTION:

These files document sub-contracts entered into by the agency and provide information concerning materials and specifications for the work to be completed. Includes name of company, specifications of work to be done, job descriptions, agreement, invoices for materials received, and other documentation relating to completion of contract.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after final payment expired and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 3:4.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2016.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80808

3

TITLE: Time studies summary reports

DATES: 1985-1992.

ARRANGEMENT: Alphabetical by type of job.

DESCRIPTION:

These reports are summaries of time studies, indicating the exact time necessary to perform an operation in order to finish a product. The reports are used to set rates for each specific task according to non-handicapped standards. Includes type of job, steps to complete the job, and the required time.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or legal value(s).
29 CFR 516.6(2) indicates a two year retention. The extra year will allow for comparison.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80814

3

TITLE: Time study files

DATES: 1983-1992.

ARRANGEMENT: Alphabetical by type of product.

DESCRIPTION:

These files are compiled in compliance with the Department of Labor and indicate each step in the manufacture of a product and the time necessary to complete each step. The studies are used to base wage rates. Includes sketches of product, observations of tester, time results of observations, and summary remarks.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

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

These studies are performed annually. 29 CFR 516.6(2) indicates a two year retention for wage and rate records.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2019.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80822

3

TITLE: Travel files

DATES: 1980-1992.

ARRANGEMENT: Alphabetical by name

DESCRIPTION:

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

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:

These records have administrative value(s).
General Schedule 9:4.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80806

3

TITLE: Trust funds' stock holdings correspondence

DATES: [ca. 1980]-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These files contain correspondence and reports from various companies where the agency accounts possess stock certificates. They are used to document the status of the stock and the expected funds coming into the accounts administered by the agency. Includes names of companies, types and amounts of stock owned, and other correspondence relating to the stock.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s).
These reports and correspondence provide background for budget preparation and for audits.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80799

3

TITLE: Warehouse inventory control files

DATES: ca. 1985-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These files indicate the shipment of finished goods to the warehouse from the producing department and are used for inventory control. Includes type and amount of finished products and date goods were sent to the warehouse.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 3:10 indicates a two year retention for inventory control files.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80823

3

TITLE: Warrant requests

DATES: 1985-1992.

ARRANGEMENT: Chronological

DESCRIPTION:

Agency copies of warrant requests. Includes vendor name and number, intended use, date, and amounts.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

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 6:1.

AGENCY: Board of Education. Office of Education. Services to the Visually Handicapped. Industries for the Blind

SERIES: 80800

3

TITLE: Year-to-date sales reports

DATES: 1986-1992.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are computer-generated reports from the Utah State Office of Education which indicate revenue from products sold and are used to monitor sales. Includes dates, types of products sold, and amounts.

RETENTION AND DISPOSITION AUTHORIZATION:

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

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:

These records have administrative, and/or fiscal value(s).
29 CFR 516.5(c) indicates a three year retention for sales and purchase records.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2017.